

APP-ADS.TXT & ADS.TXT TRENDS REPORT

Q3 2019

pixalate



TABLE OF CONTENTS

KEY TAKEAWAYS

Key takeaways	3
---------------------	---

APP-ADS.TXT

Adoption	5
----------------	---

IVT impact	6
------------------	---

Top apps	7-11
----------------	------

iOS vs. Android	12-15
-----------------------	-------

Supply chain intel	16-26
--------------------------	-------

ADS.TXT

Adoption	28
----------------	----

IVT impact	29
------------------	----

Top domains	30-32
-------------------	-------

Supply chain intel	33-40
--------------------------	-------

METHODOLOGY, DISCLAIMER

Methodology	41
-------------------	----

Disclaimer	42
------------------	----

Q3 2019: APP-ADS.TXT & ADS.TXT TAKEAWAYS

1,122%

increase in app-ads.txt
adoption in Q3 2019

50%

over half of the top 1k programmatic
apps have app-ads.txt

63%

more invalid traffic (IVT) on
apps without app-ads.txt

1 million

over 1 million domains now
have ads.txt

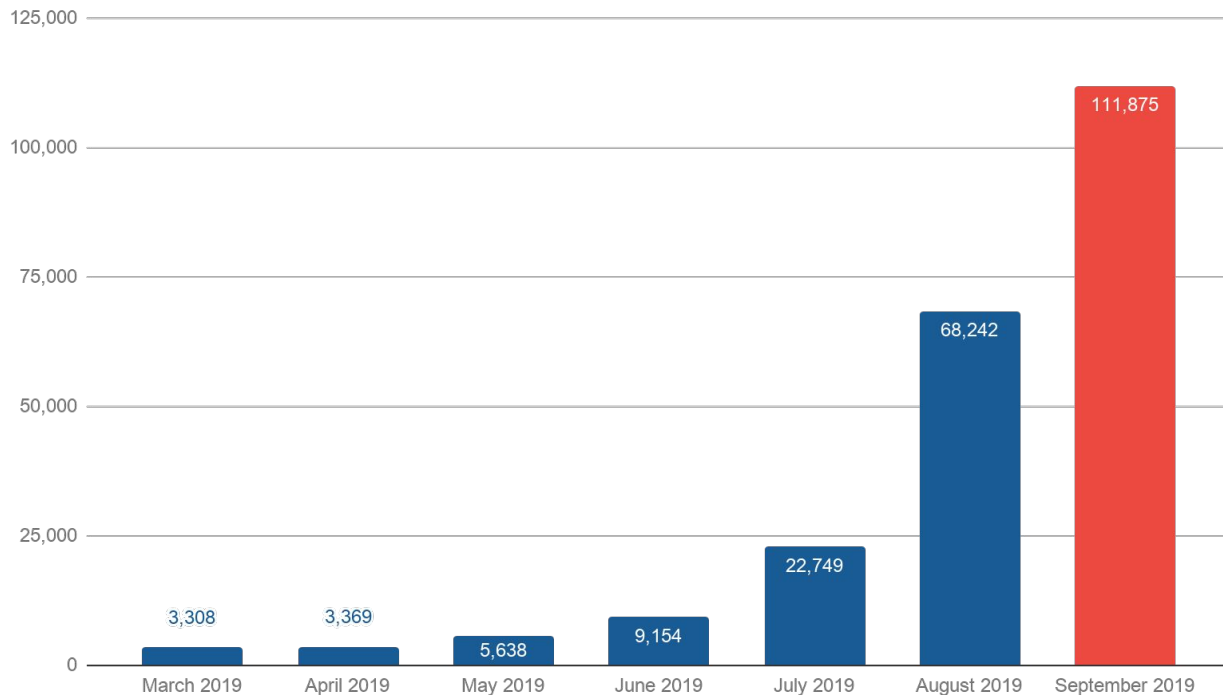
APP-ADS.TXT ADOPTION

OVERALL TRENDS & IVT IMPACT

adoption skyrockets 1,122%

APP-ADS.TXT ADOPTION SKYROCKETS 1,122% IN Q3

March - Sept. 2019; iOS & Android apps with app-ads.txt



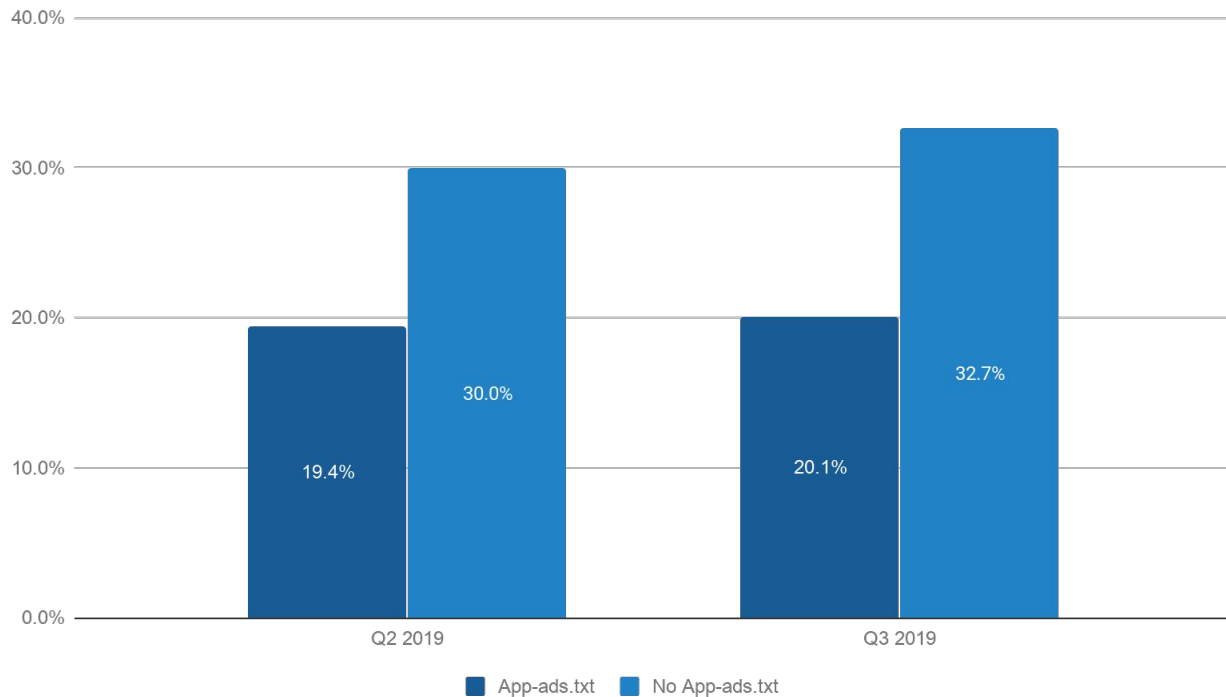
Over 110k apps
now have
app-ads.txt

APPS WITHOUT ADS.TXT HAVE 63% MORE IVT

Q2-Q3 2019; iOS & Android apps combined; invalid traffic (IVT) rates measured by Pixalate



20% with
VS.
33% without



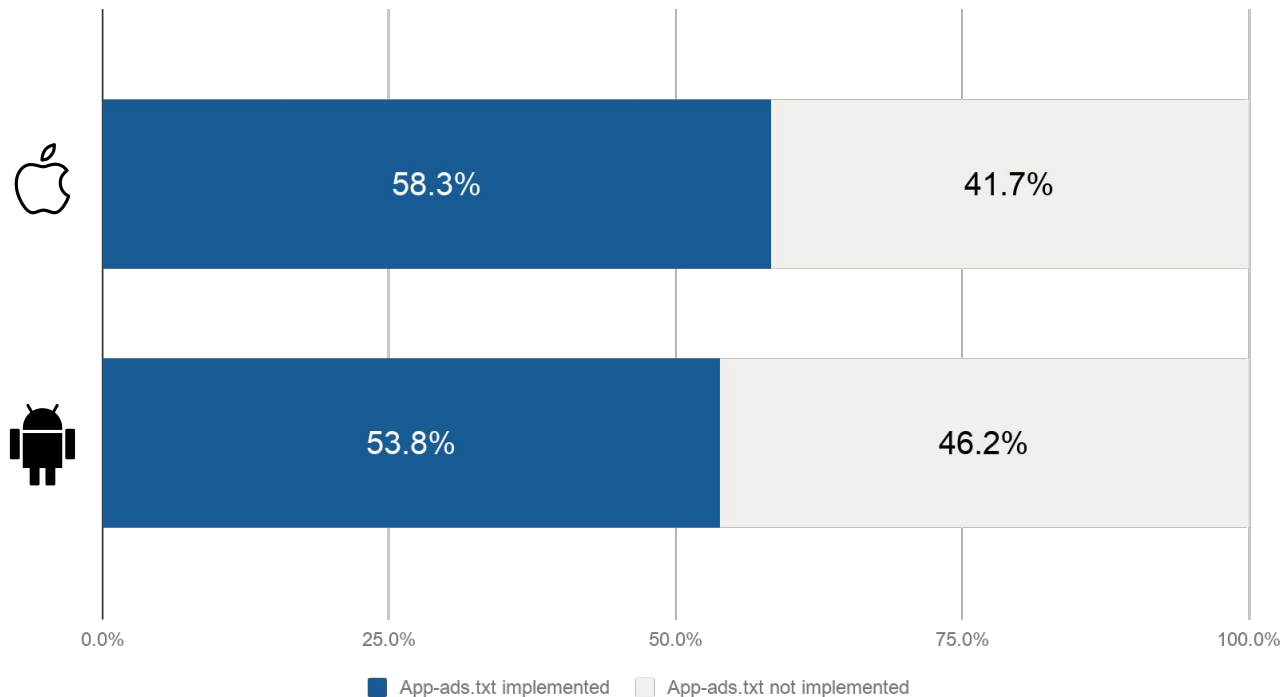
APP-ADS.TXT ADOPTION

AMONG MOST POPULAR APPS

over 50% of the top 1k programmatic apps have adopted the initiative

PROGRAMMATIC: OVER 50% OF TOP 1K HAVE ADS.TXT

Q3 2019; % of top 1k iOS/Android apps, based on programmatic ad volume, that have app-ads.txt; measured by Pivalate

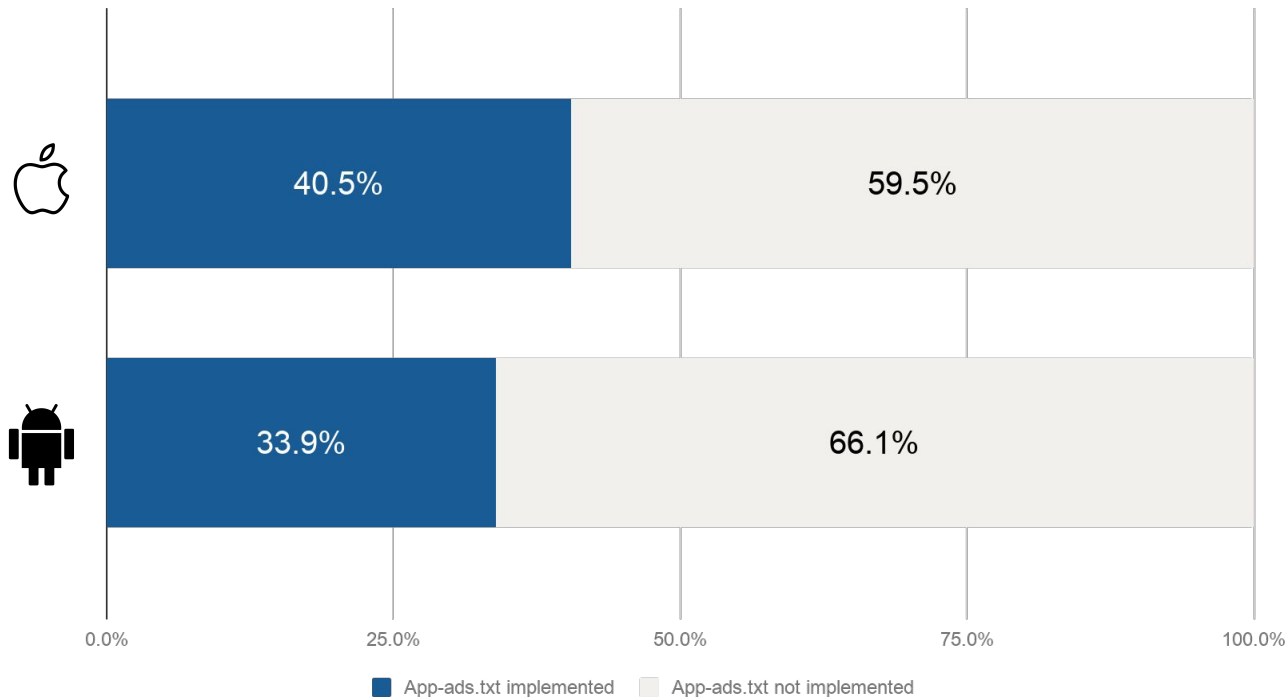


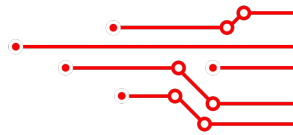
58% for iOS
&
54% for Android

PROGRAMMATIC: iOS LEADS ANDROID AMONG TOP 5K

Q3 2019; % of top 5k iOS/Android apps, based on programmatic ad volume, that have app-ads.txt; measured by Pixalate

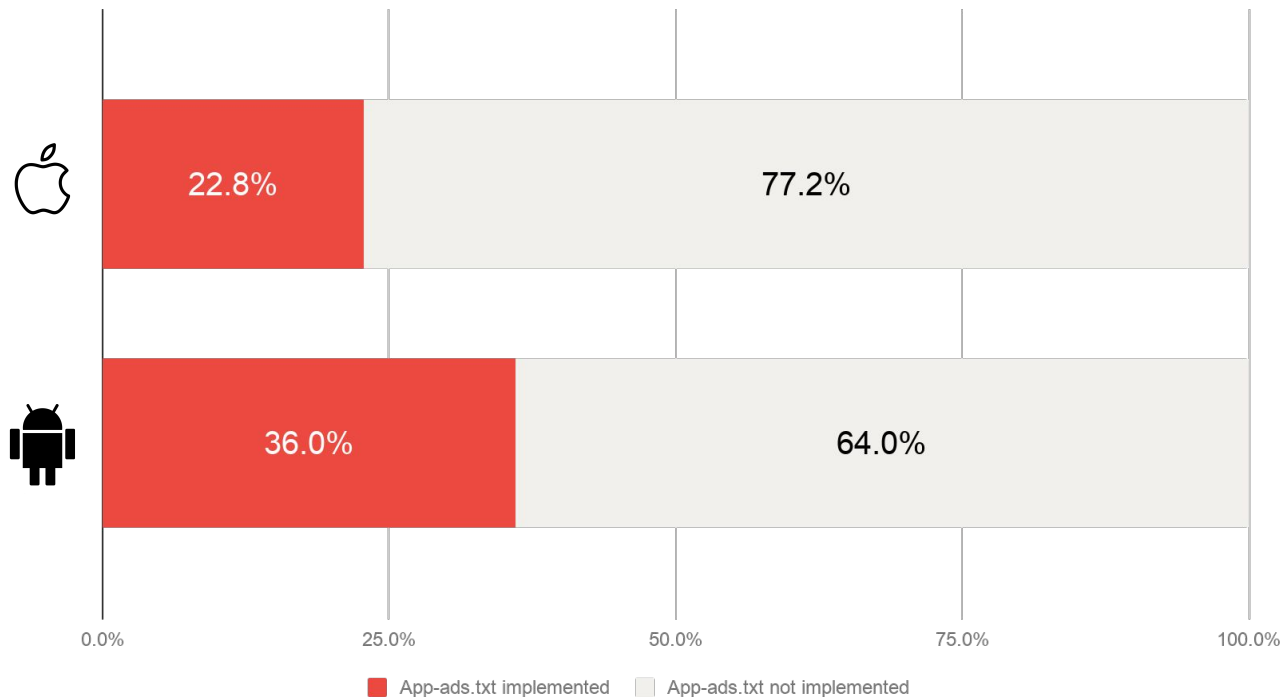
41% for iOS
&
34% for Android





USERS: 36% OF ANDROID TOP 1K HAVE ADS.TXT

Q3 2019; % of top 1k iOS/Android apps, based on users, that have app-ads.txt; measured by Pixalate

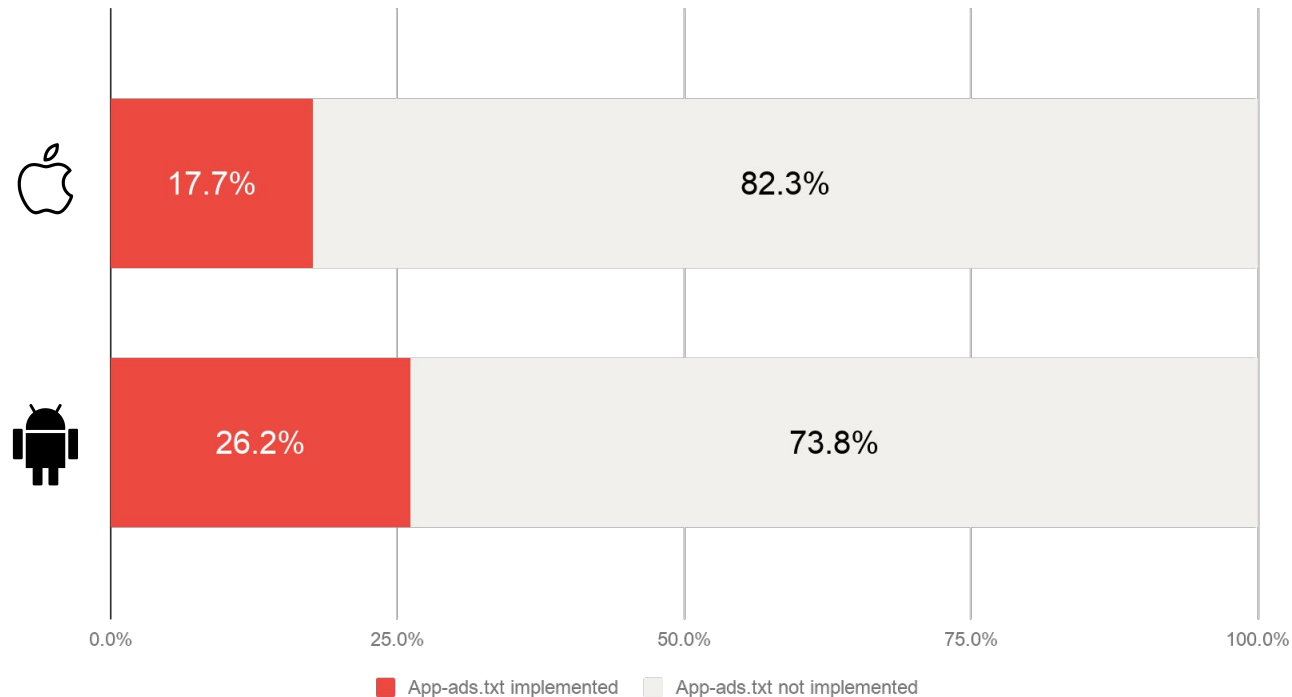


23% for iOS
&
36% for Android

USERS: ANDROID HAS FASTER ADOPTION AMONG TOP 5K

Q3 2019; % of top 5k iOS/Android apps, based on users, that have app-ads.txt; measured by Pixalate

18% for iOS &
26% for Android



APP-ADS.TXT ADOPTION

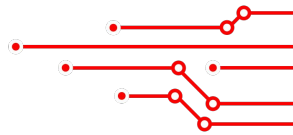
iOS vs. ANDROID

Android saw a 1,454% rise in adoption in Q3 2019



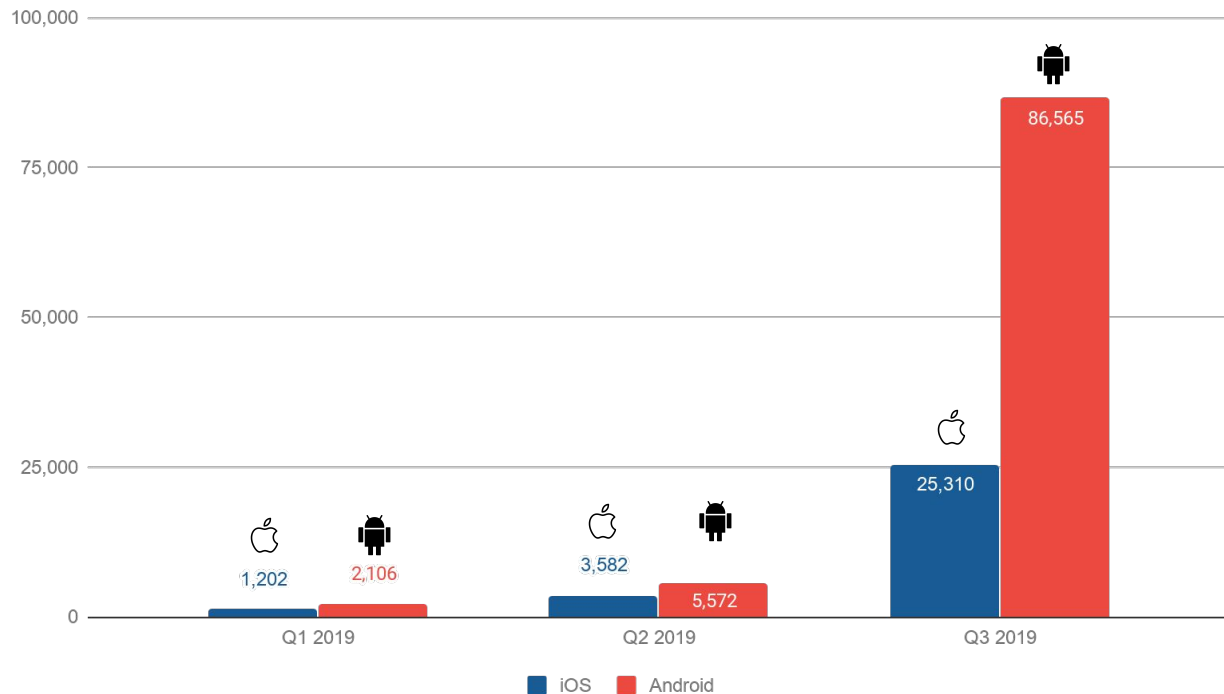
vs.





25k iOS, 86k ANDROID APPS HAVE ADS.TXT

Q1-Q3 2019; total # of Android/iOS apps with app-ads.txt



1,454% jump
for Android

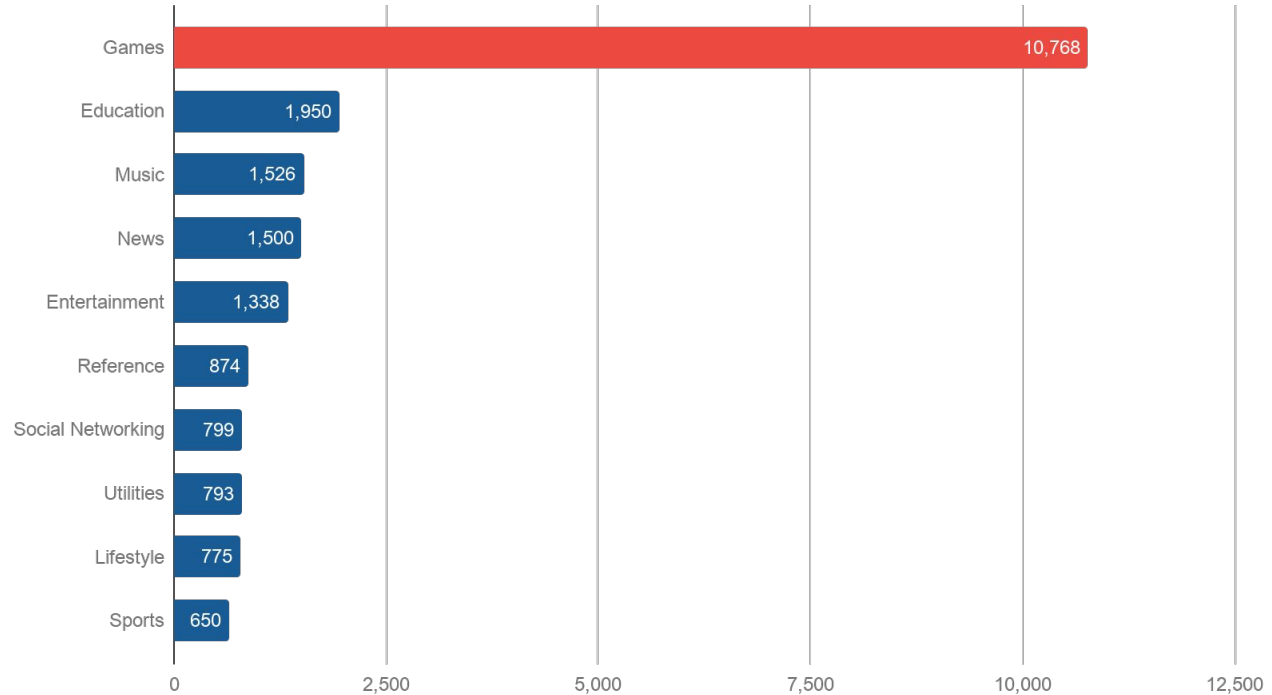
607% rise
for iOS



iOS: GAMING APPS ARE FASTEST ADOPTERS

Q3 2019; # of apps with app-ads.txt by iOS app category; top 10 categories based on app-ads.txt adoption shown

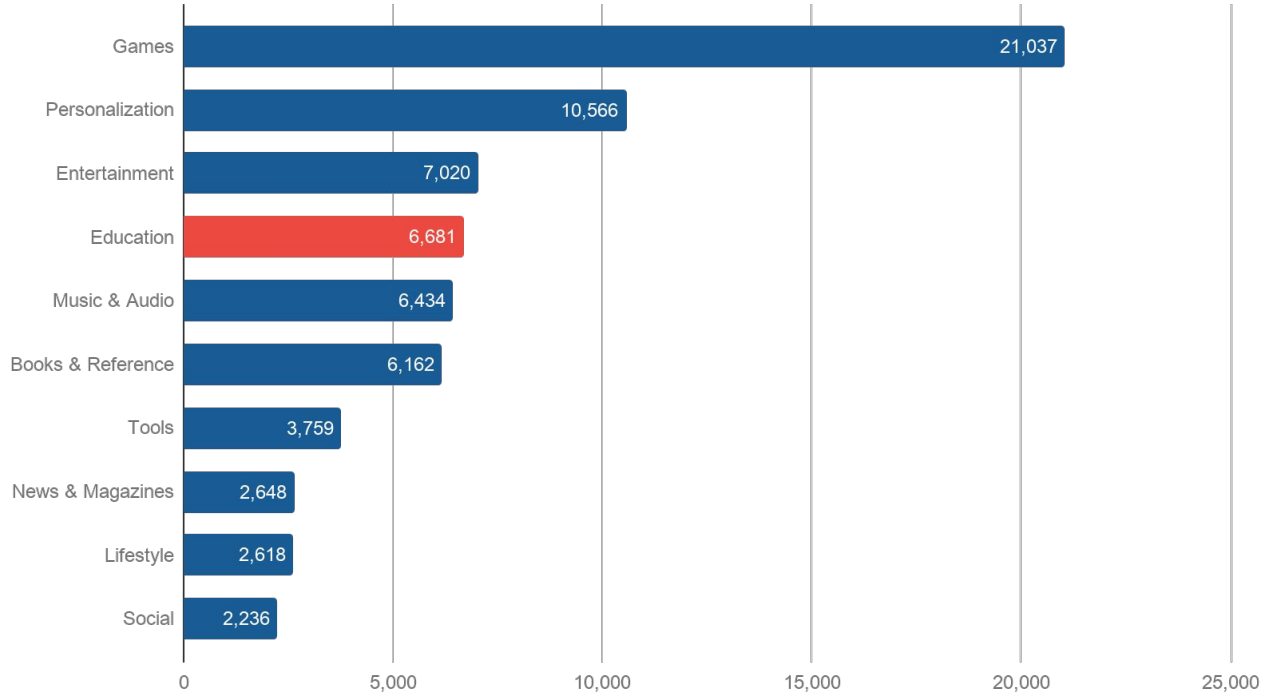
10x more iOS
Games apps
have app-ads.txt





ANDROID: EDUCATION APPS ADOPTING APP-ADS.TXT

Q3 2019; # of apps with app-ads.txt by Android app category; top 10 categories based on app-ads.txt adoption shown



Education apps are **4th-fastest** adopters on Android

APP-ADS.TXT TRENDS

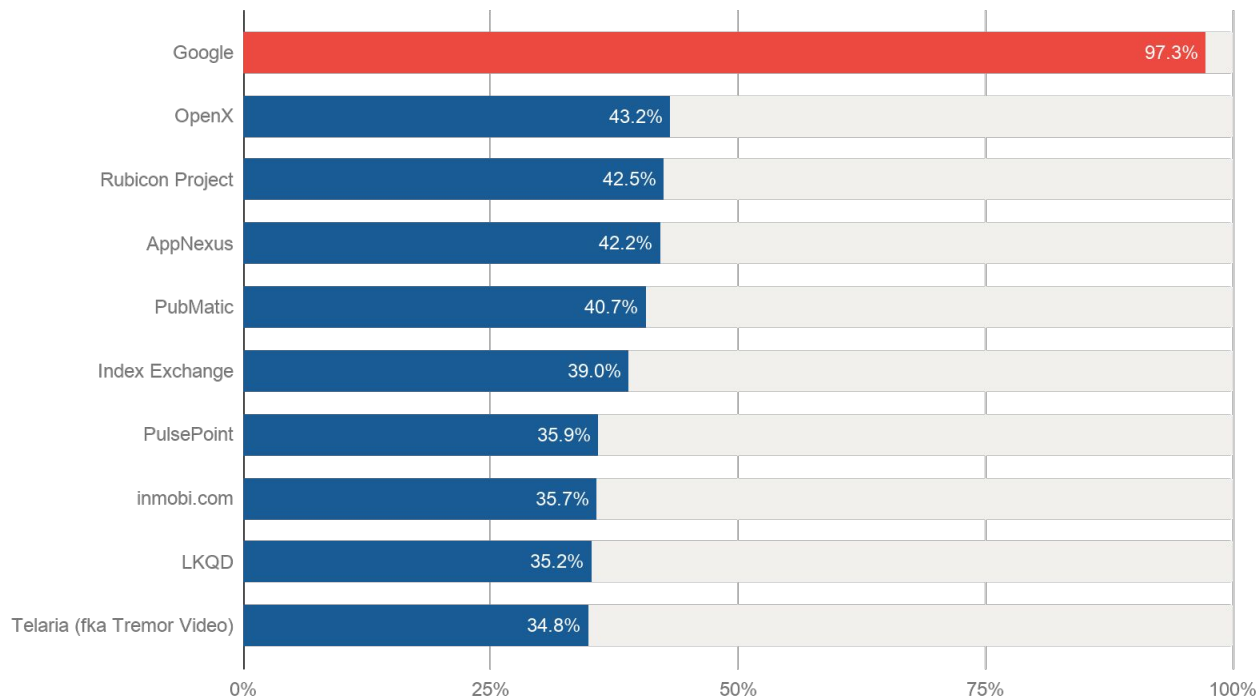
SSP (SELL-SIDE PLATFORM) RANKS

MoPub a top 'Direct' partner; OpenX a top 'Reseller' partner

GOOGLE IS ON 97% OF APP-ADS.TXT FILES

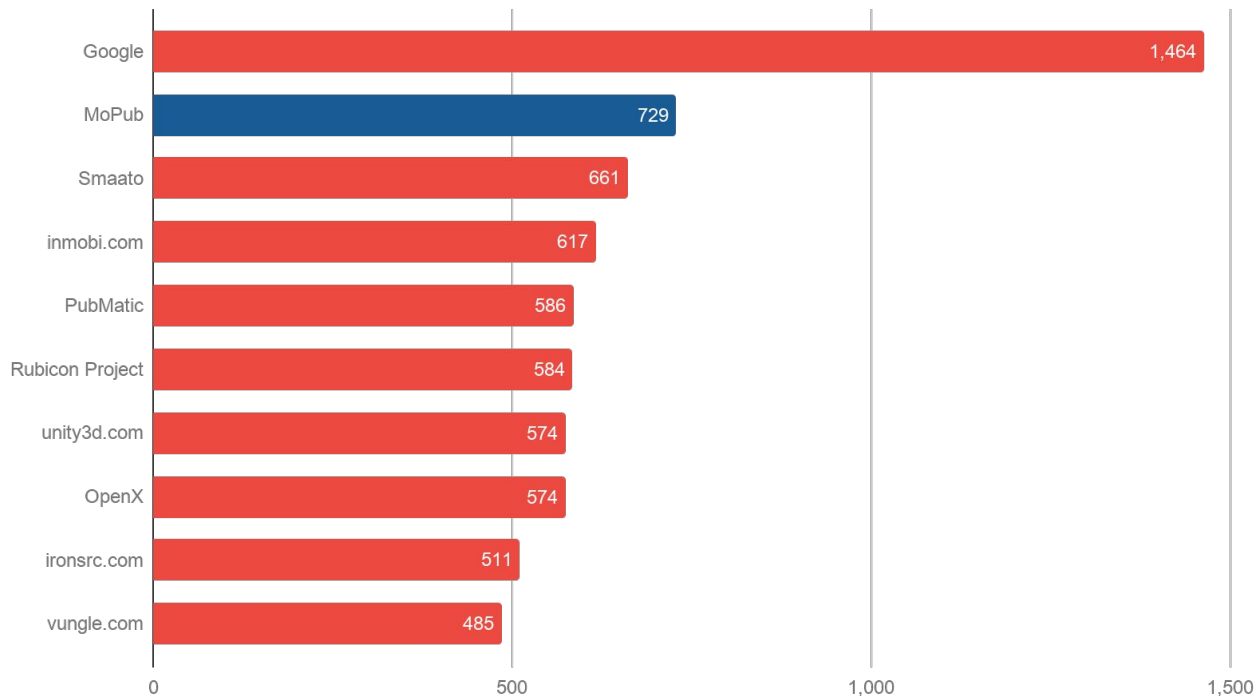
Q3 2019; rate at which a seller is listed as a partner on unique app-ads.txt files; among all apps with app-ads.txt

97% of all
app-ads.txt
files have
Google listed



ANDROID: MOPUB 2ND LARGEST 'DIRECT' PARTNER

Q3 2019; # of times a seller is listed as a 'Direct' partner on unique Android app-ads.txt files among top 5k programmatic Android apps

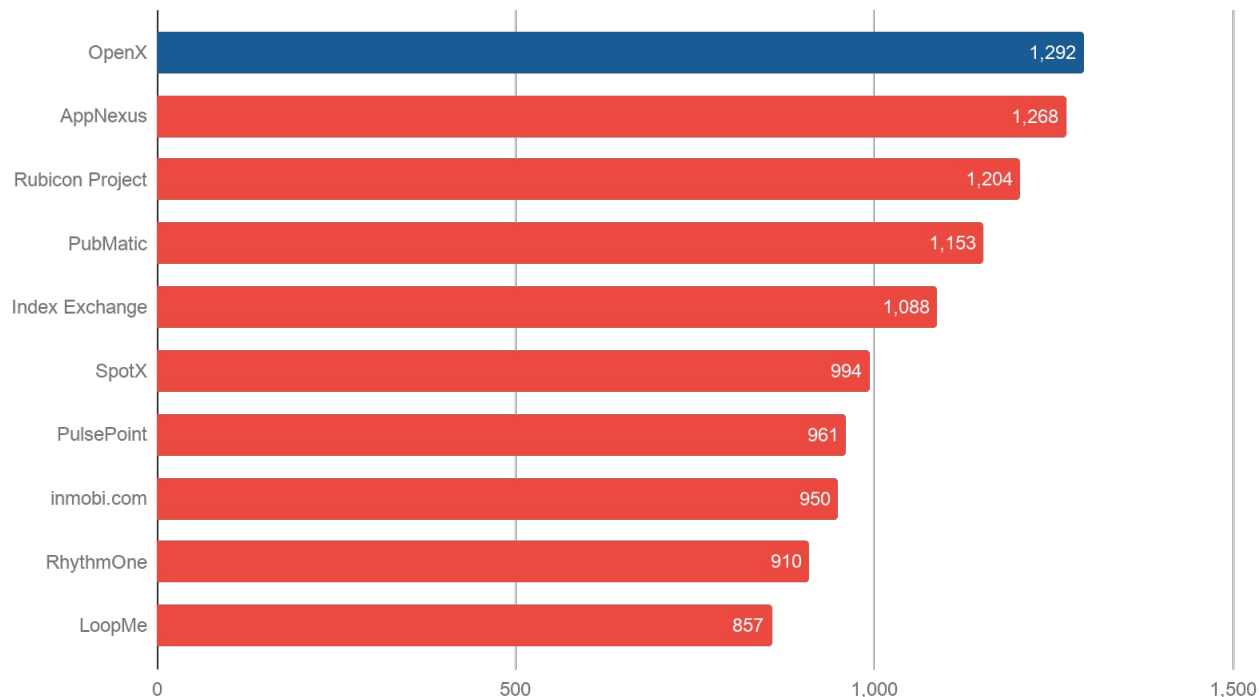


MoPub is
2nd-largest
direct partner
among top
Android apps

ANDROID: OPENX IS TOP 'RESELLER' PARTNER

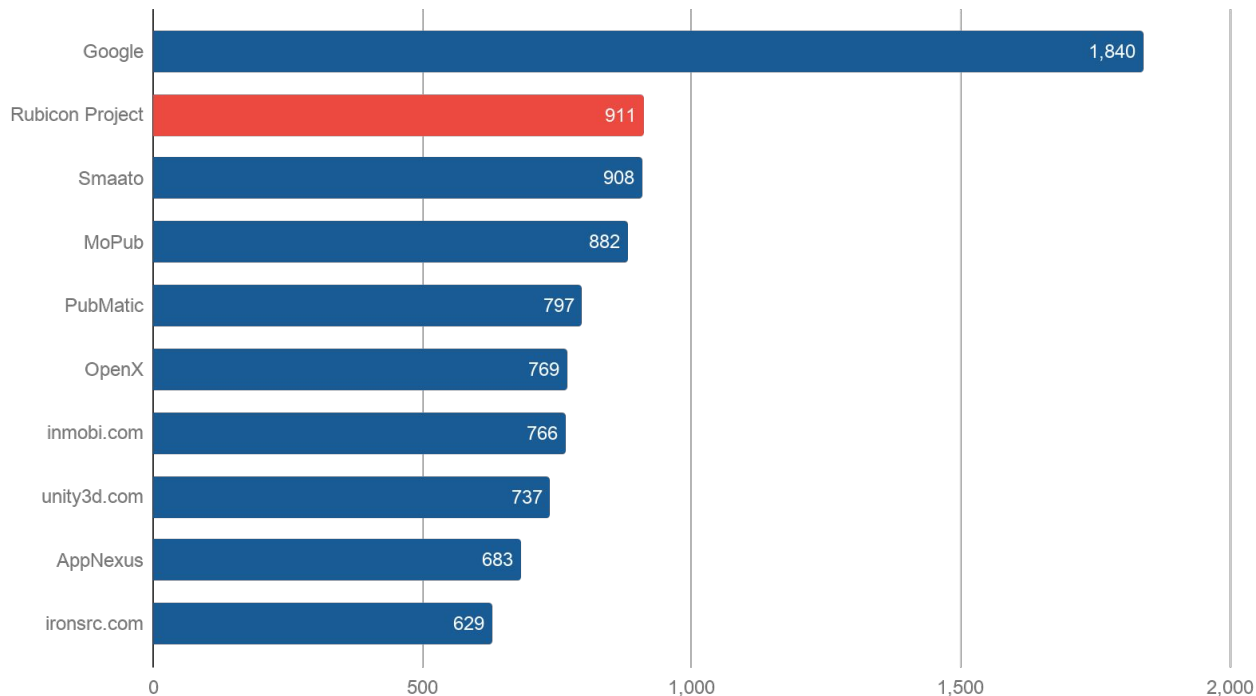
Q3 2019; # of times a seller is listed as a 'Reseller' partner on unique Android app-ads.txt files among top 5k programmatic Android apps

OpenX is the top reseller partner among Android's biggest apps

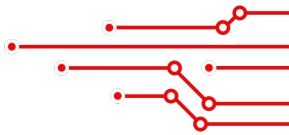


iOS: RUBICON PROJECT 2ND LARGEST 'DIRECT' PARTNER

Q3 2019; # of times a seller is listed as a 'Direct' partner on unique iOS app-ads.txt files among top 5k programmatic iOS apps



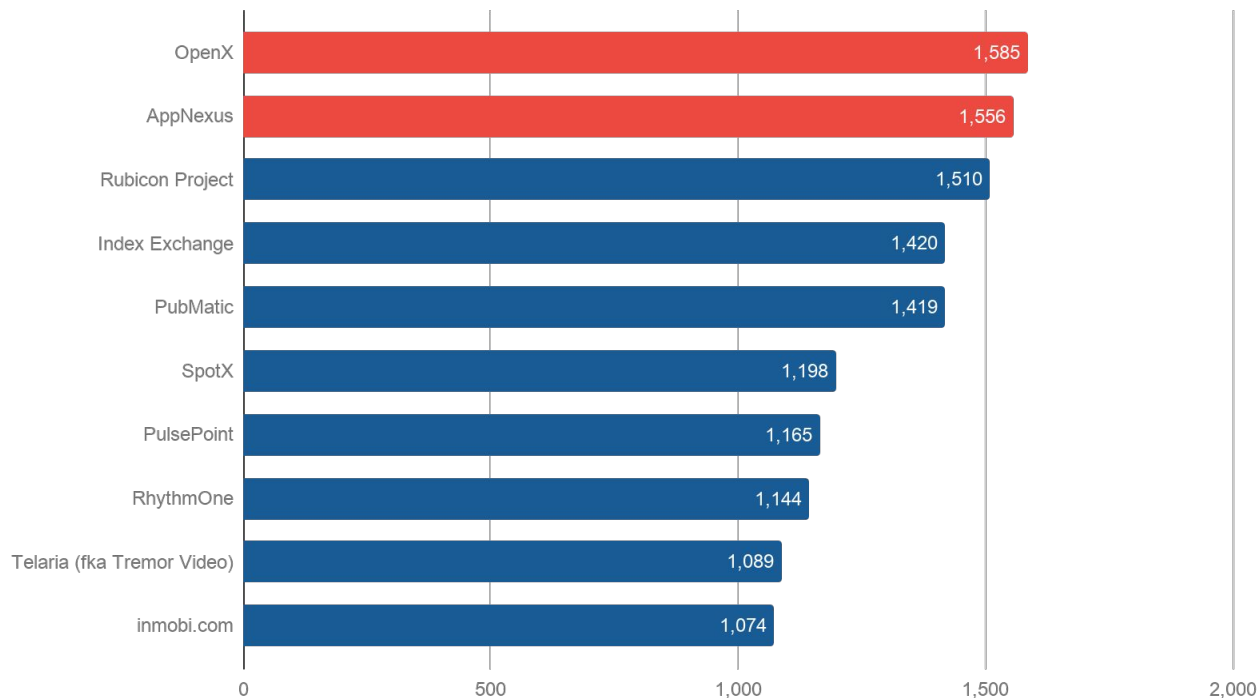
Rubicon Project
2nd-biggest
direct partner on
top iOS apps



IOS: OPENX, APPNEXUS TOP 'RESELLERS'

Q3 2019; # of times a seller is listed as a 'Reseller' partner on unique iOS app-ads.txt files among top 5k programmatic iOS apps

**OpenX &
AppNexus**
battle for biggest
reseller on top
iOS apps




























APP-ADS.TXT TRENDS

SUPPLY CHAIN INTEL: CATEGORIES

the leading app-ads.txt suppliers based on app category on iOS & Android


























ANDROID DIRECT: MOPUB, GOOGLE COMMON IN TOP 5

Q3 2019; top 'Direct' partners on Android apps with app-ads.txt; by category; top 5 Play Store categories based on total app-ads.txt adoption shown

	Games	Personalization	Entertainment	Education	Music & Audio
1					
2					
3					
4					
5					


























ANDROID RESELLER: PUBMATIC TOPS 3 BIG CATEGORIES

Q3 2019; top 'Reseller' partners on Android apps with app-ads.txt; by category; top 5 Play Store categories based on total app-ads.txt adoption shown

	Games	Personalization	Entertainment	Education	Music & Audio
1					
2					
3					
4					
5					


























IOS DIRECT: GOOGLE SWEEPS THE MAJOR CATEGORIES

Q3 2019; top 'Direct' partners on iOS apps with app-ads.txt; by category; top 5 App Store categories based on total app-ads.txt adoption shown

	Games	Education	Music	News	Entertainment
1					
2					
3					
4					
5					

IOS RESELLER: OPENX IS TOP 2 ACROSS THE BOARD

Q3 2019; top 'Reseller' partners on iOS apps with app-ads.txt; by category; top 5 App Store categories based on total app-ads.txt adoption shown

	Games	Education	Music	News	Entertainment
1					
2					
3					
4					
5					

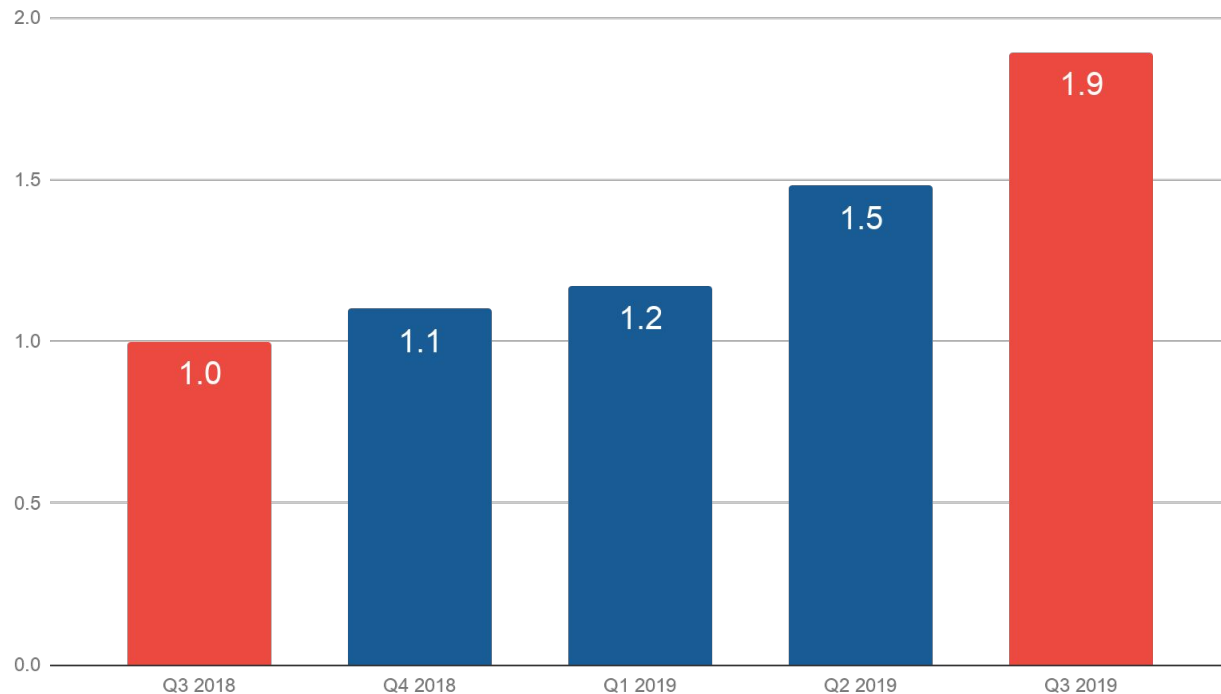
ADS.TXT ADOPTION

OVERALL TRENDS & IVT IMPACT

ads.txt adoption doubles year-over-year

ADS.TXT ADOPTION DOUBLES YEAR-OVER-YEAR

Q3 2018 - Q3 2019; total number of domains with ads.txt; indexed against Q3 2018

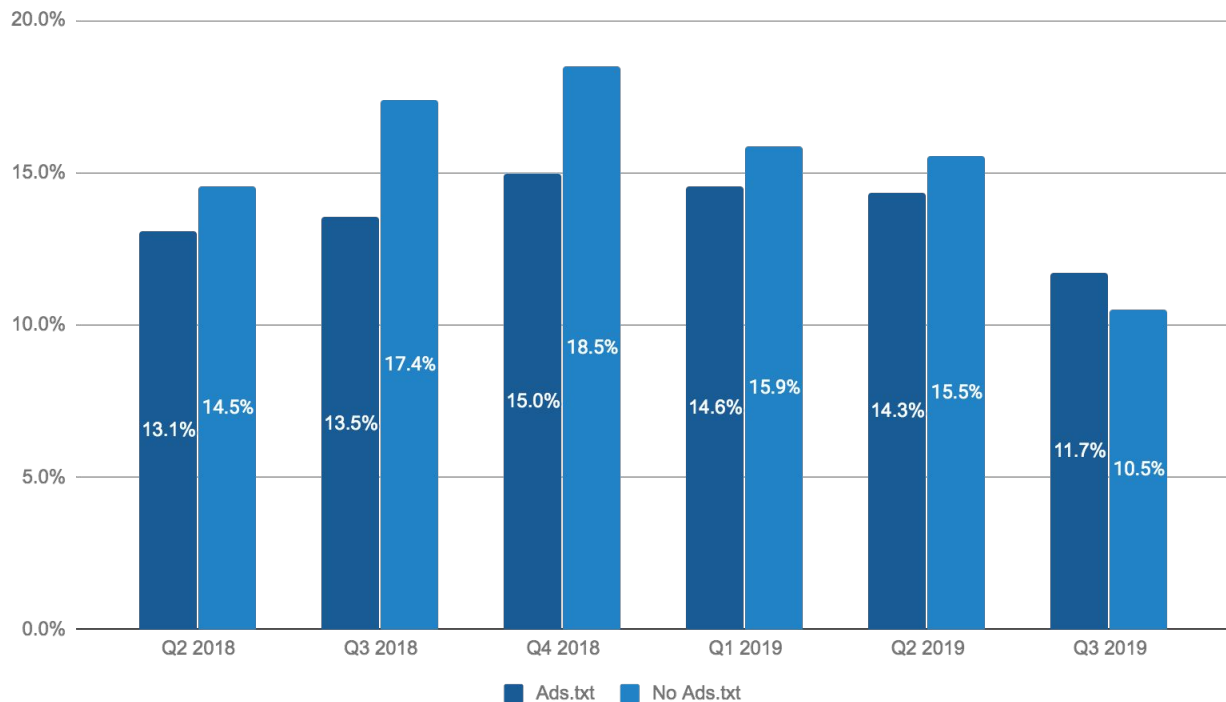


Over **1 million** domains now have ads.txt

FOR FIRST TIME, ADS.TXT IVT IMPACT IS MINIMAL

Q2 2018 - Q3 2019; invalid traffic (IVT) rates on domains with vs. without ads.txt; IVT measured by Pivalate

11.7% with
VS.
10.5% without



ADS.TXT ADOPTION

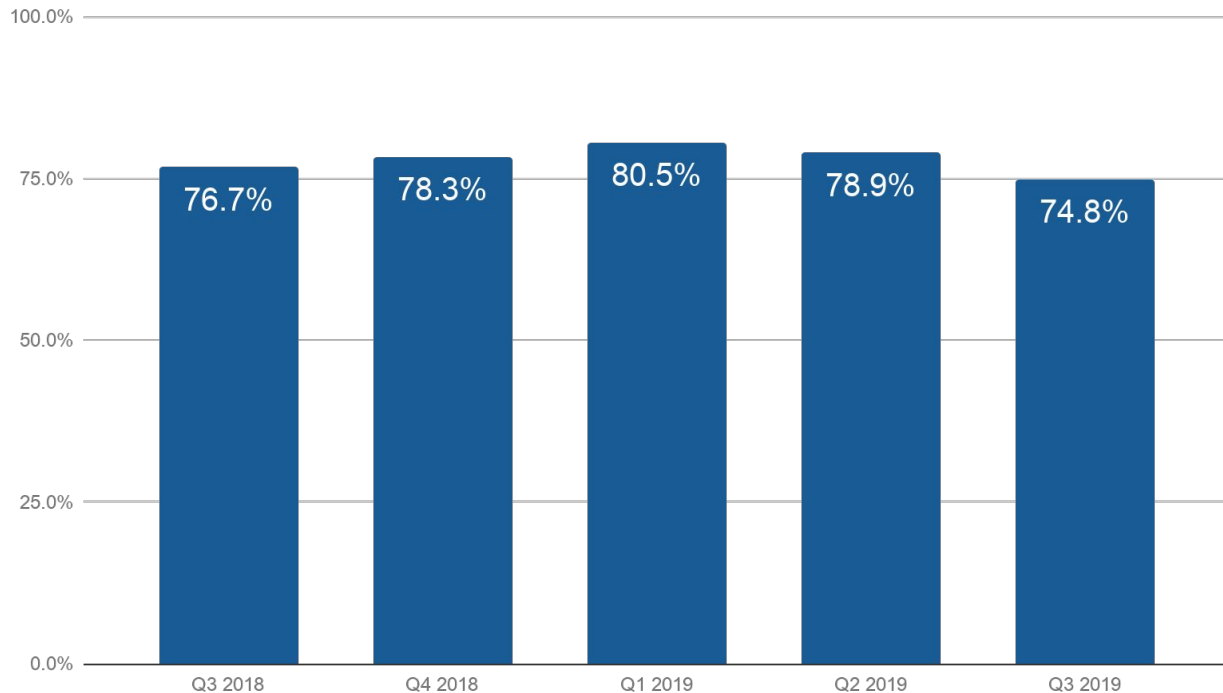
AMONG MOST POPULAR DOMAINS

75% of the top programmatic domains have ads.txt

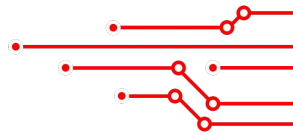


TOP 1K ADOPTION RATE DIPS TO 75%

Q3 2018 - Q3 2019; % of top 1k domains in terms of programmatic ad volume with ads.txt



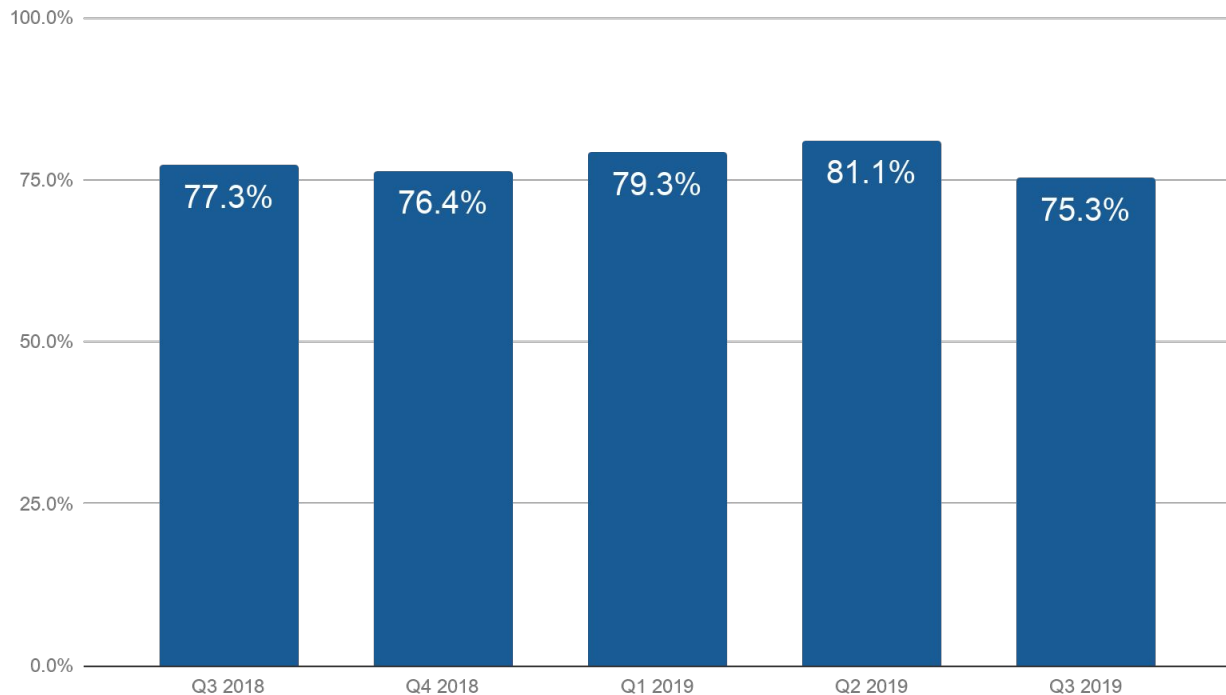
75% of the top 1k sites have ads.txt, down for 2nd straight quarter



TOP 5K ADOPTION RATE DROPS TO 75%

Q3 2018 - Q3 2019; % of top 5k domains in terms of programmatic ad volume with ads.txt

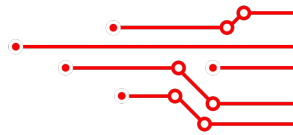
75% of the top 5k sites have ads.txt, down from 81%



ADS.TXT TRENDS

SSP (SELL-SIDE PLATFORM) RANKS

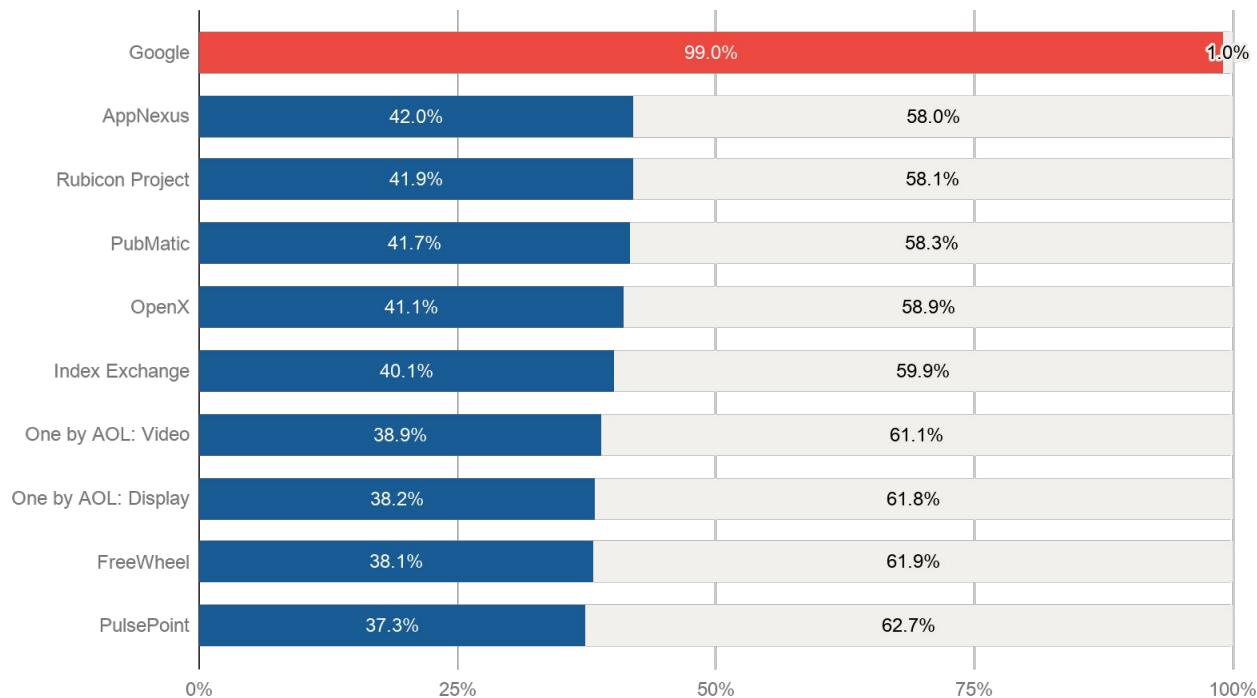
Google's throne is challenged as top 'Direct' partner on popular domains



GOOGLE IS ON 99% OF ALL ADS.TXT FILES

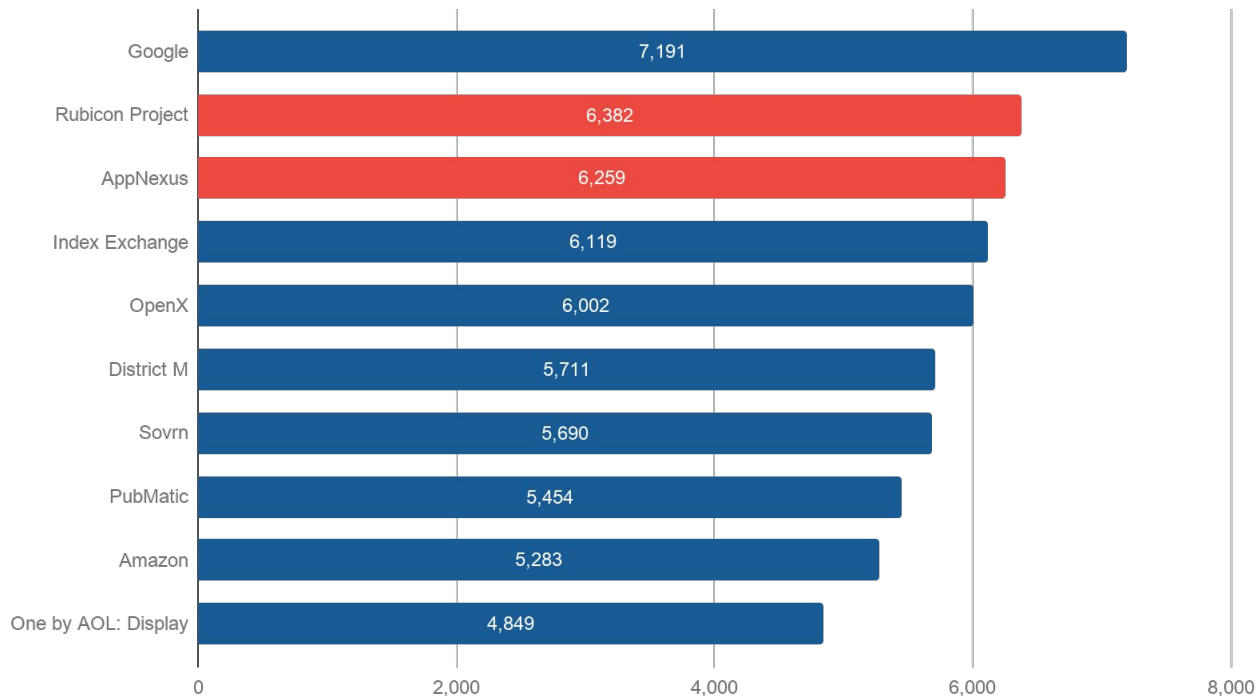
Q3 2019; rate at which a seller is listed as a partner on unique ads.txt files; among all domains with ads.txt

99% of all
ads.txt files have
Google listed



AMONG TOP 10K, GOOGLE'S THRONE IS CHALLENGED

Q3 2019; # of times a seller is listed as a 'Direct' partner on unique ads.txt files among top 10k programmatic domains

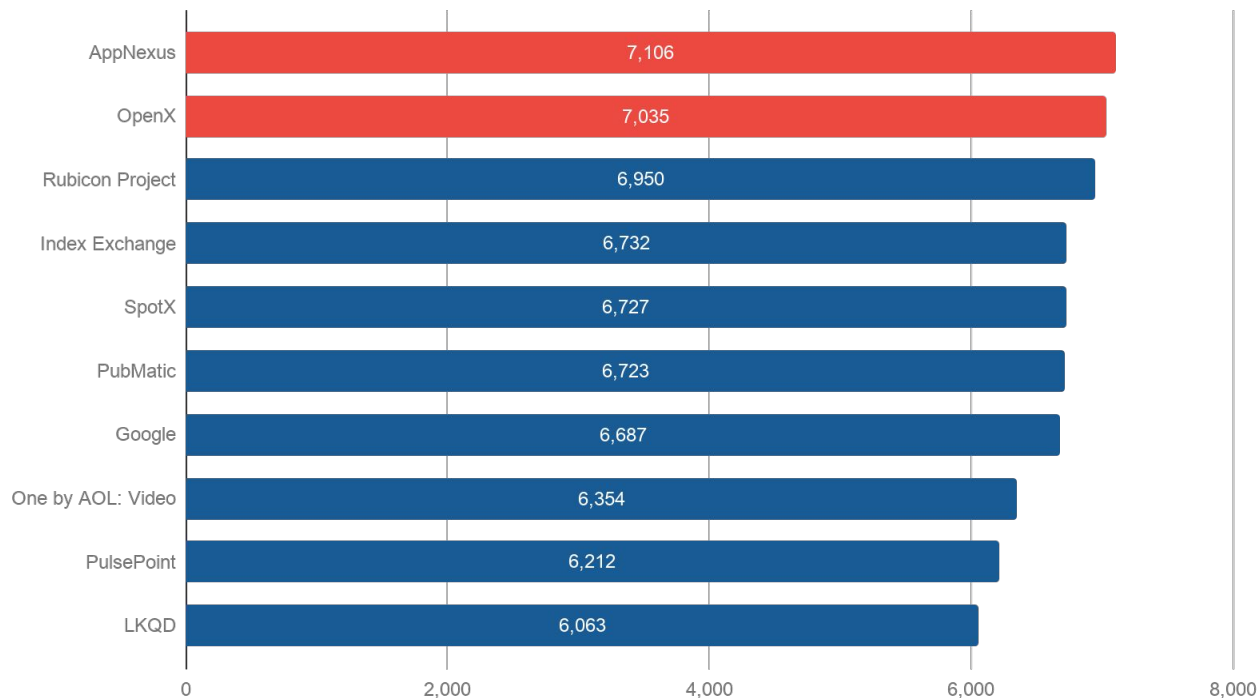


Google remains on top, but **Rubicon** and **AppNexus** are within 1k on top sites

APPNEXUS IS MOST COMMON 'RESELLER' PARTNER

Q3 2019; # of times a seller is listed as a 'Reseller' partner on unique ads.txt files among top 10k programmatic domains

AppNexus is
biggest reseller
on top sites,
closely followed
by **OpenX**



ADS.TXT TRENDS

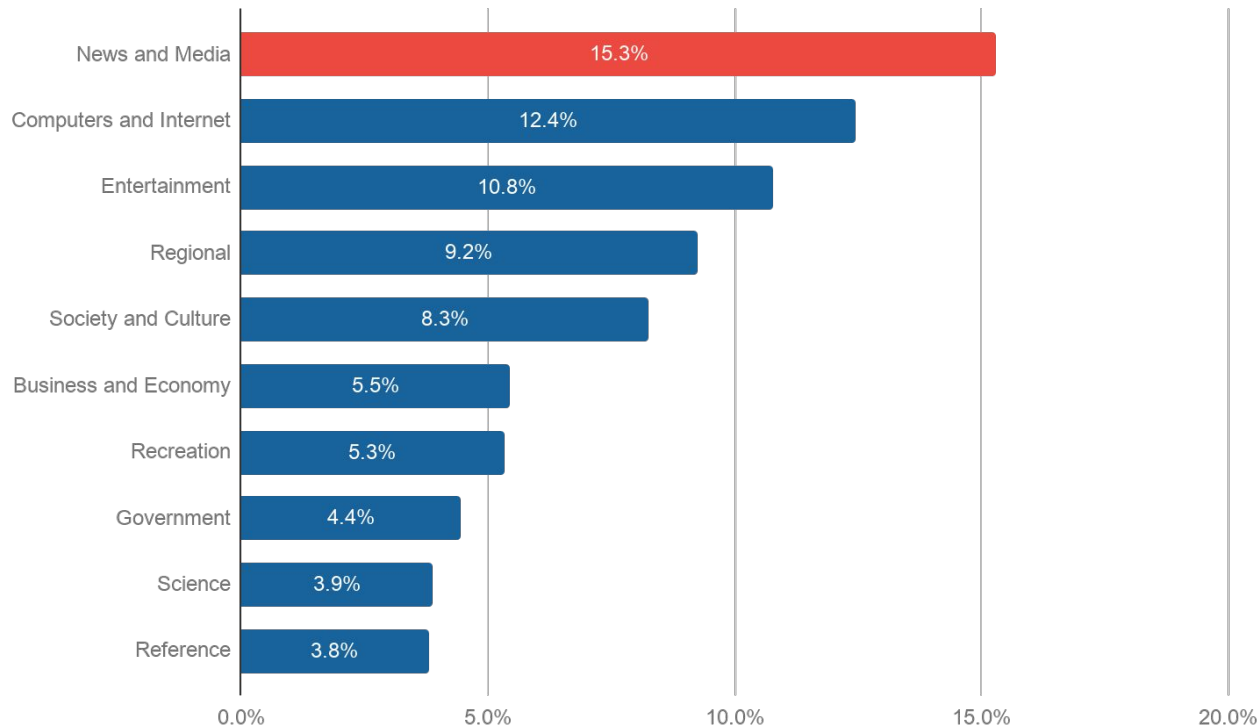
SUPPLY CHAIN INTEL: CATEGORIES

15% of all ads.txt files are on news sites



15% OF ALL ADS.TXT FILES ARE ON NEWS SITES


























Q3 2019; % of all domains with ads.txt by primary domain category



Over **15%** of all sites with ads.txt are in the **News & Media** category


























DIRECT: AMAZON CRACKS THE TOP 5

Q3 2019; top 'Direct' partners on domains with ads.txt; by category; top 5 domain categories based on total ads.txt adoption shown

	News & Media	Computers/Internet	Entertainment	Regional	Society & Culture
1					
2					
3					
4					
5					

RESELLER: APPNEXUS 1ST ACROSS THE BOARD

Q3 2019; top 'Reseller' partners on domains with ads.txt; by category; top 5 domain categories based on total ads.txt adoption shown

	News & Media	Computers/Internet	Entertainment	Regional	Society & Culture
1					
2	 PULSEPOINT™			 PULSEPOINT™	 PULSEPOINT™
3		 PULSEPOINT™			
4					
5			 PULSEPOINT™		

METHODOLOGY

METHODOLOGY

Pixalate's data science and analyst team analyzed over 1.5 million apps and over 80 million domains utilizing proprietary analytics tools to compile this research. The research contained herein represents data collected by Pixalate from April 1, 2018 through September 30, 2019. The data in this report is reflective of root domains and apps only; Pixalate has removed duplicates occurring from subdomain ads.txt files.

The top 1000/5000/10000 domains and apps in terms of programmatic ad volume (e.g. "Pixalate Top 5000") were identified using Pixalate's proprietary ranking of volume among domains and apps which support programmatic advertising.

The top 1000/5000 apps in terms of users (e.g. "User Top 1000") were identified using data provided by the Google Play Store and Apple App Store.

App category information is derived from the official Google Play Store and Apple App Store; "walled garden" apps, such as Facebook, are not included. Domain category information is obtained via a crawler.

Pixalate utilized its proprietary algorithms to measure invalid traffic ("IVT") levels across devices and channels, including General Invalid Traffic ("GIVT") and Sophisticated Invalid Traffic ("SIVT").



DISCLAIMER & ABOUT PIXALATE

DISCLAIMER

The research and insights contained within this report, including IVT rates and other such designations, represent Pixelate's opinions (i.e., they are neither facts nor guarantees). The data has not been audited or reviewed by a third party, but the research and insights are grounded in Pixelate's proprietary technology and analytics, which Pixelate is continuously evaluating and updating.

Per the [MRC](#), "Fraud' is not intended to represent fraud as defined in various laws, statutes and ordinances or as conventionally used in U.S. Court or other legal proceedings, but rather a custom definition strictly for advertising measurement purposes." Also per the [MRC](#), "Invalid Traffic' is defined generally as traffic that does not meet certain ad serving quality or completeness criteria, or otherwise does not represent legitimate ad traffic that should be included in measurement counts. Among the reasons why ad traffic may be deemed invalid is it is a result of non-human traffic (spiders, bots, etc.), or activity designed to produce fraudulent traffic."

ABOUT PIXALATE

Pixelate is an **omni-channel fraud intelligence company** 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.

Pixelate 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.
www.pixelate.com



THANK YOU

CONNECT WITH US

INFO@PIXALATE.COM

PIXALATE.COM

pixalate