

SPECIAL REPORT

PROGRAMMATIC AD SPEND IN THE AGE OF COVID-19

A CONNECTED TV/OTT 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 OTT/CTV ecosystem.

Pixalate is reporting data that it believes is reflective of programmatic advertising activity across Connected TV/OTT apps during the time period studied. The reporting set forth herein is not intended to impugn the standing or reputation of any person, entity or app.

COVID-19: PROGRAMMATIC OTT/CTV AD SPEND DROPS 14%

CHANGE IN OTT/CTV PROGRAMMATIC AD TRANSACTIONS; FROM MARCH 1-7 TO 22-28, 2020; AS MEASURED BY PIXALATE

-14% programmatic ad spend on
OTT/CTV in March 2020

+30x rise in programmatic ad spend to
'Educational' apps on Roku

+1,517% ad spend to the **PBS**
app on Roku

-30% programmatic ad spend to
the **Hulu** app on Roku

-26% programmatic ad spend to
the **Sling TV** app on Roku

+10% programmatic ad share of voice
gain for **Apple** devices

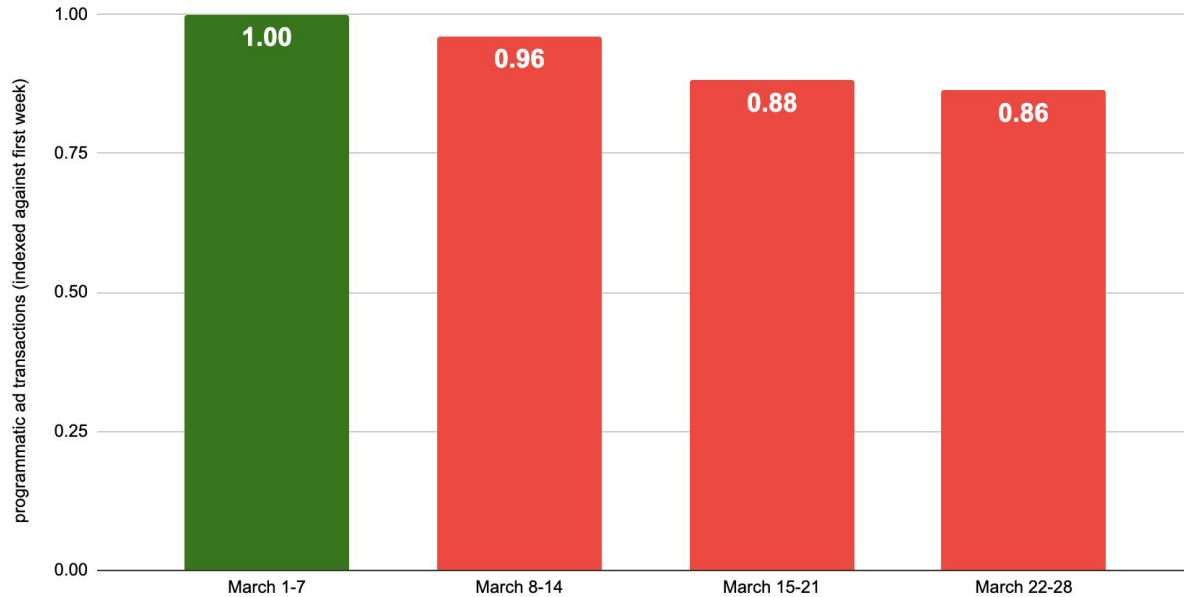
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CONNECTED TV/OTT AD SPEND TRENDS

*14% decrease in ad spend
March 1-7 vs. March 22-28*

PROGRAMMATIC OTT/CTV AD SPEND DROPS 14%

PROGRAMMATIC AD TRANSACTIONS IN MARCH 2020; AS MEASURED BY PIXALATE



**14% decrease
in programmatic
ad spend**

(first week vs. last week, March 2020)





















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NOTABLE APP RISERS & FALLERS

*PBS up 1,517%; Hulu down 30%
March 1-7 vs. March 22-28*





















ROKU STORE APPS: 20 NOTABLE RISERS

% CHANGE IN OTT/CTV PROGRAMMATIC AD TRANSACTIONS; FROM MARCH 1-7 TO 22-28, 2020; AS MEASURED BY PIXALATE

Icon	Title	% change	Icon	Title	% change
	USA Network	+1,869%		Food Network GO	+95%
	PBS	+1,517%		truTV	+45%
	VICE on TV	+1,163%		CBS All Access	+43%
	CNBC	+689%		Hallmark Channel	+42%
	DIY Network GO	+419%		STIRR	+35%
	Fox News Channel	+143%		CNNgo	+35%
	Bloomberg	+126%		Univision NOW	+35%
	FOX NOW	+116%		The CW	+34%
	ABC	+112%		WETV	+31%
	ABC News Live	+101%		Lifetime	+16%

ROKU STORE APPS: 20 NOTABLE FALLERS

% CHANGE IN OTT/CTV PROGRAMMATIC AD TRANSACTIONS; FROM MARCH 1-7 TO 22-28, 2020; AS MEASURED BY PIXALATE

Icon	Title	% change	Icon	Title	% change
	Tennis Channel	-82%		Bravo Now	-51%
	Xumo	-78%		CBS News	-39%
	Vevo	-75%		VH1	-37%
	Investigation Discovery GO	-70%		A&E	-32%
	NBA	-67%		Fox Business Network	-30%
	Science Channel GO	-66%		Hulu	-30%
	NHL	-63%		HISTORY	-28%
	AT&T TV	-53%		Fox Sports Go	-26%
	CONtv	-53%		Sling TV	-26%
	FX Now	-53%		HGTV Go	-17%

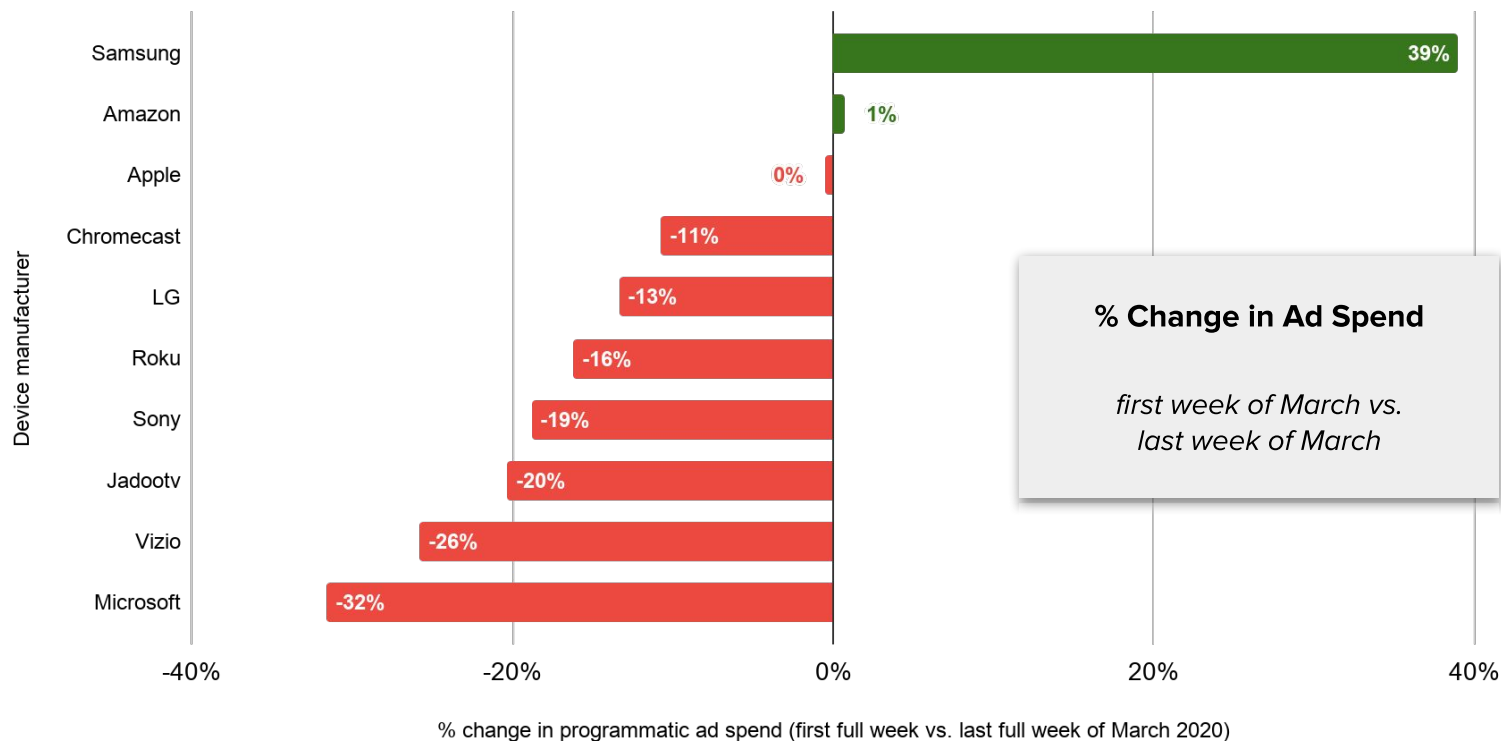
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OTT/CTV DEVICE TYPES

*Apple, Amazon devices gain 10%+ programmatic ad market share
March 1-7 vs. March 22-28*

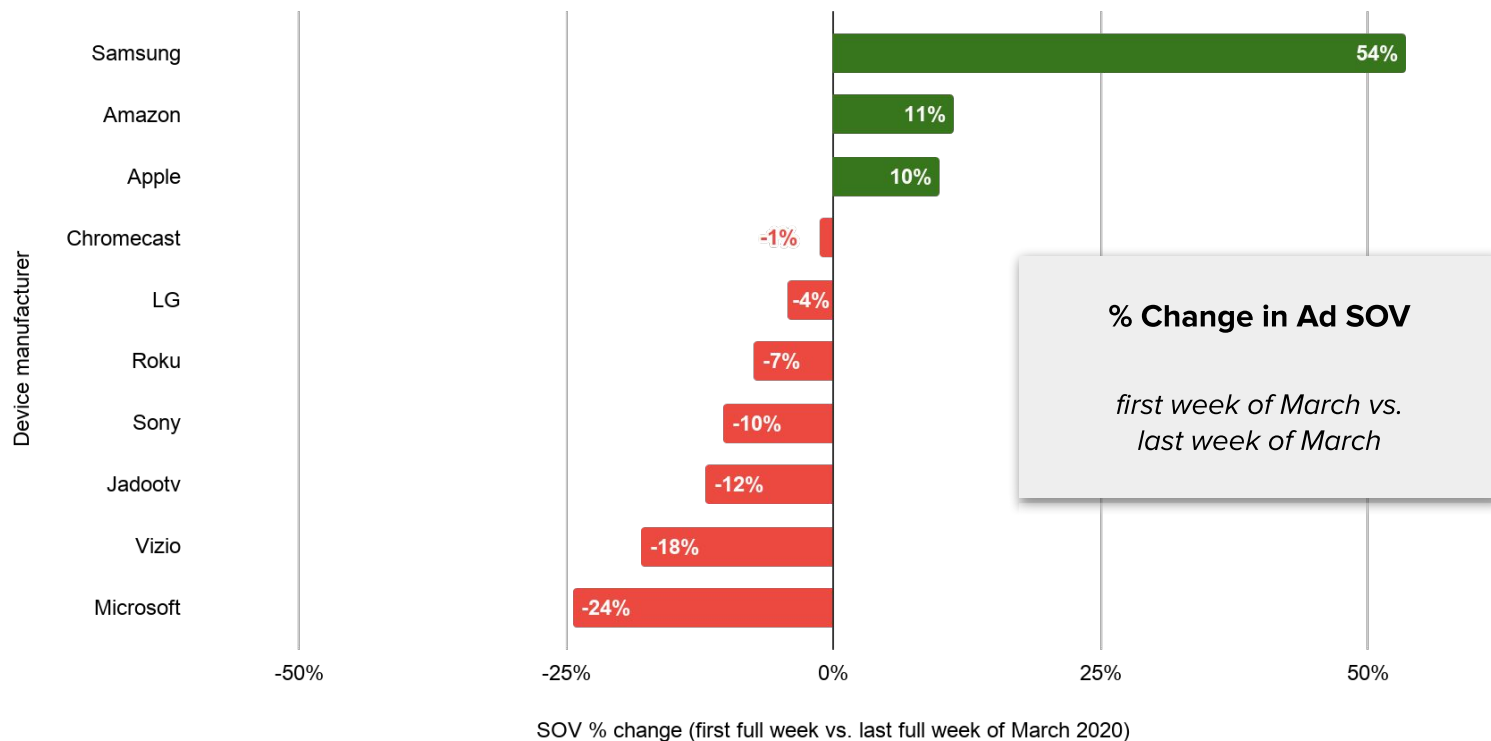
AD SPEND TO SAMSUNG OTT/CTV DEVICES RISES 39%

% CHANGE IN OTT/CTV PROGRAMMATIC AD TRANSACTIONS; FROM MARCH 1-7 TO 22-28, 2020; AS MEASURED BY PIXALATE



AMAZON, APPLE DEVICES INCREASE SHARE OF VOICE BY 10%+

% CHANGE IN OTT/CTV PROGRAMMATIC AD TRANSACTION SHARE OF VOICE; FROM MARCH 1-7 TO 22-28, 2020; AS MEASURED BY PIXALATE



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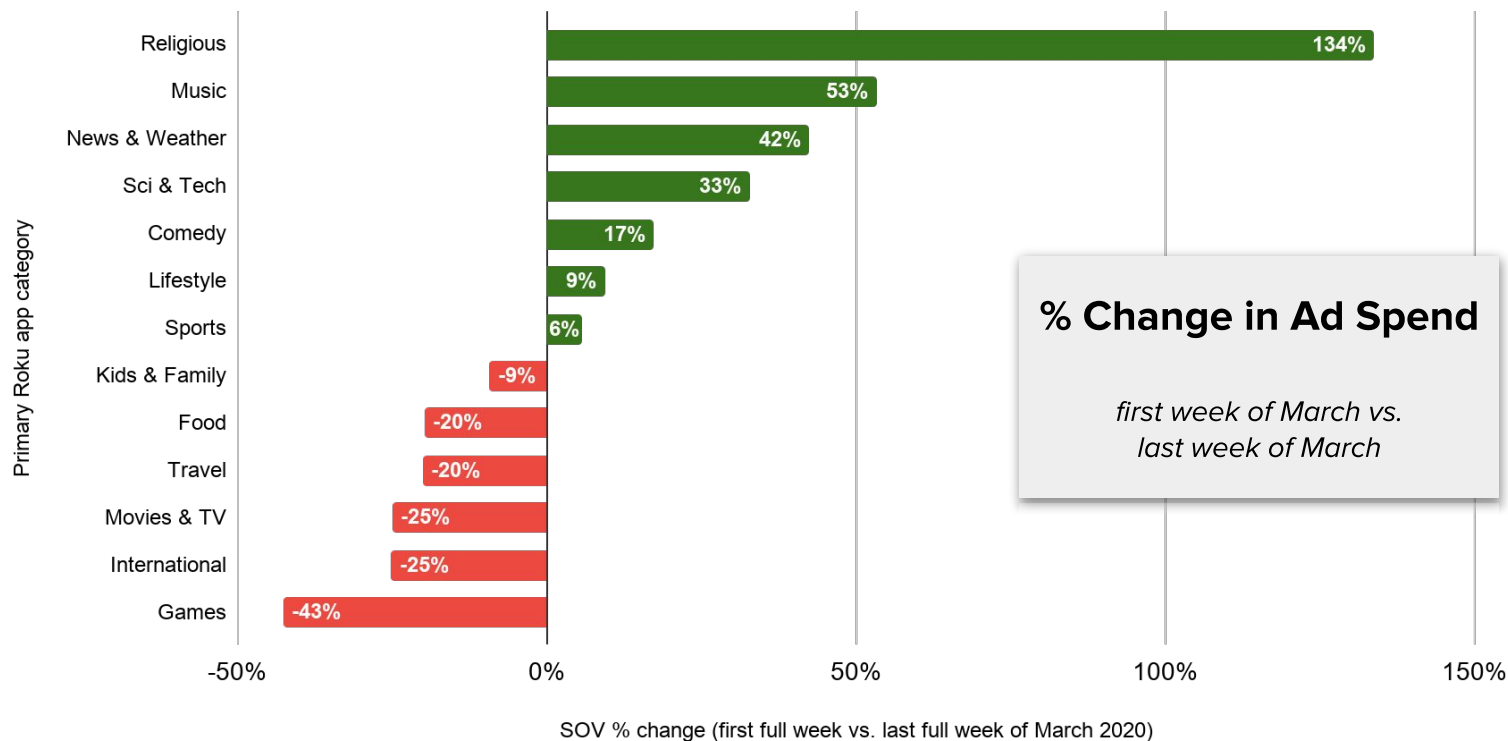
APP CATEGORY TRENDS

*'News' apps on Roku see 42% increase in ad spend
March 1-7 vs. March 22-28*

'NEWS' APPS RISE 42%, BUT 'MOVIES & TV' DROP 25%

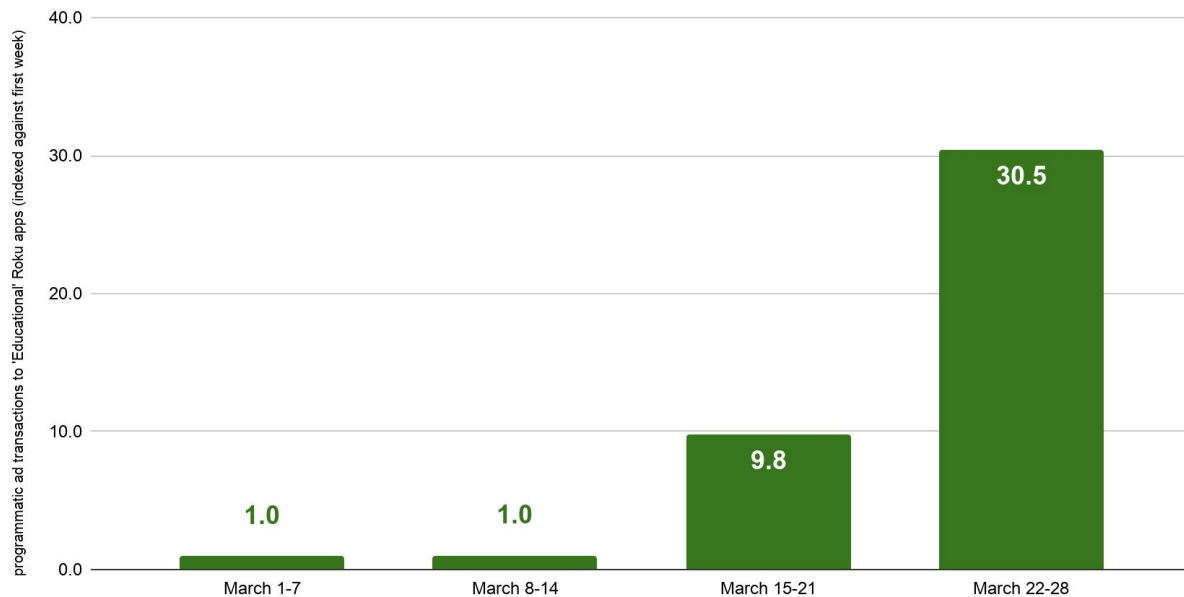
% CHANGE IN OTT/CTV PROGRAMMATIC AD TRANSACTIONS; FROM MARCH 1-7 TO 22-28, 2020; AS MEASURED BY PIXALATE

Note: 'Educational' apps rose 2,946%; see page 14 for more



'EDUCATIONAL' APP AD SPEND SKYROCKETS 2,946%

PROGRAMMATIC AD TRANSACTIONS IN MARCH 2020; AS MEASURED BY PIXALATE



**30x increase
in programmatic
ad spend**

(first week vs. last week, March 2020)

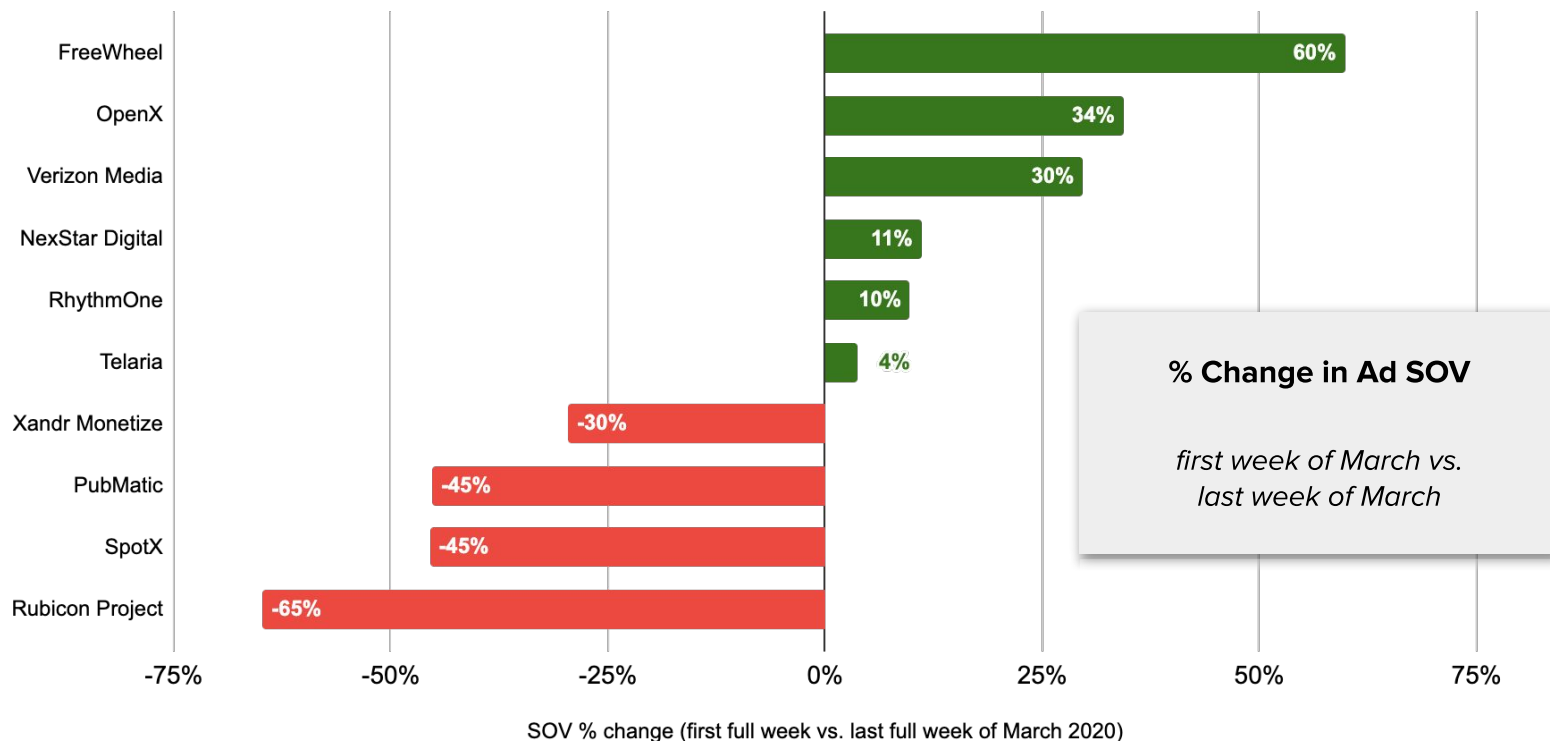
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SUPPLY CHAIN INTELLIGENCE

*Freewheel sees 60% jump in OTT/CTV programmatic ad share of voice
March 1-7 vs. March 22-28*

FREEWHEEL GAINS 60% SHARE OF VOICE IN MARCH

% CHANGE IN OTT/CTV PROGRAMMATIC AD TRANSACTION SHARE OF VOICE; FROM MARCH 1-7 TO 22-28, 2020; AS MEASURED BY PIXALATE



METHODOLOGY

Pixalate's data science and analyst team analyzed programmatic advertising activity across over 75 million Connected TV/OTT devices 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 Roku Channel Store.

"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.

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.

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 Connected TV/OTT apps in the time period studied.

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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