



Q3 Recap Benchmarking Report



Before The Data

Q3 RECAP

As we start a new quarter, we're taking a short look at the most significant trends from Q3 that may have an impact on the rest of the year.

Despite ending Q2 with uncertainty around advertiser confidence and market recovery, Q3 exceeded expectations. Overall, Q3 saw Revenue and CPMs recover from April lows and hit yearly highs. We saw more large advertisers returning, and continued spend from 2020 standouts like LendingTree. Political Advertising began to pop in September, and will continuously increase until the election.

See what PACs are spending and which advertisers are hot heading into Q4.

We anticipate the positive momentum of Q3 to continue into Q4.

Here's to a successful Q4!

The STAQ Team

About The Data

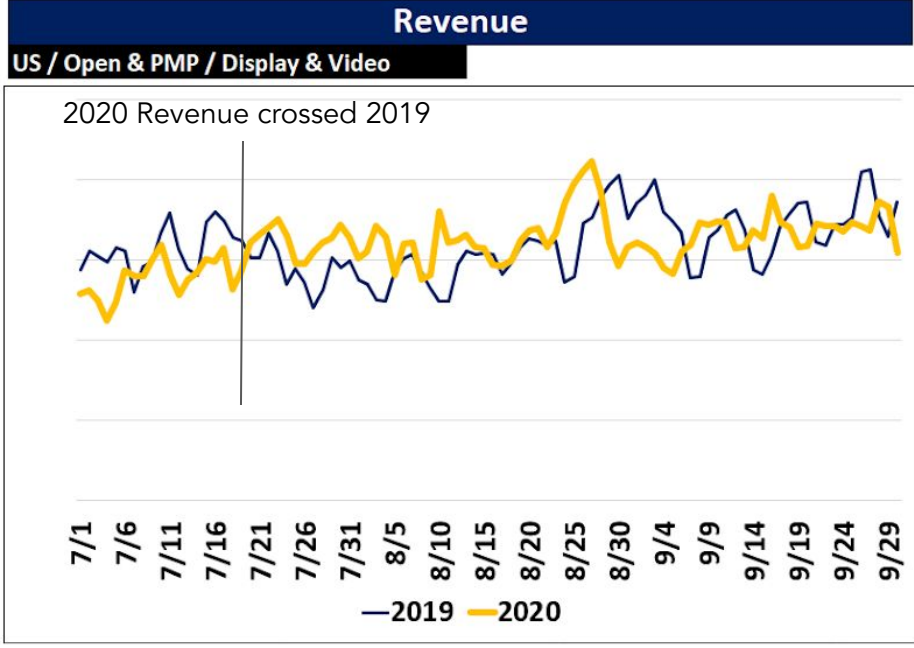
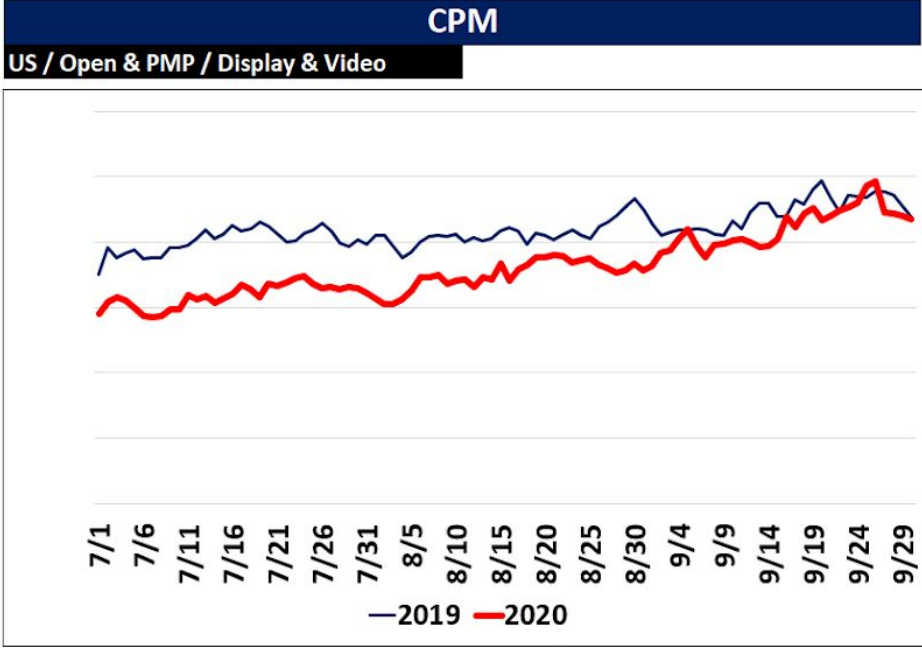
Publisher Data

- Anonymous, opt-in, and on-demand
- 40+ Publishers
- 50+ SSPs Overall
- \$1.3B+ in Annual Revenue

Advertiser Data

- 10 SSPs in Advertiser Benchmarks
- 250+ Parent Advertisers
- Advertiser Data 20% - 25% of Overall Benchmarking

Q3 Comeback Exceeds Revenue Expectations



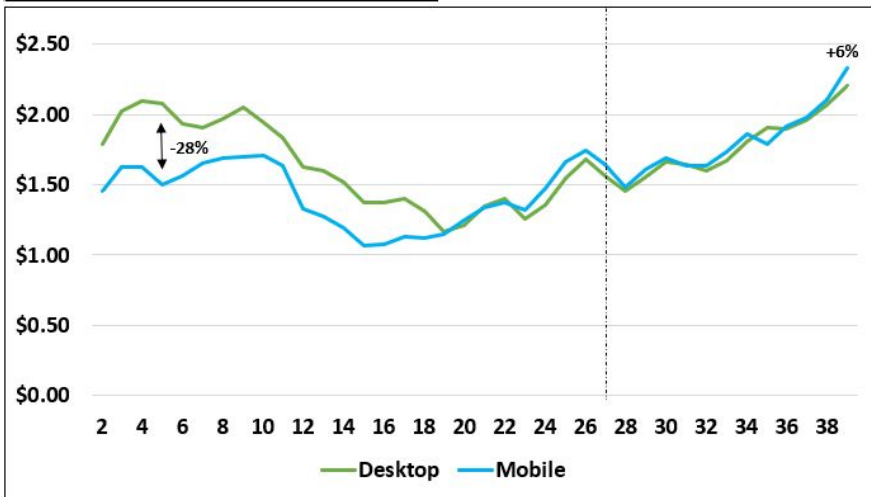
- Revenue finally surpassed 2019 in week 30 (end of July)
- CPMs increasing weekly since the start of Q3, hitting a 2020 high and surpassing 2019 in late September.

All Screens Now Cost The Same

2020 Desktop & Mobile CPMs

US / Open & PMP / Display & Video

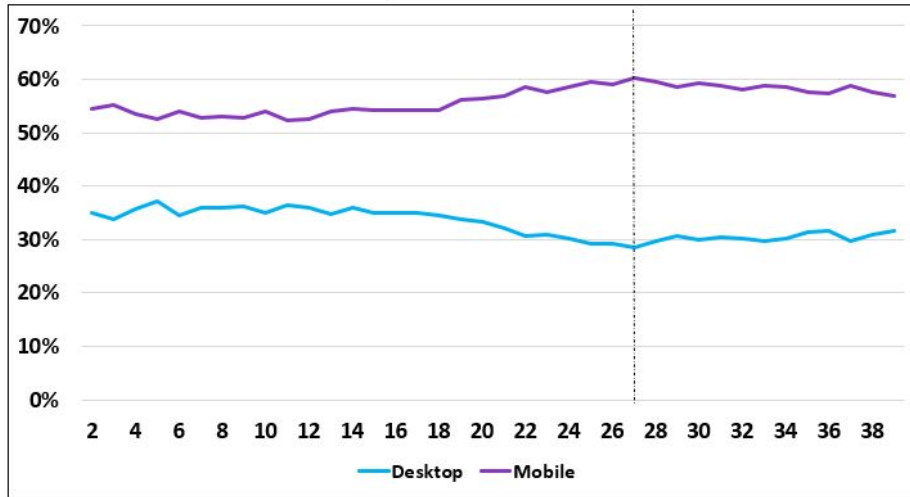
Q3 Start



2020 Desktop & Mobile Rev Share

US / Open & PMP / Display & Video

Q3 Start



- Desktop & Mobile CPMs converged with Mobile CPMs ending Q3 at about 6% higher than Desktop
- Mobile rev share increased in Q2 at the expense of Desktop and has remained relatively stable since

Q3 Top 50 Parent Advertisers By Revenue

STAQ Advertising Benchmarking Data				
WWW/ Open & Private/ Display & Video				
CPM				
Sum of Revenue				
Q3 2020 Rank	Select Advertiser Detail	Q3 2020 Trend	Q3 2020 vs. Q3 2019 % Change	Q3 vs Q2 2020 % Change
1	Adwords Small Businesses		8%	22%
2	Verizon		574%	59%
3	LendingTree, Inc.		1155%	98%
4	Amazon		-18%	19%
5	AT&T		159%	7%
6	Alphabet (Google)		235%	199%
7	Ford Motor Company		46%	64%
8	U.S. Government		169%	44%
9	Comcast		7%	26%
10	Unilever		516%	224%
11	Walt Disney		12%	112%
12	Target Corporation		198%	111%
13	State Farm		53%	24%
14	Rock Holdings, Inc.		91%	47%
15	Microsoft Corporation		93%	-13%
16	Groupe Renault		-38%	301%
17	The Kroger Co.		11%	43%
18	Adobe Inc		128%	23%
19	Volkswagen		22%	125%
20	Geely Holding Co.		163%	172%
21	Samsung Electronics Co., Ltd.		60%	152%
22	Berkshire Hathaway		2%	20%
23	Nestle		71%	162%
24	Time Warner		241%	89%
25	General Motors		-51%	18%

STAQ Advertising Benchmarking Data				
WWW/ Open & Private/ Display & Video				
CPM				
Sum of Revenue				
Q3 2020 Rank	Select Advertiser Detail	Q3 2020 Trend	Q3 2020 vs. Q3 2019 % Change	Q3 vs Q2 2020 % Change
25	General Motors		-51%	18%
26	Toyota Motor Corp.		-50%	38%
27	Sanofi S.A.		232%	44%
28	Wal-Mart		61%	191%
29	Kimberly-Clark Corp.		63%	389%
30	Beijing Xike		57%	-10%
31	Best Buy Co., Inc.		6%	43%
32	FCA Group		-72%	7%
33	Hewlett-Packard Company		7%	106%
34	The Clorox Co.		290%	65%
35	MetLife, Inc.		442%	405%
36	Home Depot		24%	32%
37	S.C. Johnson & Son		100%	1%
38	Kohl's		114%	95%
39	Deutsche Telekom (T-Mobile US)		-4%	-38%
40	Eli Lilly		261%	85%
41	Procter & Gamble		4%	-45%
42	Nike, Inc.		153%	151%
43	Apple Inc.		18%	92%
44	Dell Technologies Inc.		41%	60%
45	Nissan		-31%	272%
46	Charter Communications		8%	30%
47	Johnson & Johnson		22%	10%
48	The Allstate Insurance Company		176%	-16%
49	Honda Motors		-26%	64%
50	Wells Fargo		-32%	36%

*Green bar represents the advertisers' Peak Week of the Quarter

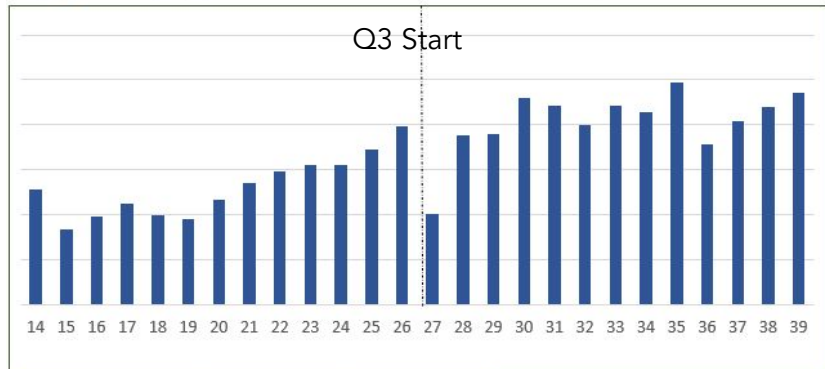
Auto Picks Up Speed In Q3

Vehicle Brands

Q2 to Q3 Net Programmatic Revenue to Publisher



WW / Open & Private / Display & Video



Industry	Q3 2019 vs. Q3 2020 % Change	Q3 vs. Q2 2020 % Change
Vehicle Brands	-29%	56%

Quarters	Rev Share
Q1 2020	12%
Q2 2020	7%
Q3 2020	9%

*Rev share is based on % of Category revenue compared to total revenue running through our dataset

Q3 2020 Rank	Select Advertiser Detail	Q3 2020 Trend	Q3 2020 vs. Q3 2019 % Change	Q3 vs Q2 2020 % Change
7	Ford Motor Company		46%	64%
16	Groupe Renault		-38%	301%
19	Volkswagen		22%	125%
20	Geely Holding Co.		163%	172%
25	General Motors		-51%	18%
26	Toyota Motor Corp.		-50%	38%
32	FCA Group		-72%	7%
45	Nissan		-31%	272%
49	Honda Motors		-26%	64%

- After significantly slowing spend in Q2, Auto started to make a comeback with all 9 auto advertisers in the Top 50 up in Q3. Renault and Nissan both up ~300% Q/Q.
- Vehicle Brands began the year with a 12% rev share in our BMX dataset before significantly dropping to 7% by the end of Q2. After increasing spend throughout Q3 they climbed back to 9%, and with this momentum expected to continue, could return to Q1 levels by the end of Q4.

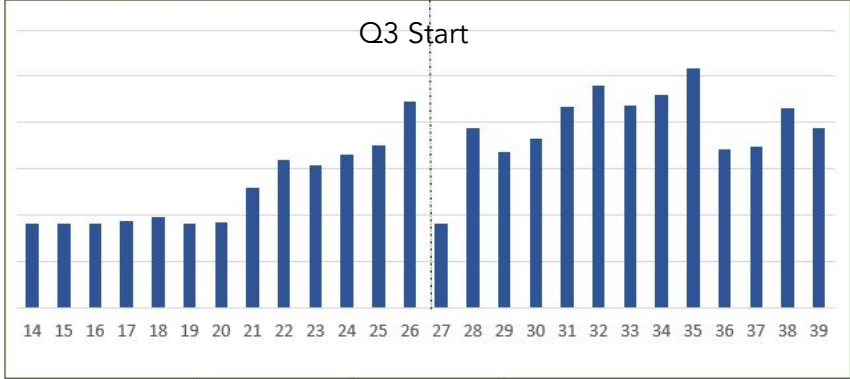
LendingTree Climbs To The Top 3

Finance

Q2 to Q3 Net Programmatic Revenue to Publisher



WW / Open & Private / Display & Video



Industry	Q3 2019 vs. Q3 2020 % Change	Q3 vs. Q2 2020 % Change
Finance	58%	54%

Quarters	Rev Share
Q1 2020	7%
Q2 2020	7%
Q3 2020	8%

*Rev share is based on % of Category revenue compared to total revenue running through our dataset

Q3 2020 Rank	Select Advertiser Detail	Q3 2020 Trend	Q3 2020 vs. Q3 2019 % Change	Q3 vs Q2 2020 % Change
3	LendingTree, Inc.		1155%	98%
14	Rock Holdings, Inc.		91%	47%
50	Wells Fargo		-32%	36%
54	The Charles Schwab Corporation		475%	180%
60	Fidelity Investments		19%	45%
65	American Express Co.		-2%	173%
67	PayPal Holdings, Inc.		381%	215%

- LendingTree who found their sweet spot of low priced inventory in early Covid significantly dropped spending the last 6 weeks of Q3.
- Finance advertisers outside of LendingTree popped up in Q3. Wells Fargo and Fidelity up ~40+% Q/Q, AMEX up ~170% Q/Q.



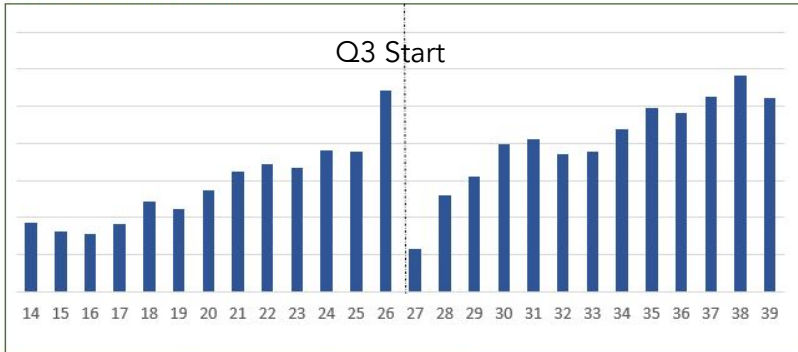
Electronics Capitalize On BTS And Remote Workforces

Computers & Electronics/ Consumer Electronics

Q2 to Q3 Net Programmatic Revenue to Publisher



WW / Open & Private / Display & Video



Industry	Q3 2019 vs. Q3 2020 % Change	Q3 vs. Q2 2020 % Change
Computers & Electronics/ Consumer Electronics	26%	42%

Quarters	Rev Share
Q1 2020	3%
Q2 2020	4%
Q3 2020	4%

*Rev share is based on % of Category revenue compared to total revenue running through our dataset

Q3 2020 Rank	Select Advertiser Detail	Q3 2020 Trend	Q3 2020 vs. Q3 2019 % Change	Q3 vs Q2 2020 % Change
15	Microsoft Corporation		91%	-4%
21	Samsung Electronics Co., Ltd.		60%	152%
33	Hewlett-Packard Company		7%	106%
43	Apple Inc.		18%	92%
44	Dell Technologies Inc.		45%	65%

- Computers/Electronics saw big increases for BTS (Back To School) and virtual learning/remote working from HP and Dell both up 60+% Q/Q.
- Microsoft a consistent 2020 spender down Q/Q. They should pick up in Q4 with the release of the new XBOX.
- New Product releases (watches) from Apple and Samsung in Sept had both of them up ~100+% Q/Q. Both are releasing new phones in October which should see them continue to increase spend into Q4.

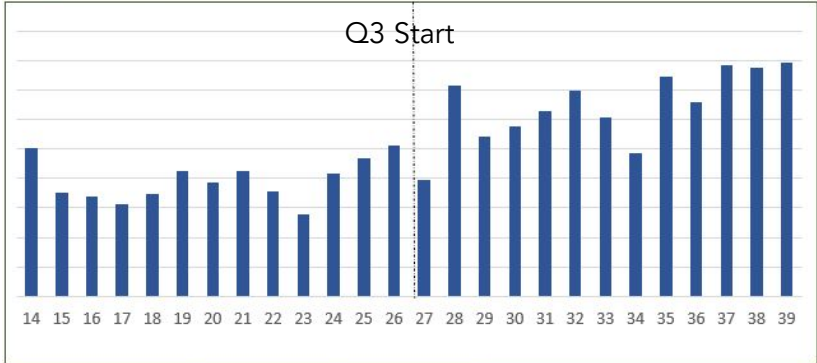


Streaming Wars Heat Up

Entertainment Industry/TV & Video

Q2 to Q3 Net Programmatic Revenue to Publisher STAG

WW / Open & Private / Display & Video



Industry	Q3 2019 vs. Q3 2020 % Change	Q3 vs. Q2 2020 % Change
Entertainment Industry TV & Video	11%	64%

Quarters	Rev Share
Q1 2020	3%
Q2 2020	2%
Q3 2020	2%

*Rev share is based on % of Category revenue compared to total revenue running through our dataset

Q3 2020 Rank	Select Advertiser Detail	Q3 2020 Trend	Q3 2020 vs. Q3 2019 % Change	Q3 vs Q2 2020 % Change
11	Walt Disney		8%	107%
24	Time Warner		241%	89%
99	Viacom Inc.		284%	8%

- Time Warner up ~90% Q/Q promoting HBO Max. Disney up 107% Q/Q as they promoted the releases of Hamilton and Mulan on Disney+.

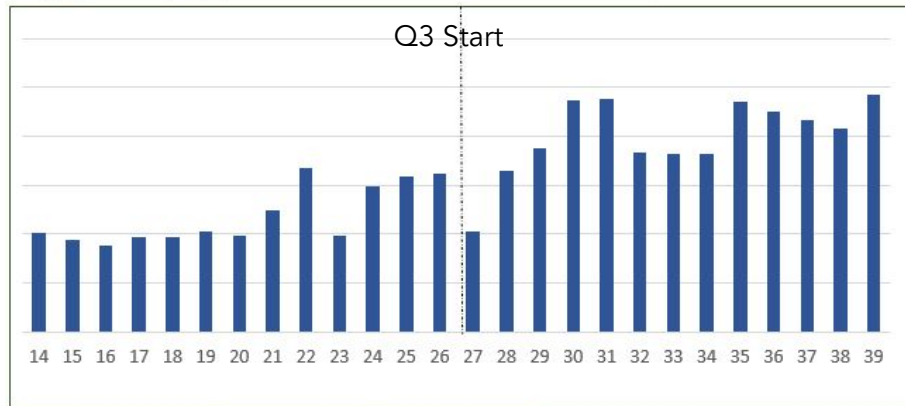
Retail Driven By E-comm

Retail Trade

Q2 to Q3 Net Programmatic Revenue to Publisher



WW / Open & Private / Display & Video



Industry	Q3 2019 vs. Q3 2020 % Change	Q3 vs. Q2 2020 % Change
Retail Trade	10%	69%

Quarters	Rev Share
Q1 2020	3%
Q2 2020	4%
Q3 2020	4%

*Rev share is based on % of Category revenue compared to total revenue running through our dataset

Q3 2020 Rank	Select Advertiser Detail	Q3 2020 Trend	Q3 2020 vs. Q3 2019 % Change	Q3 vs Q2 2020 % Change
12	Target Corporation		187%	106%
28	Wal-Mart		64%	197%
31	Best Buy Co., Inc.		6%	43%
38	Kohl's		114%	95%

- Walmart up ~200% Q/Q and without any real marketing around their "Prime" service.
- Target a consistent spender in 2020 up over 100% Q/Q.
- Expect retailers to focus on e-comm for the rest of the year.



Political Pops In Q3 And Is Just Getting Started

Select Political Advertisers	Q3 Trend	August vs. July	September vs. August
Sensitive Democratic Political Companies		148%	52%
US Advocacy		18%	-41%
Biden 2020		133%	243%
Trump 2020		-56%	-6%
NextGen Climate Action		34%	333%

- Political spend began to pop in mid to late Q3 and will accelerate until the election
- In Programmatic, Biden outspent Trump by 50% in Q3
 - Trump decreased spending throughout Q3 while Biden increased ~250% Q/Q
- The largest spending PACs of Q3 are Sensitive Democratic Political Companies and US Advocacy

Recap

- Q3 exceeded expectations and Revenue surpassed 2019
- Mobile & Desktop CPMs are the same
- Auto advertisers are spending again
- Time Warner and Disney increased spend related to streaming services HBOMax and Disney+
- Computers & Electronics saw big increases from BTS and virtual learning/remote working. Microsoft poised for the release of the new XBOX in Q4
- New product releases for Samsung & Apple saw increases that will continue into Q4
- Pharma advertisers remain consistent with varying OTC and Rx products to market. Vaccine and Covid drugs may impact spend in Q4
- Political Ad Spend began to pop in Q3 and will continue to increase until the election

Log into your STAQ account to see the latest Political Spend data and which advertisers have already started to increase spending in Q4!

Reach out to your Account Manager for more information on the BMX dataset and Q3 trends!

Thank You!