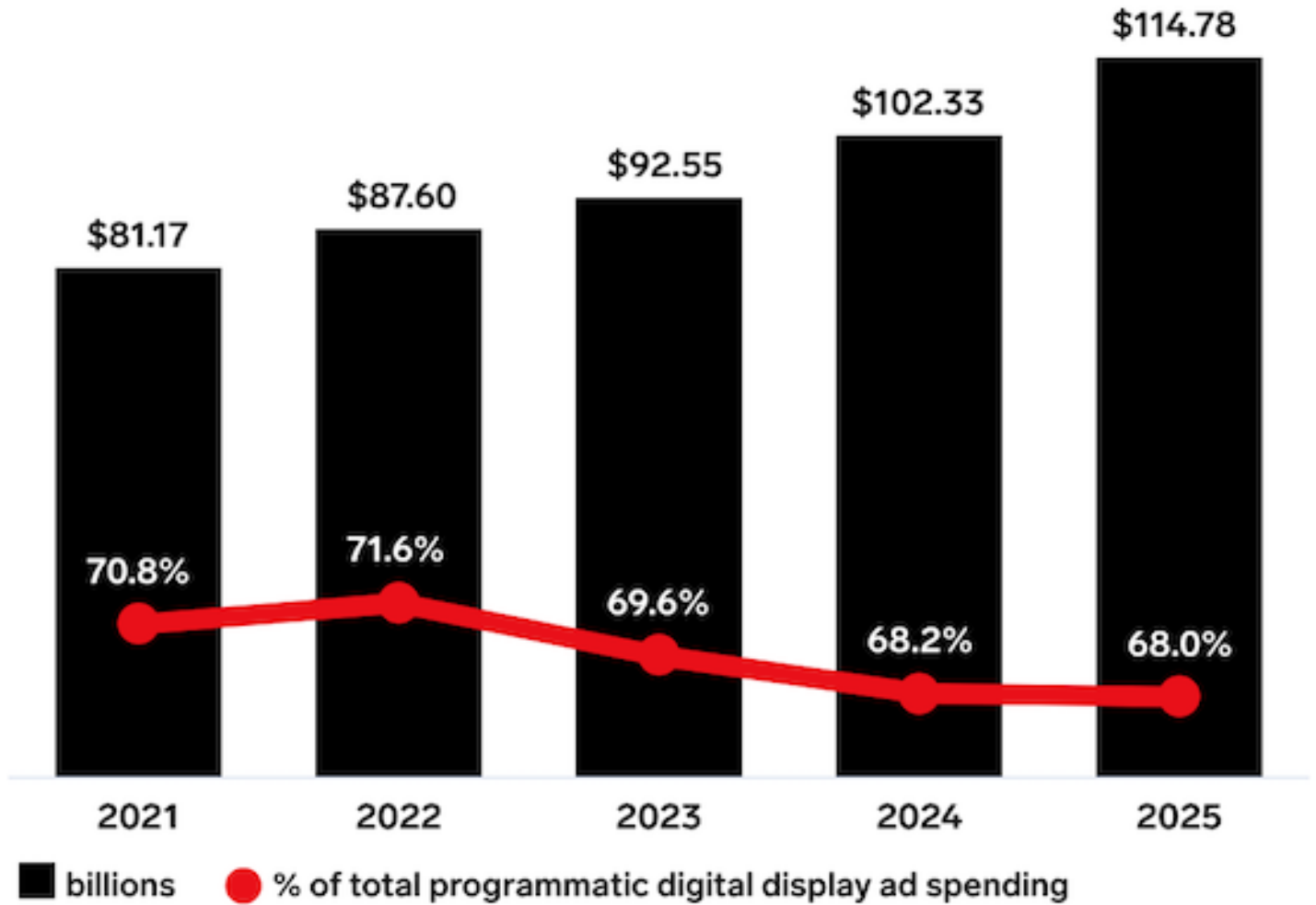


# RMNs are a bright spot in programmatic digital display ad spend, but won't make up for dip in walled garden spending

Article

# Walled Garden Programmatic Digital Display Ad Spending

US, 2021-2025



Note: includes programmatic digital display ads transacted in a closed ad ecosystem where the publisher has access to first-party data and owns and controls all operations in the entire ad tech stack, such as ad buying, serving, tracking, and reporting; its inventory is not available for purchase through third-party sellers or resellers; examples include Amazon, Google-owned and -operated properties, and Meta

Source: Insider Intelligence | eMarketer, April 2023

Insider Intelligence | eMarketer

In 2023, we predict that walled gardens will lose share of total programmatic digital display ad spending for the first time since 2017, when we first began forecasting this segment, according to our [Programmatic Ad Spending Forecast Q3 2023](#) report.

Retail media networks (RMNs) will be a bright spot in the gloom. By the end of 2023, RMNs share of total programmatic digital display ad spend will have doubled since 2018 as retailers like Amazon, Walmart, and Instacart grow their share of the digital ad market.

But retail media's success is not enough to compensate for the dip in spending with other walled gardens ... yet. Still, walled gardens will still represent the majority of programmatic digital display ad spending for the foreseeable future.