

skai

# WHY WALLED GARDENS ARE A MARKETER'S BEST BET

A Skai Survey of Marketer Attitudes  
and Preferences Towards Walled Gardens



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# Chart: Walled garden publishers garner 80%+ of digital advertising revenue

According to data from eMarketer, in 2008, more than half (52%) of U.S. digital advertising was already being spent with walled garden publishers.

This year, this small group of publishers will account for 81% of total spending, and only 12% of marketers from our survey said they would be spending less next year on walled gardens.

## US Digital Ad Revenue Share, by Company (2008-2024 eMarketer)

Company	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Amazon	0.4%	0.5%	0.6%	0.9%	1.2%	1.4%	1.3%	1.2%	1.6%	3.8%	6.5%	7.7%	10.4%	11.5%	12.6%	13.7%	14.7%
Google	29.5%	32.2%	35.4%	36.8%	37.0%	35.8%	35.2%	37.4%	36.7%	35.1%	32.8%	31.6%	28.9%	29.3%	28.2%	26.7%	25.6%
Hulu			0.8%	0.9%	1.1%	1.3%	1.3%	1.3%	1.2%	1.1%	1.3%	1.5%	1.7%	1.7%	1.7%	1.9%	1.9%
IAC	2.9%	2.3%	2.3%	1.3%	1.7%	1.7%	1.6%	1.1%	0.6%	0.5%	0.5%	0.5%	0.4%	0.3%	0.4%	0.4%	0.4%
iHeartMedia											0.2%	0.2%	0.2%	0.3%	0.3%	0.3%	0.3%
LinkedIn	0.1%	0.2%	0.3%	0.5%	0.7%	0.8%	0.9%	1.0%	1.0%	1.0%	1.1%	1.2%	1.4%	1.5%	1.6%	1.8%	1.9%
Meta*	1.0%	2.3%	3.6%	4.4%	5.0%	6.8%	9.7%	13.1%	17.3%	20.2%	22.1%	23.6%	24.9%	23.9%	22.3%	22.0%	22.0%
Microsoft			7.4%	6.2%	5.9%	6.0%	4.1%	4.1%	4.7%	4.3%	4.1%	4.0%	3.6%	3.7%	3.7%	3.7%	3.7%
Pinterest							0.1%	0.2%	0.4%	0.5%	0.6%	0.8%	0.9%	1.0%	0.9%	1.0%	1.0%
Reddit								0.0%	0.0%	0.1%	0.1%	0.1%	0.1%	0.1%	0.2%	0.2%	0.2%
Roku									0.1%	0.2%	0.3%	0.4%	0.5%	0.7%	0.9%	1.0%	1.1%
Snapchat								0.1%	0.4%	0.6%	0.6%	0.7%	0.8%	0.9%	1.1%	1.3%	1.4%
Spotify								0.2%	0.3%	0.3%	0.3%	0.3%	0.4%	0.4%	0.5%	0.6%	0.7%
Twitter			0.0%	0.2%	0.6%	1.0%	1.6%	2.0%	1.8%	1.3%	1.2%	1.2%	1.1%	1.2%	1.2%	1.3%	1.3%
Verizon Media	4.8%	4.3%	3.4%	2.9%	2.7%	2.5%	2.3%	2.0%	1.8%	4.1%	3.1%	2.5%	2.1%				
Yahoo	13.1%	11.6%	10.0%	7.5%	6.8%	5.8%	5.1%	4.2%	3.1%					1.7%	1.5%	1.4%	1.3%
Yelp			0.2%	0.2%	0.3%	0.5%	0.7%	0.8%	0.9%	0.9%	0.8%	0.7%	0.5%	0.5%	0.4%	0.4%	0.4%
YouTube	0.1%	0.2%	0.3%	0.6%	0.8%	1.1%	1.5%	1.7%	1.9%	2.1%	2.3%	2.6%	3.0%	3.1%	3.2%	3.3%	3.4%
<b>TOTAL</b>	<b>51.8%</b>	<b>53.5%</b>	<b>64.1%</b>	<b>62.3%</b>	<b>63.8%</b>	<b>64.7%</b>	<b>65.3%</b>	<b>70.6%</b>	<b>73.8%</b>	<b>75.8%</b>	<b>77.8%</b>	<b>79.5%</b>	<b>80.9%</b>	<b>81.6%</b>	<b>80.8%</b>	<b>80.7%</b>	<b>81.4%</b>





“

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.

*Gartner*

”

(From the report [Brands Retreat Behind Walled Gardens as Data Privacy Efforts Take Root](#))

# Introduction: The walls of walled gardens look better in the era of privacy

There's an old proverb in marketing: advertisers vote with their wallets.

If that's true, then the fact that nearly four out of every five digital advertising dollars is now spent within walled gardens represents a landslide vote. And it's not just planned media budgets. 80% of marketers reported in our survey that if they were given a new, incremental budget in a quarter, much or some of it would likely go to performance media publishers.

And at a time when CMO tenures are down, and pressure for marketing to drive business growth (not just vanity metrics) is at an all-time high, the spotlight is really on right now. Marketing has to be more and more accountable to outcomes in this context.

## What better media is there to be accountable with than within the walled gardens?

In many instances, it's directly tied to sales, is highly measurable, and offers tremendous value across the entire marketing funnel.

## But, what about those walls?

Some have argued that the walled gardens are more than willing to accept all the data marketers can provide but rarely send back even a fraction of their data to marketers.

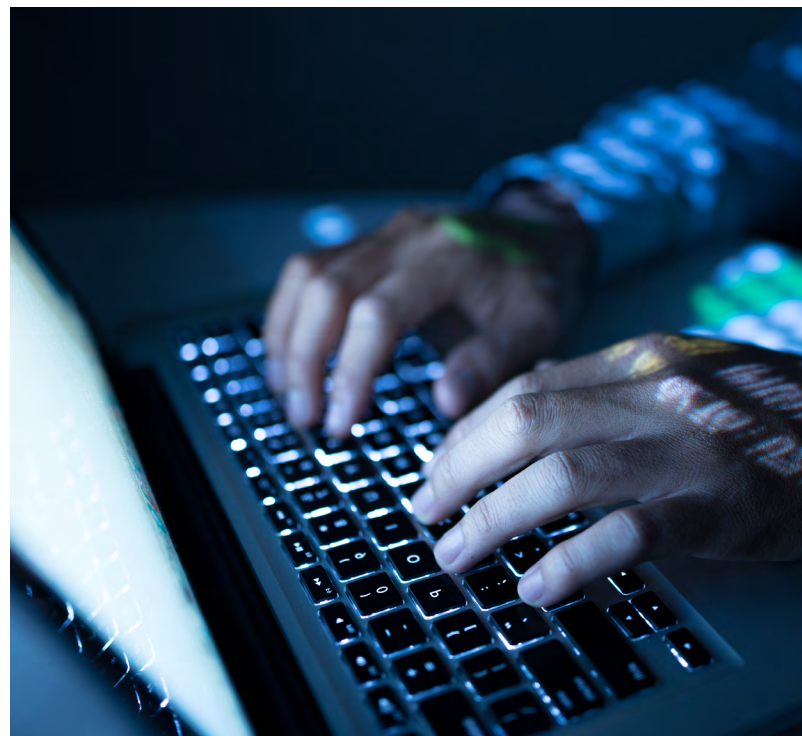
High walls that they can't see over have prompted marketers to worry about issues such as targeting transparency (*who is really being targeted?*), ad serving verification (*how many impressions are really shown?*), and biased measurement (*how effective is my investment?*).

### DEFINITION:

## *Walled garden*

In digital advertising, a walled garden refers to a giant publisher operating in a closed ecosystem in which it controls all of its activity and processes. Good examples of these include Google, Meta, Amazon, etc.

The term is co-opted from a 1970s telecom industry term used to describe the market strategy at that time for some companies to "exercise tight control over the services and applications that are available to users on the mobile devices connected via their network."



But, the world has changed over the last few years, now making these high walls advantageous to marketers. Consumer data privacy regulations limit marketers' ability to run advanced tactics on the open web and impact many useful advertising tools, including ad targeting, personalization, retargeting, measurement, optimization, etc.

With their high walls protecting logged-in users, it's possible that soon, these "enclosed ecosystems" will be the last haven for advertisers to continue running their advanced tactics. In our survey, nearly 70% of marketers report that practitioners will move more budgets to walled gardens as a way to adapt to privacy challenges.

**It seems that the walls of the walled gardens might just come in handy in the era of privacy.**



## The open web media versus closed web debate

In a report from programmatic platform [OpenX](#), the open web is defined as:

*...any online property, website, or app that is not owned by a major technology company (Facebook/Instagram, Amazon, YouTube). Examples of "the open web" include sites and apps like The New York Times, CNN, BuzzFeed, ESPN, Weather.com, Allrecipes.com, and apps like Words With Friends, Angry Birds, or Weatherbug.*

How big is the open web in terms of ad spending?

If 80% of spending goes to walled gardens, then 20% goes to the open web.

The open web companies—ad publishers and vendors—contend that this 80/20 split means that too much spending goes to walled gardens.

## Open web proponents argue that time spent online should determine budgets. What do you think?

Some open web companies have articulated a fairly basic argument on why marketers should spend much more of their budgets there. Their opinion surmises that because consumers spend 60% of their time online on the open web, they recommend marketers spend 60% of their budgets there.

Objectively, that argument seems a bit thin and self-serving.

Should **time spent** be the single driving factor behind allocating marketing budgets?

Of course not! Marketers have many other considerations for budget allocation rather than time spent, such as:

- Price of advertising impressions
- Creative production costs
- Third-party fees (e.g., tech, data, segments, etc.)
- Audience scale and reach
- Control
- Execution ease and time

But, ultimately, if you ask any CMO how their teams should be allocating budgets across publishers, it's always goal performance and return on investment (ROI).

Whether it's sales, profit, conversions, traffic, leads, registrations—or any other goal—marketing, at its core, is investing. A company invests its marketing budget to generate results.

And, that's why the ultimate determining factor for advertising budget allocation should be—and will always be—performance.



## The right approach: Strategy dictates the media plan

The open web companies try to spin the story that marketers are disproportionately overspending on walled garden media. But, their thesis only holds water if you agree that **time spent** should be the sole consideration for budget allocation.

This, of course, is a ridiculous argument. There are pros and cons to marketing on the open web, as well as pros and cons to marketing with walled gardens. Practitioners need to understand the strengths and weaknesses of both and craft a media plan that leverages the most potential to reach their goals. Marketers should spend wisely based on myriad considerations, most of all dictated by the campaign's goals and how best to attain them.

So, based on the reality of where spending is going, it seems safe to assume that marketers believe performance can be found in walled gardens.

Our survey confirms this assumption. Marketers were asked to identify which challenges they face with walled garden media. Out of the 11 challenges to choose from the challenge that was ranked last was **Can't Drive Good ROI**.

# Why walled garden media works so well

While each walled garden publisher is very different from the other, generally, we see three core characteristics of walled gardens that enable their many benefits:

- 1 MASSIVE USER BASES**

Google, Meta, Amazon, and other walled garden publishers have millions or billions of monthly average users. Google alone has six properties within its ecosystem with over 1 billion users: Search, Maps, Drive, Mail, YouTube, and Android. Even [comparatively] smaller publishers have a sizable monthly user base like Snapchat ([530+ million](#)) and TikTok ([1.8 billion by the end of 2022](#)).
- 2 LOGGED-IN USERS ACROSS DEVICES**

Tracking users online fuels a host of advanced marketing tactics: personalization, ad targeting, measurement, optimization, etc. But even before the current limitations on consumer data privacy, it was getting tricky for marketers to track online consumers. Today's internet users are elusive across their various devices, with [the average person in the U.S. having access to 10 or more in their home](#) and growing. Walled garden publishers offer one of the last online areas where users are almost always logged in across their devices.
- 3 ENGAGING AND CREATIVE BESPOKE AD FORMATS**

While the open web offers tremendous scale of ad inventory, the creative options are minimal. When accessing millions of websites from a demand-side platform, the ads have to adhere to a set standard of rectangles, most being three types: *leaderboards* (728x90 pixels), *medium rectangles* (300x250), and *skyscrapers* (160x600). However, because walled gardens have complete control over ad placements, they can offer formats that take full advantage of the online environment. These native ad formats tend to really work much better than basic rectangles.





## The 10 benefits of walled garden advertising

When you consider these three walled garden publisher characteristics—reaching massive, millions/billions of logged-in users with potent native ads—it becomes clear how they can offer these benefits.

### **Massive audience reach and scale**

One of the main reasons why most digital advertising spending goes to a short list of walled garden publishers is that marketers can reach nearly everyone on the planet without having to spread their efforts too thin.

A marketer must place ads across hundreds or thousands of open web publishers to access the same audience size as just a handful of these publishers. But, marketers want to work with as few partners as possible to reduce complexity, time, and costs.

### **The ability to utilize powerful, first-party data**

With more limitations on third-party cookies and other common identifiers, brands realize that properly using their first-party datasets is key to adapting to the future. It's filled with users that are already customers or web visitors and offers a competitive advantage because it's a unique dataset your rivals don't have. And, even better, once the (relatively low) cost to collect it is factored out, it's free to use again and again without having to pay for each round like third-party segments.

Over the last two decades, walled garden publishers have built native tools for marketers to upload first-party data and use it to better target and personalize advertising.

### **Free, out-of-the-box native audiences**

Targeting the right ads to the right people online requires the right data. While third-party audience vendors offer segments for a price, walled garden publishers offer rich audience segments which marketers can use for free when targeting ads.

Native segments are rich and robust based on users' expressed or implicit preferences, behaviors, and characteristics. They can also be combined into infinite combinations with each other as well as with first-party and third-party data segments.



## **Accurate, intrachannel measurement**

The best marketing measurement is a holistic approach that can detect the impact and influence of all your paid and unpaid efforts on each other. And, while top-level assessment is ideal for understanding total media value, the cross-device measurement offered by walled garden publishers offers a precious view to optimize their individual programs.

So, while the CMO and advertising directors need omnichannel insights to plan and allocate budgets for annual media plans, channel practitioners can use intrachannel measurement to optimize elements daily within the publisher. Thus, by optimizing top-down at the media plan level and bottom-up at the channel level, marketers can ensure they improve results from both directions. This seems to be the best practice approach to drive the most performance.

## **Seamless native ad formats and placements**

Walled garden ads are inherently better suited to performance because of how well they work within each publisher's unique environment.

For example, the search-triggered ads of Google and Amazon look and feel like search results listings and blend into the page. Meta and Instagram carousel ads offer users an expandable format to dive deeper into multiple brand messages without having to leave the page. Pinterest Promoted Pins, Snapchat Collection Ads, Apple Search Ads, etc., tend to have much higher response rates than the standard rectangles seen on most (non-walled garden) websites and apps.

## Unparalleled advertising control

While self-service advertising exists outside the walled gardens, this level of 24/7 control is a hallmark of this type of advertising. Any marketer, from the largest corporations to the smallest mom-and-pop shops, can create an account and publish ads within minutes. And, this level of fine control is not just about launching ads; practitioners can optimize minute settings to drive incremental gains on their programs.

## Robust vendor ecosystems

Walled garden publishers invest heavily in their native ad platforms to help marketers spend efficiently. But wisely, they've also invested in rich partner programs to encourage vendor ecosystems to flourish. Meta, for example, has hundreds of partner companies to help marketers manage, create, measure, and scale their Meta campaigns beyond the native platform functionality.

These third-party advertising technologies—such as Skai—only exist because of how big brands invest in walled gardens. Marketers are willing to spend a little more with vendors to help ensure success—especially in niche areas where it doesn't often make sense for the publishers to develop themselves.

## Performance-based ad costs

Google wasn't the first to offer the pay-per-click ad buying model, but it widely popularized it, and every walled garden publisher since has copied the model.

With performance-based costs, marketers know upfront that they will only pay for results, not just ad impressions, as many other online and offline advertising are sold. Over the years, performance-based has evolved beyond just clicks to drive sales, leads, and conversions.



## Native algorithmic optimization

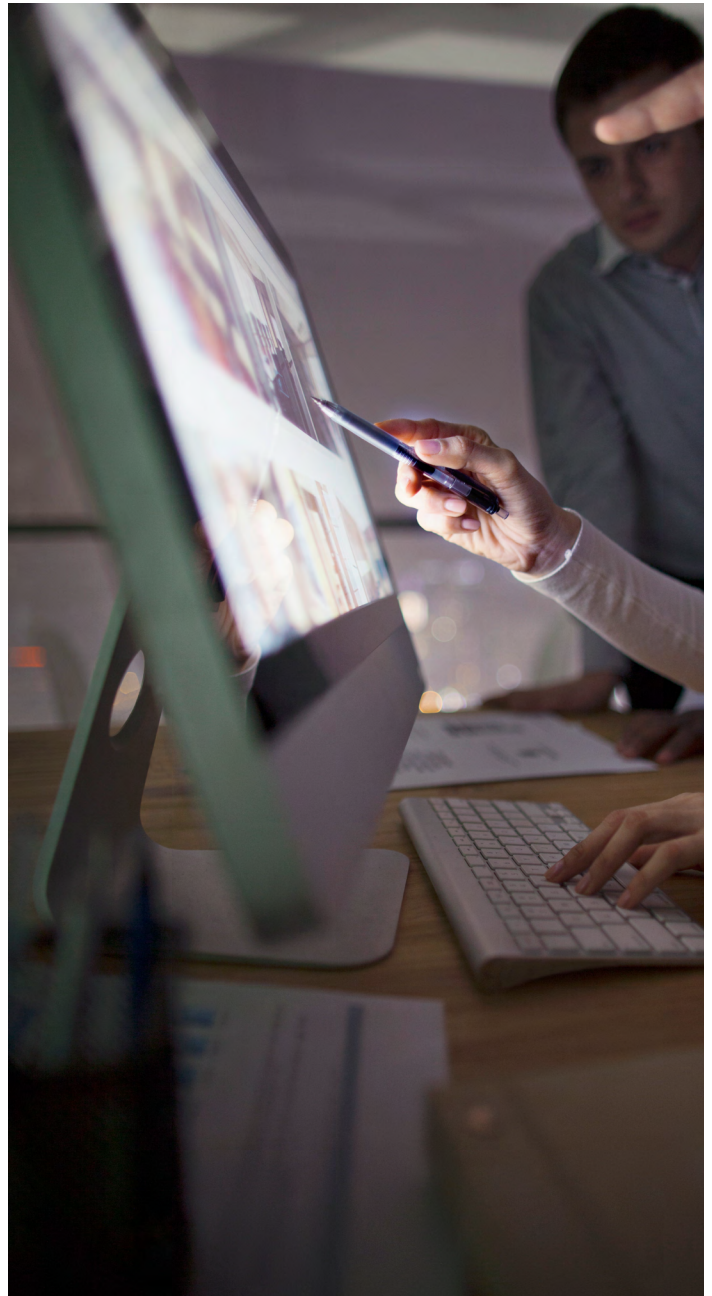
Behind the scenes, walled garden publisher ad systems are working on behalf of each of their advertisers to improve ad matching. Consider that every time an ad gets served, it could potentially be chosen from a bank of millions of ads—and properly matching advertisers to ad inventory is a critical contributing factor to campaign success.

The publisher algorithms can leverage rich datasets—that could never be shared with marketers due to privacy constraints—to detect unseen correlations between audience characteristics and clicks/conversions to help them find the needle in the haystack, e.g., the brand/ad with the highest forecasted response rate.

## Not reliant on cookies

The logged-in user base of walled garden publishers was already a market advantage in the first two decades of digital advertising.

As we enter the era of privacy, many technologies that help advertisers outside of walled gardens that use third-party cookies will become less effective moving forward. As the industry struggles to find a new unified ID, the walled gardens already have cookieless solutions which are inherently future-proofed.

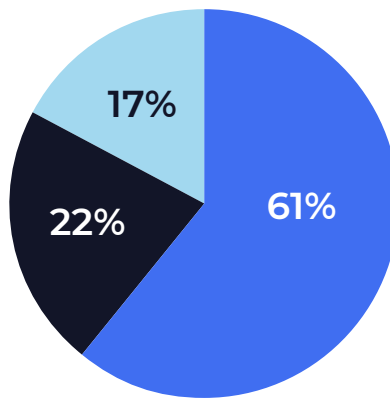


# About the survey

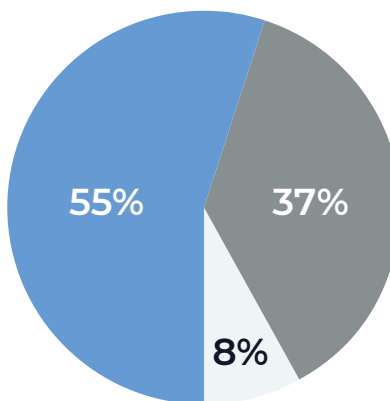
To better understand how marketers consider and use walled garden advertising now and in the future, Skai surveyed 117 U.S. marketing professionals in mid-2022. Questions included current/future spending trends, perceived strengths and weaknesses, and considerations for strategic decision-making.

NOTE: All statistics in this report—if not cited—are from this survey.

Respondent composition: Mostly executives, split agency/brand



■ Executives ■ Practitioners ■ Managers



■ Agency/Consultant ■ Brand ■ Other

Wide range of industries, including telecom, pharma, financial services, retail, etc.

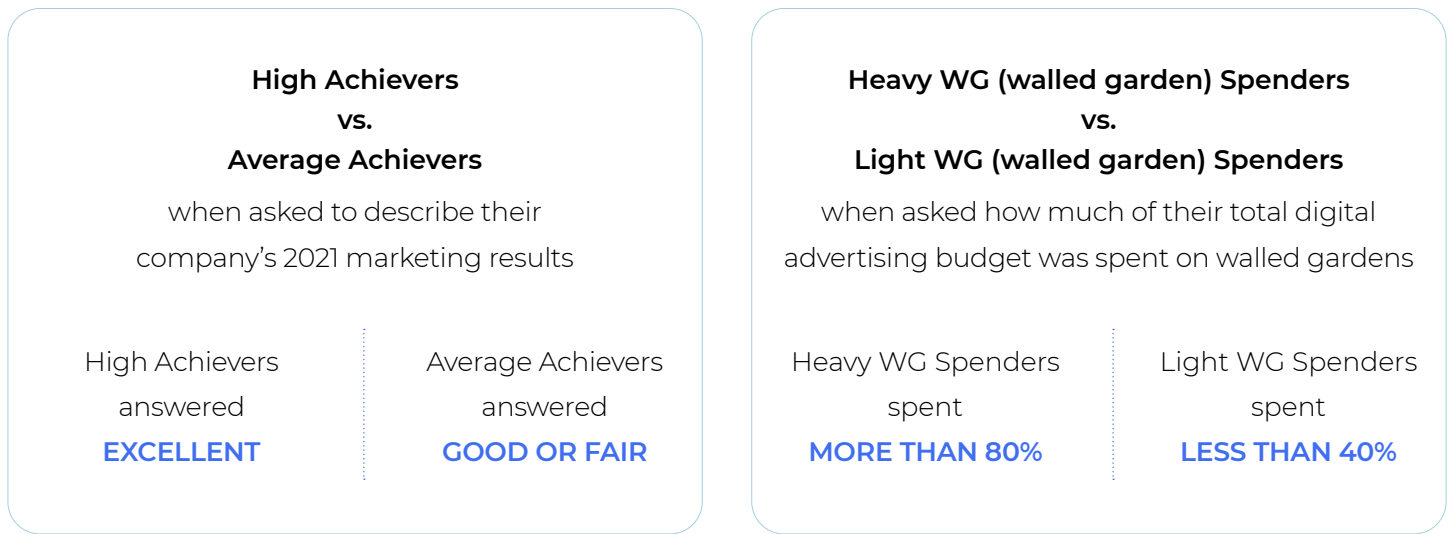
## Survey results:

# What we learned about walled garden advertising

With walled garden advertising representing more than 80% of total digital advertising spend in the U.S., we already know that marketers find this media more effective than other forms.

But, we wanted to learn a bit more. Which areas do they find superior? What will budgets look like next year? How fluid are walled garden budgets? What is the role of third-party technology?

Respondents were split into two cohort groups for analysis.

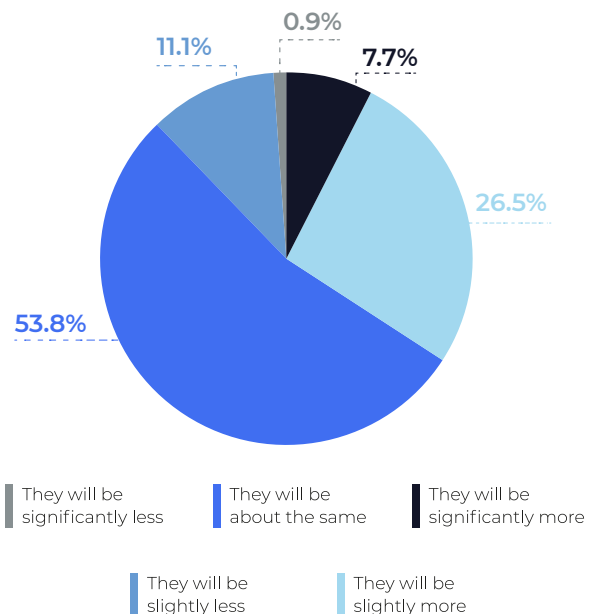


## Insights from Skai's 2022 Walled Garden Advertising survey

### Walled garden advertising spending is maintaining and growing year-over-year

88% of survey respondents said they would spend about the same, slightly more, or significantly more on walled gardens next year. Only 12% said they would be spending less.

How do you think your walled garden advertising budget percentages will change next year?

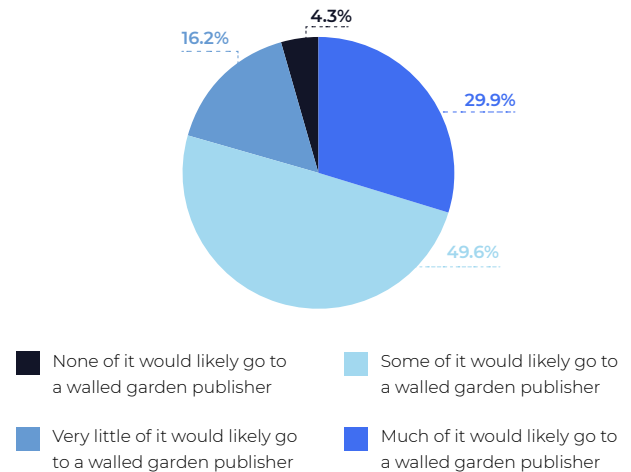


## Incremental budgets would likely go to walled gardens

When asked if their marketing department was given more budget within the quarter, nearly four out of five marketers (79.5%) said that some or much of it would likely go to a walled garden publisher. Just 4.3% said that none would likely go to one.

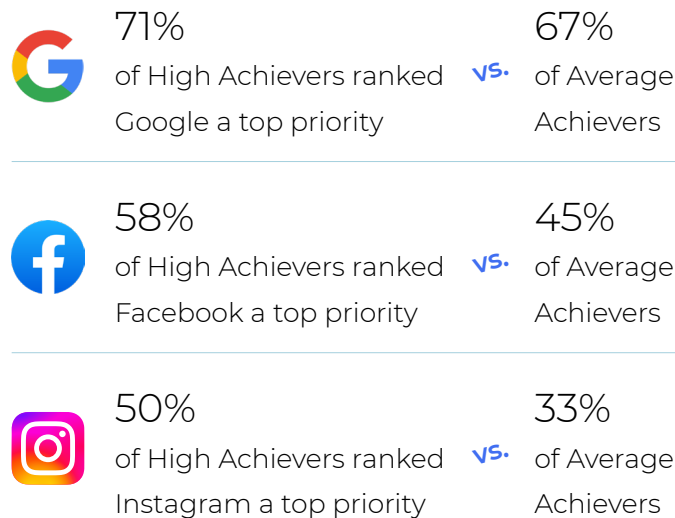
Heavy WG Spenders double down. Not surprisingly, 56% of Heavy WG Spenders would likely put much of an incremental budget toward these publishers, while just 6.3% of Light WG Spenders would reportedly follow suit.

If your marketing department was given an incremental budget today to spend this quarter, what's the likelihood it will go to a walled garden publisher?



## High Achievers prioritize walled garden publishers

When asked to rank walled garden publishers in terms of importance to their media programs this year, High Achievers ranked these companies as a top priority (priority level 5 out of 5) more often than Average Achievers.



## Walled garden advertising seems to lend itself well to the best practice of budget fluidity

Budget fluidity—the ability to easily move money to where it needs to go in the media plan—is a hallmark of a sophisticated marketing organization. The opposite—trapping investments into preset silos—prevents marketers from optimizing their programs, limiting total marketing ROI. High Achievers and Heavy WG Spenders reported high budget fluidity within and across channels.

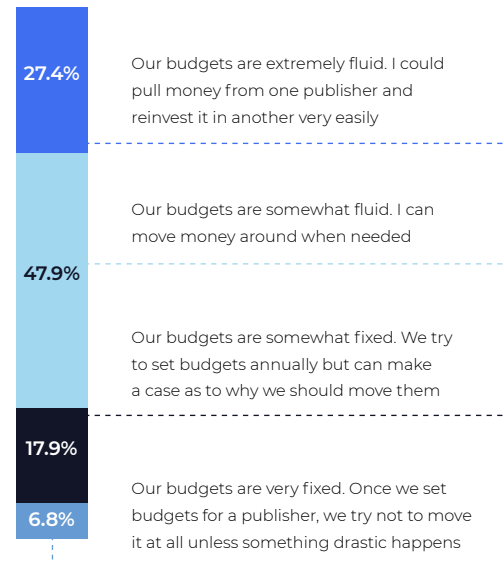
## Intrachannel fluidity

In terms of intrachannel fluidity (moving budgets between walled garden publishers within the same channel), more than three in four marketers report having a somewhat or extremely fluid approach.

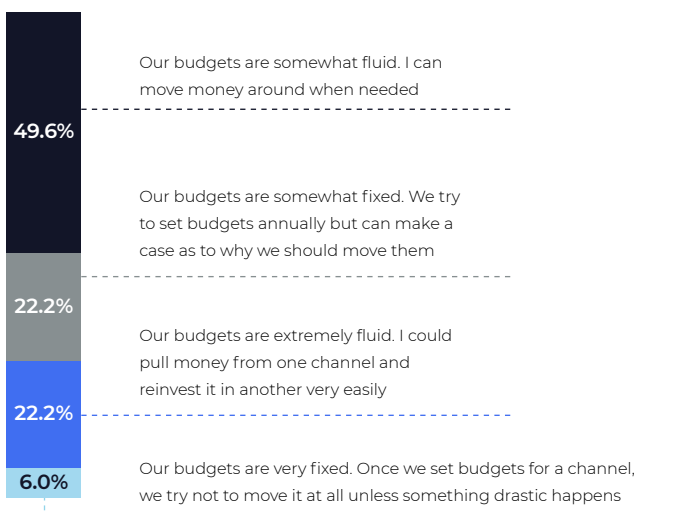
Heavy WG Spenders and High Achievers are more fluid and less fixed than their counterparts.

- Only 6.3% of Heavy WG Spenders reported intrachannel budgets being fixed or very fixed versus 34% of Light WG Spenders
- Only 16% of High Achievers reported channel intrachannel budgets being fixed or very fixed versus 31% of Average Achievers

## What level of budget fluidity do you have across walled garden publishers within the same channel (e.g. Google to Microsoft or Amazon Ads to Walmart, etc.)



## What level of budget fluidity do you have with walled garden spending across channels? (e.g. between search and social or between social and retail media)



## Program fluidity

With regard to program fluidity (moving budgets between walled gardens even in different channels), 72% of marketers report having a somewhat or extremely fluid approach.

Additionally,

- Only 19% of Heavy WG Spenders reported program budgets being fixed or very fixed versus 23% of Light WG Spenders
- Only 13% of High Achievers reported program budgets being fixed or very fixed versus 19% of Average Achievers

## Ad Targeting, Formats, and Buying are leading areas of walled gardens versus open web publishers

When asked which areas do they feel managing marketing in walled gardens is superior to managing it on the open web, marketers' top three results were Targeting, Ad Formats, and Buying.



High Achievers also listed **Personalization** as a top three advantage



High WG Spenders listed **Optimization** as a top three advantage

## Third-party tools are needed to unlock the full value of walled gardens

Native publisher tools are free and offer solid platforms for marketers to run basic programs. When marketers were asked if they preferred the native platform with third-party platforms versus the native platform alone, they affirmed the value of partner technology.

Native tool is better or necessary with a third-party platform

Native tool is fine on its own



66%

34%



70%

30%



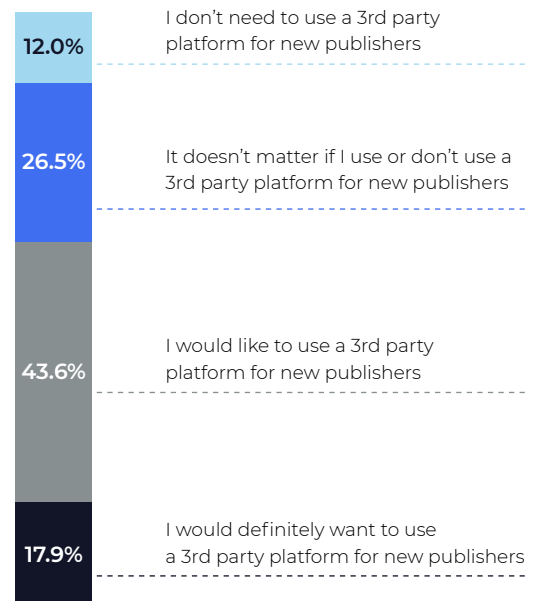
73%

27%

## Third-party platforms are also essential to use for new and emerging walled garden publishers

62% of marketers reported that they would definitely want or like to use a third-party platform for new or emerging publishers. Only 12% of marketers feel they don't need a third-party platform for new publishers.

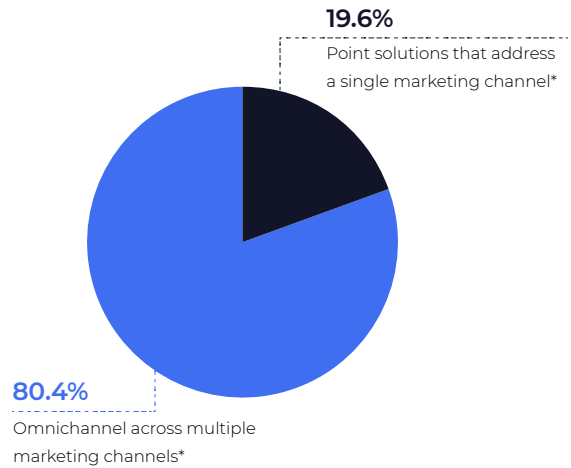
Do you believe that using a third-party platform is beneficial for new and emerging walled garden advertising? (e.g. TikTok, Reddit, new retail media publishers, etc.)



## Omnichannel tools that work across channels are the preferred ad tech stack

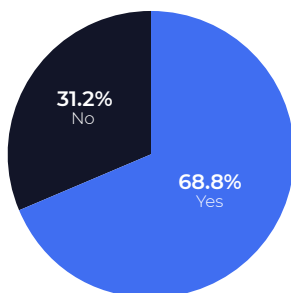
When asked which model best describes their current ad tech stack for digital advertising, more than four out of five (81%) reported that they primarily work with omnichannel tools across multiple marketing channels. Just 19% are just using individual channel point solutions.

Which best describes your current ad tech stack for digital advertising?(Choose all that apply) \*By “channel” we mean marketing channels, such as paid search, paid social, etc.



## Moving more ad spending to walled gardens is a way marketers will try to adapt to privacy and tracking policies

Do you believe that moving more ad spending to walled gardens is one of the ways marketers will try to adapt to privacy/tracking policies?



One of the biggest stories in advertising over the last two years would have likely been the shift in consumer data tracking. Marketers have been dealing with curveballs such as Apple’s ATT privacy policy and other limitations on tracking online users. Walled garden publishers can target, personalize, and measure massive audiences of logged-in users. That’s why nearly 70% report that practitioners will spend more with these publishers as a way to hurdle these challenges.

# Conclusion:

## Walled gardens will be the tip of your omnichannel spear

All marketers know that their entire media—online and offline, paid and organic—work together to impact and influence sales and revenue. The hard part is knowing how to do it right.

But, for those forward-thinking pioneers that take on this challenge, omnichannel marketing represents an opportunity to drive performance and take market share away from competitors. They see the potential for tapping into the synergistic potential of planning and managing channels together rather than today's siloed and separated approach, which may limit total program ROI.

### **So, where will walled garden advertising play its role in the omnichannel future?**

Today, digital advertisers are already spending heavily on walled gardens. As we learned in our survey, they plan to spend more on it next year, would likely allocate incremental budgets, and believe third-party technology should be used to unlock its total value.

As practitioners explore the opportunity of a more holistic, omnichannel marketing approach, walled garden advertising may offer the very best starting point for this new direction. After all, omnichannel marketing inherently requires more data connectivity to function, which the logged-in users of walled garden publishers can offer better than any other ad inventory source online.

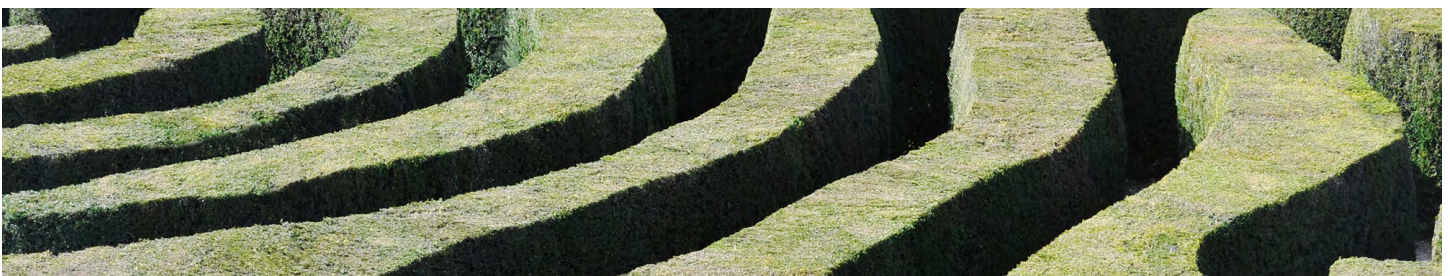
### **Will the walls of the walled gardens get in the way of omnichannel marketing?**

One of the benefits of so the majority of ad spending going to the walled gardens is that those publishers are more incentivized to adapt to the new needs of marketers to keep those investments coming their way.

A great example of this is just a few short years ago. Google and Facebook changed their policies to enable ads to be directed to retailers rather than forcing advertisers to point ad traffic to their owned properties. Shortly after, Amazon launched Amazon Attribution, which allows marketers to measure the impact of those search and social ads which drive to its store. These two innovations are changing the way advertisers are approaching online commerce marketing.

As marketers continue to evolve to the omnichannel approach, walled garden publishers will find ways to enable the functionality required to make it a reality. They have the resources and expertise—and the fiscal motivation—to do so.

For marketers looking to explore how omnichannel marketing can help their organization, walled gardens will continue to be a core part of media plans to help make this journey a reality.



## About Skai™

Skai™ (formerly Kenshoo) is a leading omnichannel marketing platform that uniquely connects data and performance media for informed decisions, high efficiencies, and optimal returns.

Its partners include Google, Meta, Amazon Ads, TikTok, Snap, Walmart Connect, Instacart, Roundel, Criteo, CitrusAd, Pinterest, Microsoft, Apple Search Ads, and more.

For over 15 years Skai has been trusted by an impressive roster of brands including Pepsico, Michaels, Reckitt, Daimler, LG and Vodafone.

The company is headquartered out of Tel Aviv, with seven international locations, and is backed by Sequoia Capital, Arts Alliance, Tenaya Capital, Bain Capital Ventures, Pitango and Qumra Capital.

Visit [skai.io](https://skai.io) for more information.