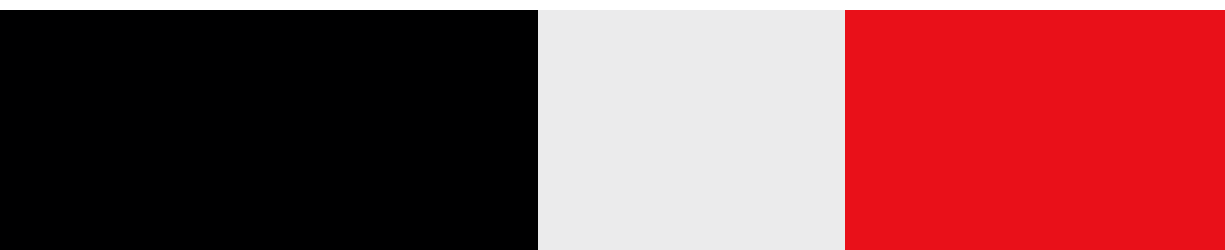
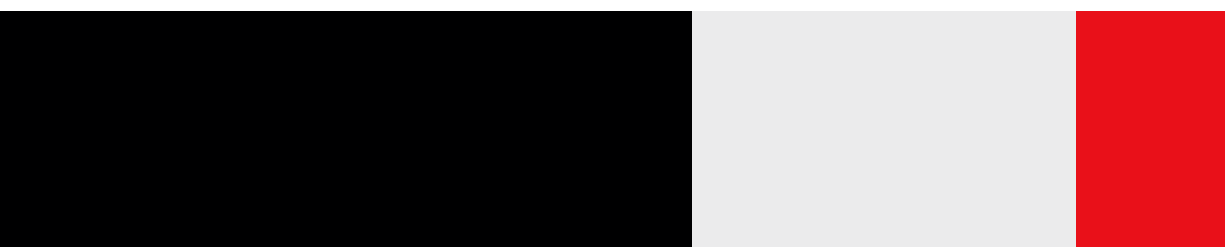


Programmatic Advertising Forecast and Ad Tech Trends H1 2025

Curation and Consolidation Take the Market by Storm

Programmatic advertisers are navigating a market on the brink of big change. As they await word from the US courts on the fate of Google's ad tech business, Google prepares to hand consumers the reins on cookie deprecation. Meanwhile, curation and consolidation are already reshaping programmatic supply paths. This EMARKETER analyst report will help you understand the trends driving programmatic budget allocations, and how ad tech vendors are responding.



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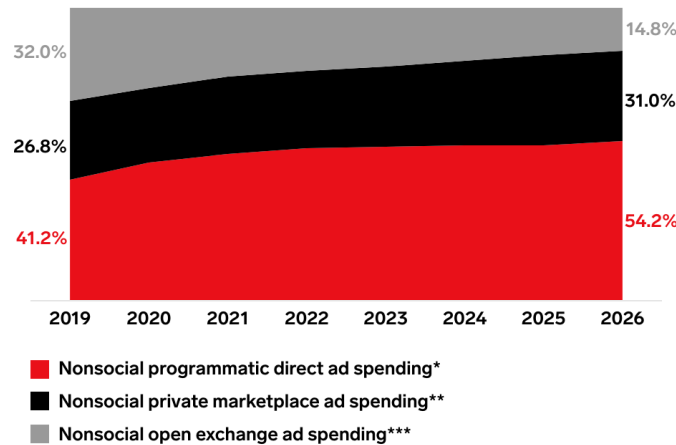
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Programmatic Advertising Forecast and Ad Tech Trends H1 2025

- **Retail media networks (RMNs) are expanding their influence in the programmatic display market.** Retailers' first-party data advantages will attract over a quarter of new programmatic display ad dollars between now and 2026. Amazon licensing its ad tech to other retailers will accelerate this trend.
- **Connected TV (CTV) is gaining share of programmatic display budgets.** Although mobile is still on top, CTV will widen its lead over desktop and laptop computers. Programmatic pathways will be responsible for all growth in the CTV market through 2026, the end of our forecast period.
- **Closed and private ecosystems are still on the rise.** Programmatic direct is the most popular transaction method regardless of whether programmatic spending with social networks is included in the equation. Advertisers are also prioritizing private marketplaces (PMPs). In 2025, PMPs will see nearly \$2 for every \$1 spent on the open exchange.
- **Curation is receiving more attention—and scrutiny.** The trend has been gaining steam for years, but hype is mounting as sell-side ad tech players leverage curation to resist disintermediation. Done transparently, it can surface valuable impressions to buyers. But curated inventory is not inherently clean supply.
- **This year will be huge for ad tech consolidation.** Mergers and acquisitions (M&A) activity picked up throughout 2024. Deal volume will likely accelerate as 2025 unfolds, with favorable regulatory conditions fueling transactions around data activation and growth channels like CTV and retail media.

Programmatic Direct Is Gaining Share of Nonsocial Programmatic Market Thanks to RMNs and CTV
 % of US nonsocial programmatic display ad spending, by transaction method, 2019-2026



Note: excludes ads on social networks like Facebook and X; includes advertising that appears on desktop and laptop computers, mobile phones, tablets, and other internet-connected devices; includes programmatic ads that are transacted in real time, at the impression level; *includes all programmatic ads that are transacted as blocks of inventory using a non-auction-based approach via an API; **includes ads transacted through an invitation-only RTB auction where one publisher or a select group of publishers invites a select number of buyers to bid on its inventory; ***includes ads transacted through a public RTB auction in which any buyer or seller can participate, also known as open auction or open marketplace;
 Source: EMARKETER Forecast, Jan 2025

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The programmatic market will grow despite privacy whiplash and regulatory uncertainty

Cookies are dead. Long live cookies. Industry priorities have shifted now that third-party cookies have received a stay of execution from Chrome. But cookies will still be less widely available in the near future. And between privacy laws and policy changes from other browsers and operating systems, signal loss still looms large.

For more on Google's change of plans regarding cookie deprecation, read our August 2024 report, "[Chrome's New Path for Privacy](#)."

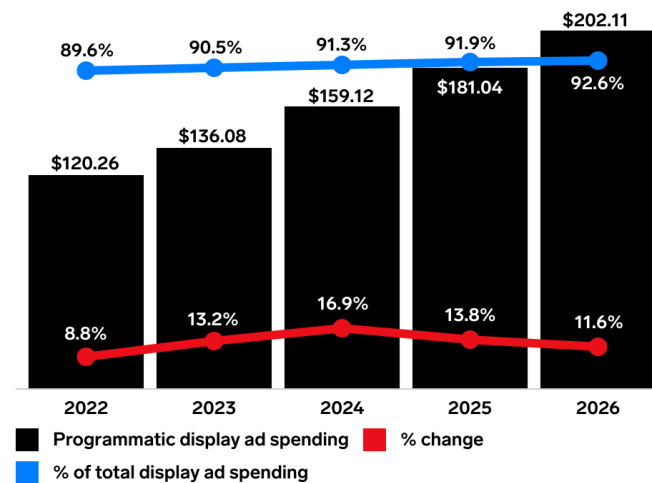
Disruption is imminent for programmatic. The market teeters on the brink of several seismic shifts around identity and audience data and a landmark antitrust ruling that could energize an already hot M&A streak. Despite it all, programmatic ad spending will continue to grow at a healthy clip, outpacing the overall display market.

Programmatic advertisers are on track to pass \$200 billion in spending by 2026

Most display advertising is transacted or fulfilled via automation, falling under our definition of programmatic. Despite decelerating this year and next, programmatic display ad spending growth will remain in the double digits, sustaining a market weighed down by sluggish growth in nonprogrammatic display.

Programmatic Advertisers Are on Track to Surpass \$200 Billion in Spending Next Year

billions in US programmatic display ad spending, % change, and % of total display ad spending, 2022-2026



Note: digital display ads transacted or fulfilled via automation, including everything from publisher-erected APIs to more standardized RTB technology; includes native ads and ads on social networks like Facebook and X; includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets, and other internet-connected devices
 Source: EMARKETER Forecast, Jan 2025

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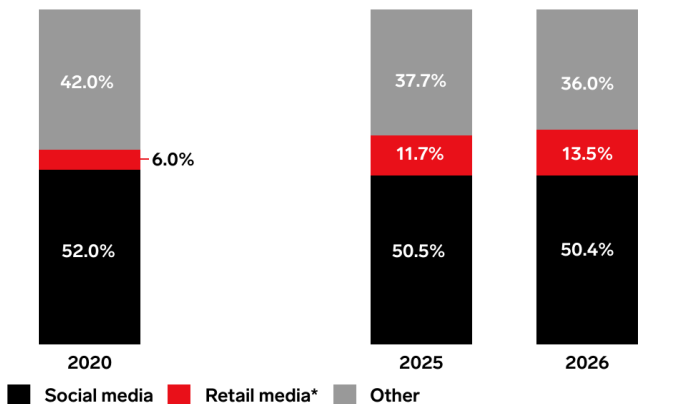


Retail media will continue gaining share of programmatic ad spending at the expense of social networks—and everyone else

Retail media programmatic display ad spending will grow more than twice as fast as total programmatic display ad spending in 2025. By the end of the year, RMNs will have nearly doubled their share of programmatic display ad spending since 2020. Social media networks, which accounted for over half of the programmatic display market in 2020, have mostly held their own. But everyone else is losing share.

Retail Media Programmatic Ad Spending Is Growing Faster Than Other Market Segments

% of total US programmatic digital display ad spending, by media, 2020-2026



Note: digital display ads transacted or fulfilled via automation, including everything from publisher-erected APIs to more standardized RTB technology; includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets, and other internet-connected devices; numbers may not add up to 100% due to rounding; *includes digital advertising that appears on websites or apps that are primarily engaged in retail ecommerce or is bought through a retailer's media network or demand-side platform (DSP); includes ads purchased through retail media networks that may not appear on ecommerce sites or apps
Source: EMARKETER Forecast, Jan 2025

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It's worth noting that, by dollar volume, programmatic ad spending is growing across all media categories. But RMNs will account for over a quarter of new programmatic ad dollars between now and 2026, and their market share must come from somewhere.

Retailers' first-party data is winning programmatic budgets. Like social and streaming platforms, RMNs benefit from large logged-in audiences—which become increasingly valuable as third-party cookies and other legacy tracking tech blink out. Retail media has the added advantage of first-party consumer purchase data, which powers segmentation and closed-loop attribution.

Most retail media spending will still go to search—for now. In 2025, only about a third (36.4%) of ad spending with RMNs will go to display formats, with search making up the balance, per our forecast. As retailers enhance their display offerings, display will make up a more substantial portion of retail media ad spending, and retail media's share of programmatic display will increase accordingly.

Amazon is ready to help other retailers sell display ads programmatically. Its recently [launched Amazon Retail Ad Service](#) licenses its ad tech to competitors and gives them access to demand from Amazon advertisers. The move will reinforce Amazon's dominant position in retail media and broaden its influence in programmatic. Amazon currently takes in over two-thirds of retail media programmatic display ad spending.

Amazon is also investing in its demand-side platform (DSP) and offsite impression supply as it courts non-endemic programmatic advertisers. Amazon DSP is already the second-most-popular buy-side ad tech platform among retail media buyers, trailing Google Ads by only a few percentage points in our August 2024 survey. It's likely less widely used among nonretail media programmatic advertisers. Amazon's still got work to do to bring the strengths it has inside its garden walls—like behavior-based targeting and effective attribution—to the open web. But it's made its ambitions clear: "Eventually, we want [our DSP] to be the largest AI-driven buying platform for all digital marketers," Kelly MacLean, vice president of Amazon Ads, told Digiday.

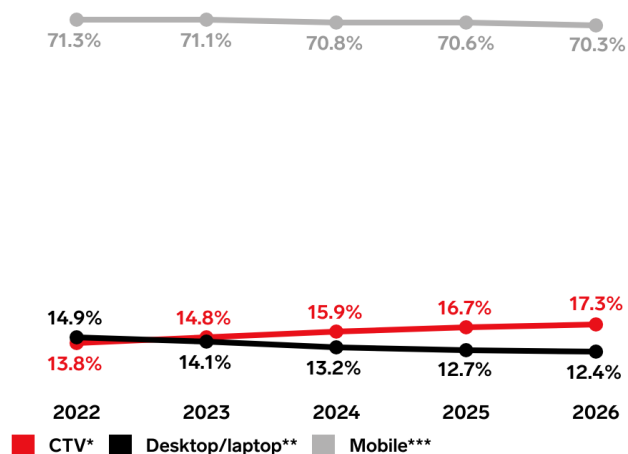
Although mobile dominates by dollar volume, CTV is growing more quickly

Social media props up mobile's share of programmatic display ad spending, which has hovered around 70% since 2018. Without social networks, mobile accounts for under half (41.7%) of programmatic display budgets.

Despite decelerating growth, programmatic CTV is increasing its share lead over desktop/laptop. This year, over 90% of CTV display ad dollars will transact programmatically. Such automated pathways will be responsible for all growth in the CTV market through 2026, the end of our forecast period. Programmatic will continue to be the animating force behind innovation in CTV as streamers' ad businesses mature and networks like [Comcast](#) build products catered to smaller advertisers historically shut out from TV advertising due to its high costs.

Programmatic Connected TV (CTV) Continues to Widen Its Share Lead Over Desktop/Laptop

% of US programmatic digital display ad spending, by device, 2022-2026

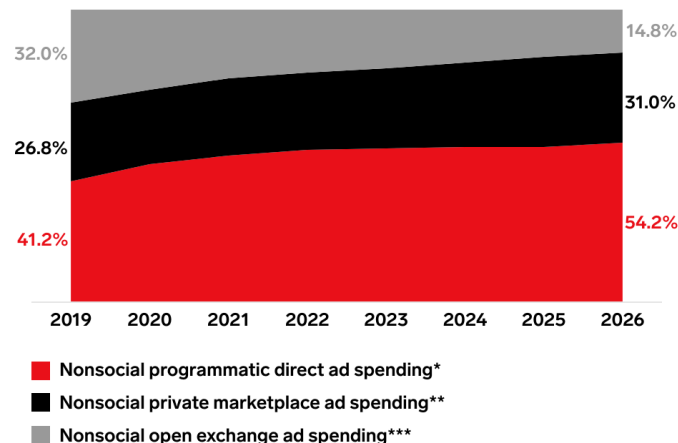


Note: digital display ads transacted or fulfilled via automation, including everything from publisher-erected APIs to more standardized RTB technology; includes native ads and ads on social networks like Facebook and X; numbers may not add up to 100% due to rounding; *includes advertising that appears on connected TV devices; excludes network-sold inventory from traditional linear TV and addressable TV advertising; **includes advertising that appears on desktop and laptop computers and other nonmobile internet-connected devices; data after 2016 excludes connected TV devices; ***includes ad spending on tablets
Source: EMARKETER Forecast, Jan 2025

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Programmatic Direct Is Gaining Share of Nonsocial Programmatic Market Thanks to RMNs and CTV

% of US nonsocial programmatic display ad spending, by transaction method, 2019-2026



Note: excludes ads on social networks like Facebook and X; includes advertising that appears on desktop and laptop computers, mobile phones, tablets, and other internet-connected devices; includes programmatic ads that are transacted in real time, at the impression level; *includes all programmatic ads that are transacted as blocks of inventory using a non-auction-based approach via an API; **includes ads transacted through an invitation-only RTB auction where one publisher or a select group of publishers invites a select number of buyers to bid on its inventory; ***includes ads transacted through a public RTB auction in which any buyer or seller can participate, also known as open auction or open marketplace;
Source: EMARKETER Forecast, Jan 2025

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PMPs and programmatic direct continue to attract more new programmatic budgets

Programmatic direct is the most popular transaction method, representing over three-quarters of the programmatic display market. Programmatic direct includes the vast majority of social media display ads, which are directly purchased at a fixed price with a particular platform and served programmatically. By removing social networks from the equation, it's easier to see the boost RMNs and streaming platforms have given programmatic direct.

But PMPs have also gained share of programmatic budgets. In 2020, PMPs and the open exchange each accounted for about half of nonsocial RTB ad spending. This year, programmatic advertisers will spend nearly twice as much on PMPs as they will on the open exchange. Advertisers prioritize PMPs for a variety of reasons, including ease of first-party data activation, perceived or actual supply chain transparency, and access to premium inventory.

Accessing premium or otherwise specific inventory is the fuel behind curation. Although the term caught on as a buzzword in the latter half of 2024, curation isn't new. It's just receiving more attention—and scrutiny—as sell-side ad tech players use it to resist disintermediation.

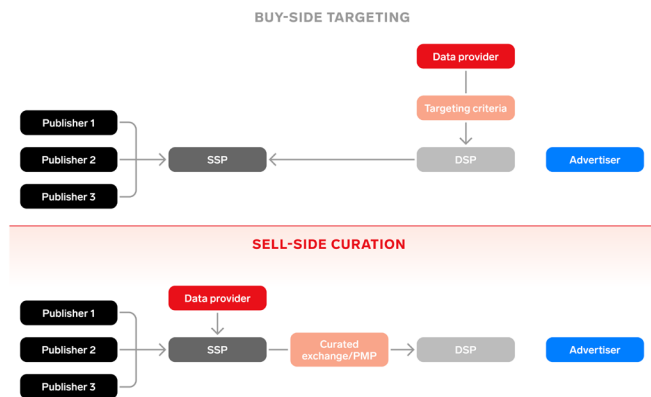
Curation has taken on new importance as sell-side ad tech fights for relevance

Broadly, curation routes ad dollars toward a smaller pool of auctioned ad inventory with a unifying characteristic or set of characteristics. Curators can filter and bundle inventory based on audience or publisher attributes, type of ad unit (e.g., premium video, interactive media, high attention), contextual information, or any combination thereof.

Curation has been on the uptick for years. The Trade Desk (TTD) made waves with its Sellers and Publishers 500+ Marketplace last year. The solution, essentially a large inclusion list, narrows the open web down to a subset of websites and apps that TTD regularly vets and updates. In 2022, GroupM launched Premium Marketplace to provide clients with direct access to high-quality inventory. The trail of curation-related products dates back to before 2021, when PMP ad spending growth started outpacing that of open exchange and even programmatic direct, per our forecast.

Now, hype is mounting as sell-side ad tech capitalizes on the trend. When curation happens on the sell side of the supply chain, data providers enrich and package ad inventory before the bid request reaches the DSP. It reduces the number of distribution points for the data provider, thus minimizing technical integrations and data security weak points.

Sell-Side Curation Changes Where Data Is Applied in the Supply Chain



Source: Azerion as cited in Ad Tech Explained, Nov 2024; EMARKETER Analysis, Feb 2025

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Sell-side curation can also expand reach for advertisers. Buy-side targeting can result in overserving to small audiences and bid duplication, which can raise prices. Curated marketplaces solve for those challenges by identifying and surfacing impressions from overlooked, but still valuable, inventory sources.

But sell-side curation doesn't always complement buy-side targeting. When PMPs aren't delivering, the first troubleshooting tactic is to confirm whether the buyer has targeting turned off. Targeting often cancels out the scale advantages of PMPs.

Buyers that employ curation indiscriminately won't realize its benefits

Beyond performance benefits, advertisers are interested in curation as a means of [avoiding made-for-advertising \(MFA\) inventory](#) or simplifying the supply chain, per Brian Binder, senior innovation and growth director for TV, audio, and display at Tinuiti. In other words, some buyers are using curation as a supply path optimization (SPO) tactic.

How Is Sell-Side Curation Different From Other Related Trends?

Sell-side curation

Data providers layer data onto ad inventory and/or package it based on a unifying characteristic (e.g., audience, ad unit type, contextual information, high attention).

Traffic shaping

Demand-side platform (DSP) servers can handle only a certain number of queries per second. Therefore, they only "listen" to the queries that they think will perform. Publishers and supply-side platforms (SSPs) respond by sending DSPs more of what they buy and less of what they don't.



Supply path optimization (SPO)

Players across the ecosystem simplify the programmatic supply chain by cutting out unnecessary intermediaries and minimizing redundancies. SPO is driven by several concurrent trends, including reduction of ad tech fees, sustainability, privacy compliance, and inventory quality assurance.

Source: EMARKETER Analysis, Feb 2025

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By its nature, SPO disintermediates unnecessary or underperforming middlemen. Indeed, done transparently, curation can help facilitate buyers' SPO efforts by reducing hops in the supply chain.

But plenty of sell-side curation happens without transparency to buyers—or publishers—which impedes SPO. “There’s a really murky world of curation which has effectively flooded the market with PMPs but isn’t actually providing more direct pathways,” said Joe Root, CEO and co-founder of Permutive. Instead, the programmatic market is becoming more opaque, with buyers left in the dark as to whether higher take rates are justified.

And not all PMPs will positively influence performance. According to Drew Stein, CEO and co-founder of Audigent, a PMP requires three key ingredients to drive better campaign outcomes: unique data, deep technical integration with pipes into scaled inventory sources, and robust optimization capabilities.

Curation will drive ad tech partnerships and acquisitions in 2025

2024 closed with a curation-related acquisition. Experian, a giant in the data and identity space, bought data management platform and curation vendor Audigent in December. As excitement around curation extends into 2025, more ad tech players will snatch up curation specialists or build their own curation solutions by striking partnerships with data vendors and supply-side platforms (SSPs).

Sell-side curation is a threat to DSPs. “It’s pulling the decision engine away from them,” said Scott Messer, principal and founder at publisher consultancy Messer Media. “And the power dynamic is such that they’re losing their budget control, which means they’re also losing their margin.”

But DSPs are fighting back. In January 2025 alone, two major buy-side ad tech players made moves to encourage buyers to rely on their solutions:

- Yahoo’s DSP allied with Jounce Media, Peer39, and Scope3 to procure data on the supply chain, contextual signals, and carbon emissions, respectively. Those partnerships will power its new curation solution.
- TTD announced plans to [acquire Sincera](#), a metadata and media telemetry startup. Although TTD denies that the rise of sell-side curation played a meaningful role in its acquisition strategy, having access to Sincera’s supply-side intel will enhance its bid decisioning.

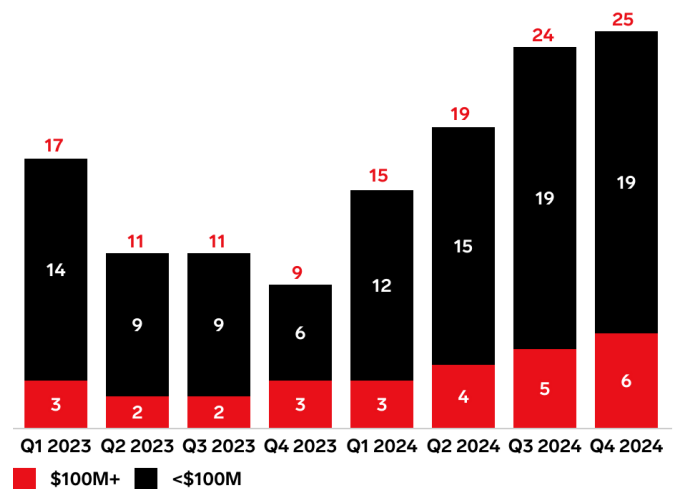
Ad tech consolidation is finally here

M&A gained momentum in H2 2024

Ad tech M&A increased by 73% YoY in 2024, according to data from Luma Partners. After accelerating over the course of the year, deal volume in Q4 2024 was the highest it’s been since the record-breaking Q4 2021, when the sector saw 28 transactions.

Ad Tech Companies Picked Up the Pace on M&A Over the Course of 2024

number of US ad tech merger and acquisition (M&A) transactions, by deal amount, Q1 2023-Q4 2024



Source: Luma Partners, “2024 Full Year Market Report,” Jan 7, 2025

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Most deals were under \$100 million. There were plenty of rationalization transactions, which happen when two smaller companies merge or when a business expands into new geographies or channels through an acquisition. While these tend not to be big ticket deals, they “reflect a healthy, maturing industry in its consolidation phase,” per Luma’s year-end market analysis.

But scaled transactions also grew. Many of these occurred around video and CTV (e.g., [Mediaocean-Innovid](#), [Outbrain-Teads](#)) or data and data activation (e.g., [Zeta Global-LiveIntent](#), [Experian-Audigent](#)). Or, in the case of [Walmart-Vizio](#), both CTV and data.

Expect more dealmaking this year

Ad tech's M&A streak will carry into 2025. Between the TTD-Sincera deal and T-Mobile announcing plans to [acquire digital out-of-home \(DOOH\) SSP Vistar Media](#), it's already off to a hot start.

Deal volume will likely accelerate as the year goes on.

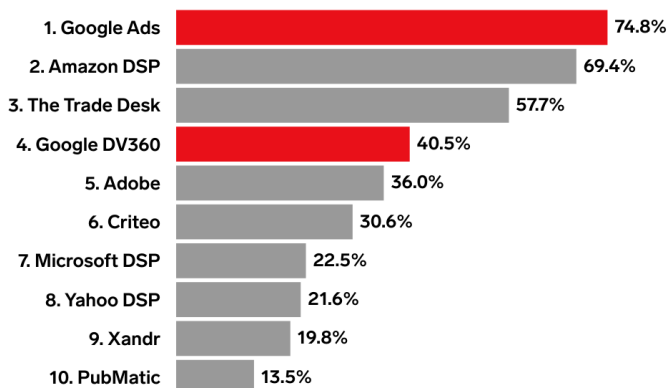
There are two potential tailwinds to consolidation:

- **There could be a more favorable dealmaking environment under the new Trump administration.** The Department of Justice (DOJ) and Federal Trade Commission—which share responsibility for antitrust enforcement—are expected to take a more lenient approach to merger review than they did under the Biden administration. And if Trump succeeds in lowering interest rates, that could spur even more activity.
- **The market is waiting on a landmark antitrust decision.** If the DOJ wins its [case against Google's ad tech business](#), Google may be compelled to divest some or all of the sell-side components of its highly integrated ad tech operation. This would likely have knock-on supply chain effects for its popular buy-side platforms, Google Ads and Display and Video 360 (DV360), sending ripples through the ad tech ecosystem as supply and demand are rerouted. Consolidation is a natural consequence of such disruption.

Google's Buy-Side Ad Tech Is the Most Widely Used, Accounting for 2 of the Top 5 Platforms

% of US retail media ad buyers, by top 10 ad tech platforms*, Aug 2024

Q: Which of the following ad tech platforms does your organization work with directly? Select all that apply.



Note: n=111; *additional response options, including "I don't know," not shown
Source: EMARKETER Survey, "US Retail Media Networks Buyer Perceptions," Sep 2024

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Data and data activation will remain ad tech's center of gravity.

Data powers curation, AI and machine learning models, measurement, and all manner of programmatic tactics. As state privacy laws proliferate and cookies become scarce, advertisers are prioritizing first-party data strategies to preserve addressability. When Chrome gives consumers the option to disable third-party cookies at the browser level—a shift that 4 in 5 marketing professionals worldwide expect to occur by Q2 2025, according to research by ID5—signal loss will escalate, forcing ad tech to adapt.

By now, most major ad tech companies have invested in cookieless targeting and measurement solutions. But once Chrome's universal opt-out mechanism goes live, those solutions will be put to the test. Many standalone identity providers with high-quality data, tech, or methodology will get acquired.

A note on Google's search antitrust case

The DOJ [proposed that Google divest Chrome](#) to help restore competition in search after a judge ruled that the company has an illegal monopoly in that market. Chrome's fate is tied to ad tech by way of the Privacy Sandbox and the migration of bid decisioning to browsers and devices. Any developments on this front will take years to unfold, and we will explore the implications of legal decisions as they're made.

Deals will also pop up around growth channels. Only about 1 in 10 US retail media advertisers plan on increasing the number of ad tech platforms they work with, per our survey. The majority of advertisers expanding their programmatic campaigns into other channels will want to do so with existing partners. To better position themselves to attract new programmatic ad dollars, major ad tech platforms will bolster their omnichannel offerings by acquiring smaller competitors that specialize in CTV, retail media, DOOH, and audio.

How should marketers approach their programmatic strategies in 2025?

- **Appraise first-party consumer data and organize it for activation.** Gone are the days when it was best practice to collect any and all consumer data in case it will be useful one day. As the programmatic market reorients around privacy, advertisers must audit data inflow and outflow to minimize risk of legal noncompliance while extracting maximum value from first-party assets.
- **Conduct thorough due diligence on curated inventory.** PMPs have advantages, but they are not inherently clean supply, and they won't always perform. As with any buzzy ad tech trend, some vendors will jump on the bandwagon to extract revenues without a proven product. Before routing spend through a PMP, marketers should evaluate the curator's credentials or request that agency partners provide the findings of an evaluation conducted on their behalf.
- **Build internal competency around ad tech.** As the market consolidates, some advertisers will find themselves working with vendors going through a change of ownership. Buyers with robust technical know-how will have an easier time transitioning key contacts or assessing new partners, if necessary. Working with larger ad tech players may help avoid disruption to service.

How data collaboration is powering the next generation of cross-media measurement

This sponsored article was contributed by [LiveRamp](#).



Daniella Harkins

Senior Vice President, Go-to-Market
LiveRamp

The next generation of measurement is here. Gone are the piecemeal solutions that offered limited insights across channels and performance.

Data clean rooms offer a holistic approach to measurement. They help marketers measure across publishers by responsibly linking data sources securely. Clean rooms mark a significant advancement in cross-media measurement, enabling comprehensive data connectivity and insights to substantiate ROI across all media investments. This collaborative approach mitigates risks and boosts cross-media measurement, improving marketing accuracy and effectiveness.

To demystify data clean rooms and help marketers build their cross-media measurement strategies, a strategic approach is essential. Here are some key steps:

1. Identify critical insights and organize your data for impact.

Before any partnerships, companies must organize internal data for insights. This involves sorting existing data assets and ensuring robust data governance. Identify the critical insights and data that can impact your business and set a strong foundation. This crucial first step helps pinpoint the key audiences and insights you need, guiding your decisions in selecting the right partners for future data collaboration and value creation.

2. Determine your data collaboration partners and define the partnership terms.

Engage in ongoing discussions to align on the terms that support your objectives while accommodating their data policies. For organizations new to data

collaboration, starting with a single partner can simplify the process. This approach allows you to focus on building cross-media intelligence through incremental steps, expanding to more partners as your capabilities grow.

3. Select a clean room solution that fits your requirements.

Selecting the right solution is critical for successful data collaboration with multiple partners. Companies should assess potential vendors based on ease of use, privacy controls, and support for essential use cases. Clean rooms should offer robust connectivity with collaboration partners like publisher networks, demand-side platforms, and log-level data sources. This interoperability is vital for accessing measurement learnings in one place and achieving a unified view of campaign performance.

4. Start small and expand as you become comfortable.

Use the learnings from your first 2–3 key partners and use cases to secure resources for expansion. As you gain confidence in the intelligence you're deriving from these tests, gradually expand your measurement scope to include more channels and partners.

Adopting data clean rooms is fundamental for marketers aiming to improve cross-media intelligence. Unlocking collaboration across your media partners creates business value based on robust insights. LiveRamp is at the forefront of both data collaboration and cross-media intelligence, equipping brands with the tools, technology, collaboration network, and expertise to excel. Discover more about LiveRamp's Clean Room [here](#).

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EMARKETER research is based on the idea that multiple sources and a variety of perspectives lead to better analysis. Our interview outreach strategy for our reports is to target specific companies and roles within those companies in order to get a cross-section of businesses across sectors, size, and legacy. We also look to interview sources from diverse backgrounds in order to reflect a mix of experiences and perspectives that help strengthen our analysis. The people we interview for our reports are asked because their expertise helps to clarify, illustrate, or elaborate upon the data and assertions in a report.

Brian Binder

Senior Innovation and Growth Director, TV, Audio & Display

Tinuiti

Interviewed January 17, 2025

Scott Messer

Principal and Founder

Messer Media

Interviewed January 17, 2025

Ron Pinelli

Senior Vice President, Digital Research and Standards and Associate Director

Media Rating Council (MRC)

Interviewed January 9, 2025

Joe Root

CEO and Co-Founder

Permutive

Interviewed January 21, 2025

Drew Stein

CEO and Co-Founder

Audigent

Interviewed January 17, 2025

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