

Gartner for Marketing Leaders

# Brands Retreat Behind Walled Gardens as Data Privacy Efforts Take Root

Digital Performance Benchmarks Team

Gartner®



Ongoing data privacy disruptions and consumers' accelerated adoption of digital channels are upending traditional ad placements. Digital marketing leaders should prepare by exploring how leading brands are adapting ad efforts within the walled gardens of YouTube, Amazon and Facebook.

**Digital Performance Benchmarks Team**



## Introduction

Digital marketing leaders cannot rely on user-level identifiers like they used to. Sparked by global privacy legislation (e.g., General Data Protection Regulation, California Consumer Privacy Act) and consumers' growing demand for greater ownership over their digital identities, device makers and web browsers are making efforts to advance data privacy for internet users. Although these advancements may empower internet users, they adversely affect marketers' digital advertising efforts.

In particular, two major developments are upending digital marketing teams' ability to target users across websites, channels and devices:

**Third-party cookies crumble.** Google Chrome, the world's most popular web browser, plans to phase out the use of third-party cookies in late 2023, following in the footsteps of Safari and Firefox. (See [Google to Drop All the Cookies, but Hold the Cards.](#))

**Apple restricts the use of device identifiers.** As part of its iOS 14.5 update, Apple's AppTrackingTransparency framework requires third-party app developers to prompt Apple device users to opt in or out of all app-specific targeting or tracking. (See [Apple Upsets the Digital Advertising Cart.](#))

## Walled Gardens Flourish as Data Privacy Efforts Take Root

In response to these data privacy disruptions, marketers are placing more of their advertising dollars within “walled gardens”— giant, consumer-facing digital platforms such as Google, Facebook and Amazon. Walled gardens attract marketers due to their abundance of owned and constantly updated first-party data. Marketers can use proprietary advertising tools found on these platforms to deliver and measure targeted, brand-safe ads to users with reduced risk of privacy compliance violations or other customer data blunders. With digital advertising now capturing 11.2% of marketing budgets, walled gardens will continue to grow in importance as marketers seek safety and reliability in their digital ad placements.

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**Together Google, Facebook and Amazon constitute nearly two-thirds of total U.S. digital ad revenue.**

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However, in exchange for greater safety and reliability, marketers relinquish transparency and control. Marketers are completely dependent on how these closed ecosystems measure and interpret advertising performance, making it difficult to understand and compare campaigns outside their walls. Although marketers can leverage these platforms’ advanced targeting features to run highly-sophisticated ad campaigns, they can only get an aggregated view of campaign performance as walled gardens preserve the integrity of their users’ privacy. In short: data that resides within these walls stays there.

In this research, you’ll learn how brands across industries are advertising within walled gardens as they brace for evolving data privacy disruptions and adapt to consumers’ accelerated adoption of digital channels. We’ll share best practices and brand-specific examples of ways you can make more strategic use of your own ads within these walls as competition heats up.

This research is part of an ongoing series stemming from our annual Digital IQ: Advertising Benchmarks for 2021. Although Gartner’s Digital IQ measures the overall trends in digital advertising, this research serves as a deeper analysis into brands’ advertising efforts across three walled gardens: Google-owned YouTube, Amazon and Facebook.

## Overview

### Key Findings

- In response to ongoing data privacy disruptions, brands across industries are migrating a greater proportion of their digital advertising dollars to the walled gardens of Google, Amazon and Facebook.
- Although walled gardens promise greater safety and reliability for targeted ad placements, marketers relinquish transparency and control. Marketers are dependent on how these closed ecosystems measure and interpret advertising performance, making it difficult to understand and compare campaigns outside their walls.
- Advertising activity within walled gardens will likely continue to surge as marketers navigate a cookieless future and digital advertising remains among CMOs' top channel investment priorities.

## Key Recommendations

To better execute on your digital advertising strategy:

- Maintain a pulse on the digital advertising activity of brands within walled gardens using our cross-industry benchmarks, and compare these efforts with your own to see where you stand.
- Adapt to future disruptions by remaining agile across your media mix of walled gardens and publishers. Focus ad spend where your target audiences are likely to frequent, and don't be afraid to experiment placing ads with smaller, yet growing platforms.
- Prepare for the future of data clean rooms by identifying use cases and goals that would be met by leveraging data clean rooms within and outside of walled gardens.

## Analysis

### Brands Retreat Behind the Walled Gardens of YouTube, Amazon and Facebook

Gartner analyzed over 1,100 brands across six industries between 2Q20 and 1Q21 to uncover an industry-agnostic view of the top trends taking place across digital advertising today (see Methodology section). We found that brands across industries have substantially increased advertising investments within the walled gardens of Google-owned YouTube, Amazon and Facebook as they brace for impending data privacy disruptions and adapt to consumers' accelerated adoption of digital channels. See Digital IQ: Advertising Benchmarks for 2021.

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**Advertising across multiple walled gardens helps marketing teams reach a more diverse and broader audience while remaining flexible to potential platform-specific disruptions (e.g., the “Stop Hate for Profit” Facebook advertising boycott). However, some marketing teams may actually benefit by concentrating walled garden ad spend on a single platform. For example, it may be more beneficial for marketers to master and measure a single platform if they don’t prioritize digital advertising as a marketing channel or if a majority of their primary target audience resides on a single platform.**

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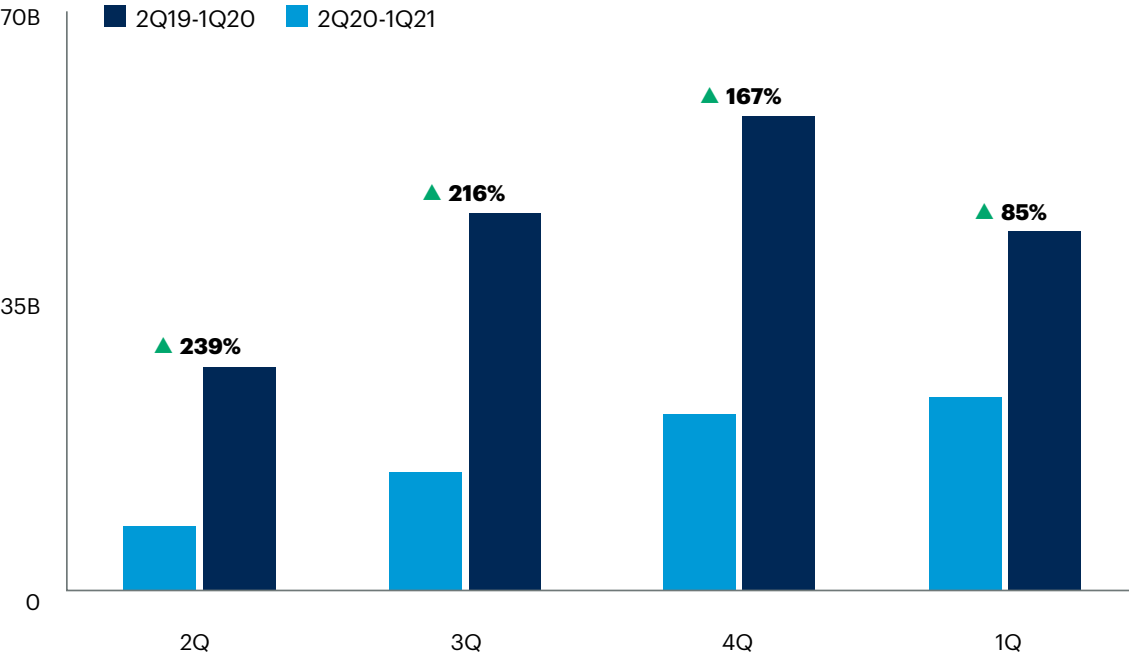
Let’s take a look at advertising activity across the spectrum of walled gardens, starting with YouTube.

### YouTube

With more time on their hands during lockdown, many people turned to YouTube for everything from DIY projects to home workout routines to learning new recipes. YouTube was so prevalent during the pandemic that it captured 8 percentage points of growth among U.S. consumers, and marketers took notice (see How Top Brands Are Excelling at Video Advertising).

Between 2Q20 and 1Q21, brands across industries substantially increased the number of desktop and mobile web advertising impressions bought on YouTube (see Figure 1). Marketers took advantage of consumers’ increased appetite for video content and YouTube’s advanced targeting capabilities to engage homebound audiences at scale. As the second-most visited website in the world, YouTube will remain a dominant force for marketing teams looking to target users with video, display and search ads as data privacy developments reach fruition.

Figure 1: YouTube Web Advertising Impressions Growth  
Desktop and Mobile Web Advertising Impressions



n = 922 brands on YouTube from 6 industries: consumer goods, financial services, healthcare, manufacturing & natural resources, retail, and travel & hospitality

Source: Gartner analysis of Pathmatics data

Note: YouTube advertising nonstandard impressions include desktop static, desktop video and mobile web pre-roll video.

## Brand Spotlights

Here are a few ways select brands are taking advantage of YouTube's unique advertising features and characteristics.

### Apple Samples YouTube's Menu of Ad Options

YouTube gives marketers a breadth of video advertising options to choose from. Ranging from skippable to non-skippable ads that play in the beginning, middle or end of other YouTube videos, marketers can place video ads of varying lengths — with 6-second, 15-second and 30-second ads being most common. Marketers can also place display and search ads across YouTube's website and search results pages.

Having captured the greatest share of total YouTube ad impressions among brands in our Digital IQ Advertising Benchmarks, Apple provides an example of how one brand sampled YouTube's menu of advertising options. Apple placed a series of display ads for specific Apple products and Apple TV+ streaming service, directing users to owned YouTube channels for both. Apple also crafted a series of video ads of various lengths, some with calls to action that brought users off of YouTube and onto Apple's owned web properties (see Figure 2).

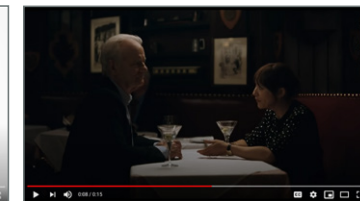
Figure 2: Apple Takes Advantage of YouTube's Breadth of Ad Options Growth



**Display** ad featuring Apple's TV+ streaming service, directing users to its Apple TV YouTube channel.



**Six-second video** ad featuring Apple's iPhone 12, directing users to Apple.com.



**Fifteen-second video** ad featuring an Apple TV+ exclusive, "On the Rocks."



**Thirty-second video** ad advertising its Apple News+ subscription service.

Source: Apple



## **Taco Bell Targets Its Ads on Select YouTube Channels**

With YouTube’s “content targeting” feature, marketers can place video ads on specific devices, YouTube channels or even individual YouTube videos, while excluding placement on defined YouTube channels. This grants a high level of granularity for marketers seeking advanced targeting capabilities and brand-safe environments.

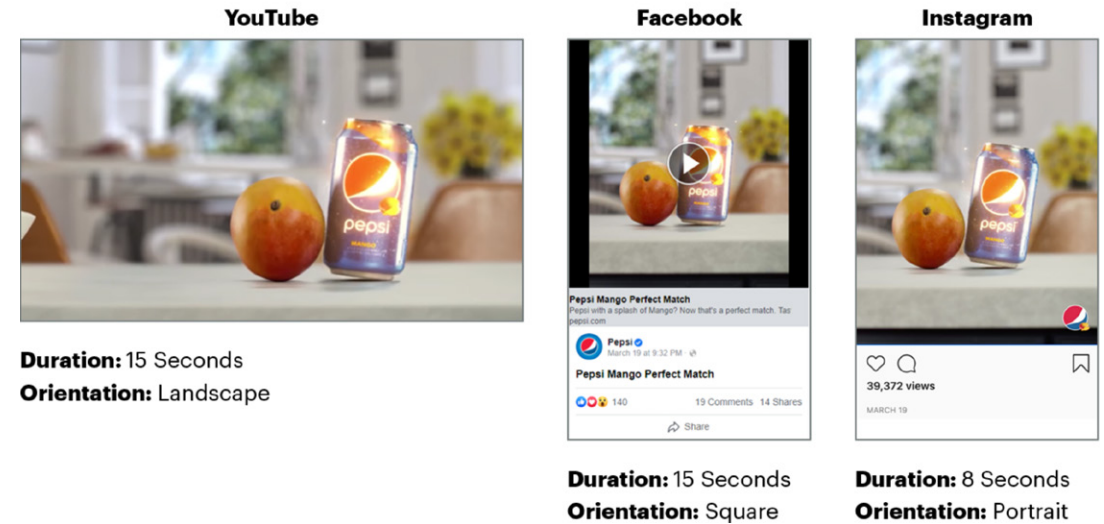
As the top-ranked travel and hospitality brand in our Digital IQ Advertising Benchmarks, Taco Bell took advantage of YouTube’s targeting capabilities by placing video ads on specific YouTube channels its target audiences are likely to frequent. For example, the quick service restaurant placed its 15-second “\$10 Cravings Pack” ad largely across three YouTube channels revolved around gaming and pop culture. These video ads included a call to action that brought viewers to its Taco Bell locations landing page.

## PepsiCo Extends the Use of Its YouTube Video Ads Across Other Form Factors

Producing video ads is often a big undertaking for organizations and involves expensive equipment and production crews. Marketers can extend the return on their video advertising investments by reusing parts of a single video ad to fit multiple platforms, devices and viewing habits.

PepsiCo did just that with its Pepsi Mango video ad campaign. The beverage giant took its original 15-second landscape ad on YouTube and reworked its aspect ratios to fit the form factors of Facebook and Instagram (see Figure 3). By doing this, PepsiCo catered to different viewing habits and platforms without having to create entirely new video ads. This tactic will likely grow alongside walled garden ad efforts as programmatic video ads with standard dimensions become less common.

Figure 3: PepsiCo Extends the Use of a Single Video Ad



Source: Gartner analysis of Pathmatics data; PepsiCo

### Amazon

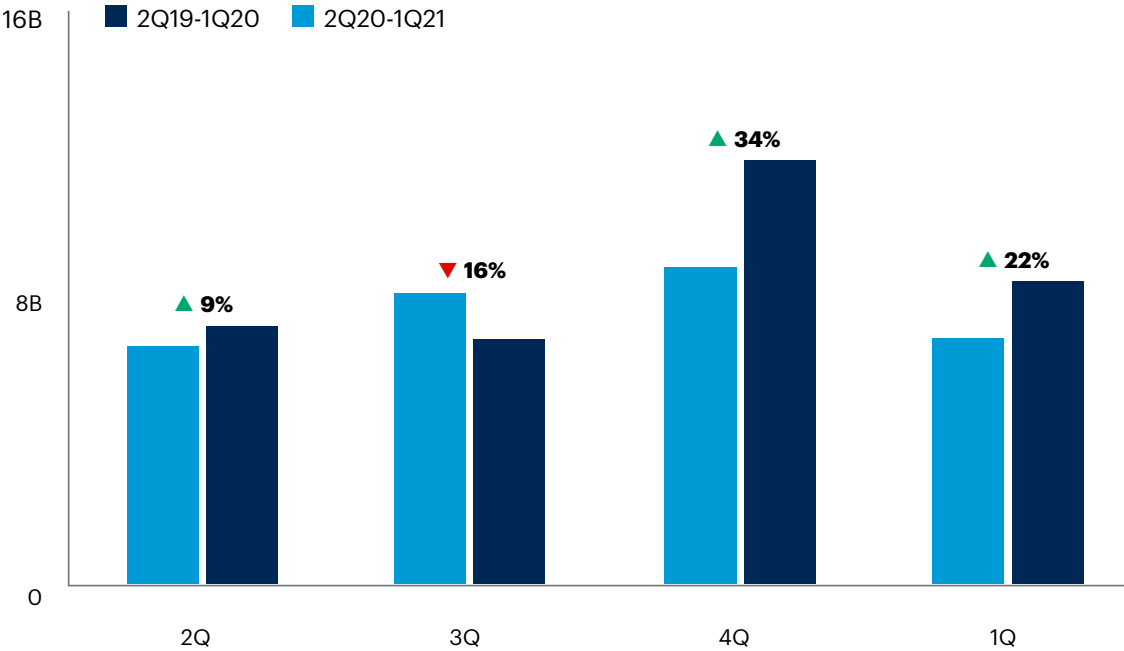
Amazon grants commerce-focused marketers a distinct advantage over Google and Facebook: A rich repository of purchase intent data. Marketers can use this data to create targeted ads for consumers who are much closer to a point of purchase — regardless of whether they sell anyproducts through Amazon. And Amazon’s data reservoir continues to fill.

Amazon propelled its digital commerce dominance to new heights during lockdown as other retailers languished. Despite outcries over frontline working conditions and ongoing consumer-led boycotts, the retail giant reported net sales of \$108.5 billion in 1Q21, a 44% increase from 1Q20. Its overall digital advertising business reveals a similar growth story, having now captured over 10% share of the U.S. digital advertising market. Amazon also boasts a highly desirable user base. Its more than 200 million global Amazon Prime members include about half of the U.S. general population, skew younger, are higher income and are generally more tech savvy than non-Prime members. But Amazon isn’t just an online retail marketplace. The company continues to expand its reach outside of digital commerce into categories such as online video streaming (Twitch, IMDb), physical retail (Whole Foods) and much more.

Between 2Q20 and 1Q21, marketers increased desktop and mobile web impressions to take advantage of consumers’ growing online shopping habits (see Figure 4).

Figure 4: Amazon Web Advertising Impressions Growth

#### Desktop and Mobile Web Advertising Impressions



n = 348 brands on Amazon from 6 industries: consumer goods, financial services, healthcare, manufacturing & natural resources, retail and travel & hospitality

Source: Gartner analysis of Pathmatics data

Note: Amazon advertising impressions include desktop static, desktop video and mobile web static; excludes mobile apps; excludes nonstandard IAB sizes, custom skins and site takeovers; mobile web excludes most highly targeted and retargeted ads, ads behind a log-in and interstitials.

## Brand Spotlights

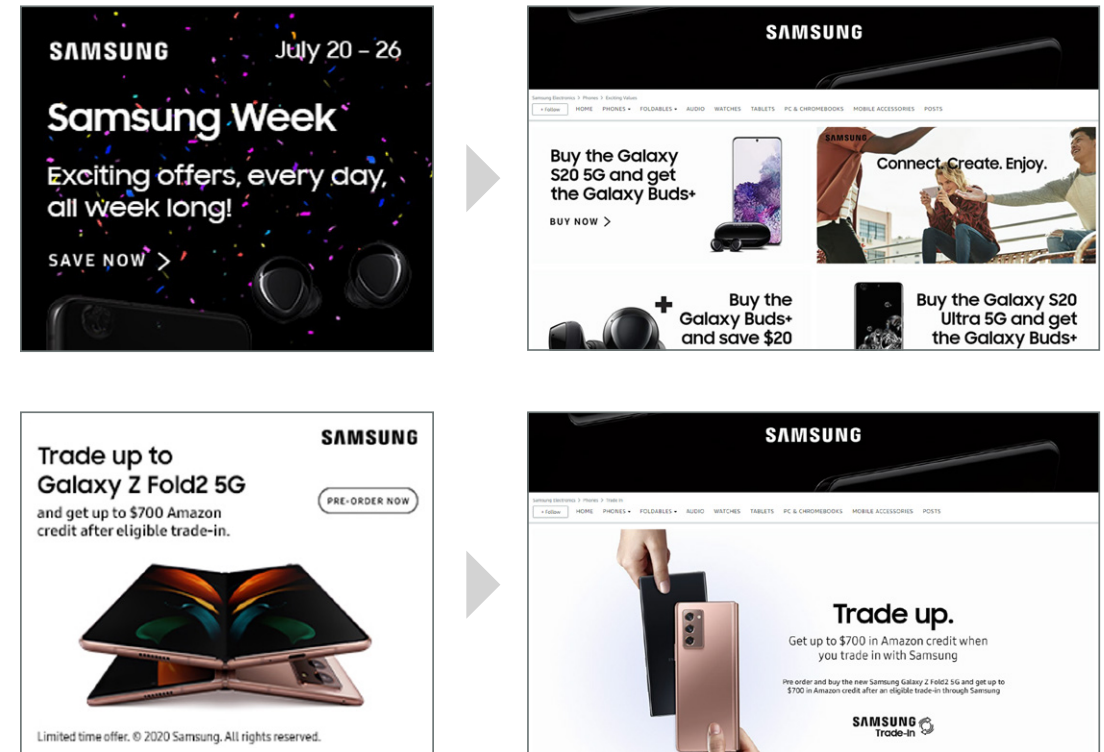
Here are a few ways select brands are taking advantage of Amazon's unique advertising features and characteristics.

### Samsung Directs Customers to Its Amazon Store Page

Many marketers within companies selling products on Amazon take advantage of “Amazon Stores” — an always-on, dedicated brand destination on Amazon. Brands can create their own free Amazon Store to provide a brand-centric experience for Amazon customers. These stores range from basic pages that catalog best-selling products sold through Amazon to more detailed pages that emulate a brand website, flush with navigation features, video and shoppable media.

Samsung takes full advantage of its Amazon Store by shepherding users there through a series of display ads placed on and off of Amazon through Amazon's ad network. Once there, customers can peruse category pages Samsung created on its store page, such as Back to School, Phones, Watches and more. These pages are filled with videos and shoppable media that feature and direct users to individual product pages. Samsung also ran display ads that sent users to its Trade In Amazon Store page, a special program where Amazon customers can trade in existing Samsung products in exchange for Amazon store credit (see Figure 5).

Figure 5: Samsung Directs Audiences to Its Amazon Store



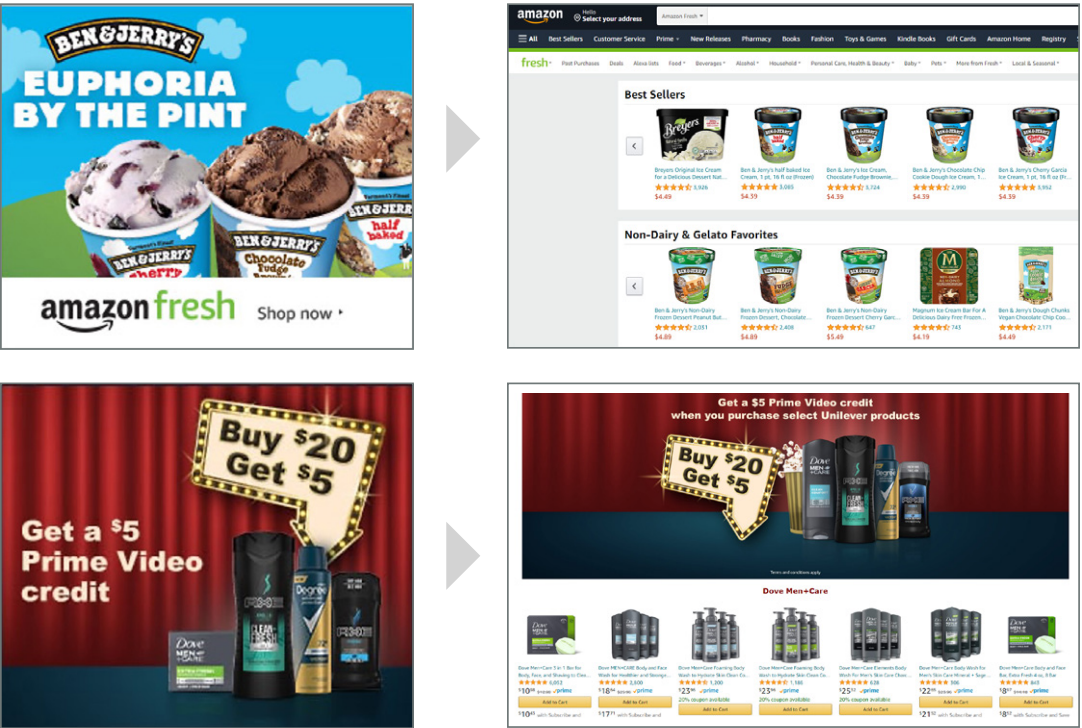
Source: Samsung, Amazon



Unilever Brands’ Display Ads Promote Cross-Selling on Amazon

Although many brands use display ads on Amazon to direct users to individual product pages, Amazon Store pages or other landing pages off Amazon, some brands take a slightly different approach. For example, display ads for Unilever’s individual ice cream brands (Ben & Jerry’s, Breyers and Talenti) take Amazon users to an Amazon Fresh search results page containing Unilever’s ice cream brand products. Unilever also created display ads that featured a special Amazon-specific promotion for Unilever-owned Dove, Axe and Degree care products. Its variations of these display ads directed users to a special deal page containing qualifying products (see Figure 6).

Figure 6: Unilever Brands Promote Cross-Selling Through Amazon Display Ads



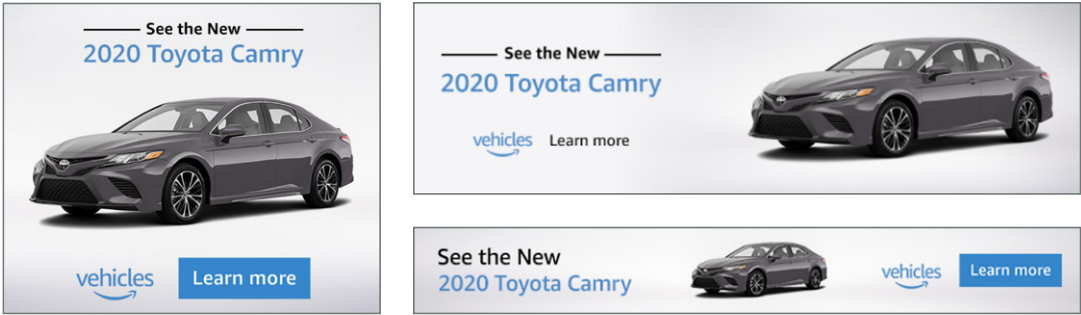
Unilever’s brand display ads direct Amazon users to pages containing multiple Unilever-specific brand products.

Source: Unilever

### Toyota Drives Amazon Customers to Amazon's Vehicles Community

Toyota, the top-ranked manufacturing and natural resources brand in our Digital IQ Advertising Benchmarks, exemplifies how marketers in companies that sell high-consideration products can advertise on Amazon's platform even if they don't directly sell products on Amazon. Toyota placed a series of display ads on Amazon's Vehicles community, a place where car shoppers can research car models through product-like pages flush with specs, customer reviews, pictures and more (see Figure 7). These ads directed users to specific Toyota model pages on Amazon's Vehicles community to drive brand awareness and consideration. Toyota also used Amazon's ad network to place ads on more established, industry-specific publishers like CarandDriver.com and Edmunds.com. (See "Amazon Vehicles" Represents a Unique Advertising Opportunity for Auto Brands.)

Figure 7: Toyota Advertises on Amazon's Vehicles Community



Toyota delivered three display ad variations for the 2020 Toyota Camry across Amazon's Vehicles community.

Source: Toyota

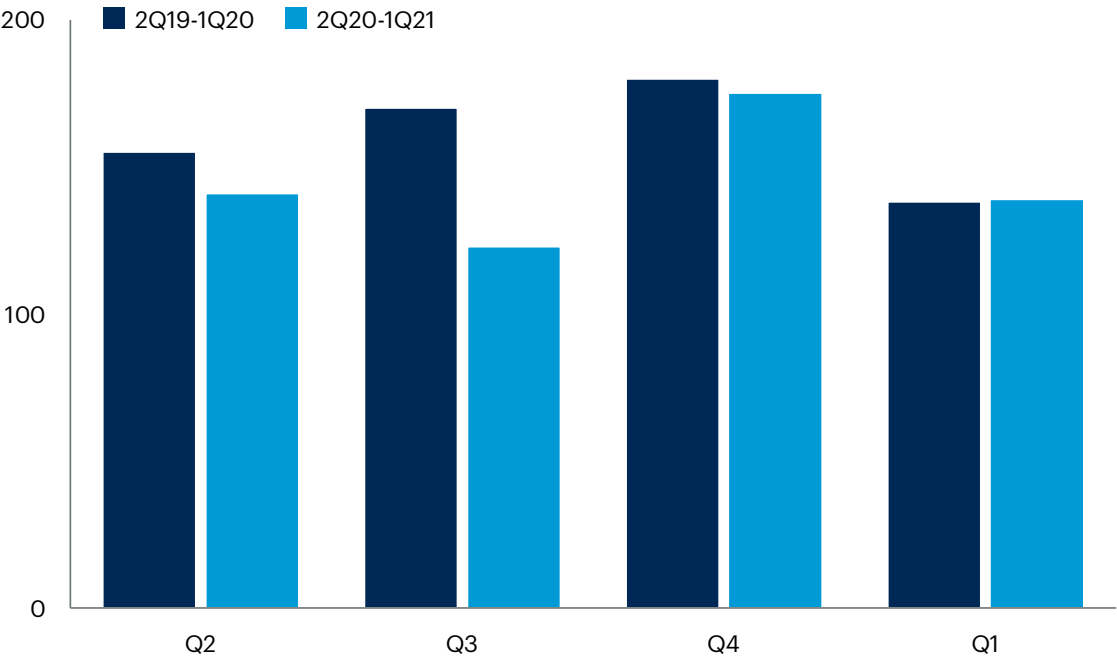
Facebook

Facebook continues to dominate the social media landscape as the second-most widely used social platform in the world (just behind YouTube). However, 2020 proved to be a tumultuous year for Facebook.

When looking at advertising impressions from brands on Facebook’s mobile app, impressions were down year over year for the first three quarters starting with 2Q20, while YouTube and Amazon prospered (see Figure 8). What started as a relatively light pullback in 2Q20 amid COVID-19-induced business closures crescendoed in 3Q20 when the “Stop Hate for Profit” Facebook advertising boycott persuaded major advertisers to pause their Facebook ad spend. (See Beyond Boycotts: Why and How Brands Can Steer Social Media Away From Poisonous Polarization.)

Figure 8: Facebook Mobile App Advertising Impressions Growth

Desktop and Mobile Web Advertising Impressions



n = 1,142 brands from 6 industries: consumer goods, financial services, healthcare, manufacturing & natural resources, retail and travel & hospitality

Source: Gartner analysis of Pathmatics data

Note: Facebook mobile app ad impressions include sponsored posts appearing in the News Feed; post types include link, photo, video, carousel, status, event, music and offer posts.

This pullback in ad spend didn't last long, however. The fourth quarter holiday season brought major advertisers back to Facebook, helping the social media giant arrest its decline in ad impressions and gain a slight uptick in the first quarter year-over-year. Facebook's ability to remain relevant to advertisers despite this turbulence and negative press demonstrates its continued value to digital marketing teams. However, advertising activity on Facebook will likely grow more slowly compared to historic rates as it increases ad prices and navigates the fallout of Apple's iOS 14.5 update, which will impact marketers' ability to advertise on third-party iOS apps through the Facebook Audience Network.

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**Facebook's ad impressions from large advertisers staggered during this period — an overwhelming share of its ad revenue comes from small, locally-owned businesses. With eight million advertisers, Facebook's total ad revenue continues to surge despite the local pandemic and recent boycott.**

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## Brand Spotlights

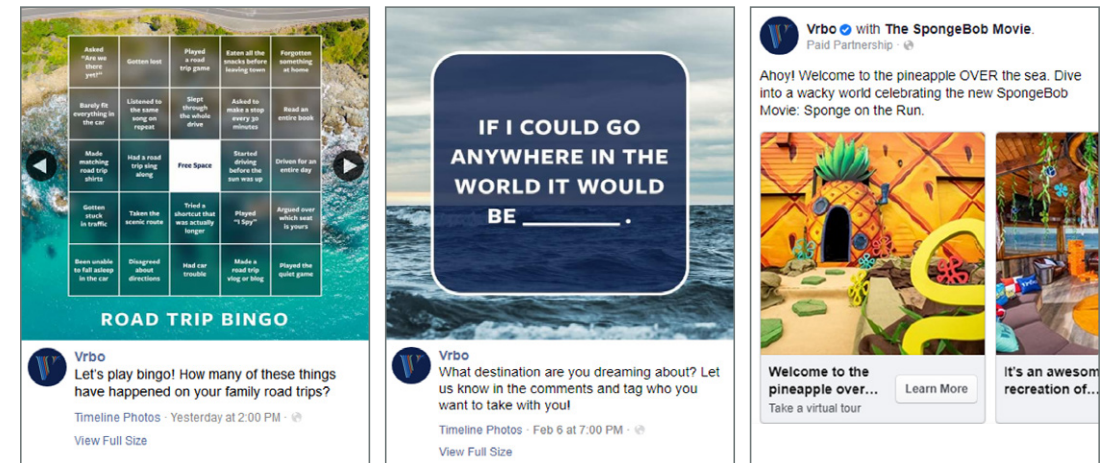
Here are a few ways select brands are taking advantage of Facebook's unique advertising features and characteristics.

### Vrbo Brings Fun and Amusement to Facebook Users' Feeds

Travel and hospitality brands such as Vrbo were significantly impacted by the global pandemic. With travel restrictions and lockdown orders in place, Vrbo had to get creative with its messaging. Vrbo still focused the bulk of its efforts on vacation rentals — albeit with a stronger focus on “staycations” and road trip worthy destinations. However, the company kept its homebound audiences engaged through a series of promoted Facebook posts that delivered amusement and sparked engagement among users. This strategy speaks to consumers' desire for entertaining brand content. According to Gartner's 2021 Consumer Advertising and Content Marketing Survey, 37% of consumers who said they follow brands on social media enjoy seeing branded social media content that's entertaining.

Vrbo drove customer engagement through Facebook ads that invited users to participate in a fun game of road trip bingo and spurred users to comment on posts with answers to questions related to personal aspirations, such as their dream destination. Vrbo also partnered with Paramount Pictures to promote “The SpongeBob Movie: Sponge on the Run” through Facebook carousel posts that brought Facebook users to an actual rental listing for a “pineapple over the sea.” Customers could virtually tour this three-story real-life replica of the fictional Sponge Bob Square Pants universe located in Huntington Beach, California (see Figure 9).

Figure 9: Vrbo Brings Fun and Amusement to Facebook Users' Feeds

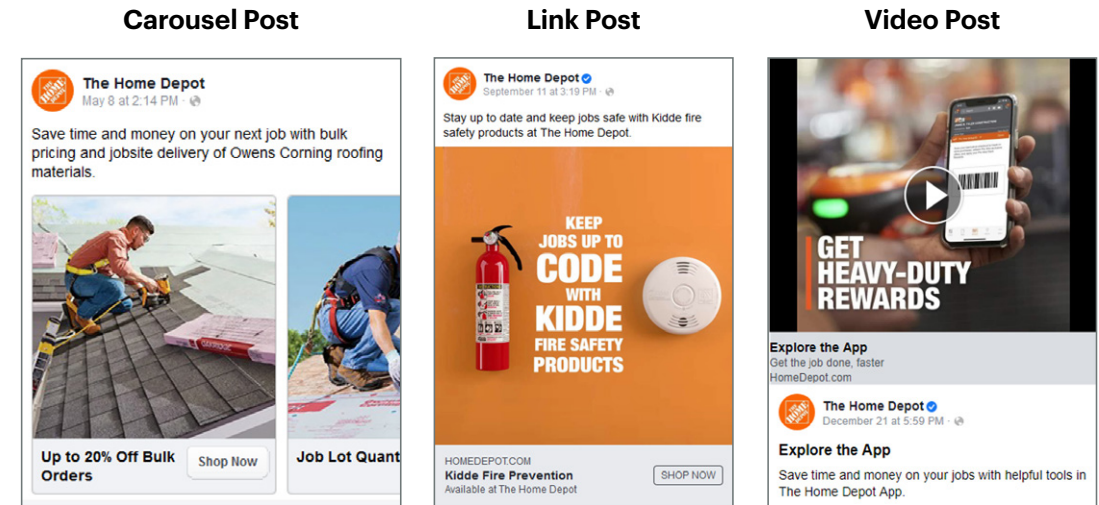


Source: Vrbo, Facebook

## The Home Depot Targets Facebook's Small Business Owners

According to Facebook, there are over 90 million small businesses on the platform, presenting a unique opportunity for B2B companies wishing to target small business owners using Facebook's trove of first-party data. The Home Depot provides a good example of one brand doing just that. While the home improvement retailer geared most of its Facebook ads toward homeowners — especially homeowners looking for DIY projects during the pandemic — it also served up a host of ads targeted to contractors and trade professionals. The Home Depot used these ads to promote its jobsite delivery services, bulk material pricing, mobile app and more using a variety of Facebook ad types that directed users to the company's web properties (see Figure 10).

Figure 10: The Home Depot Targets Small Business Owners With a Variety of Facebook Ads

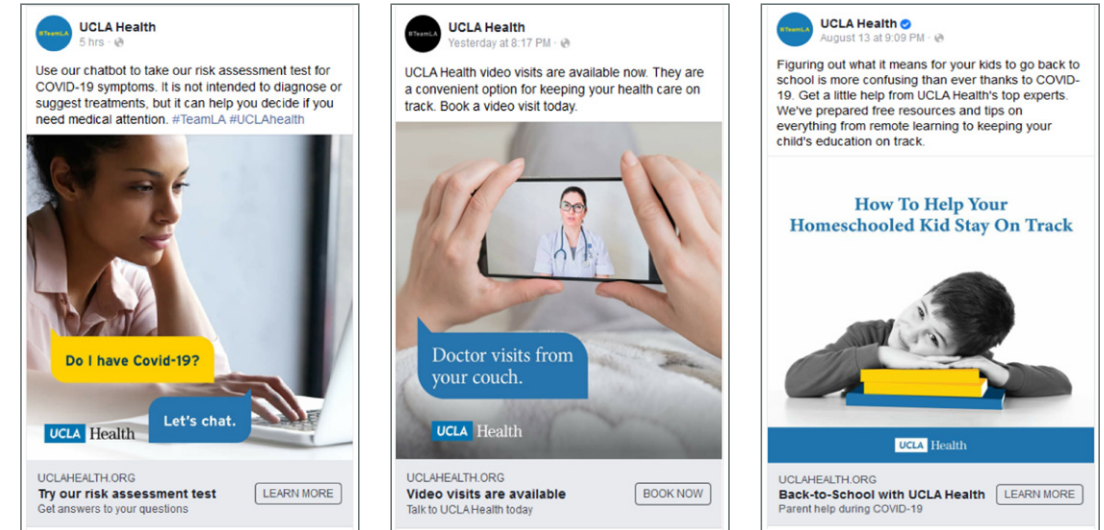


Source: Home Depot, Facebook

## UCLA Health Promotes Educational Content and Digital Patient Experiences

UCLA Health, the top-ranked healthcare brand in our Digital IQ Advertising Benchmarks, leveraged Facebook as a means to maximize consumers' elevated interest in healthcare with educational content and digital patient experiences. Throughout the course of the pandemic, UCLA Health provided topical, relevant messages to consumers on topics such as vaccine development, COVID-19 testing and telehealth, establishing itself as a knowledge center in addition to being a care center. It leveraged Facebook's promoted link posts to point audiences to UCLA Health's virtual care experiences, such as its COVID-19 risk assessment test, telehealth services and thought leadership related to kids' return to school in the U.S. (see Figure 11). UCLA Health was also the Index leader for Facebook advertising impressions in Gartner's Digital IQ Index: Hospitals and Health Systems 2021, serving 2.5 times more impressions in 2020 than the Index average.

Figure 11: UCLA Health Maximizes Consumers' Elevated Interest in Healthcare



Source: UCLA Health, Facebook

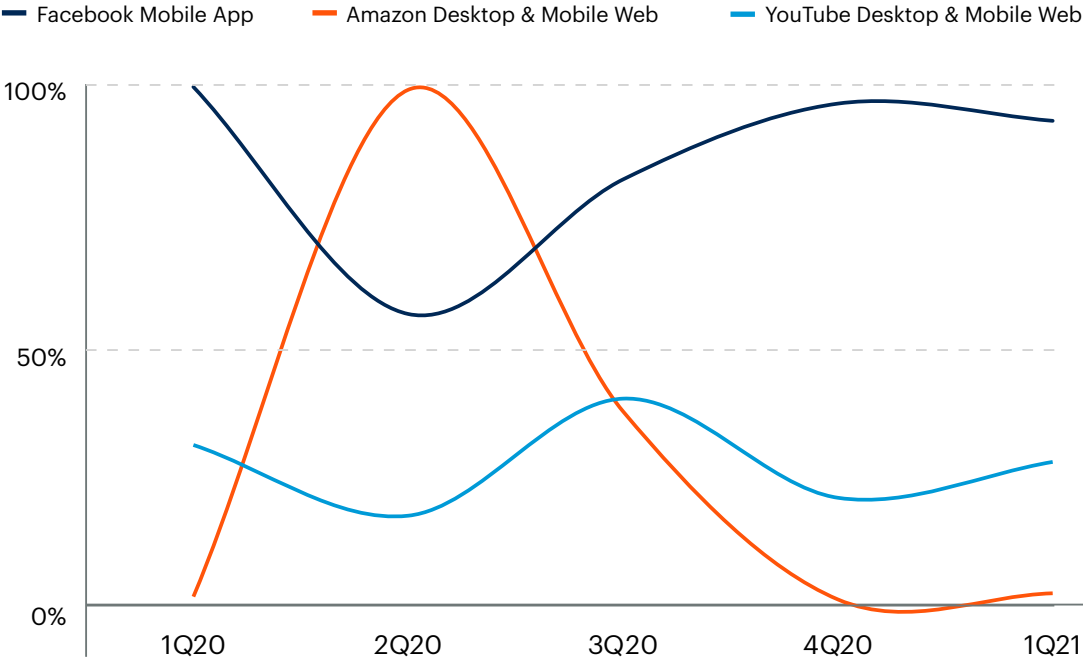
### Top Brands Remain Agile Across the Media Mix

The past 18 months tested the resiliency of marketing teams as they were forced to adapt to new market realities with diminished budgets. Resilient brands were those that remained agile — not just in their channel and program mix, but also in their media mix. Agile marketers quickly tested and adapted their ad campaigns and publisher placements as consumer behaviors shifted and marketers prepared for a cookie-less future. (See The State of Marketing Budgets in 2021: Insights From Gartner’s Annual CMO Spend Survey.)

Toyota, for example, exercised media mix agility as it nimbly shifted spend across walled gardens between 2Q20 and 1Q21. The automotive company strategically diverted some of its Facebook investments to Amazon in the second quarter of 2020. It placed ads on Amazon’s Vehicles community as part of a push to market sport utility vehicles in preparation for summer, then shifted spend back to Facebook for its Toyotathon event in the fourth quarter. Meanwhile, Toyota continued to invest in YouTube to varying degrees, halving impressions on YouTube in 2Q while testing ads on Amazon, then pulling back again in 4Q as it focused campaigns back on Facebook (see Figure 12). See Digital IQ: Advertising Benchmarks for 2021.

Figure 12: Toyota Pulses Spend in Walled Gardens

### Advertising Impressions Indexed Against Maximum



n = 2.68B (1Q20) max impressions on Facebook mobile app; n = 726M (Amazon 2Q20) on Amazon, YouTube desktop and mobile web

Source: Gartner analysis of Pathmatics data

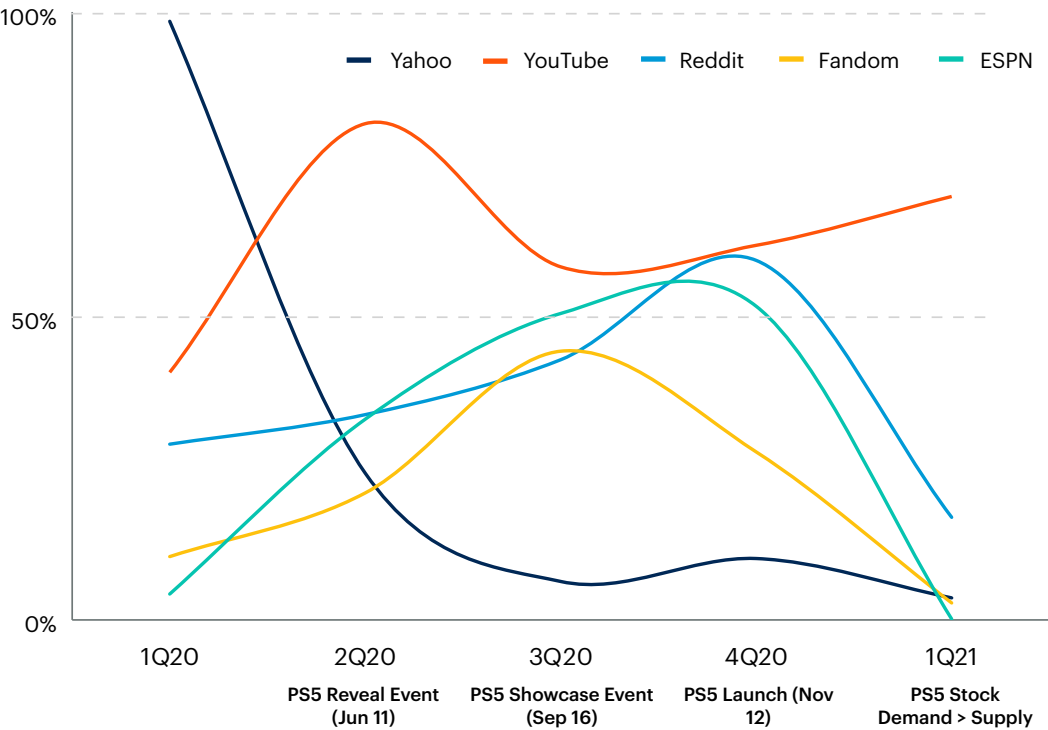
Note: Facebook mobile app ad impressions include sponsored posts appearing in the News Feed; post types include link, photo, video, carousel, status, event, music and offer posts.



PlayStation provides another example of media mix agility as the top-ranked brand overall in our Digital IQ Advertising Benchmarks. In the run up and launch of its PS5 console, PlayStation focused ad placements across an ecosystem of publishers that its target audience was likely to frequent. The console maker moved away from Yahoo, where it mainly gathered indirect impressions, to publishers such as YouTube, Reddit, Fandom and ESPN (see Figure 13). This mix of walled gardens (YouTube), direct (ESPN) and indirect (Reddit and Fandom) publishers more closely aligns with PlayStation's target demographic of young gamers. It also helped PlayStation avoid competing directly with Microsoft's Xbox, which launched its new console in the same period.

Figure 13: PlayStation's Agile Publisher Mix

Desktop and Mobile Web Advertising Impressions



Source: Gartner analysis of Pathmatics data

Note: Advertising impressions include desktop static, desktop video, mobile web static and mobile web YouTube pre-roll video; excludes mobile apps; excludes nonstandard IAB sizes, custom skins and site takeovers; mobile web excludes most highly targeted and retargeted ads, ads behind a log-in and interstitials.

## Experiment Within Emerging Walled Gardens

The period between 2Q20 and 1Q21 also saw some brands increasing advertising impressions within smaller — yet growing — walled gardens. Amazon-owned Twitch, for example, provides fertile marketing ground for advertisers wishing to tap into the live streaming platform's core demographic of young gamers (see [Why Marketing on Twitch Is Right for Your Brand](#)). With Amazon having incorporated Twitch into its ad platform, marketers can serve targeted ads to Twitch users using Amazon's unique first-party customer insights.

Taco Bell took advantage of Twitch's significant growth during the pandemic and started advertising on the platform in November and December 2020. While Twitch accounted for 22% of Taco Bell's desktop display ads during those two months, it captured 43% of desktop display ad traffic to Taco Bell's website. The quick service restaurant appealed to Twitch's younger, often harder to reach, audience by focusing video campaigns on limited-time products, like its Cheddar Chalupa, joking that customers will be upset when it's eventually removed from its menu.

## Prepare for a Future of Data Clean Rooms

Although walled gardens offer marketers a convenient and privacy-compliant outlet to run highly targeted ads, marketers lack transparency and specificity into how their campaigns perform within — and across — these platforms. One way walled gardens are attempting to meet marketers' needs for more advanced analysis capabilities is by building out data clean rooms.

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### **Gartner defines a data clean room as a secure, isolated platform that links anonymized marketing and advertising data from multiple parties.**

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Data clean rooms serve as a crack in the wall that marketers can peer through. They contain detailed advertising impression data, but don't store personally-identifiable information. Marketers can analyze advertising performance and import their own first-party data to build custom audiences without risking data privacy violations.

However, data clean rooms are still a relatively nascent technology; Gartner predicts that it will likely be five to 10 years before data clean rooms become established in the marketplace (see Hype Cycle for Digital Advertising, 2021). Of the walled gardens, Google is the only platform to have a generally-available data clean room (dubbed "Ads Data Hub"). However, Amazon announced its own data clean room that is in beta testing ("Amazon Marketing Cloud") and likely to be generally available soon. Outside of the walled gardens, ad agencies such as IPG's Acxiom, Publicis Groupe's Epsilon and dentsu's Merkle offer their own channel-agnostic solutions.

Marketers should plan for the future of data clean rooms today by defining the use cases and goals that can be met by leveraging data clean rooms within and outside of walled gardens. They should also consider whether current and future investments within a particular walled garden warrant the additional investments and time commitments necessary to harness that walled garden's data clean room — assuming one exists at all. Marketers in companies that spend over \$1 billion in advertising a year should make data clean room investments today. Those with less than \$100 million in advertising should seek opportunities to utilize data clean rooms as self-service point solutions (see How to Plan for Data Clean Rooms).

## Glossary Terms

### Indirect ad buying

When digital inventory is bought programmatically from a publisher site with one or more of the following ad tech software or services involved in the transaction: DSPs, SSPs, ad networks, trading desks and ad exchanges.

### Direct ad buying

When digital inventory is bought directly from a publisher site with no involvement from the above ad tech mediators. Direct buys can be made programmatically.

## Methodology

**Gartner's Digital IQ: Advertising Benchmarks for 2021** measures and scores the digital advertising performance of 1,142 brands across six industries and sub-industries:

### Consumer products

- CPG
- Food and beverages
- Personal care

### Financial services

- Insurance U.S.
- Retail banking U.S.
- Wealth and asset management U.S.

### Healthcare

- Hospitals and health systems
- Pharma RX

### Manufacturing and natural resources

- Aerospace and defense
- Auto
- Industries and chemicals

### Retail

- Luxury
- Monobrand retail
- Multiline retail

### Travel and hospitality



**Table 1 summarizes digital advertising impressions data from Pathmatics used in analysis:**

Device/Platform	Included Ad Formats		Excluded Ad Formats
<b>Desktop (Panel and Crawler-Based)</b>	<ul style="list-style-type: none"><li>• Video and static ads, including images and GIFs</li><li>• YouTube Discovery, preroll, midroll and postroll video</li></ul>	<ul style="list-style-type: none"><li>• Click-to-play video</li><li>• Common native ad formats</li><li>• Ads behind logins (e.g., WSJ, Hulu)</li></ul>	<ul style="list-style-type: none"><li>• Social ads (e.g., Facebook, Instagram, Twitter)</li><li>• Nonstandard IAB sizes</li><li>• Custom skins and site takeovers</li></ul>
<b>Facebook Mobile App (Panel-Based)</b>	<ul style="list-style-type: none"><li>• Sponsored posts appearing in the news feed</li></ul>	<ul style="list-style-type: none"><li>• Post types include:<ul style="list-style-type: none"><li>• Link</li><li>• Photo</li><li>• Video</li><li>• Carousel</li><li>• Status</li><li>• Event</li><li>• Offer</li><li>• Music</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Ads served in mobile browser experience</li></ul>
<b>Mobile Web (Crawler-Based)</b>	<ul style="list-style-type: none"><li>• Static ads, including images and GIFs</li><li>• YouTube preroll video</li><li>• Common native ad formats</li></ul>		<ul style="list-style-type: none"><li>• Ads served in mobile apps</li><li>• Mobile web video ads (except for YouTube preroll ads)</li><li>• Retargeted and highly targeted ads</li><li>• Ads behind logins</li><li>• Interstitials</li><li>• Social ads (e.g., Facebook, Instagram, Twitter)</li><li>• Nonstandard IAB sizes</li><li>• Custom skins and site takeovers</li></ul>

Source: Pathmatics

# Actionable, objective insight

Explore these additional complimentary resources and tools for marketing leaders:

## Research



### CMO Spend Survey

CMOs must reprioritize channels, programs and resources to remain competitive and efficient. Learn more with this research.

[Download Research](#)

## Research



### Digital IQ: Advertising benchmarks for 2021

Benchmark your digital advertising performance against B2B and B2C brands across six industries.

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## On-demand webinar



### Will Your Advertising Strategy Survive Privacy and Cookie Changes?

Learn about the impact of Apple's and Google's privacy and identity updates and build a resilient advertising strategy.

[Watch Now](#)

## Content Hub



### Digital Marketing Leader

Are your digital marketing objectives aligned to business goals? Learn the goals, priorities and tactics of leading peers to help you benchmark your initiatives.

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