



May 2020

Covid-19 Benchmarking Meeting
With Data Through May 16

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About The STAQ Benchmarking Data

Benchmarking Data

- Anonymous, opt-in, and on-demand
- 40+ Publishers
- 50+ SSPs Overall
- \$1B+ in Revenue on an annual basis

Advertiser Benchmarking Data

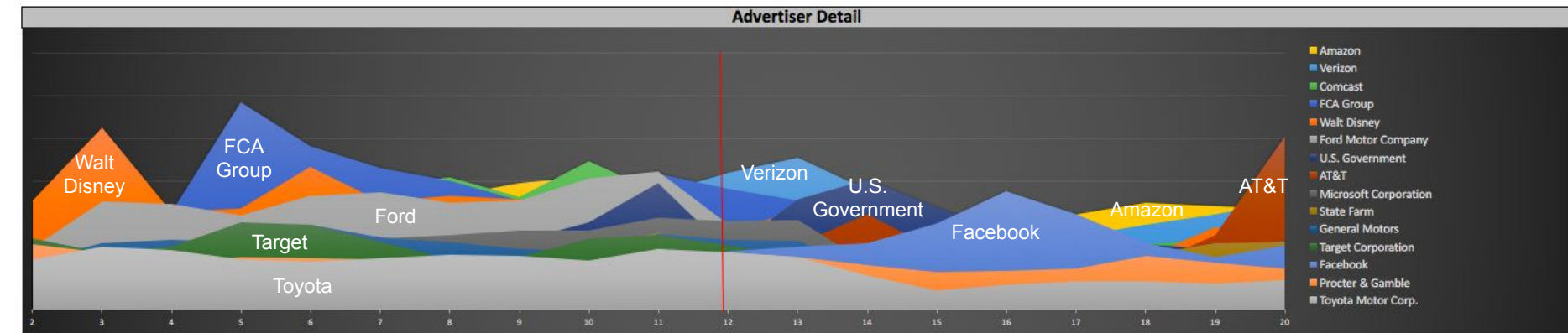
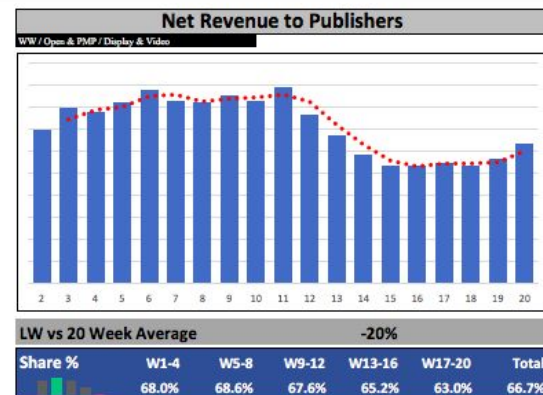
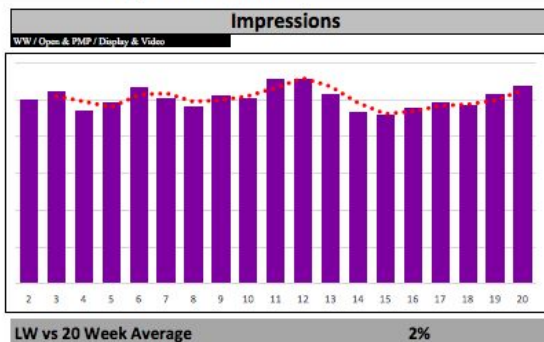
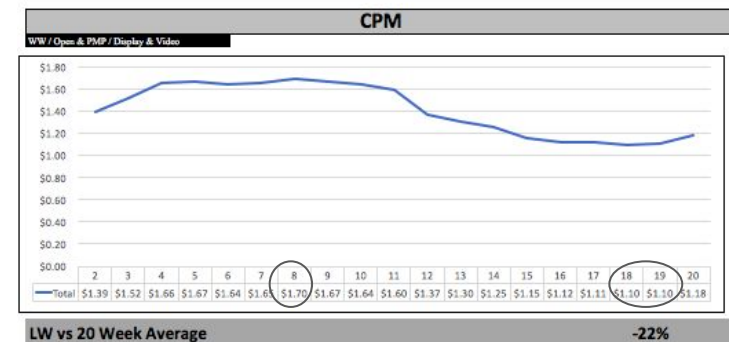
- 10 SSPs in Advertiser Benchmarks
- 200+ Parent Advertisers
- Advertiser Data 40% of overall Benchmarking

How The Data Is Curated

- Programmatic only -- WW, Open and PMP, Display and Video (unless specified)
- Some of the data is self selecting based on publishers participating
 - Publisher Categories are classified as: News, Information, Lifestyle & Entertainment, Games & Tech, and Sports
- Data presented is based on what's available in the API from the Partners
- Run Benchmarking after running customer data. Data through Saturday, May 16
- Data presented is by week (excluding Week 1 which is only 4 days) and runs Sunday through Saturday

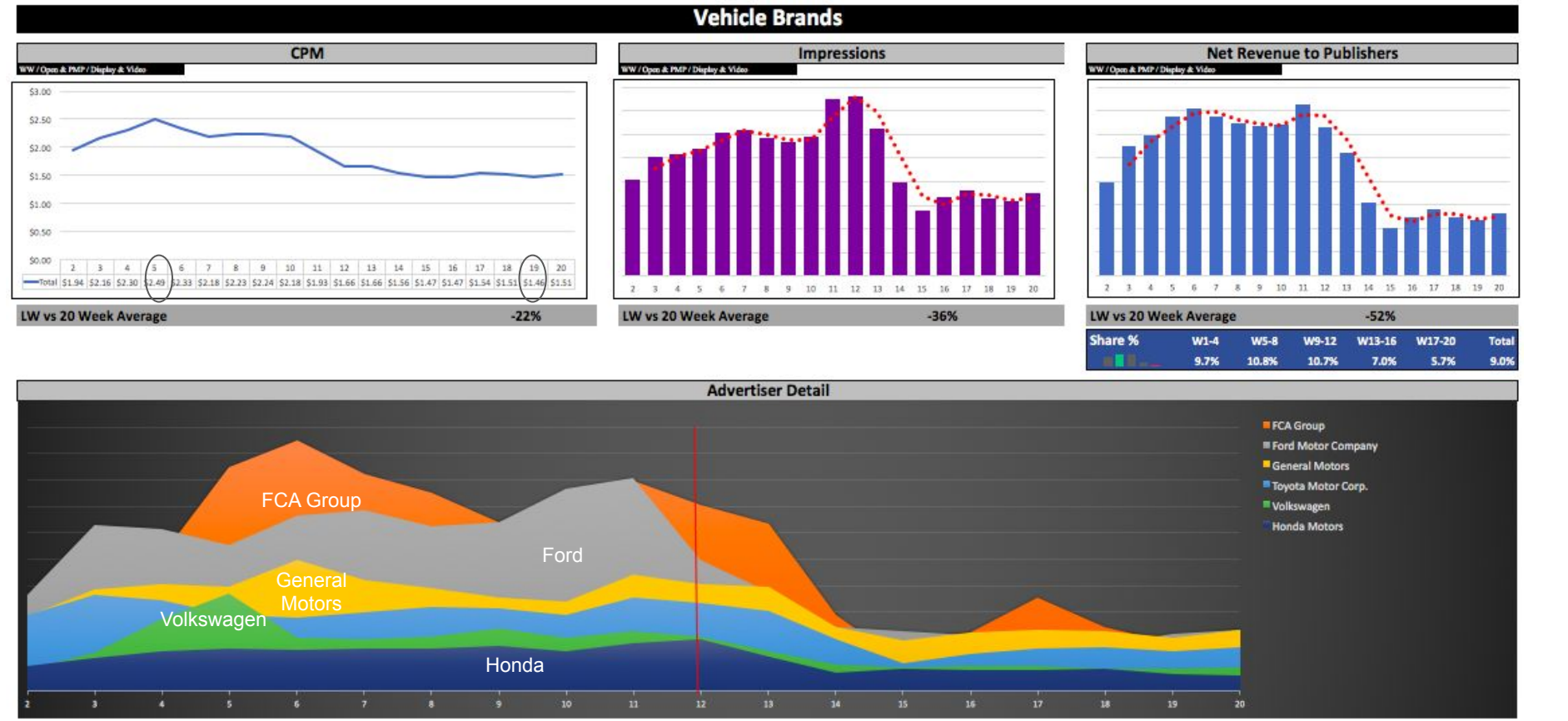
Top Covid Spenders That Aren't AdWords

Top Advertisers



The Data: Top Vertical View 2020 by Week

Covid Puts The Brakes On Vehicle Brands



Background Data

FCA Group down 59%
Ford down 49%

WW, Open & PMP, Display & Video

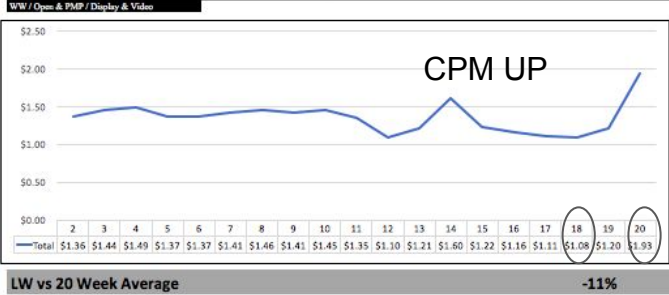
DR Not Taking Advantage In Usually Strong Category



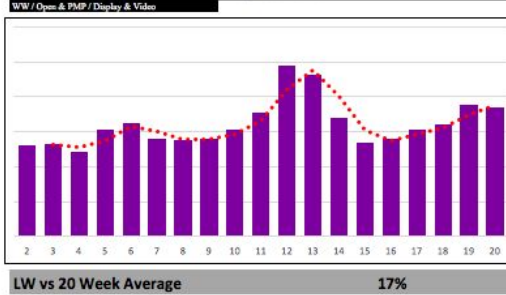
AT&T Kicks Mobile & Wireless Into 5G

Mobile & Wireless

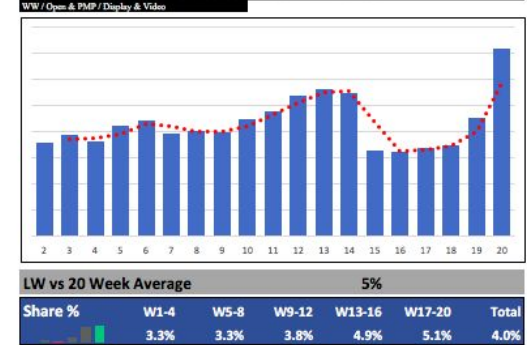
CPM



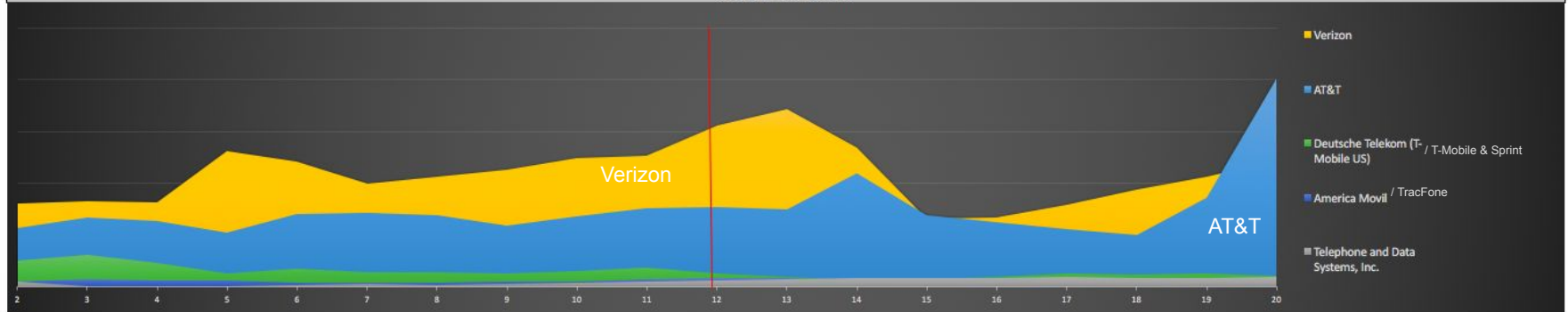
Impressions



Net Revenue to Publishers



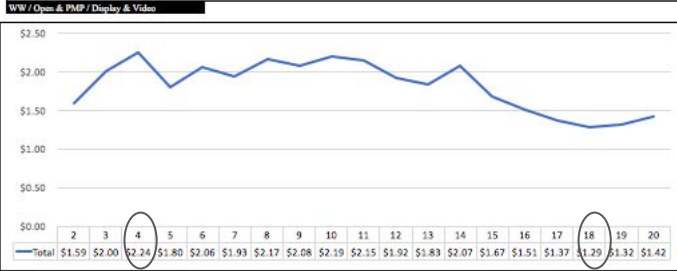
Advertiser Detail



Thanks Jake From State Farm

Insurance

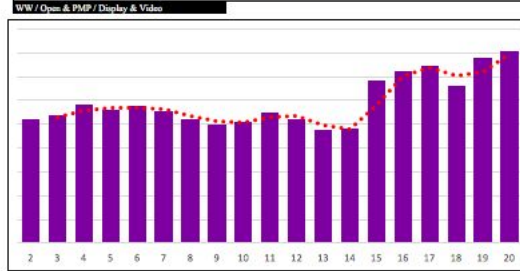
CPM



LW vs 20 Week Average

-28%

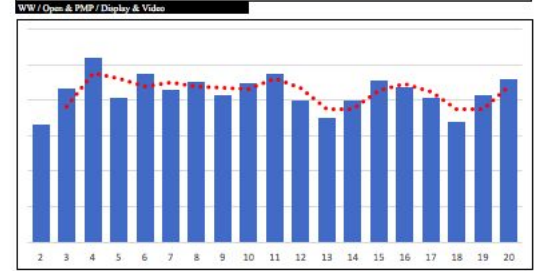
Impressions



LW vs 20 Week Average

31%

Net Revenue to Publishers

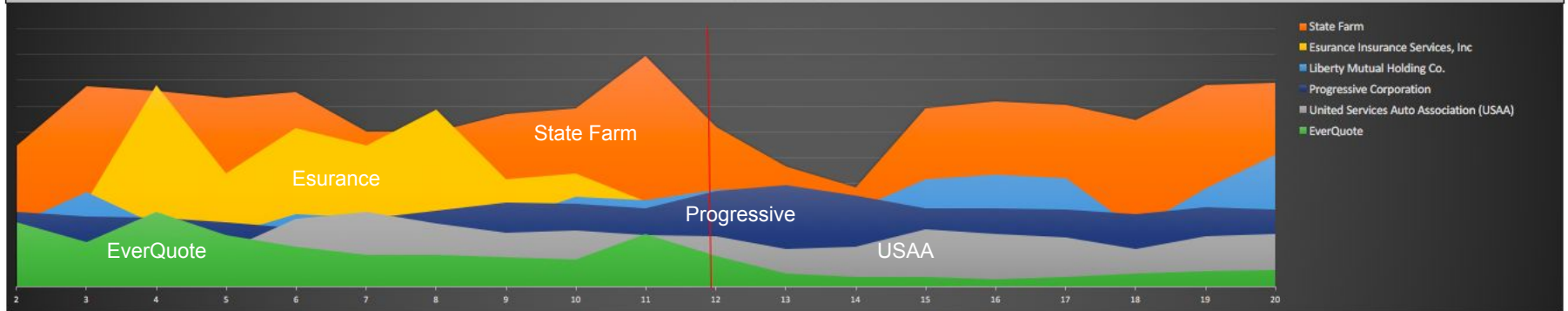


LW vs 20 Week Average

-3%

Share %	W1-4	W5-8	W9-12	W13-16	W17-20	Total
	3.7%	3.6%	3.5%	4.7%	4.5%	4.0%

Advertiser Detail



Background Data

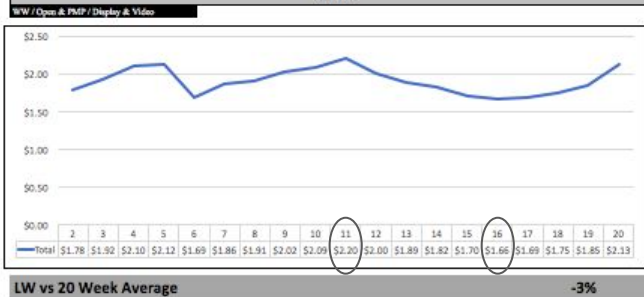
State Farm up 17%
Esurance down 26%
Liberty Mutual up 56%

WW, Open & PMP, Display & Video

Pharma Steady, Advertisers Aren't

Pharmaceuticals & Biotech

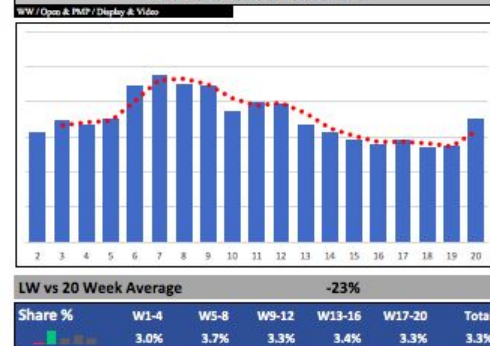
CPM



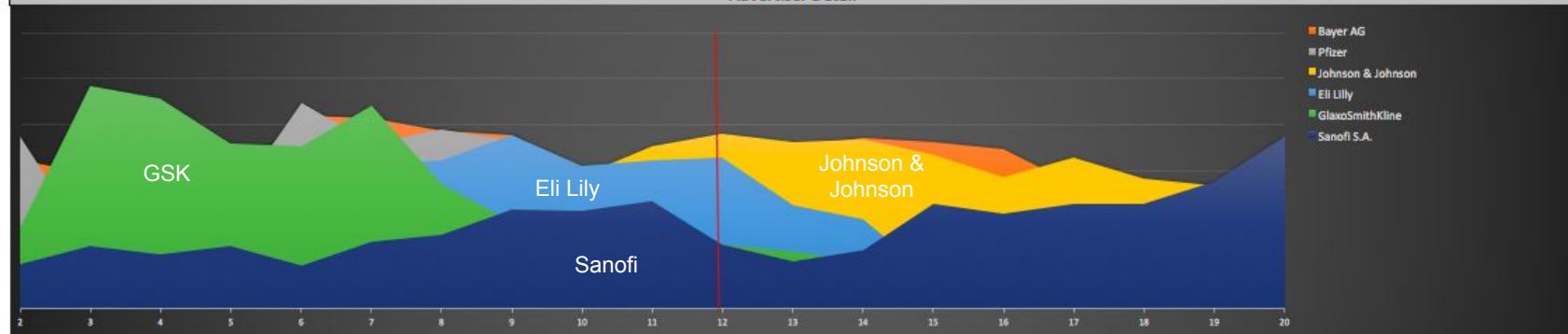
Impressions



Net Revenue to Publishers



Advertiser Detail

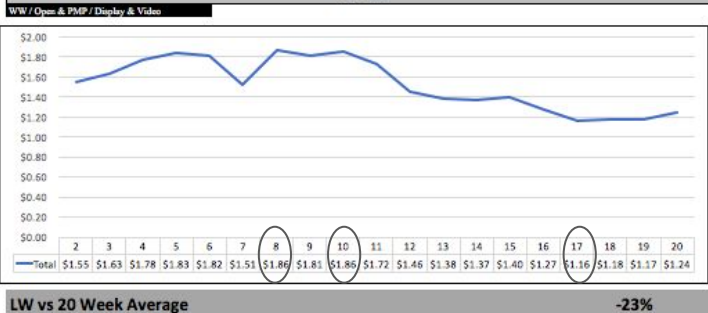


Sanofi had a high week 19 and 20. Up 104%
 GSK fell end of February. Down 59%
 Bayer down 11%

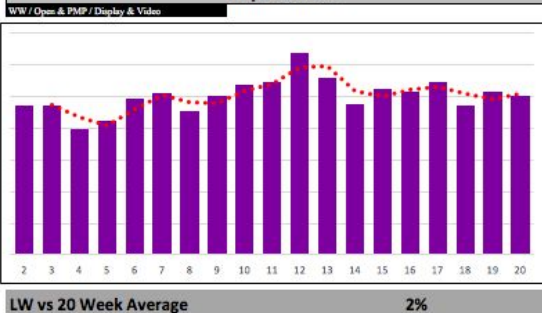
Comcast Takes Advantage Where Others Miss Opportunity

Service Providers

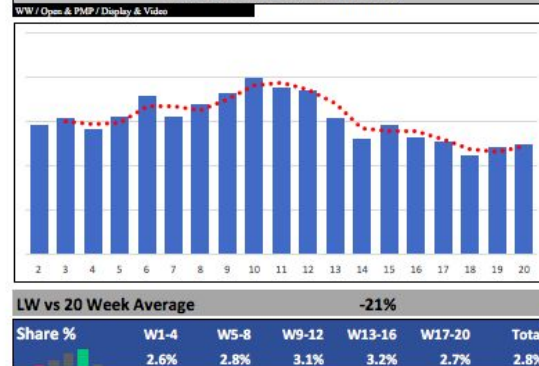
CPM



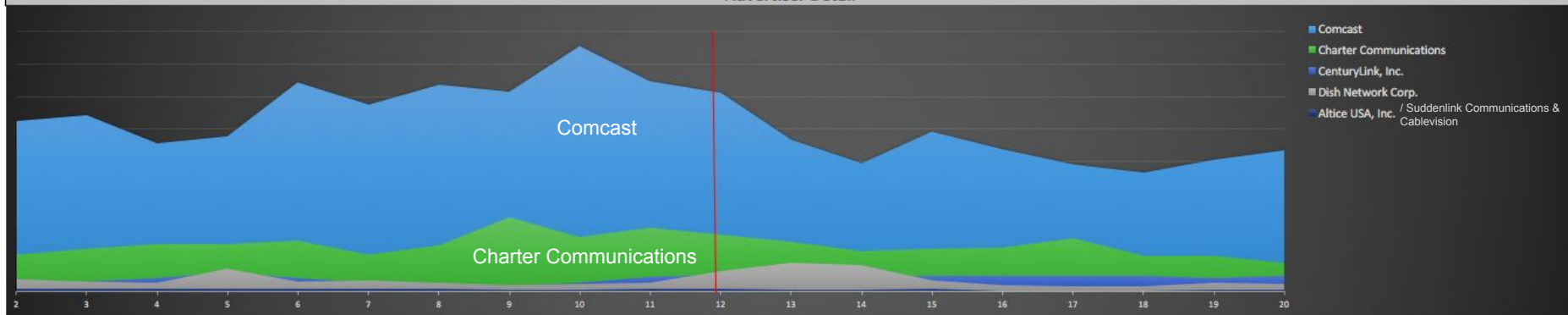
Impressions



Net Revenue to Publishers



Advertiser Detail



Microsoft Returns, Apple Reopens



Microsoft dipped at start of Q2. Coming back in May. Up 8%

Dell down 3%

HP fell beginning of Feb. Down 57%

Background Data

WW, Open & PMP, Display & Video

Disney Alone In Entertainment Spending

Background Data

Entertainment Industry

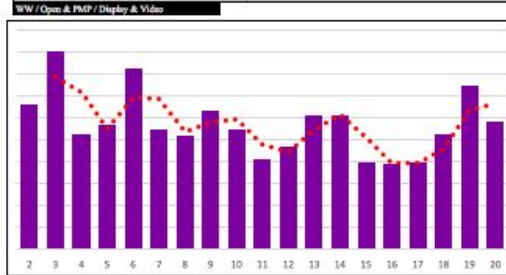
CPM



LW vs 20 Week Average

-31%

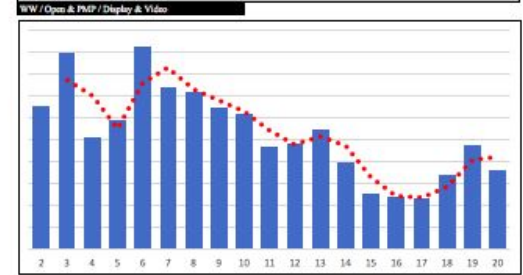
Impressions



LW vs 20 Week Average

31%

Net Revenue to Publishers



LW vs 20 Week Average

-10%

Share %	W1-4	W5-8	W9-12	W13-16	W17-20	Total
	2.3%	2.4%	1.8%	1.6%	1.5%	2.0%

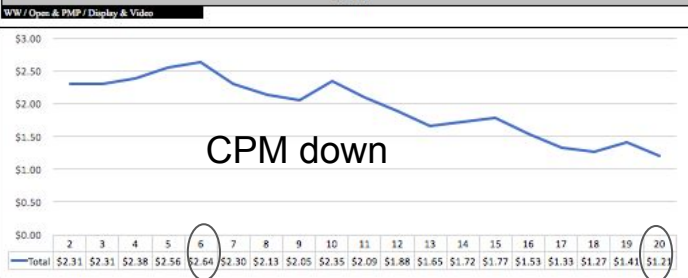
Advertiser Detail



Nordstrom Stepping In With eCommerce

Retail Trade

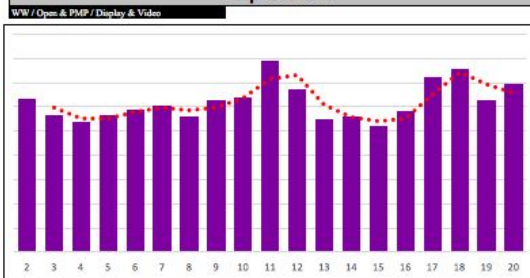
CPM



LW vs 20 Week Average

-27%

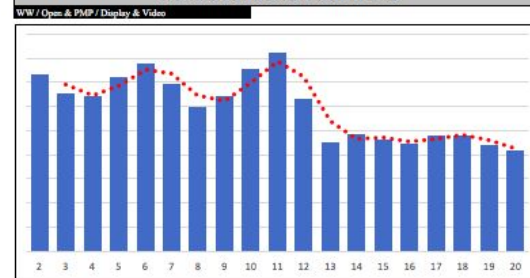
Impressions



LW vs 20 Week Average

1%

Net Revenue to Publishers

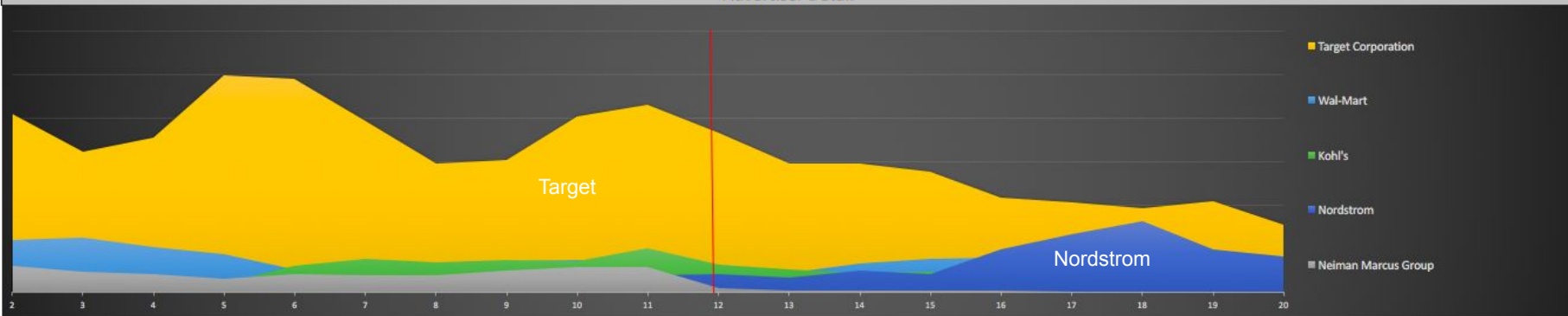


LW vs 20 Week Average

-26%

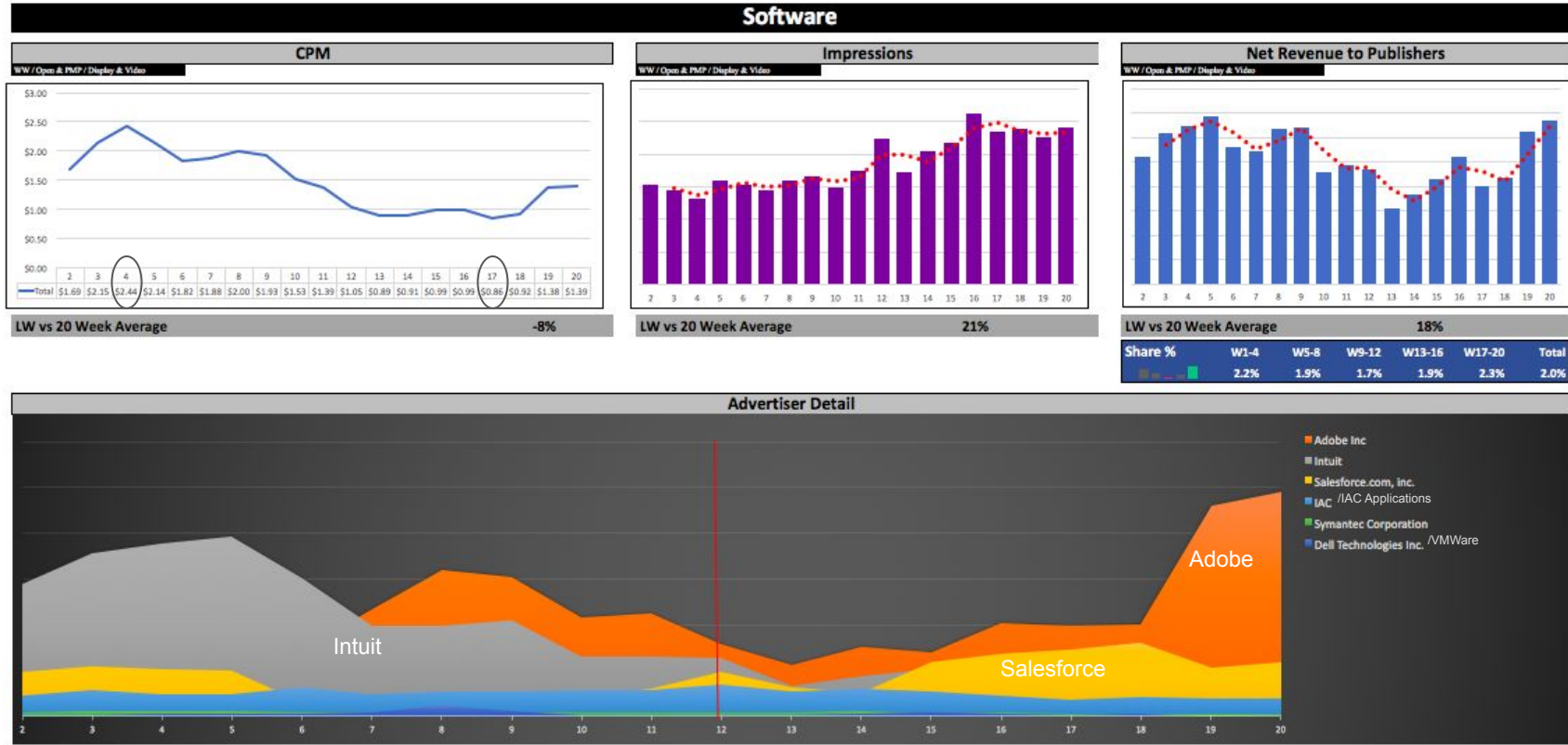
Share %	W1-4	W5-8	W9-12	W13-16	W17-20	Total
	2.4%	2.2%	2.3%	2.1%	2.0%	2.2%

Advertiser Detail



Adobe Started Getting Creative In May

Background Data



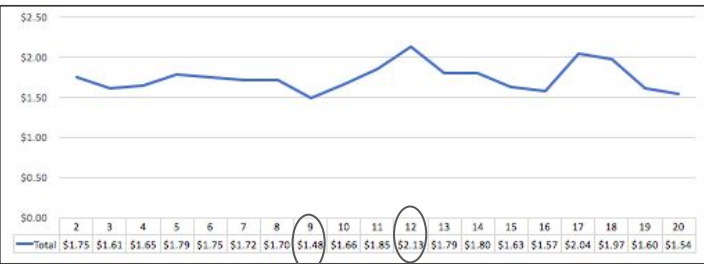
Adobe picked up in May. Up 136%
 Intuit consistent decline, drop off in May. Down 92%
 Salesforce picked up in Q2. Up 34%

We're Eating At Home, But Nestlé Only Spender

Food

CPM

WW / Open & PMP / Display & Video

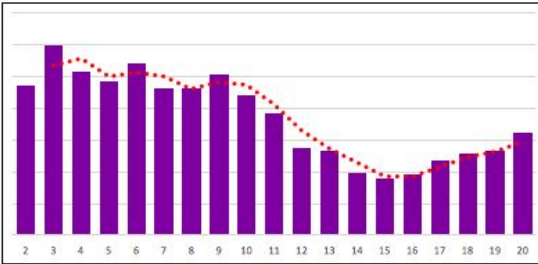


LW vs 20 Week Average

-8%

Impressions

WW / Open & PMP / Display & Video

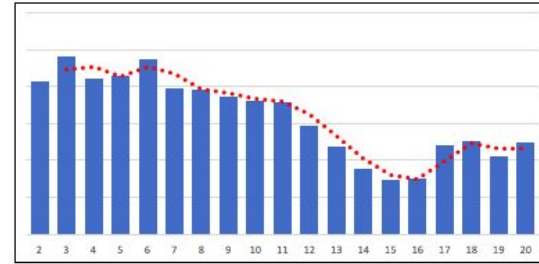


LW vs 20 Week Average

-28%

Net Revenue to Publishers

WW / Open & PMP / Display & Video

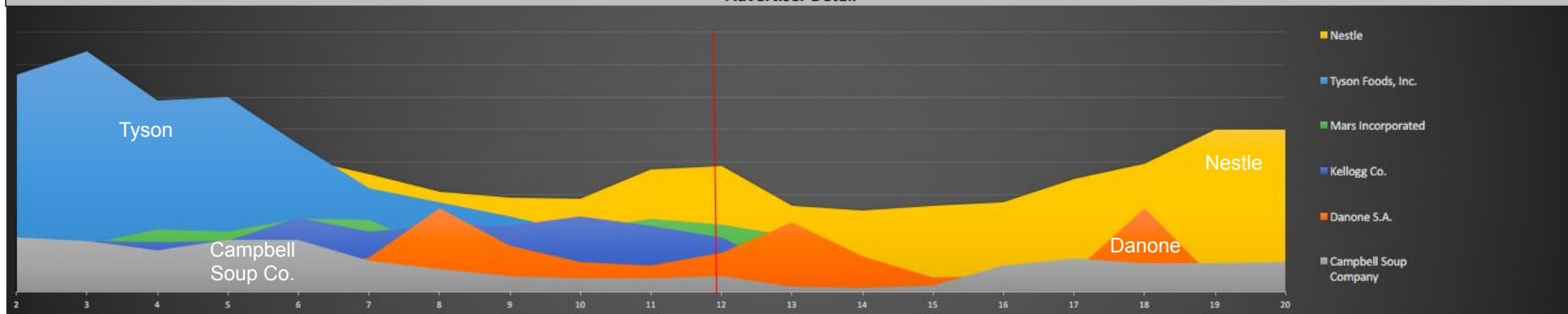


LW vs 20 Week Average

-33%

Share %	W1-4	W5-8	W9-12	W13-16	W17-20	Total
	1.5%	1.3%	1.1%	0.8%	1.1%	1.2%

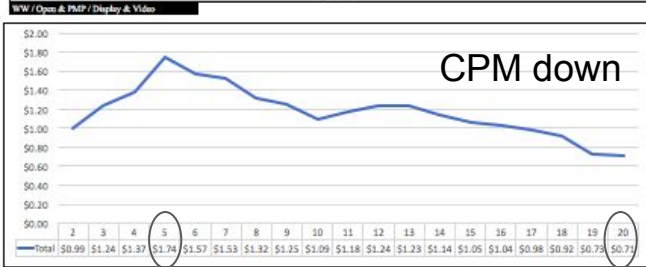
Advertiser Detail



Adidas Getting Back In Shape

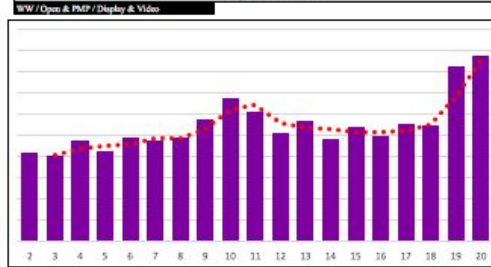
Apparel

CPM

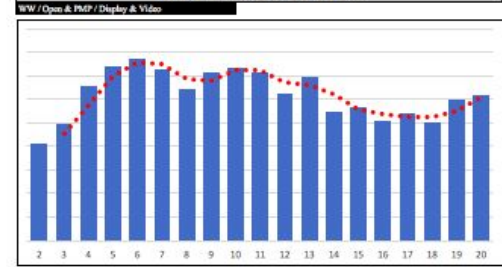


LW vs 20 Week Average -38%

Impressions

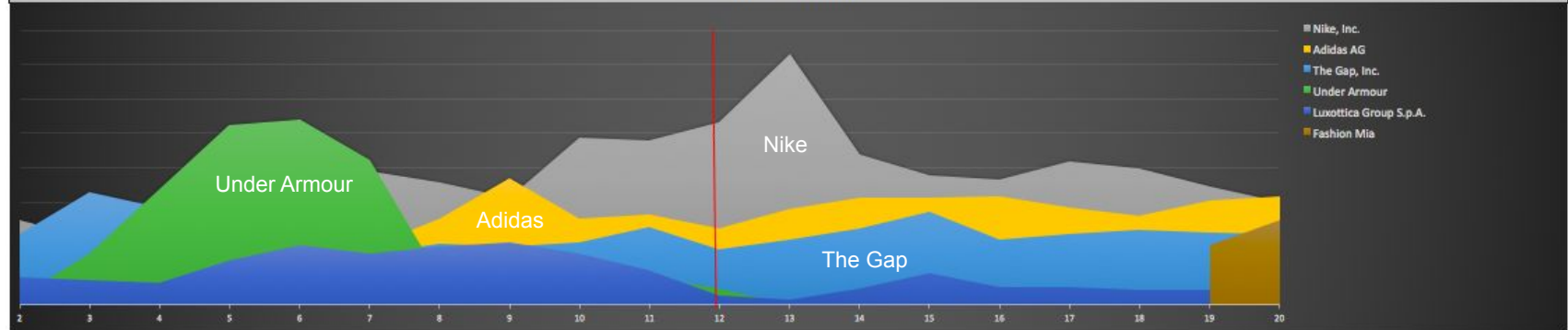


Net Revenue to Publishers



Share %	W1-4	W5-8	W9-12	W13-16	W17-20	Total
	1.0%	1.2%	1.1%	1.3%	1.2%	1.2%

Advertiser Detail



Nike down 22%
 Adidas up 29%
 Under Armour fell off end of March. Down 99%

Wayfair Capitalizing On Stay At Home

Background Data

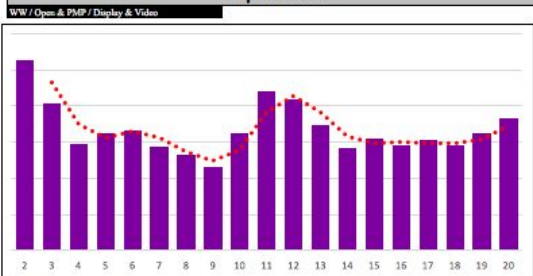
Home Furnishings

CPM



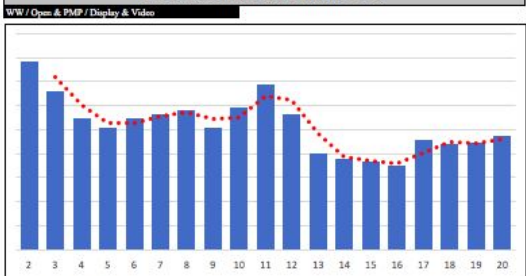
LW vs 20 Week Average -13%

Impressions



LW vs 20 Week Average -3%

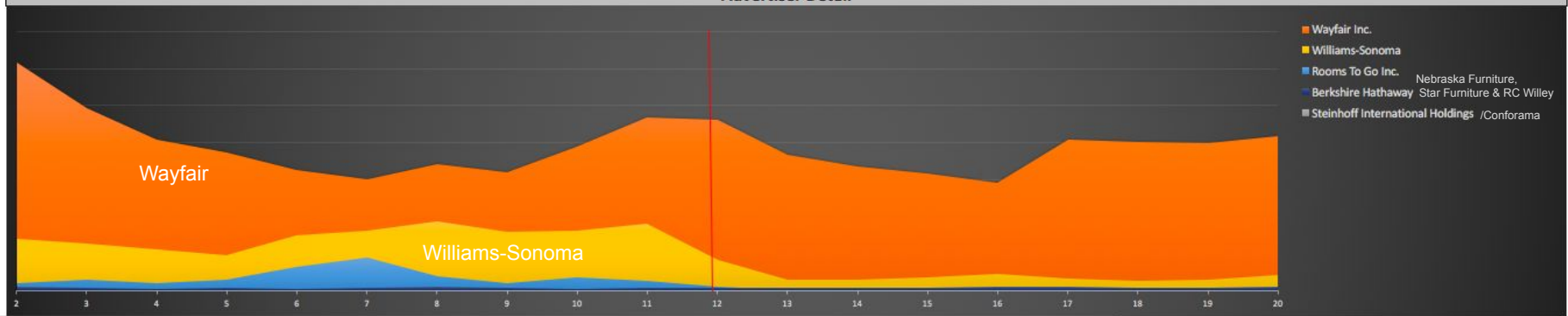
Net Revenue to Publishers



LW vs 20 Week Average -14%

Share %	W1-4	W5-8	W9-12	W13-16	W17-20	Total
	1.1%	0.9%	1.0%	0.8%	1.0%	1.0%

Advertiser Detail



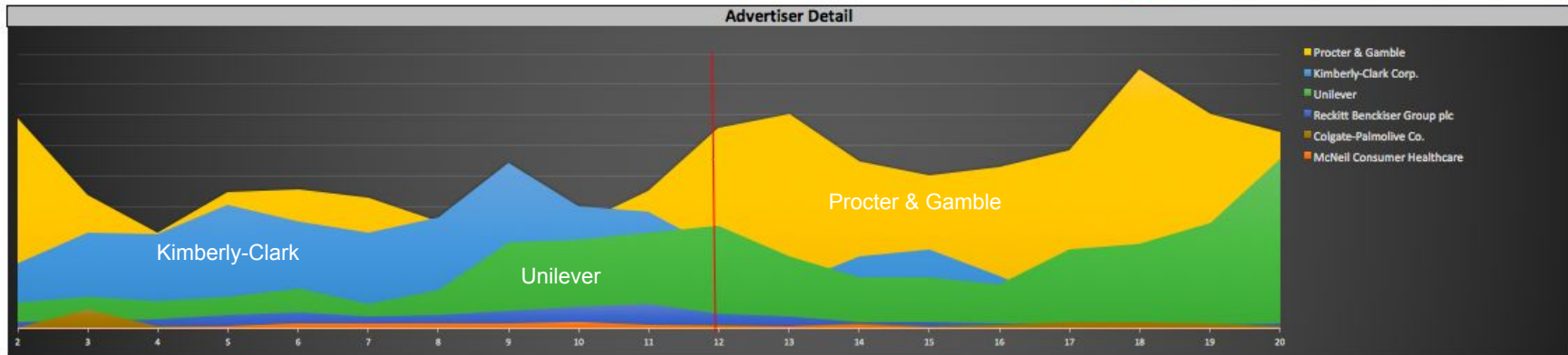
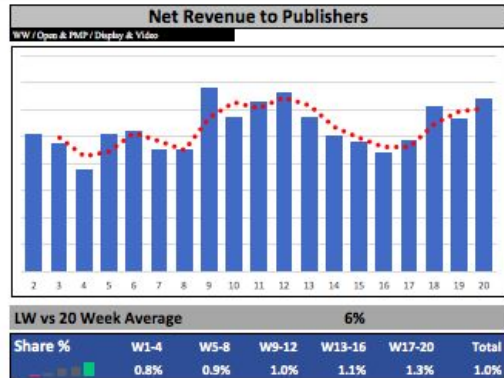
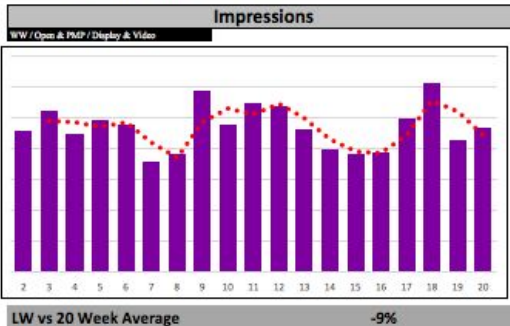
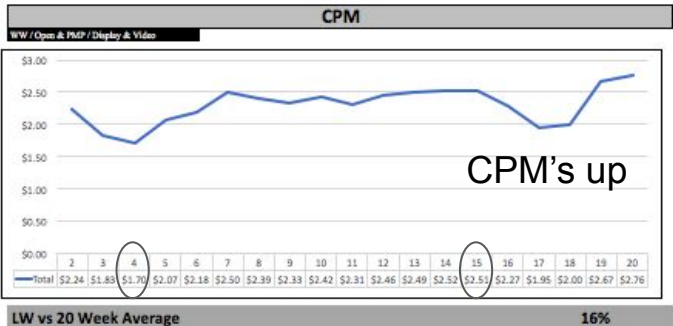
Wayfair up 7%

Williams-Sonoma decreased mid-March. Down 56%

WW, Open & PMP, Display & Video

Unilever Picking Up What P&G Is Putting Down

Consumer Goods

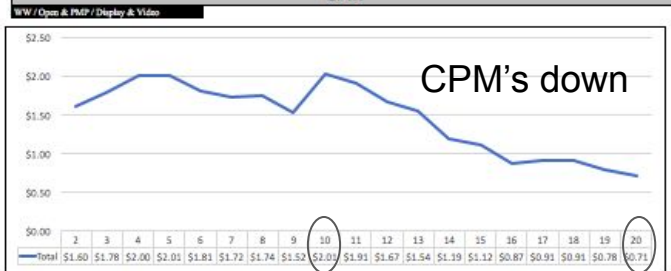


Comeback Stories?

Pepsi Gone, Liquor & Lattés

Beverages

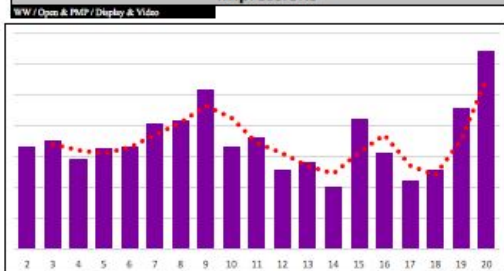
CPM



LW vs 20 Week Average

-46%

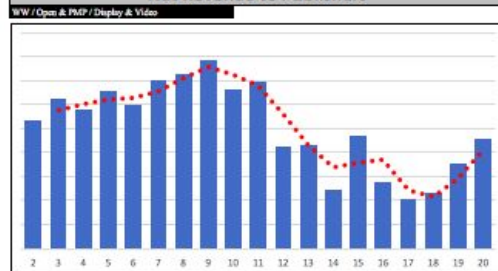
Impressions



LW vs 20 Week Average

29%

Net Revenue to Publishers

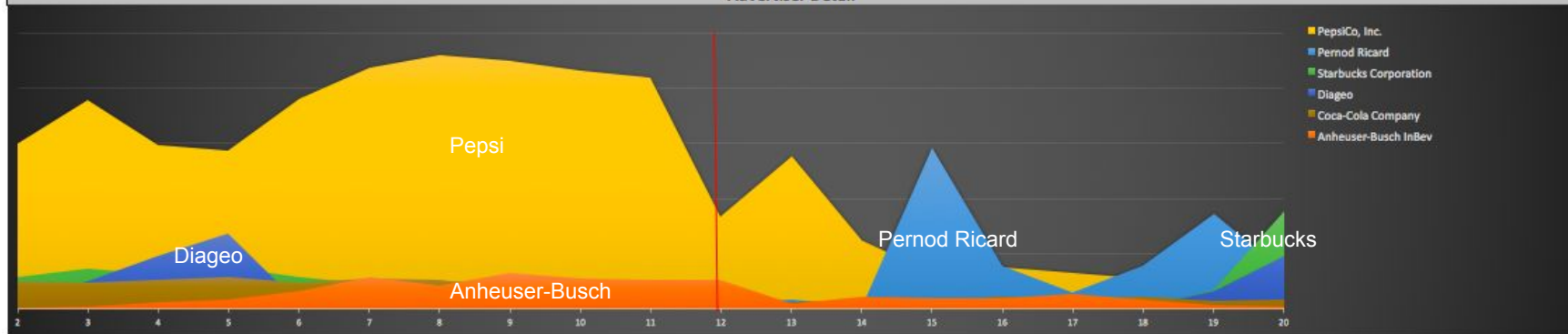


LW vs 20 Week Average

-30%

Share %	W1-4	W5-8	W9-12	W13-16	W17-20	Total
	0.5%	0.6%	0.5%	0.4%	0.3%	0.5%

Advertiser Detail



America Runs On... We Forget, Need More Coffee

Restaurants

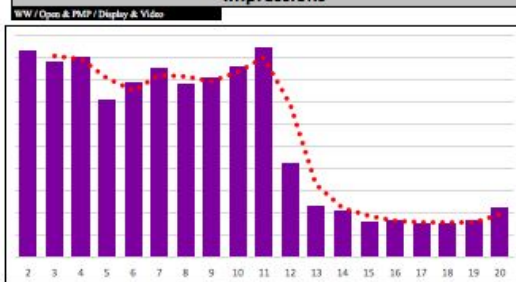
CPM



LW vs 20 Week Average

4%

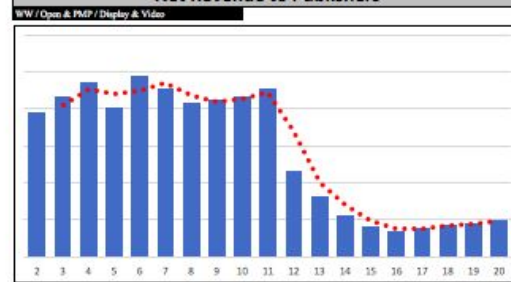
Impressions



LW vs 20 Week Average

-70%

Net Revenue to Publishers

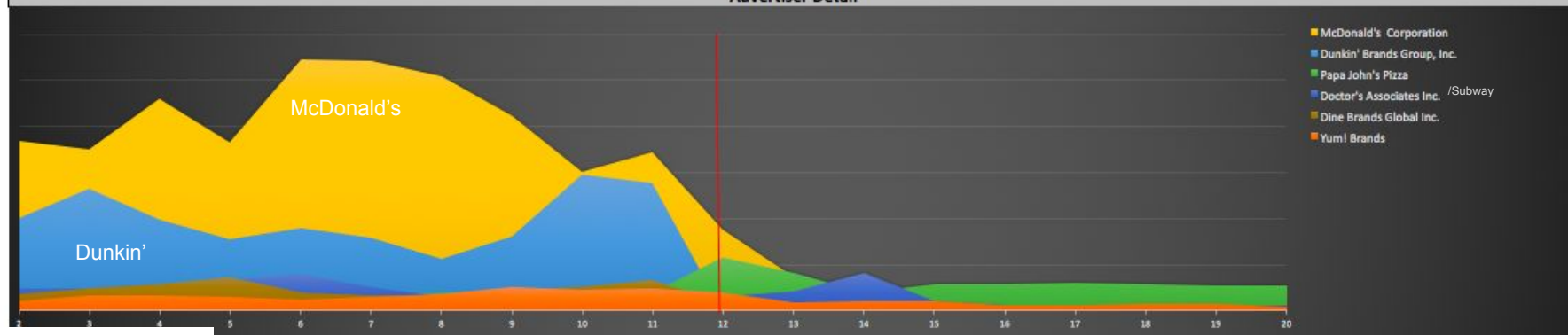


LW vs 20 Week Average

-68%

Share %	W1-4	W5-8	W9-12	W13-16	W17-20	Total
	0.7%	0.7%	0.6%	0.2%	0.2%	0.5%

Advertiser Detail



Travel Is Grounded Except For Hilton

Hotels & Accommodations

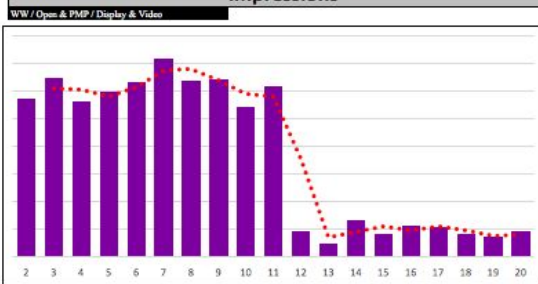
CPM



LW vs 20 Week Average

-12%

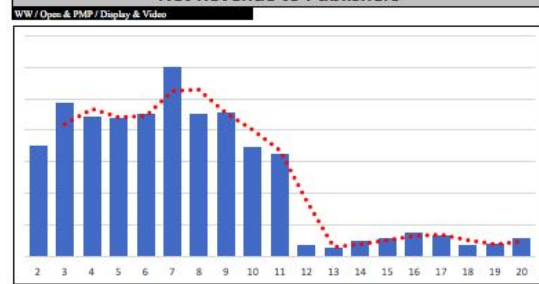
Impressions



LW vs 20 Week Average

-80%

Net Revenue to Publishers

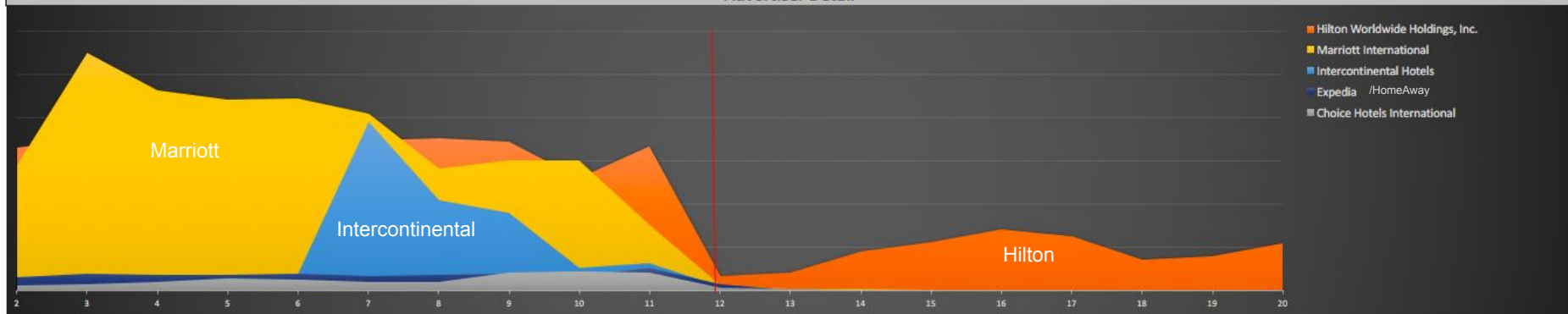


LW vs 20 Week Average

-84%

Share %	W1-4	W5-8	W9-12	W13-16	W17-20	Total
	0.8%	0.8%	0.5%	0.1%	0.1%	0.5%

Advertiser Detail



Recap

- Largest Decliners: QSR, Travel, Auto
- Largest Gainers: Mobile & Wireless (AT&T), Software, CPG
- Most consistent: State Farm, Comcast, Wayfair
- We see the swoosh!