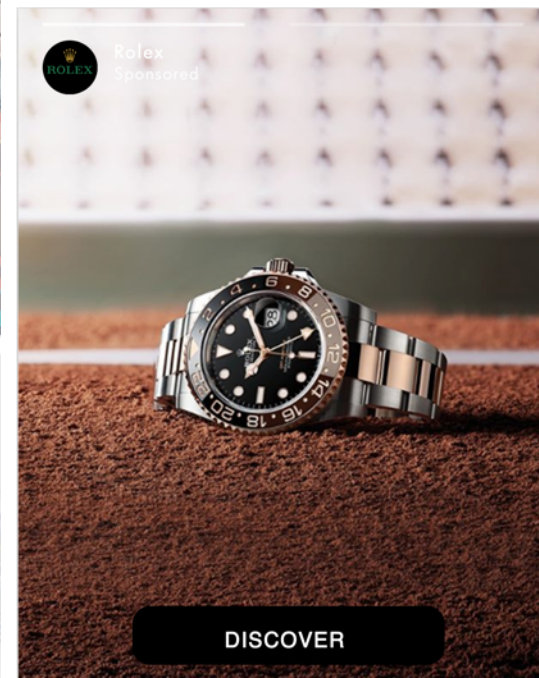
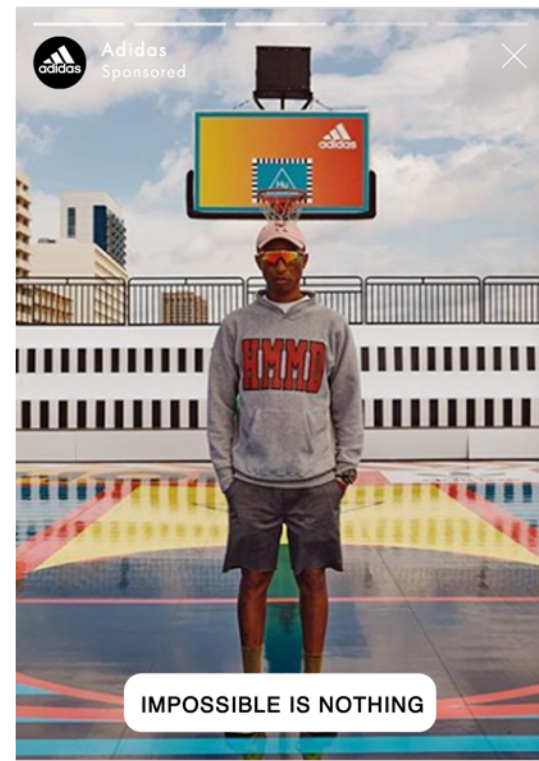


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COVID-19 UK ADVERTISING TRENDS

MARCH & APRIL, 2020.

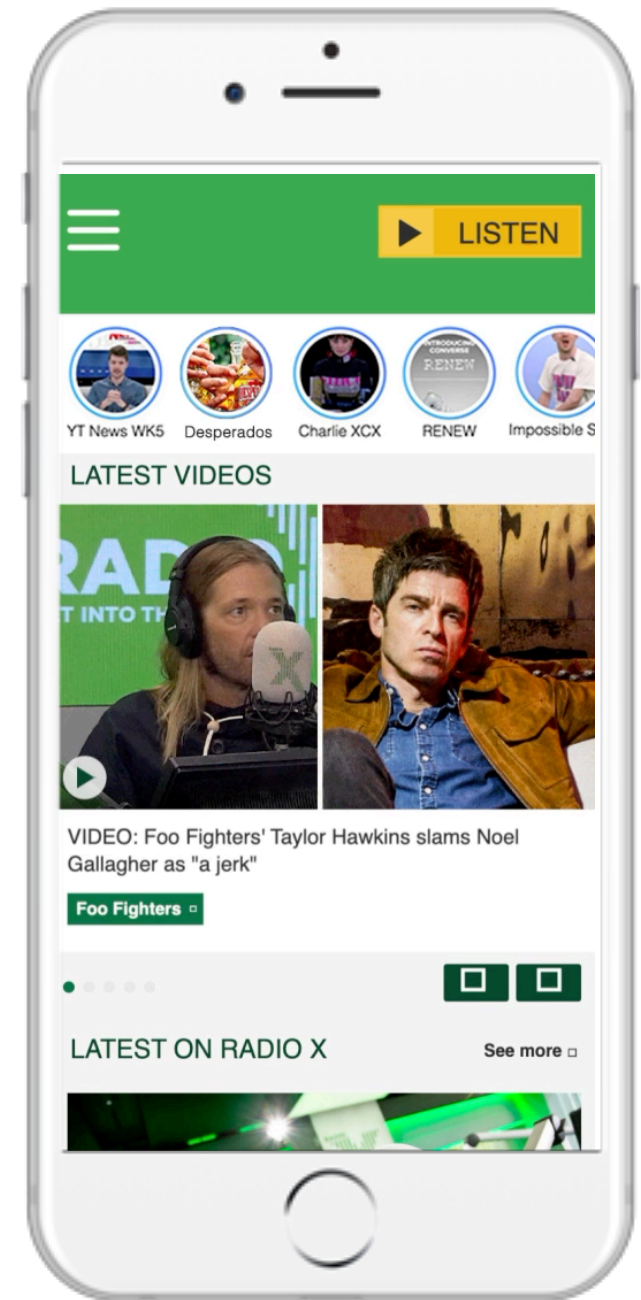


ADVERTISING IN COVID-19

HIGHLIGHTS

SIX WEEKS INTO THE COVID-19 LOCKDOWN ADYOULIKE ANALYSIS OF UK ADVERTISER SPEND BY VERTICAL REVEALS INCREASES, DECREASES AND OPPORTUNITIES FOR MARKETERS. KEY FINDINGS:

1. Increased Supply across publisher partners, particularly News, as consumers spend more time reading publisher content.
2. Increased Supply has led to lower eCPMs on average in March/April.
3. Business verticals increase spend in early April above early March figures.
4. Hobbies & Interests Increase ad spend in early April to early March spend.
5. News publications ramp up advertising for subscription services to capitalise on consumer demand for quality, trustworthy information
6. Health, Food, Pet and Shopping verticals slowly increasing spend from the sudden lows at the end of March

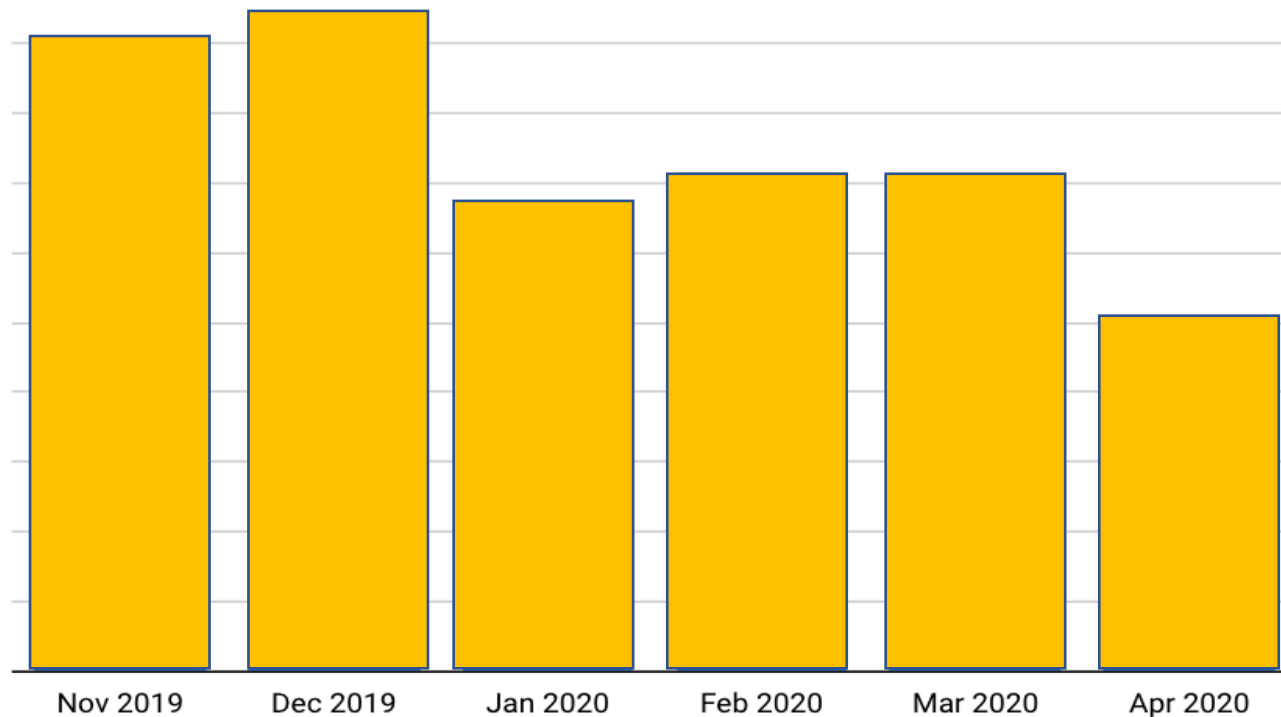


**DIGITAL
SUPPLY** for
advertisers
to target has
increased



Publishers are seeing an increase in website visitors during the lockdown, resulting in increased supply for advertisers to target.

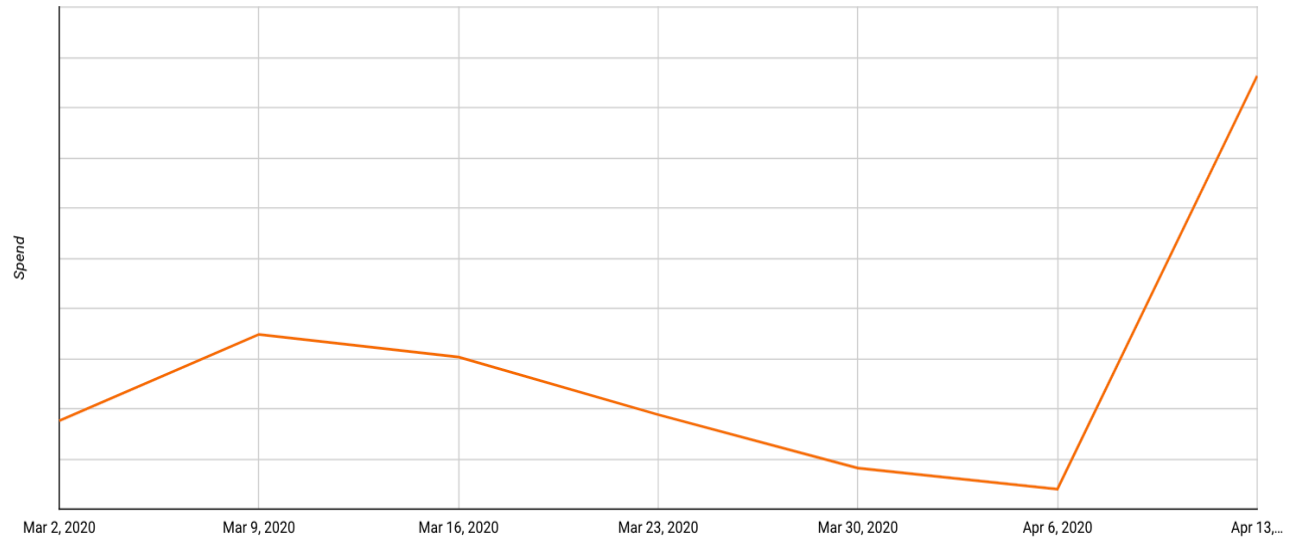
Average eCPMs paid by advertisers have declined.



- April has seen a **44.83%** decline in average eCPMs over December 2019
- April has seen a **27.7%** decline in average eCPMs over March 2020

Month	% Drop Since December 2019	% Drop since March 2020
Dec-19		
Apr-20	44.83	27.27
Mar-20	24.14	
Feb-20	22.84	
Jan-20	28.45	

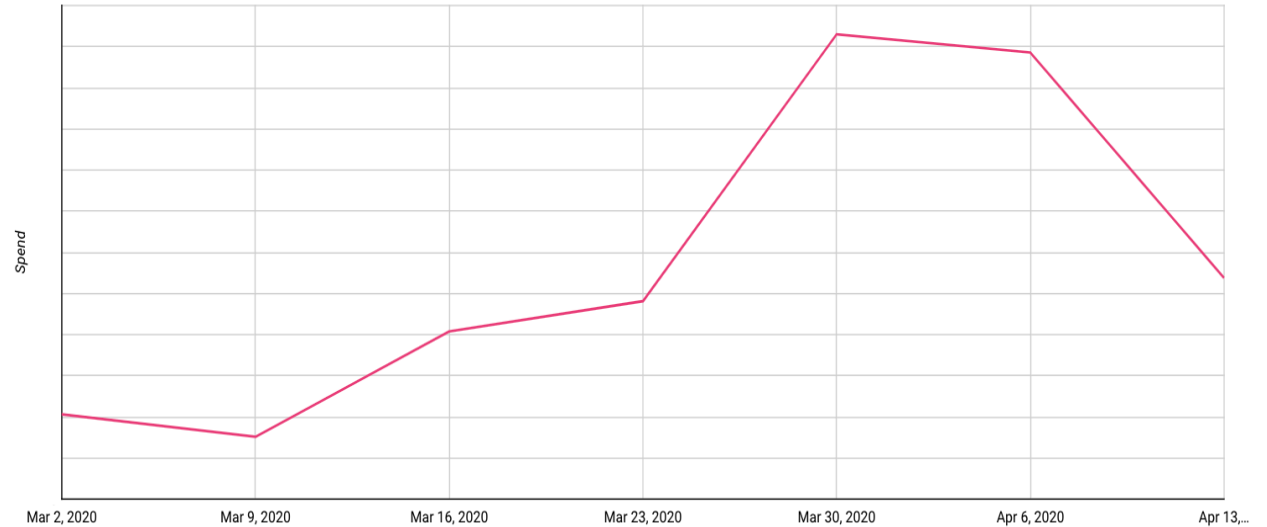
**Business
advertisers**
up +229%
on the start
of March.



Analysis: Business solutions, cloud services & analytics advertisers ramp up advertising from the week 13 - 19 April are spending more on advertising than they were in early March.

News brand advertisers

up +200% on the start of March.

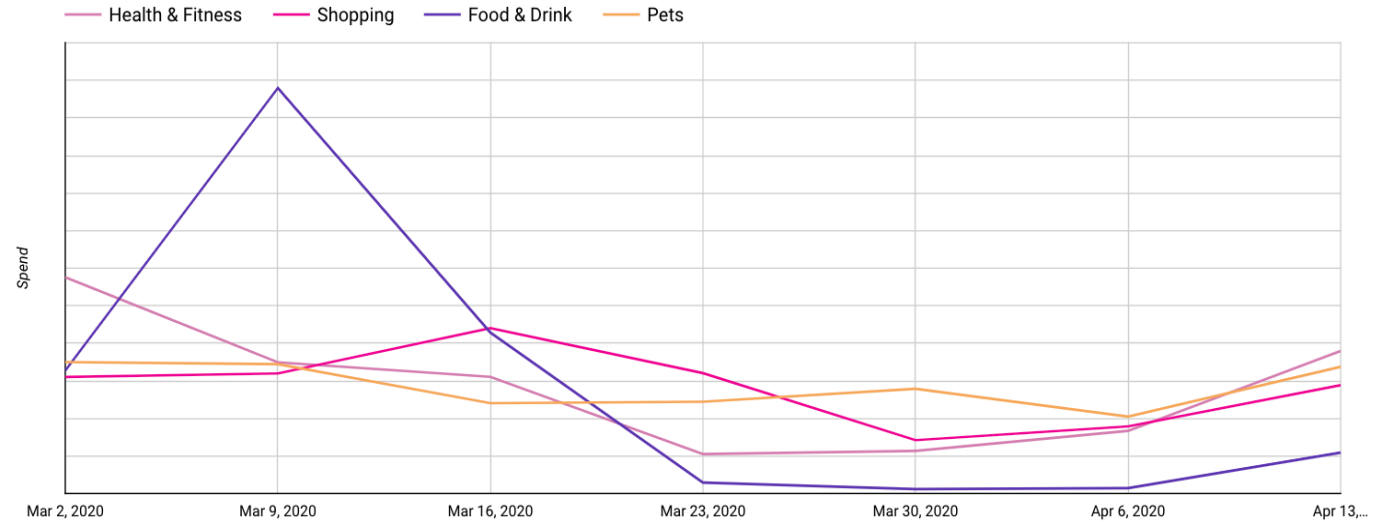


Step rise from start of lockdown 23 March to 06 April. Spend Decline 13 - 19 April, but still higher than in early March.

Analysis: 'Traditional' print publishers, looking to increase their digital subscriptions and promote the quality of their reporting have ramped up their digital ad spend in early April.

**Health & Fitness,
Food & Drink,
Pets and
Shopping** have
increased spend
in April.

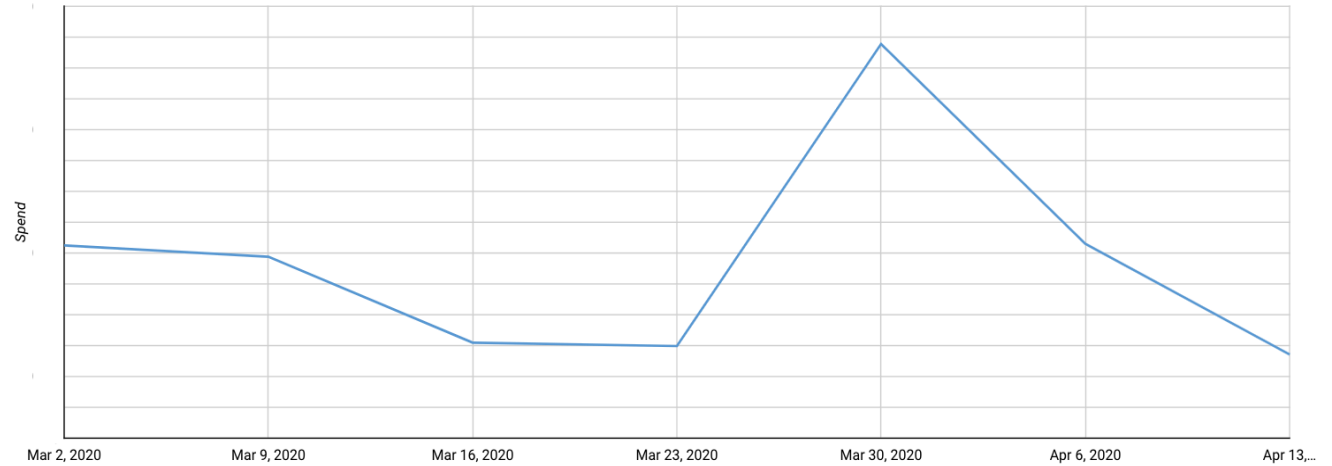
Food & Drink: +500%
Health & Fitness: +237%
Pets: +1700%
Shopping: +150%



Analysis: Although not spending to pre-crisis levels, the sustained upward trend for April suggests many brands are adjusting to the 'new normal' and capitalising on more digital supply to increase their reach with consumers.

Hobby & Interest advertisers

up +110% on the start of March.



Steep rise from start of lockdown 23 March to 06 April. Spend Decline 13 - 19 April, but still higher than in early March.

Analysis: Hobby and interest advertisers recognise the opportunity that exists with changing lifestyles and stay-at-home messaging, ramping up ad-spend in the initial lockdown period to win new customers.

**But many
advertising
verticals
remain well
below pre-
crisis levels**

Vertical	% Decline in Advertising Spend Since early March
Personal Finance	-94
Arts & Entertainment	-93.05
Real Estate	-91.1
Family & Parenting	-92.9
Careers	-97.5
Automotive	-98.2
Sports	-97.7
Travel	-99.1

While We Have Your Attention A Message About Brand Safety & COVID-19

Dear Advertisers,

We are going through a period of significant disruption – and digital advertising is going through unprecedented times. As a leading ad-tech partner to the UK's largest news publishers I am writing with a request on keyword blocking and Covid19.

At this time **UK news publishers are providing a much-valued public service**, updating the public with clear, precise information on the virus and it's impact to all of our lives.

Our own analysis has shown a significant increase in traffic to our news publishers since the middle of March lockdown was put in place.

I'm sure you are already aware that industry trade bodies such as ISBA are calling on advertisers to take a measured approach to **COVID-19 keyword blocking**. When advertisers opt to block the keyword "coronavirus" so their brand does not appear adjacent to COVID-19 related content, this understandably creates a challenge for trusted publishers and media outlets.

Edelman's Trust Barometer: Special Report on Trust and the coronavirus does in fact show **that consumers are more engaged and spend longer with ads next to content that's deemed to be 'hard news'**.

As a valued advertising partner we are asking all of our advertisers to support our news publisher partners at this time and **reconsider any blanket ban on Covid-19 and Corona related keyword blacklisting that you may have in place.**

Leading brand safety companies, such as [Integral Ad Science, IAS](#), say on the topic:

"IAS is advising a pragmatic approach, considering that not all COVID-19 content can be deemed unsuitable, and that this broad application of keyword blocking may lead to a significant reduction in scale. Given the vital role of trusted content publishers in keeping the public safe and well-informed, we are advising more thoughtful consideration be given."

We appreciate this is a difficult topic for many agencies and their clients, but there are a number of safety measures that ADYOULIKE can put in place to alleviate many of these concerns – and we know our valued publisher partners would appreciate the additional support at this time.

Dale Lovell, UK Managing Director.

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Every Brand Has
A Story To Tell.

