

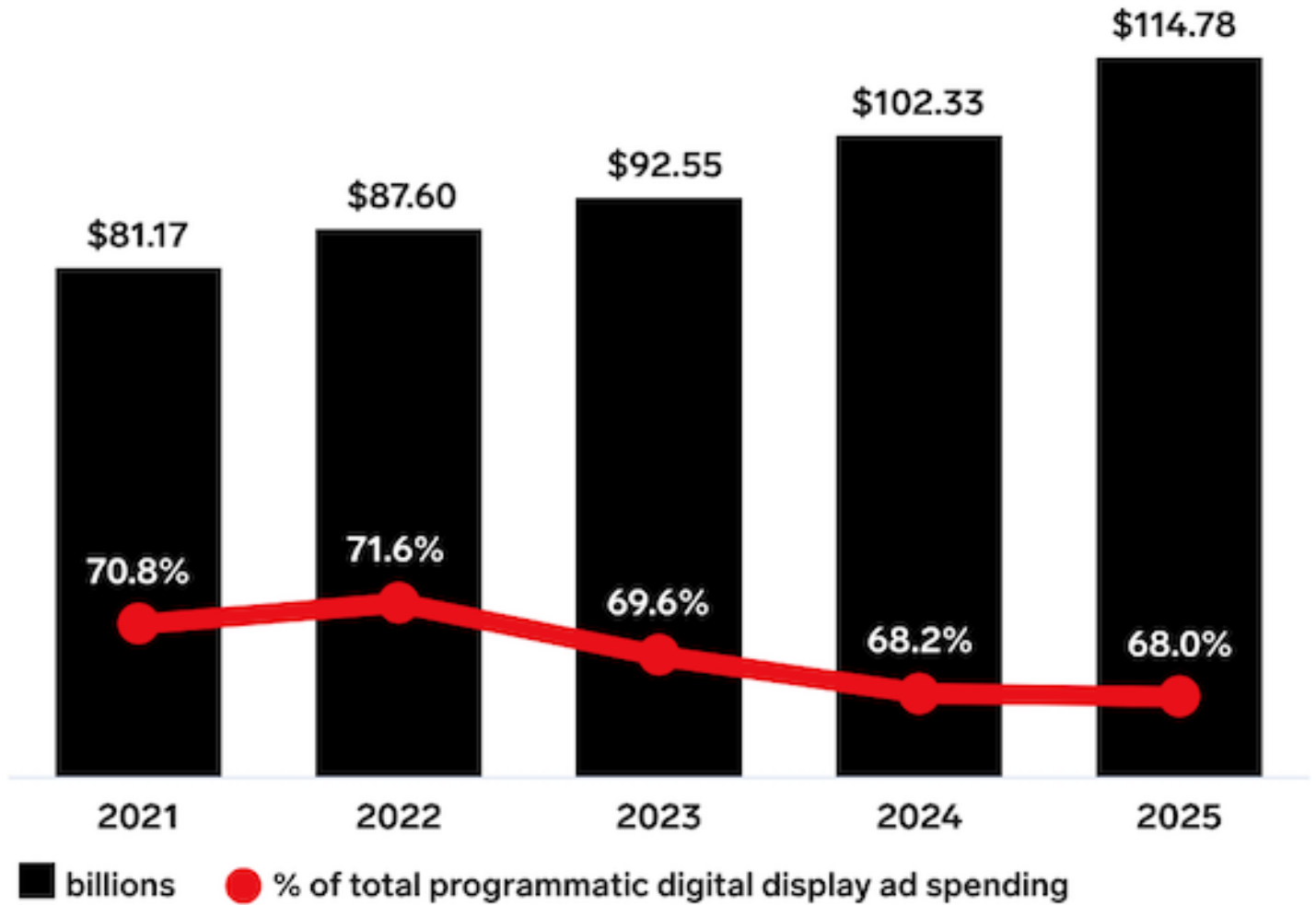
# Walled garden programmatically digital display ad spend to cross \$100 billion

Article

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# 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

**Key stat:** US walled garden programmatic digital display advertising will cross the \$100 billion mark next year, according to our forecast.

**Beyond the chart:**

- Walled gardens will lose share of the programmatic digital display ad spend market for the first time since we began tracking the segment in 2017.
- Walled garden spend share is being dragged down as the duopoly of Meta and Google becomes less dominant, and retail media networks have not yet made up for this dip.
- We don't include search ads in our definition of programmatic digital display ads. If we did, walled gardens would likely continue winning share of programmatic spend, as noted in our [“Programmatic Ad Spending Forecast Q3 2023”](#) report.

**Use this chart:**

- Understand walled gardens' role within the programmatic landscape.

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