



# GLOBAL CONNECTED TV (CTV) AD SUPPLY CHAIN TRENDS ASIA PACIFIC REGION

**Q1.2024**

An analysis of the state of open programmatic CTV advertising, including top devices, trending categories, and ad fraud risk



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## ABOUT THIS REPORT:

Pixalate's data science team analyzed programmatic advertising activity across over 94 thousand Connected TV ("CTV") apps and nearly 6 billion global open programmatic ad transactions in Q1 2024 to compile this research. Pixalate's datasets consist predominantly of buy-side open auction programmatic traffic sources.

Pixalate is sharing this data not to impugn the standing or reputation of any person, entity or app, but instead, to render opinions and report trends pertaining to CTV programmatic advertising activity in the time period studied.



# REPORT AUTHORS



**Brooke Huntley**

VP Product

**pixalate**



**Alba Del Villar**

Chief  
Economist

**pixalate**



**Hawn Smith**

Research and  
Development Analyst

**pixalate**

**AFAC** 🔍  
AD FRAUD &  
COMPLIANCE

**pixalate**  
RESEARCH CENTER

# Q1 2024 CTV Supply Chain Trends: Asia Pacific

**43% YoY increase** in open programmatic **CTV advertising spend in APAC**, Q1 2024, an accelerated growth rate compared to the 15% YoY increase last year (Q1 2023 vs. Q1 2022).



**29% invalid traffic (IVT)** rate in APAC open programmatic CTV in Q1 2024, 11% quarterly increase from 26% in Q4 2023.



**Hulu is the top grossing CTV app in APAC in Q1 2024**, with an estimated \$334K in open programmatic ad spend on Fire TV.

**hulu**

**47% share** of Roku APAC open programmatic advertising ran within **“Not Classified” category apps**, followed by 39% in the **“Movies & TV”** category.

**Roku**

**Android** has the highest CTV operating system market share in APAC in Q1 2024, with **60% SOV**, Fire OS comes in second with 15% OS market share.

android   
tvOS

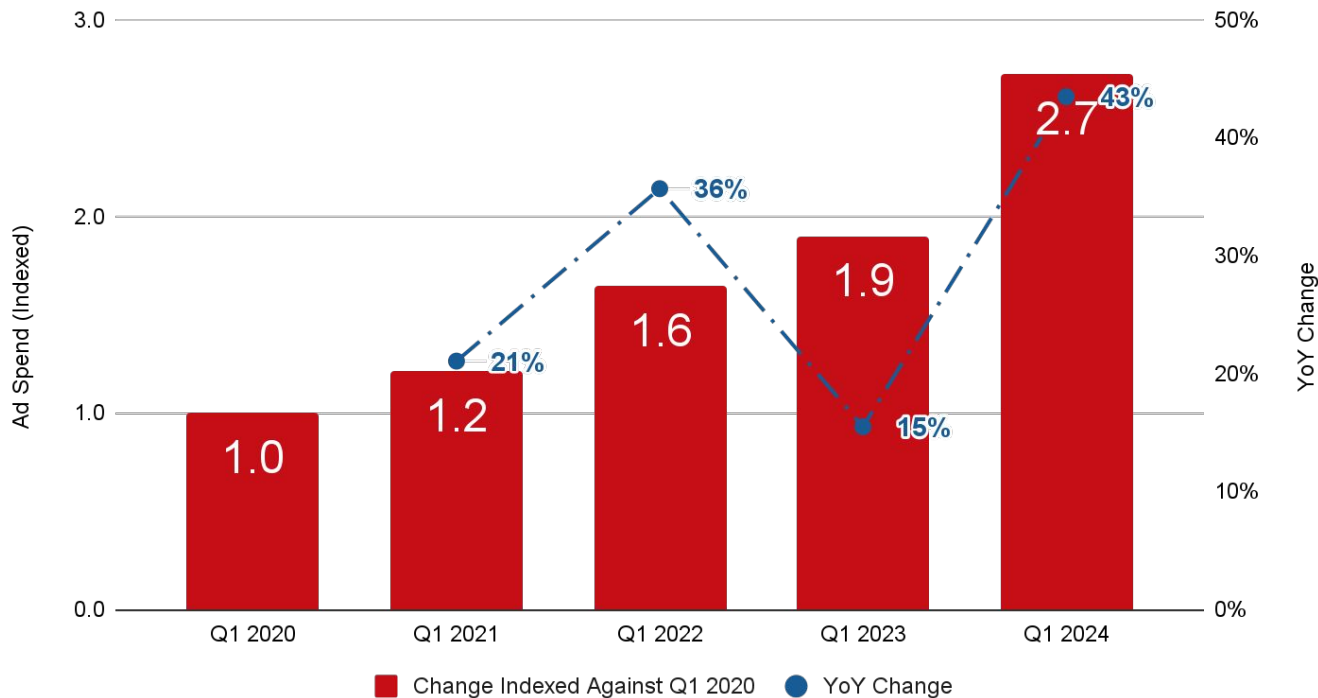


# 43%

YoY increase in APAC open programmatic CTV ad spend in Q1 2024, as measured by Pivalate.





## APAC: Estimated Open Programmatic CTV Ad Spend

Open programmatic ad sales proxied for ad spend, APAC Q1 2024, as measured by Pivalate



# CTV Ad Spend: Top Grossing CTV Apps in APAC, Q1 2024

Top 5 grossing CTV apps per platform based on estimated open programmatic advertising in APAC Q1 2024, as measured by Pixalate

	Rank	Name	Ad Spend
	1	YuppTV - Live, CatchUp, Movies	\$41K
	2	Vevo: Music Videos and Live Channels	\$3K
	3	Plex - Free Movies & TV	\$2K
	4	Text Twist	\$1K
	5	Fox News Channel	\$1K
	1	Hulu	\$334K
	2	HD Video For YouTube	\$310K
	3	WWE	\$74K
	4	Zombie Gate Mob	\$40K
	5	Canale IV	\$27K
	1	Viki: Asian Drama, Movies & TV	\$7K
	2	WildEarth TV - Nature Safari	\$6K
	3	MLB	\$4K
	4	YuppTV - Live TV & Movies	\$3K
	5	Atmosphere TV	\$3K
	1	iQIYI	\$79K
	2	YuppTV	\$62K
	3	XITE	\$20K
	4	SAMSUNG TV PLUS	\$5K
	5	tvplus	\$2K

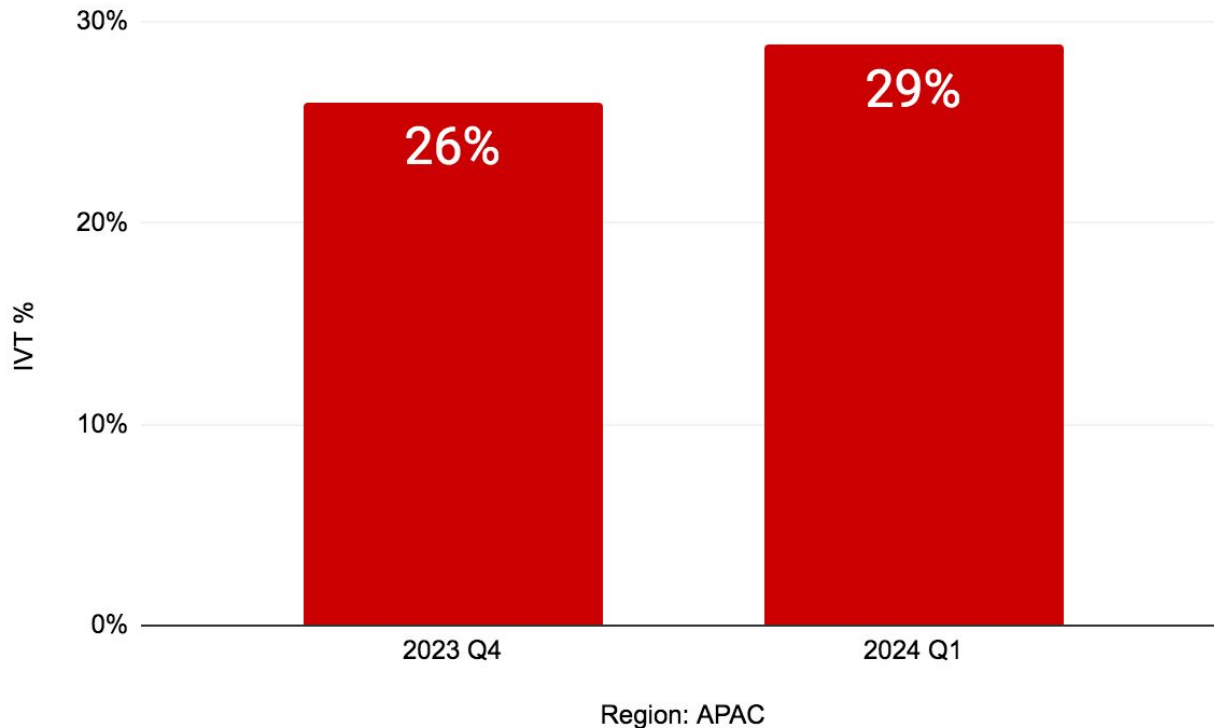


# 11%

open programmatic CTV invalid traffic in the APAC region (IVT, including ad fraud) rate in Q1 2024, up 11% QoQ, according to Pixalate's data.

## Quarterly CTV Invalid Traffic Rates (IVT Inclusive of Ad Fraud)

Invalid traffic ("IVT" - inclusive of ad fraud) by quarter in open programmatic CTV; APAC; as measured by Pixalate



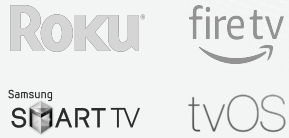
A family of four is sitting on a couch in a living room, watching a television. The TV screen displays the Flow app interface, which includes a menu on the left with options like 'Inicio', 'Inicio de TV', 'Películas', 'Series', and 'Interactivos'. The main screen shows a large movie poster for 'ANOR' and several smaller promotional tiles for 'flow', 'METADATA', and 'flow'. The time '17:15' is visible in the top right corner of the TV screen. The background shows a white brick fireplace and a white shelf with various items.

# OPEN PROGRAMMING AD TRENDS

App Growth | Open Programmatic Ads | App Categories

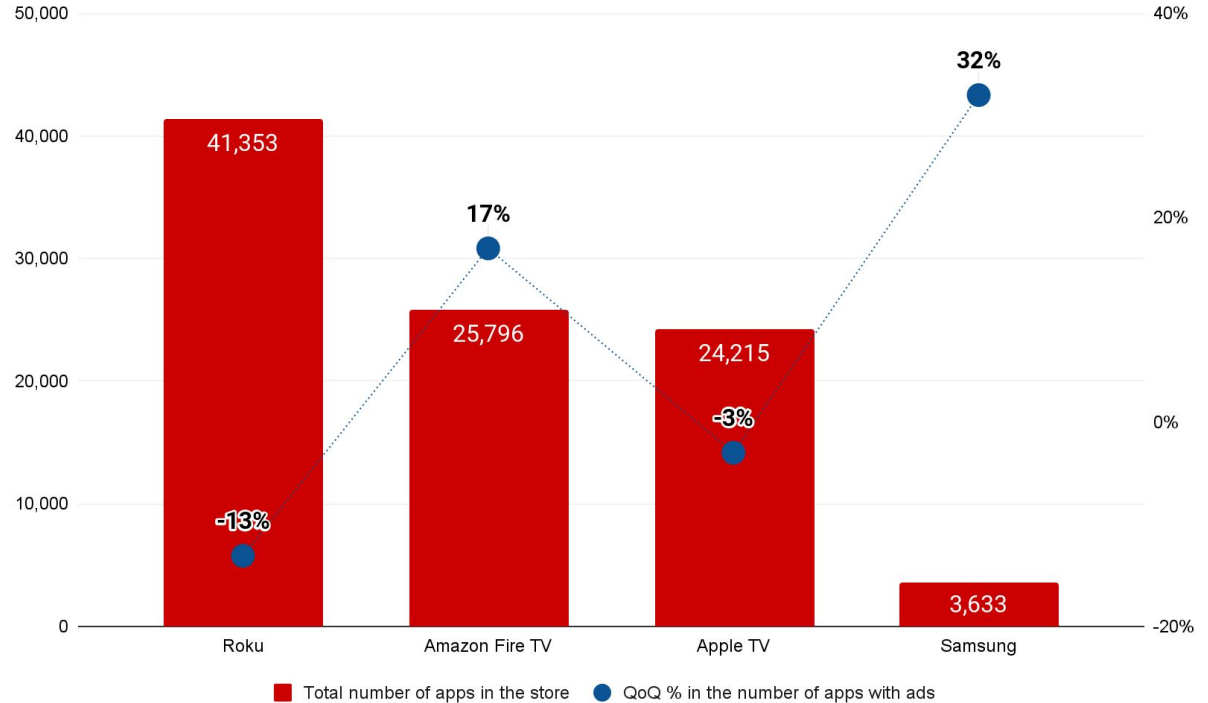






## Number of Apps and Apps with Programmatic Advertising in Q1 2024

# of total apps and apps w/open programmatic ads (>= 50 IVT-free ads sold) Global in Q1 2024 vs. Q4 2023; as measured by Pixalate



# 32%

The number of apps with ads in **Samsung Smart TV** increases 32% QoQ, according to Pixalate's data

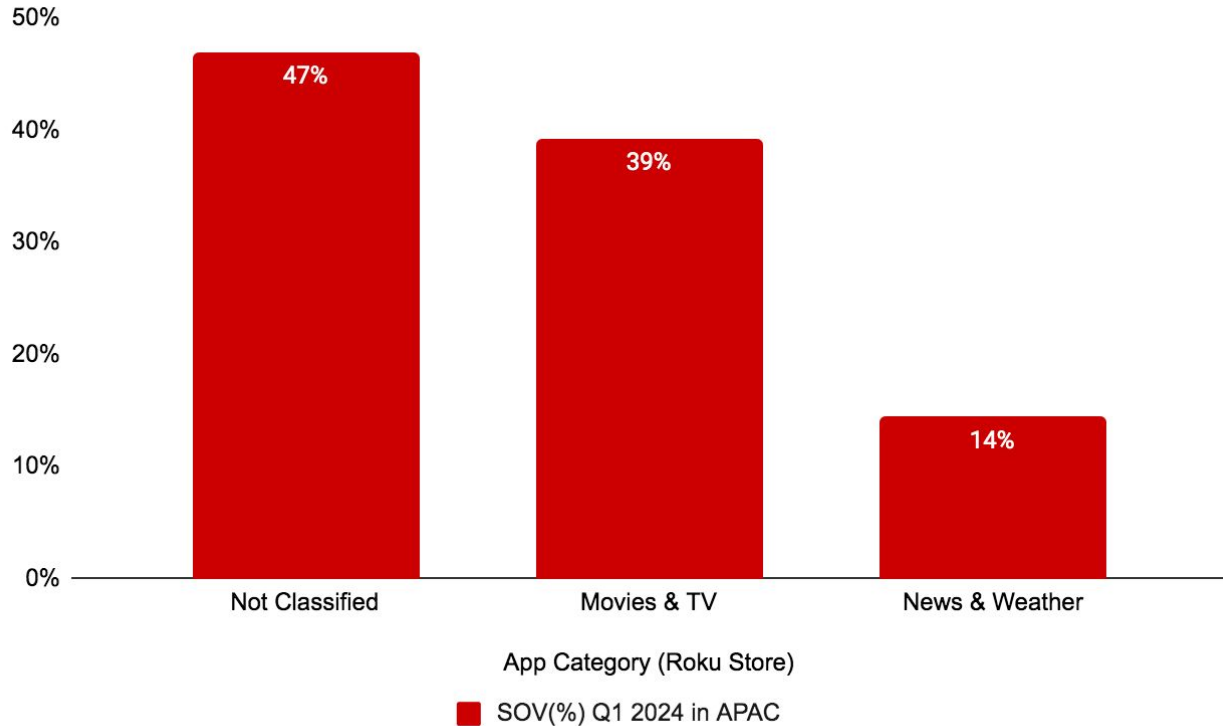


# 47%

estimated category share of voice (SOV) in APAC for Roku apps in the “**Not Classified**” app category, according to Picalate’s data

## Roku App Categories: Open Programmatic Advertising SOV

Open programmatic advertising SOV among top five app categories; APAC; Q1 2024; as measured by Picalate



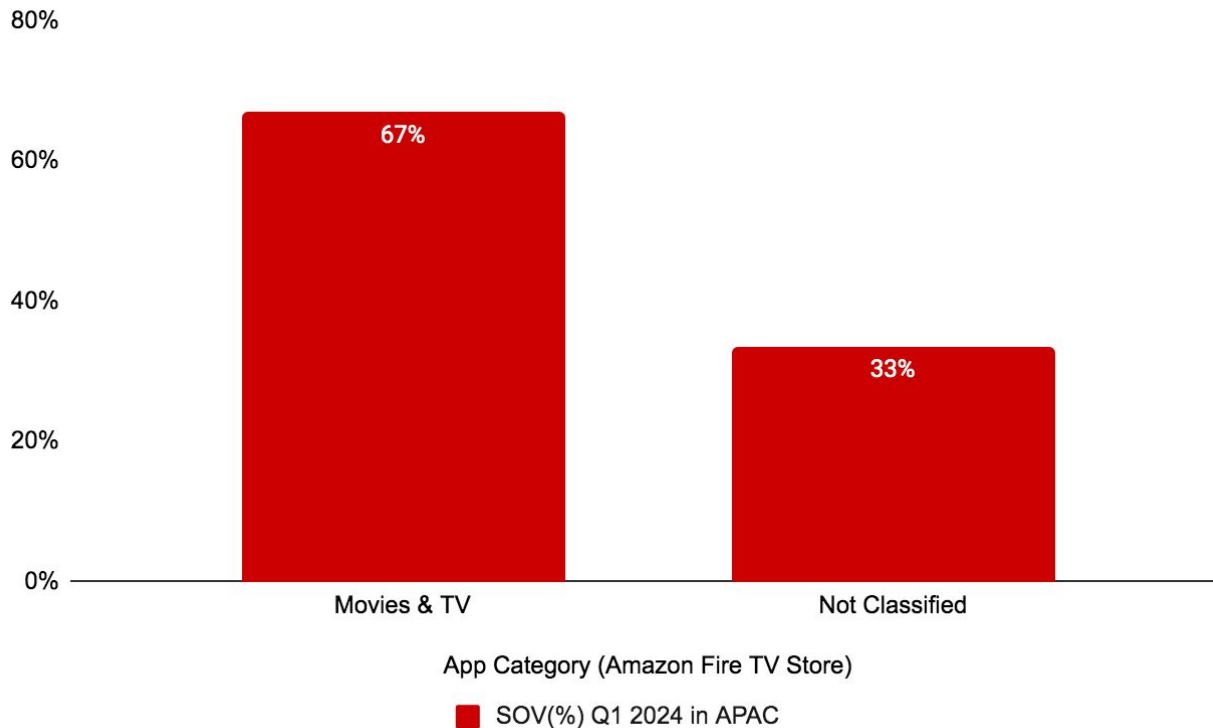


# 67%

estimated category share of voice (SOV) in APAC for Amazon Fire TV apps in the “Movies & TV” app category, according to Pixalate’s data

## Amazon Fire TV App Categories: Open Programmatic Advertising SOV

Open programmatic advertising SOV among top five app categories; APAC; Q1 2024; as measured by Pixalate

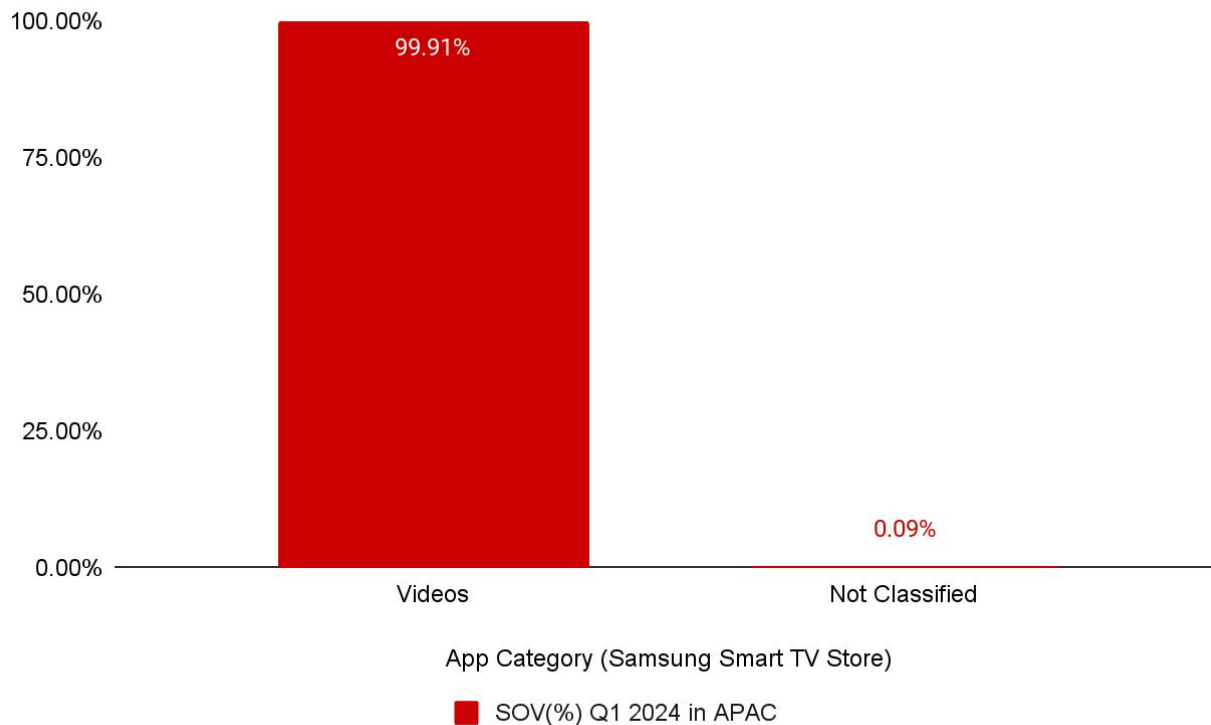


# 99%

estimated category share of voice (SOV) in APAC for Samsung Smart TV apps in the “Videos” app category, according to Pivalate’s data

## Samsung Smart TV App Categories: Open Programmatic Advertising SOV

Open programmatic advertising SOV among top five app categories; APAC; Q1 2024; as measured by Pivalate



CTV OPERATING SYSTEMS

# AD SPEND TRENDS BY OS

Roku | Android | tvOS | Tizen | Windows | Linux | SONY



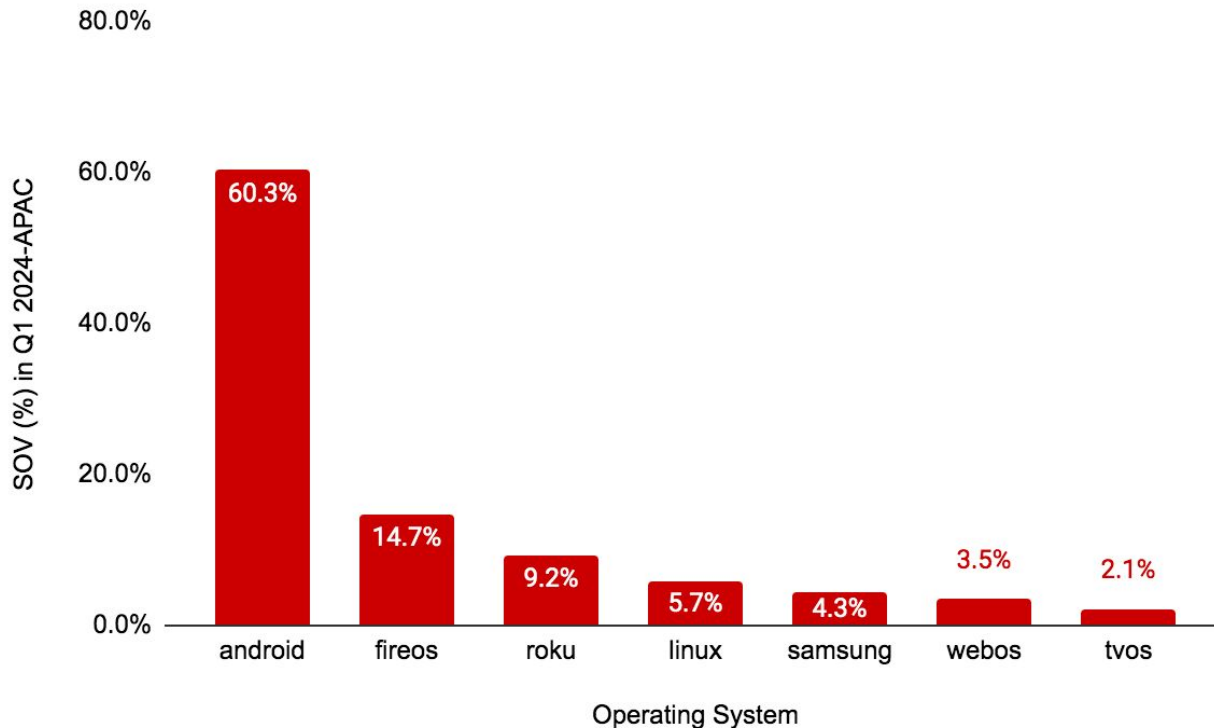


# 60%

CTV OS market share for  
**Android Q1 2024 in  
APAC**, according to  
Pixalate's data.

## Q1 2024 CTV Operating System (OS) Market Share

Share of voice of open programmatic ads sold by operating system; APAC; Q1 2024; as measured by Pixalate





# METHODOLOGY, DISCLAIMER & GLOSSARY

# Methodology

Pixalate's data science team analyzed programmatic advertising activity across over 94 thousand Connected TV (“CTV”) apps and nearly 6 billion global open programmatic ad transactions in Q1 2024 to compile this research. Pixalate's datasets consist predominantly of buy-side open auction programmatic traffic sources.

In the context of this report, programmatic ad transactions, as measured by Pixalate, are proxied for ad spend. The report examines global programmatic advertising activity. Pixalate's datasets — which are used exclusively to derive these insights — consist predominantly of buy-side open auction programmatic traffic sources.

## Global Ad Spend Estimates

Pixalate global open programmatic CTV ad spend figures (page 6) were estimated using the following methodology:

- Total estimated global digital ad spend: \$668 billion ([Statista](#))
- CTV's estimate share: 10% ([eMarketer](#))
- Upfronts' estimate share: 34% ([eMarketer](#))
- Open programmatic estimated share: 50% ([Simplifi](#))
- Estimated yearly share of spend by quarter (Pixalate):
  - Q1: 20%
  - Q2: 21.7%
  - Q3: 26.3%
  - Q4: 32.1%



# Glossary

**Ad market share / share of voice (SOV):** This is based on the proportion of sold programmatic ads that go to a certain device, operating system, category, etc. For example, if Device X received 20 of 100 total ads one quarter, its market share would be 20%. If Device X then received 36 of 120 total ads the next quarter, its market share would have increased by 50% (from 20% to 30%). This is not inclusive of invalid traffic.

**Ad spend:** In the context of this report, programmatic ads sold, as measured by Picalate, are used as a proxy for ad spend. This is inclusive of invalid traffic.

**Apps:** An app is also sometimes called a “channel” when discussing CTV advertising. This report uses the term “app” for consistency. “Apps with programmatic ads” are based off app Bundle IDs in the ecosystem across all CTV app stores.

**Connected TV/OTT:** Also referred to as “CTV” in this report. Picalate defines CTV based on the device being used by the end-user. Examples of CTV devices include Apple TV, Roku, Chromecast, Amazon Fire TV, Smart TVs, and gaming platforms.

**Household adoption:** This includes the estimated percentage of U.S. households that are reachable via any non-CTV form of programmatic advertising (such as mobile in-app), as measured by Picalate that are also reachable via CTV programmatic advertising, as measured by Picalate. Invalid traffic (IVT) is removed.

**Programmatic CTV:** The report examines global programmatic advertising activity across CTV devices. Picalate’s datasets consist predominantly of open auction programmatic traffic sources.

# DISCLAIMER

The content of this report reflects Picalate's opinions with respect to the factors that Picalate believes can be useful to the digital media industry. Any data shared is grounded in Picalate's proprietary technology and analytics, which Picalate is continuously evaluating and updating. Any references to outside sources should not be construed as endorsements. Picalate's opinions are just that, opinions, which means that they are neither facts nor guarantees.

Picalate is sharing this data not to impugn the standing or reputation of any entity, person or app, but, instead, to report findings and trends pertaining to the time period studied.

Per the [Media Rating Council \(MRC\)](#), "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." Certain IVT is also sometimes referred to as "ad fraud." 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.

# ABOUT PIXALATE

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Pixalate is a global platform for privacy compliance, ad fraud prevention, and data intelligence in the digital ad supply chain. Founded in 2012, Pixalate's platform is trusted by regulators, data researchers, advertisers, publishers, ad tech platforms, and financial analysts across the Connected TV (CTV), mobile app, and website ecosystems. Pixalate is MRC-accredited for the detection and filtration of Sophisticated Invalid Traffic (SIVT).



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info@pixalate.com



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