ADSWIZARDS / DECISION FRAMEWORK / 2026

# The Invisible Auction

Why “eligible” doesn’t mean you can actually buy the market.

> **Eligibility is no longer binary. An advertiser can be policy-compliant, verified and approved — and still have access to only a fraction of the available auctions.**

Evidence model: every claim below is marked Documented, Inferred, Hypothesis, or Unknown. See Section 06 for the full framework. Accessed 7 September 2026 — policy details may change; reverify before reuse.

DECISION FRAMEWORK

# The Invisible Auction

Why “eligible” doesn’t mean you can actually buy the market.

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**STATUS** Decision framework, v1 · September 2026 · **CLAIM** This is AdsWizards Lab’s model for separating observable market demand from advertiser-specific market access. It is not Google’s forecasting method. Every claim below is tagged by evidence tier — see Section 06.

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Google Ads market sizing usually begins with demand. Search volume, CPC forecasts, impression estimates and competitor activity can tell us how much commercial opportunity appears to exist in a market.

But they cannot tell us how much of that opportunity a specific advertiser can actually access.

Google’s expansion of Limited Ad Serving makes this distinction explicit. An advertiser can be verified. Its ads can be approved. Its product can be permitted to advertise. And its serving can still be limited.

This introduces a layer that conventional demand forecasting does not model: **advertiser-specific market access.**

We therefore separate Google Ads capacity into three different quantities:

```
Potential Market → Accessible Market → Achievable Spend
```

The distinction changes a seemingly simple question — *how large is this Google Ads market?* — into a more useful one:

> **How much of this market can this advertiser access, win and sustain under current conditions?**

01 / DECISION FRAMEWORK

# Demand Is Not Capacity

ADSWIZARDS LAB — FRAMING

A conventional Google Ads market estimate often starts with observable demand:

```
Search demand × expected CPC  ≈  media opportunity
```

This is useful. But it contains an important assumption: that the advertiser can participate across the opportunity being measured.

That assumption is increasingly unsafe.

Between observable demand and actual spend sit multiple constraints. Some are explicit. Others are dynamic, advertiser-specific and only partially observable.

> **The amount of demand that exists and the amount an advertiser can buy are not the same number.**

# An Expanding Qualification Layer

GOOGLE DOCUMENTED

Limited Ad Serving predates 2026. What changed in 2026 is its scope.

In June 2026, Google announced an expansion of Limited Ad Serving across Search. In August 2026, Google announced a broader update covering Google Ads products and ad-serving scenarios, with implementation rolling out progressively through 2028.

The significance is larger than a single policy update. Limited Ad Serving establishes an explicit qualification layer between formal eligibility and unrestricted delivery.

The relevant structural change is therefore not simply:

*"Google introduced another advertising restriction."*

It is:

> **Access to advertising inventory can depend on advertiser qualification even when individual ads remain approved.**

# Approved Is Not the Same as Unrestricted Serving

GOOGLE DOCUMENTED

Google explicitly separates ad approval from delivery. Under Limited Ad Serving, individual ads are not necessarily disapproved. Instead, impressions may be limited while Google determines whether an advertiser is qualified to serve without those limits in certain ad-serving scenarios.

Google lists seven groups of signals that may contribute to this assessment:

- Account attributes
- User activity and reports
- Account maturity
- Ad format usage
- History of policy compliance
- Advertiser industry
- Advertiser verification status

This creates two states that are easy to collapse into one.

**POLICY ELIGIBILITY**

*Can this advertiser and this ad participate under the applicable rules?*

**ADVERTISER QUALIFICATION**

*Is this advertiser currently qualified to serve without impression limits in the relevant scenarios?*

```
Ad approval ≠ unrestricted delivery
```

For capacity analysis, this distinction matters. An approved campaign cannot automatically be assumed to have unrestricted access to the entire measurable opportunity.

04 / DECISION FRAMEWORK

# The Unknown Variable

UNKNOWN — NOT PUBLISHED BY GOOGLE

Google documents the existence of advertiser qualification. It does not provide a capacity calculator for it.

There is no public formula that converts account maturity, verification status, policy history and the other qualification factors into a known percentage of available inventory. Google does not publish:

- a universal qualification threshold;
- the relative weight of individual factors;
- the percentage of inventory affected;
- a guaranteed assessment period;
- a predictable schedule for expansion of serving access.

On reassessment timing, Google's documentation is unusually explicit:

> **"We can't say how long this might take."**

Advertisers can appeal Limited Ad Serving decisions. But an appeals process is not a forecasting model. The implication for market sizing is important: we know the access layer exists, but we cannot directly observe its size in advance.

And a documented qualification factor should not be mistaken for a known effect size. Google confirms, for example, that account maturity is considered. It does not disclose how much account maturity matters.

# The Missing Layer in Market Sizing

ADSWIZARDS LAB MODEL

This produces three different concepts that should not be treated as interchangeable.

### POTENTIAL MARKET

The total commercially relevant advertising opportunity visible in the market. It may be estimated from query demand, CPC forecasts, impression forecasts, competitor presence, category demand, and geographic and seasonal patterns.

*Answers: how much relevant opportunity appears to exist?*

### ACCESSIBLE MARKET

The portion of the Potential Market that this advertiser can currently participate in. It may be constrained by legal eligibility, licensing and certification, advertiser verification, Google Ads policies, advertiser qualification, serving restrictions, and other advertiser-specific access conditions.

*Answers: how much of the opportunity can this advertiser currently access? In some cases, this cannot be reliably estimated before sufficient account-level evidence exists — **unknown is a valid analytical result.***

### ACHIEVABLE SPEND

The portion of the Accessible Market that the advertiser can realistically win and sustain. It may depend on auction competition, bids and budget, conversion economics, relevance, campaign architecture, creative coverage, landing-page performance, measurement quality, and operational capacity.

*Answers: how much can this advertiser realistically deploy?*

```
Achievable Spend  ≤  Accessible Market  ≤  Potential Market
```

These are three different quantities. A demand forecast should not be reported as though it were all three.

# What Is Documented, What Is Inferred

The access layer is documented. Its quantitative effect is not.

DOCUMENTED

Google can impose impression limits while assessing advertiser qualification. Google explicitly distinguishes this state from individual ad disapproval. Google identifies seven groups of qualification signals. The assessment includes advertiser- and account-specific characteristics. Qualification may be reassessed. Google does not guarantee how long reassessment will take.

INFERRED

If serving access can depend on advertiser qualification, then two advertisers targeting the same underlying demand cannot automatically be assumed to have equivalent access to that demand. Advertiser qualification therefore represents a potential constraint between observable market demand and achievable media spend. Standard demand forecasts do not explicitly model this variable.

HYPOTHESIS — REQUIRES OBSERVATION

Qualification restrictions may reduce the amount of inventory available to a particular advertiser sufficiently to affect practical market-capacity estimates. The magnitude cannot be inferred from Google’s published documentation alone. It must be observed empirically.

UNKNOWN

We cannot reliably calculate in advance: how much inventory is inaccessible; which qualification signal matters most; how the signals interact; how quickly access changes; whether qualification affects different auction segments differently; when an advertiser has reached effectively unrestricted access; and whether account maturity alone predicts the size of the access gap. These are measurement questions, not documented platform facts.

07 / DECISION FRAMEWORK

# Two Advertisers, One Market

ADSWIZARDS LAB — ILLUSTRATION

Imagine two advertisers targeting the same product category, GEO and query universe. Both see the same forecast.

```
Potential Market — $100k / month
```

Both have sufficient budgets. Both have approved ads. But their account states differ.

**ADVERTISER A**

*Established account · completed verification · long operating history · stable policy record · existing category activity*

**ADVERTISER B**

*New account · recently verified · limited operating history · little historical category activity*

The underlying market demand is identical. The advertisers are not. We therefore cannot safely conclude:

```
Potential Market A = Potential Market B
```

means

~~Accessible Market A = Accessible Market B~~

An established history or completed verification may reduce qualification uncertainty. But Google does not provide enough information to infer the remaining access gap from those factors alone.

And even equivalent market access would not guarantee equivalent spend. Different economics, bids, relevance and execution can still produce different Achievable Spend.

# Identifying the Gap

ADSWIZARDS LAB — FRAMING

Identifying a capacity gap is not the same as measuring demand.

When observed spend falls below Potential Market, the constraint may sit at different layers of access, competition, economics or execution. A larger demand forecast cannot identify which constraint is binding. That requires account-level evidence.

> **Market sizing and capacity diagnosis are separate analytical problems.**

# A Better Way to Report Market Capacity

ADSWIZARDS LAB MODEL

When access is uncertain, a market-capacity assessment should not collapse everything into one precise number. Report the layers separately.

| LAYER | WHAT TO REPORT | EXAMPLE |
|---|---|---|
| **1. Potential Market** | Estimated total commercially relevant opportunity. | $80k–$150k / month |
| **2. Accessible Market** | Opportunity the advertiser can currently participate in. When sufficient evidence does not yet exist, say so. | Unknown during initial advertiser qualification — *not* “$120k/mo because a demand forecast suggests it” |
| **3. Initial Achievable Spend** | Economically and operationally realistic deployment under current conditions. | $15k–$30k / month |

Then update the estimate as actual account and auction evidence accumulates. This prevents a market forecast from becoming an unsupported spending commitment.

# Decision Framework

Before answering “how much can we spend in this market?”, answer three questions.

**Q1** How much relevant demand exists? → **Potential Market**

**Q2** How much of that demand can this advertiser currently access? → **Accessible Market**

**Q3** How much of the accessible opportunity can the advertiser win and sustain? → **Achievable Spend**

The framework is intentionally asymmetric. Potential Market can often be estimated before launch. Accessible Market may initially contain significant uncertainty. Achievable Spend becomes increasingly observable as account-level evidence accumulates.

> **Capacity should be treated as a dynamic estimate, not a fixed property of the market.**

# The Principle

Market sizing asks: *how much opportunity exists?*

Capacity analysis asks: *how much of that opportunity can this advertiser access, win and sustain now?*

Those questions are not safely interchangeable. Google's Limited Ad Serving documentation provides explicit evidence that formal ad approval and unrestricted delivery are separate states. It does not tell us exactly how large the gap between them is. That gap has to be measured.

```
Market Opportunity  is observable.
Market Access  is conditional.
Achievable Capacity  is advertiser-specific.
```

```
Google Ads Market Capacity = f ( Market × Advertiser ×
Account State × Time )
```

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**METHODOLOGY NOTE**

This framework deliberately separates documented platform behavior from methodological inference and hypotheses requiring empirical observation. The three-layer model presented here — Potential Market → Accessible Market → Achievable Spend — is a simplified public view of the more granular market-capacity framework AdsWizards Lab uses internally when assessing client accounts.

# Evidence Model & Sources

Every claim in this framework is tagged with one of four tiers. This is stricter than a simple citation list — it tells you how much weight the claim can bear.

| DOCUMENTED | INFERRED | HYPOTHESIS | UNKNOWN |
|---|---|---|---|
| Stated directly in Google's own policy documentation. The strongest tier — closest to a direct quote. | A conclusion that follows logically from documented facts. Not a Google statement, but not speculation — reasoning shown. | AdsWizards Lab's own model or claim requiring empirical testing. Treat as a hypothesis until observed. | A question Google's documentation does not answer, and that cannot currently be estimated responsibly. |

## SOURCES


[1] **Google Ads Policy Help — Update to Limited Ad Serving Policy (August 2026)**
States that Google limits impressions rather than disapproving ads, and lists the seven groups of qualification signals; source of "we can't say how long this might take."
support.google.com/adspolicy/answer/17344822
Posted 5 August 2026 · Accessed 7 September 2026

[2] **Google Ads Policy Help — Limited ad serving**
Canonical policy page: defines qualified advertisers, the appeals process, and the reassessment mechanism.
support.google.com/adspolicy/answer/13889491
Accessed 7 September 2026

[3] **Google Ads Policy Help — Updates to Limited ad serving Policy (June 2026)**
Documents the June 2026 expansion of Limited Ad Serving to additional scenarios on Google Search.
support.google.com/adspolicy/answer/17122370
Accessed 7 September 2026

[4] **Search Engine Land — Limited Ad Serving: Why Google Ads suddenly show less often**
Used for industry context only. Google policy documentation is treated as authoritative for platform behavior.
searchengineland.com/limited-ad-serving-google-ads-486730
September 2026 · Accessed 7 September 2026


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Platform documentation and product behavior can change. Re-verify time-sensitive claims before reuse.

**Capacity is not a property of the market. It’s a property of the market × advertiser × account state × time.**

The Invisible Auction — our model, our evidence, shown in full.

Growth architecture for complex and policy-sensitive markets.