

Adtech & Publishers on the frontline of COVID-19:

*Dealing with COVID-19 scams and
malware*



THE MEDIA TRUST
We know digital security.

APRIL 16, 2020



Welcome

Speakers today

- Matt O'Neill – General Manager, EMEA
- Cory Schnurr – Head of Marketplace Innovation
- John Ilacqua – Head of Publisher Strategies, Americas
- Bruce Lovett - moderator

Our Agenda



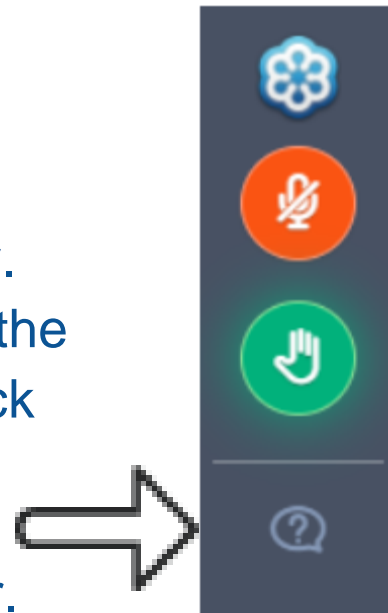
Housekeeping

Recording: Yes, you'll receive the recording of this webinar in a follow up email.

Q&A: Questions will be held until the end of the webinar. At any time you may submit a question by navigating to the question mark icon in the upper right of your screen. Click the icon and input your question.

Mute: The audience will be on mute during this webinar.

Learn more: We will not go into detail about our solutions on this webinar. If you want more information type "Learn More" in the Questions box and we will contact you.





COVID-19 Impact

Global economic impact

The virus will decide when we reopen the U.S. - Fauci

Dow Jones YTD



S & P YTD



Headlines from around the world

THE PROGRAMMATIC PUBLISHER

Coronavirus climbs up keyword block lists, squeezing news publishers' programmatic revenues

Britain's newspaper publishers warn they face losing £50m because of 'blocklists' as advertisers stop their brands appearing next to coronavirus articles

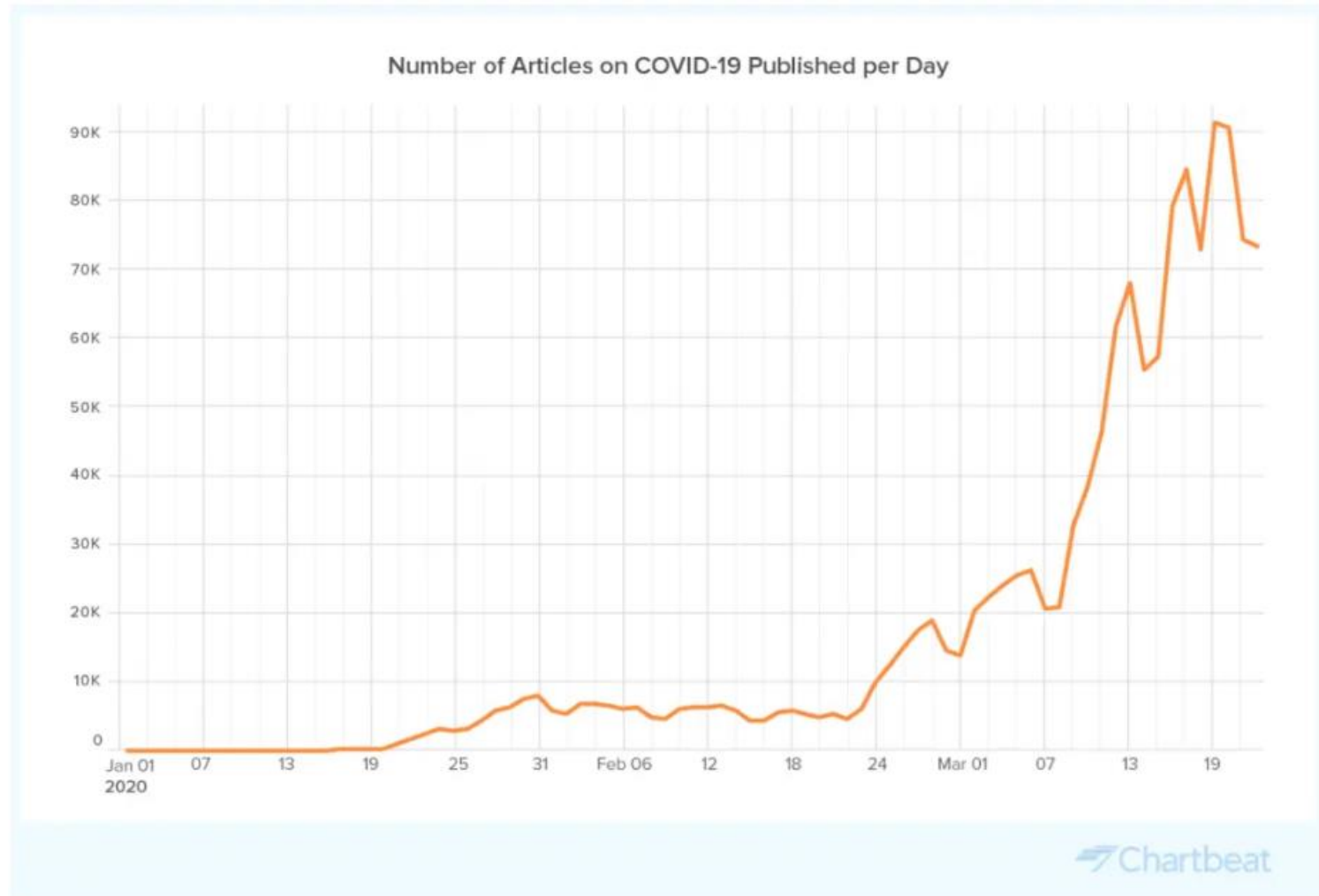
Emarketer: Ad Spend Slowdown In China May Signal What's To Come Across The Globe

'A Seismic Shock': Jittery Companies Pull Back on Ads During Pandemic

Coronavirus could cost U.S. advertising industry billions



COVID-19 dominating the news



Impressions up, eCPMs down

March data compared to January & February:

- 26% *increase* in total impressions
- 15% *drop* in eCPMs



U.S. Publishers

- 30% *increase* in total impressions
- 20% *drop* in eCPMs

EU Publishers

- 23% *increase* in total impressions
- 10% *drop* in eCPMs

Source: Data from Google Ad Manager



COVID-19: Legitimate vs. Scam



Auf den Punkt: Der Nachrichten-Podcast

Aktuelles zum Coronavirus erfahren Sie auch in unserem Podcast. Podcast kostenlos anhören.

Süddeutsche Zeitung

COVID-19

We're all in this together.

Independence  [Learn more](#)

Coronavirus and markets:
How should investors react?

The Stephens Group
[Click here >](#)



**Not just locked.
Secured.**

As an
essential business
we are
NOW OPEN

[Store Now](#)

In order to prevent the spread of the COVID-19, you can rent or reserve your unit online or by phone!

Lowne Storage

CORONAVIRUS IN OSTHOLSTEIN:
Alles Wichtige im Liveblog.

LN+ [Jetzt zu den News ▶](#)



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COVID-19: The Gray Area

Headway: Books' Key Ideas

MAKE QUARANTINE EFFECTIVE



Easy way to a Better You 📖 Get your daily dose of knowledge with 15-minute bite-sized summaries from the world's best nonfiction books 📖 📖 Install the Headway app and start your Free Trial now!

[Install](#)

Soaring Eagle Waterpark and Hotel RETREAT

COVID-19 WATER PARK FACTS
FROM THE WORLD WATERPARK ASSOCIATION

No evidence COVID-19 spreads through the use of pools and hot tubs

Proper operation, maintenance, and disinfection of pools and hot tubs should remove or inactivate the virus that causes COVID-19

Soaring Eagle Waterpark utilizes sophisticated water monitoring systems that ensure proper chemical balance in our water features.

GENTLE ON SKIN!

ANTI VIRUS SANITISER



Vote - Is This Ad a Scam?



SPONSORED

SCREW YOU COVID-19
BECAUSE OF YOU, I NOW HAVE

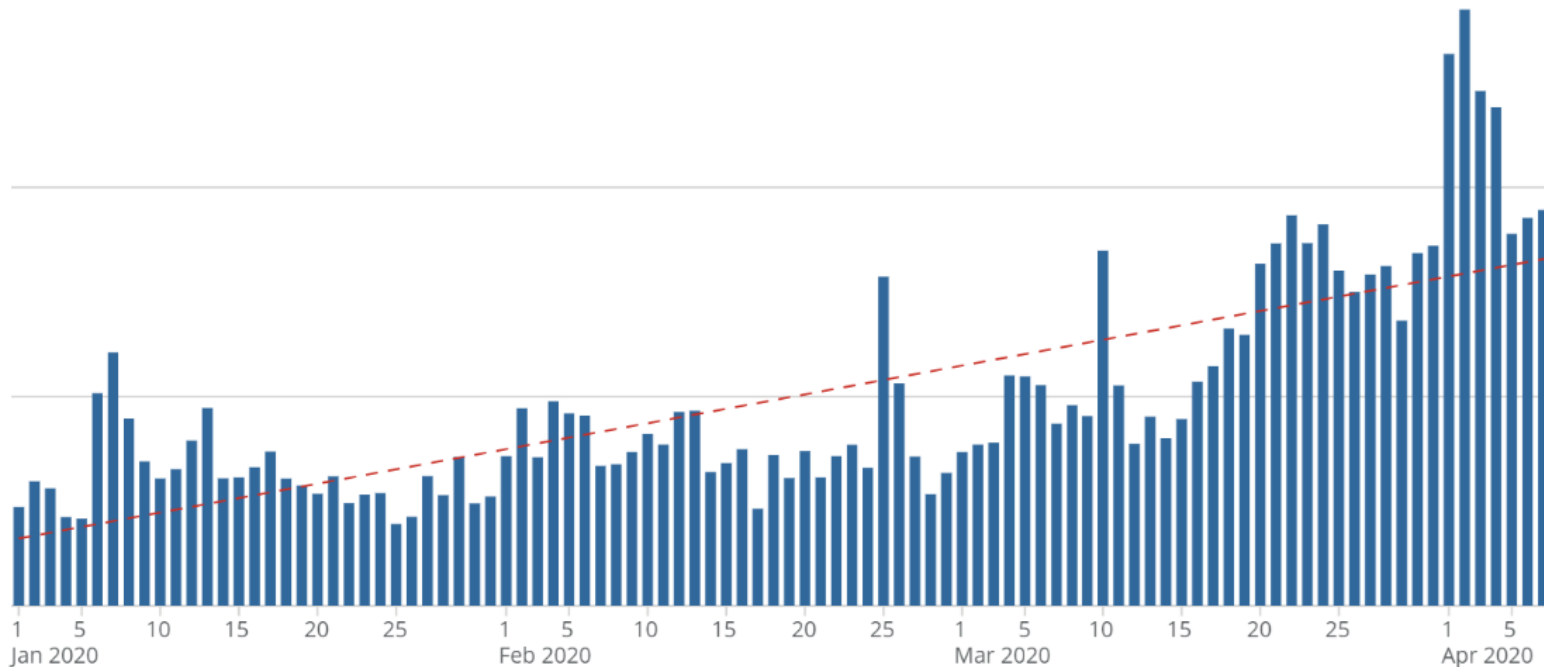
YOUR LOGO GOES HERE

Show your employees and clients
you are thinking about them! For
customized, unique promotional...



The Media Trust confirms malware increase

Percent of malware blocked going up over Q1, Q2



Malware blocks per 1,000 filled impressions

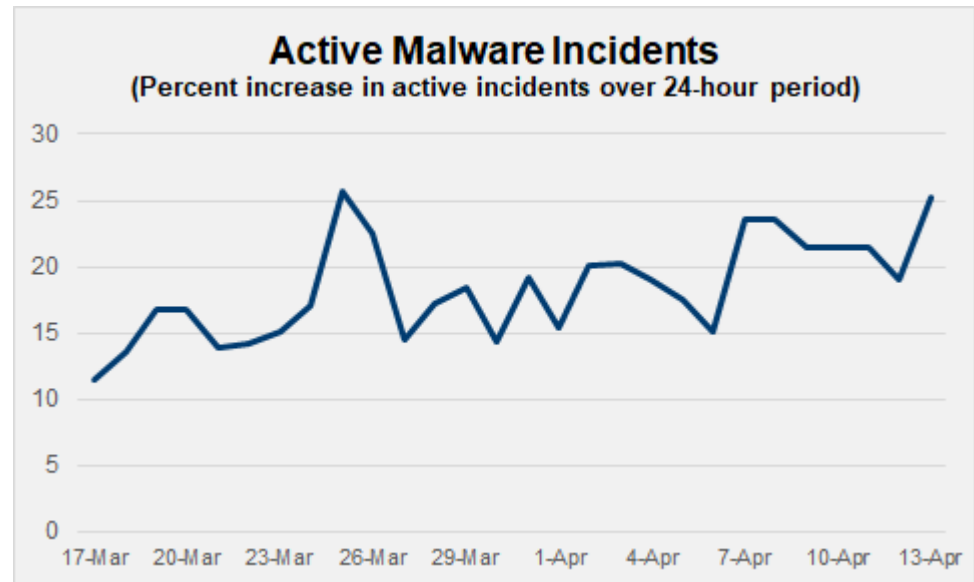


Types of malware attacks

Malicious attacks - ranked

1. Fake software install
2. Forced redirect
3. Personal data scam
4. Brand fraud
5. Fake virus popup

**Daily malware threats increasing
an average of 18%**





Adtech & Publisher Strategies & Tactics

Top adtech and publishers report impact

Publisher

- Traffic is up broadly, ~ 20%
- Increase in traffic is largely unmonetized
- Programmatic demand is seeing the most significant downside
- 70% of publishers are adjusting revenue forecasts for Q2 downward

Adtech

- Demand down 30-70%
- Advertisers are delaying payments to agencies
- Platforms are facing renegotiating of fees
- Margins are slimming; lower CPMs mean lower margins



Key themes across adtech & publishing

Adtech

- Risk mitigation
- Revenue desperation
- Hesitancy and fear
- Known unknown

Publisher

- “Active Holding Pattern”
- Evaluating partnerships and cost cutting measures
- Potential Security and Data Compliance Issues
- Focus on UX and Readership
- Experimenting with alternative revenue streams



Publisher solutions & mitigation strategies

Strategic:

- Political ad spends can be reached
- Video/streaming opportunities
- Creative/Branded-content strategies
- Pursue partners in insulated/stable categories
- Create leverage with strategic partnerships

Tactical:

- Raising price floors
- Key-value retargeting (away from COVID-19 content)
- Adjustments to AdX pricing rules
- Re-evaluate reseller agreements



Adtech solutions & mitigation strategies

Strategic:

- **Identify the reach and the scope of the problem**
- **Forecast longer term effects and recovery**
- **Mitigate risk of non-payment or defaults**
- **Advise supply partners to reevaluate AQ restrictions**



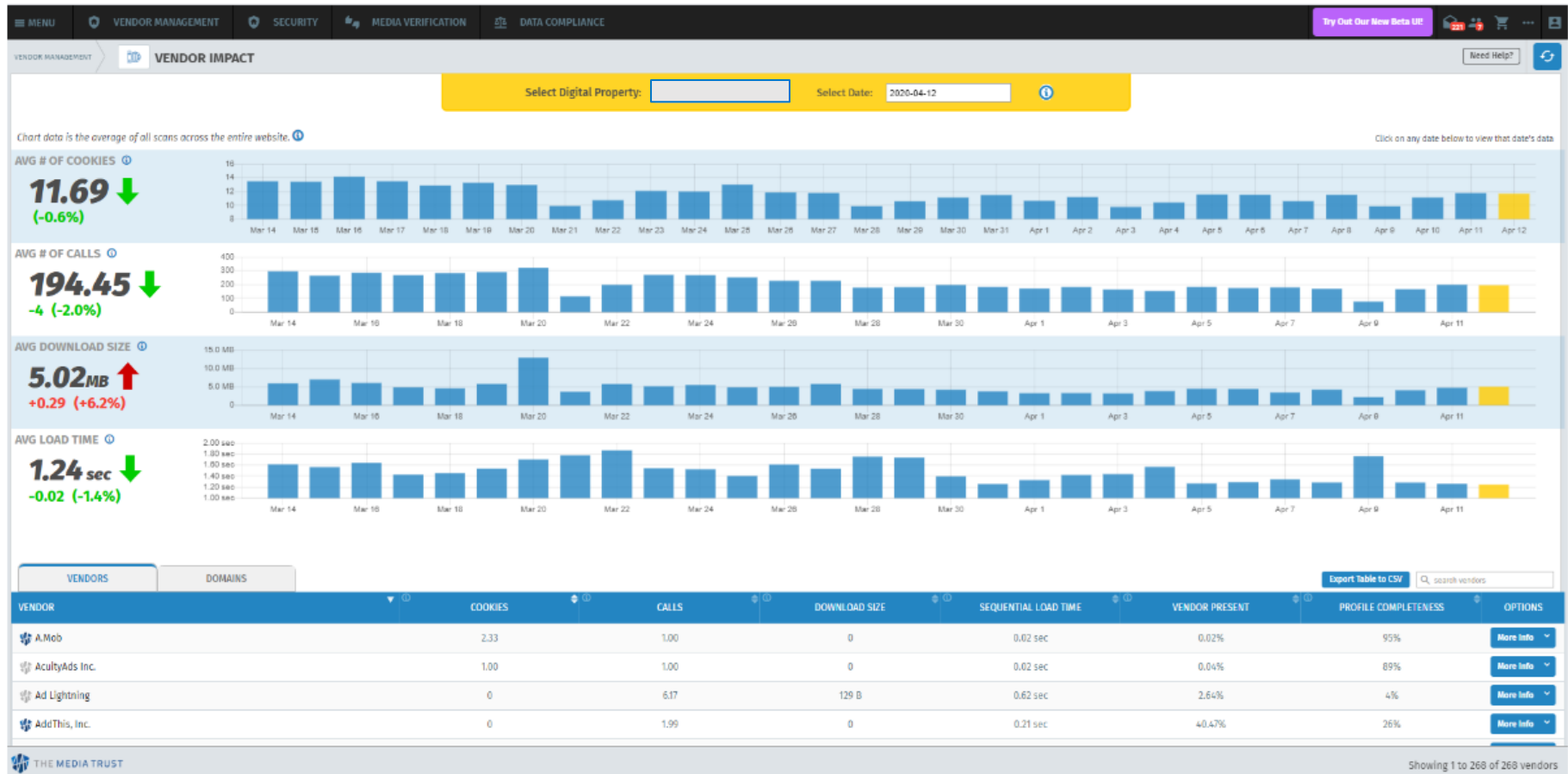
Tactical:

- **Add insurance policies in anticipation of payment defaults**
- **Negotiate vendor fees and payment terms**
- **Reduce operational costs to match reductions in scale and revenue**
- **Analyze demand landscape, trends, and gaps**
- **Create emergency plans - “future proof”**

One Ecosystem, Holistic Approach



Visibility and Accountability = Pillars





Questions and Answers

- Recording of this webinar will be sent soon via email
- “Learn More” in the Questions box if want further information on the solutions we provide
- More from The Media Trust soon, including an IAB webinar - check out our blog and newsletter
- Other questions? Info@themediatruster.com



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