US Programmatic Trends

August 2026

Report Overview

This edition of the DataBeat Programmatic Trends Report draws on anonymized data from partners across the DataBeat network to surface U.S. programmatic advertising performance and trends for August 2026. The report benchmarks July 2026 results against both June 2026 and July 2025, delivering a dual lens of month-over-month and year-over-year perspective.

$55+ Million
Monthly Revenue Tracked

35+ Billion
Monthly Impressions Tracked

200+ Bidders
Tracked

Key Highlights

On a month-over-month basis, **Display** CPMs fell **20.3%** and **Video** CPMs declined **7.8%**, resulting in a **19.9% overall** CPM decline.

Year-over-year, **Display** CPMs held broadly flat to modestly positive at **1.8%**, while **Video** CPMs surged **40.1%**, producing a net **overall** CPM increase of **25.0%**.

The month-over-month softening reflects a pronounced mid-summer pullback in advertiser demand. To navigate the seasonal dip and prepare for the Q3 ramp, publishers should focus on strengthening direct deals, optimizing floor prices, and leveraging header bidding to sustain auction competition. Prioritizing high-performing ad formats and diversifying demand sources will be key to protecting revenue through the softer period and capturing demand as budgets return.

Overall CPM

MoM -19.9%
YoY +25.0%

Display CPM

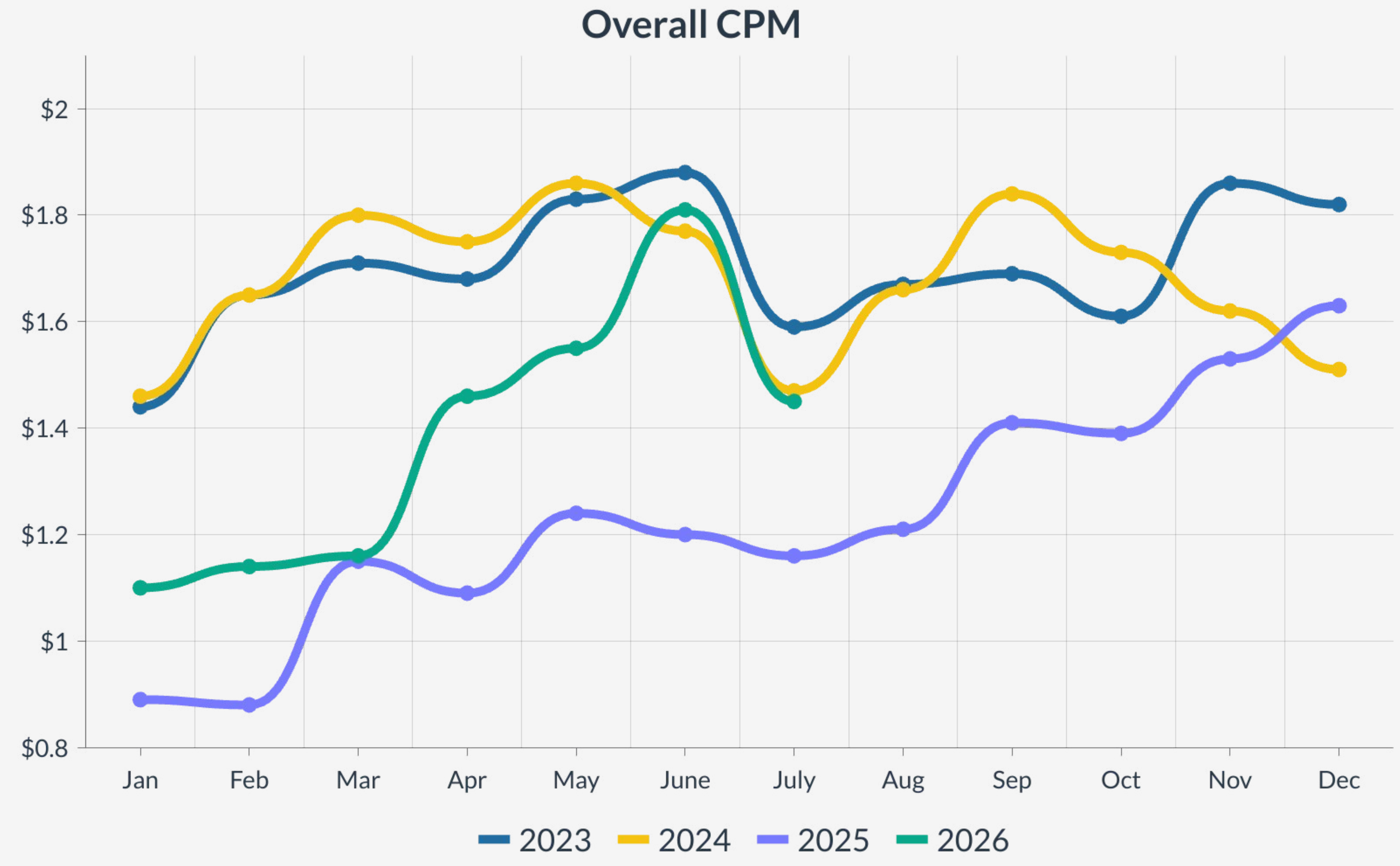
MoM -20.3%
YoY +1.8%

Video CPM

MoM -7.8%
YoY +40.1%

Prog Fill rate

MoM -4.0%
YoY -2.5%



Let's connect

Traffic Landscape

DATABEAT a mediamint company

Traffic Trends:

PV / USER	SESSIONS / USER	ENGAGED SESSIONS	NEW USERS
-6%	-2%	+12%	+18%
2.54 vs 2.40	1.83 vs 1.79		

- Audience growth was broad and genuine this month, with **New Users (+19%)** rising faster than **Total Users (+16%)**, a sign the **Industry pulled in a new audience** rather than just reactivating existing readers. When every top-line metric climbs together like this, the cause is usually an external demand pull, not a single internal fix.
- The incremental traffic held its quality rather than diluting it, as **engaged sessions** grew in step with **total sessions** (**both ~+14%**) and **engagement rate stayed effectively flat**. That is the line between real growth and a vanity spike, and this month the growth is real.
- PV/session and Sessions/User softened slightly even as volume jumped, pointing to more frequent, shorter, single-purpose visits rather than deeper browsing. This is the behavioural fingerprint of high-intent, event-driven and AI-referred traffic: readers arrive knowing what they want, get it, and leave satisfied.

Month-on-Month Shift in Traffic Sources :

CHANNEL	TRAFFIC SHARE	SESSIONS (JULY VS JUNE)	ENGAGEMENT RATE	PV / USER	SESSIONS / USER	KEY SIGNAL	STATUS
Organic Search	30.54% (-0.23%)	12.70%	42.10%	2.47 (-4.4%)	1.75	Search remained the largest traffic source, with traffic growing but engagement continuing to soften.	SHIFTING
Direct	29.44% (+0.12%)	14.00%	63.00%	2.28 (-12.3%)	1.64	Direct traffic grew strongly while maintaining the highest engagement, showing the strength of loyal audiences.	STRONG
Organic Social	14.55% (-0.32%)	11.10%	17.10%	1.82 (0.0%)	1.57	Traffic increased, but very low engagement suggests much of the growth is coming from lower-intent audiences.	SHIFTING
Email	1.73% (-0.08%)	8.30%	44.50%	4.07 (-1.7%)	2.31	Email remained a smaller but highly engaged channel, delivering strong content consumption per user.	STRONG
Referral	14.45% (+1.06%)	22.50%	4.30%	3.07 (-0.5%)	2.65	Referral recorded the strongest channel growth and gained share, but extremely low engagement raises quality concerns.	SHIFTING
Paid Social	5.60% (-0.38%)	6.30%	1.00%	1.89 (+0.9%)	1.63	Paid Social added traffic but continued to deliver the weakest engagement, limiting the value of its growth.	WEAK

Discovery Shift & Industry Impact :

- The AI channel is the fastest-growing segment this month (**Sessions +66%, New Users +75%**), with engagement steady at **62%**. Volume nearly doubled with no quality dilution, turning what had been an early signal into a clear, sustained trend. It tracks with ChatGPT referrals to publishers jumping 2.4x to 3.5x in July (Cloudflare, Similarweb): a new high-intent channel, still small but compounding fast.
- **New Users** outgrew **Total Users** here (**+75% vs +62%**), a sign of incremental acquisition, not old readers arriving a new way. AI assistants surface the brand to people search and direct were not reaching, giving reach the other channels cannot. Worth winning now while it is cheap, and watching as Google's AI Mode expands into 40-plus markets.
- The **FIFA World Cup 2026** was likely the biggest external driver of the surge. The most-watched World Cup in US history, its climax (semis and the July 19 final) fell inside month 7, exactly when **Sessions, Referral and Direct spiked**. For sports, news, entertainment and lifestyle sites, World Cup demand for scores, schedules and viral moments plausibly drove the Organic Search, Referral and Desktop upticks, desktop especially, given match-time checking at work.

Where Demand Pays More: AdX vs Open Bidding

This month's theme is Advertiser Performance: AdX vs Open Bidding. Both compete for the same ad space in the same auction, so this is a fair comparison. AdX is built into the ad server and brings Google demand that no other exchange can, so it almost always fills. Open Bidding lets other exchanges bid in that same auction, which adds competition on price. Open Bidding pays a higher CPM in every inventory type, even though it handles only about a quarter of revenue, and its lead is roughly twice as big among our largest advertisers. That lead is widest on App and smallest on Web. Part of it is built in. Open Bidding partners know the price they have to beat when the request reaches the ad server, so they usually bid above to win. That is their edge. But it only adds competition, not fill. They take a small share of impressions, so they lift price without moving volume. That is where AdX is strong.

Understanding Performance by Inventory Type :

App is being competed for, not just filled

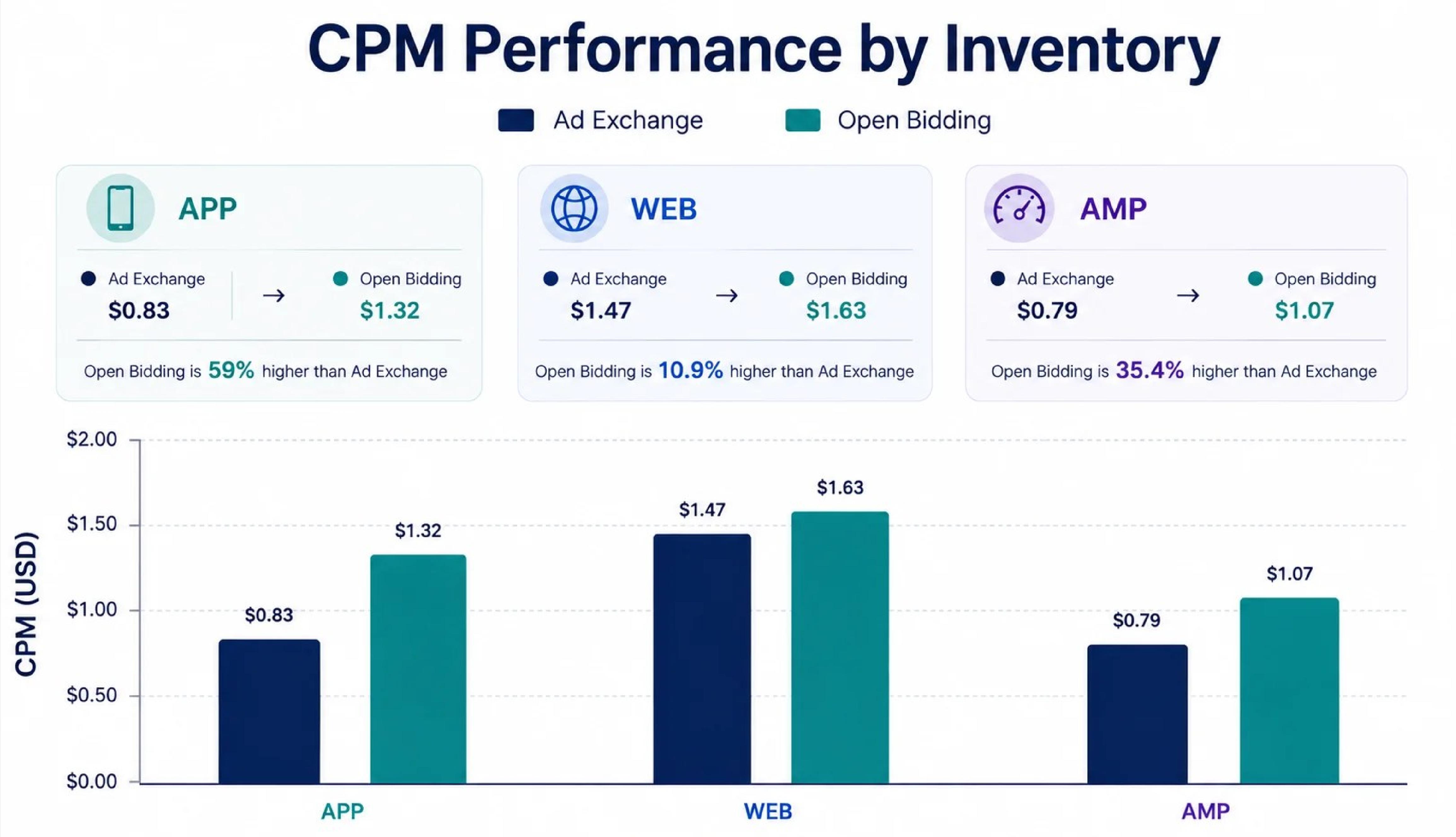
- The gap is far too big to be normal auction competition. Some buyers only reach App through Open Bidding, so when those partners are not in the auction we sell App for less than it is worth.
- Open Bidding brings in less than half the advertisers AdX does, yet ten buyers make up about three quarters of its App revenue. App pays well, but it leans on a few partners, so it is easier to lose than it looks.

Web's narrow AdX lead reflects a constraint, not a ceiling

- The two channels are close on Web because Web has the most buyers. AdX keeps up here by bringing volume of demand, not by paying more. Gains on Web come from small improvements repeated across a lot of inventory.
- Web is about **80%** of revenue, so its small percentage gap is worth more money than App's big one. Web should be judged on the money it adds, not on how its gap compares with the others.

AMP's premium reflects AdX stepping back

- A gap can grow because the cheaper side is pulling back, not because new buyers turned up. That is what is happening on AMP, so the gap should not be read as recovery.
- AMP has as few buyers as App but pays far less. What is left is a small group winding down, so AMP is worth judging on what it earns rather than on the gap between channels.



What the Split Signals

AdX drives stronger fill, while Open Bidding offers a premium price. Open Bidding pays more in every inventory type, and it does that as the smaller channel. The reason is choice. When buyers can pick how they reach our inventory, they pay more for the route they trust. The biggest buyers are building their own routes now, and some are skipping shared auctions altogether. Open Bidding is where that demand shows up first. This is not a case for cutting AdX. We need it for scale, and it brings buyers no one else can. It is a case for managing the two differently instead of treating them as one. Web comes first, because a small gap on most of our revenue is worth more than a big gap on a little. App is where we can move fastest. AMP is too small to base decisions on.

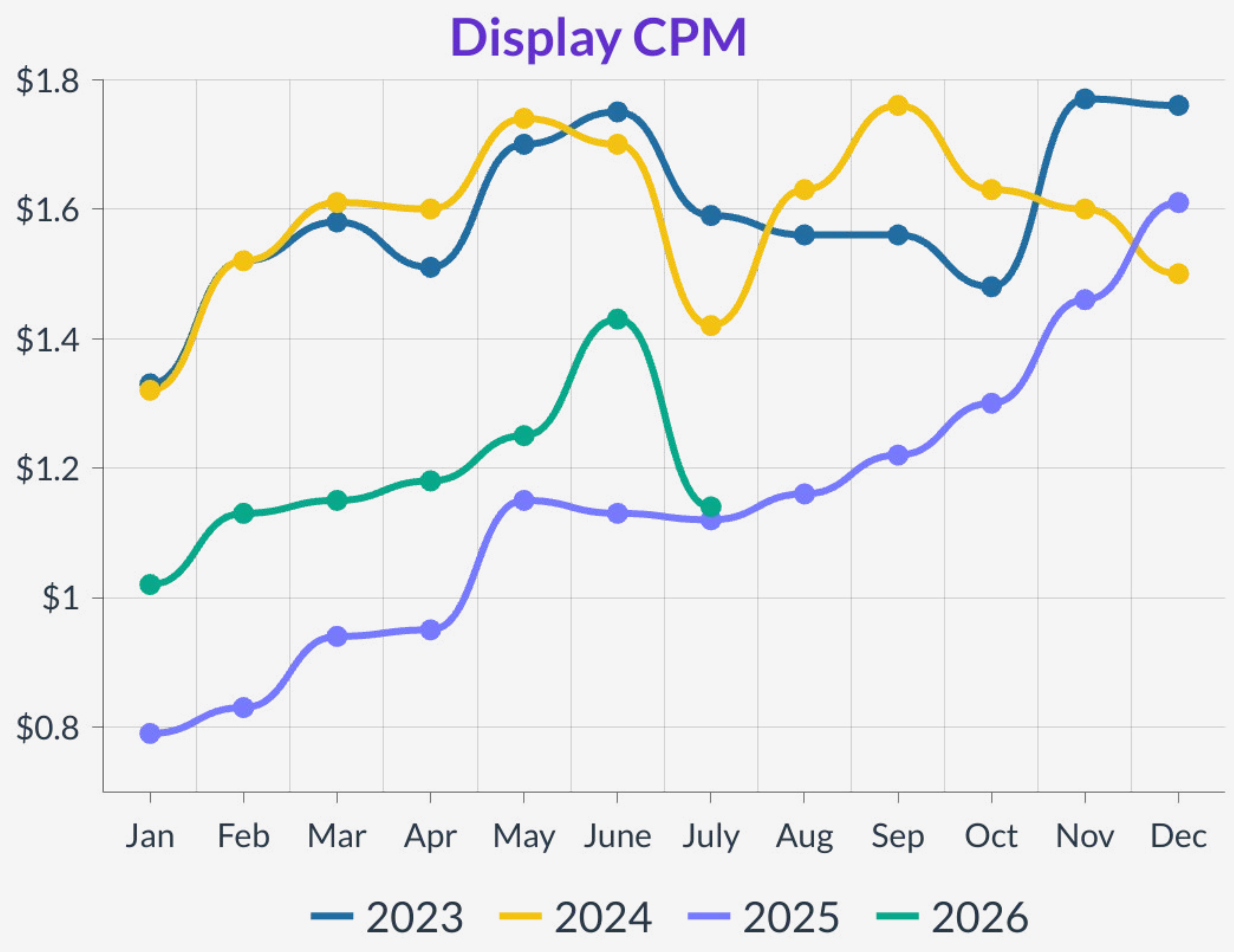
Let's connect

Here's a look at industry trends, broken down by inventory and demand.

Media Trends

Display Trends

- Display CPMs fell 20.3% MoM but held broadly flat to modestly positive at +1.8% YoY, a pronounced mid-summer pullback as advertiser budgets paused between the Q2 close and back-to-school planning. The sharp MoM drop cut across nearly every partner, signaling a broad demand softening rather than isolated weakness.
- Declines varied widely across partners, from -13.6% to -51.8%, with the largest partner, Ad Exchange (53% SOV), falling 22.5%. The spread was widest among smaller partners, which contained both the steepest drops and the most resilient performers.

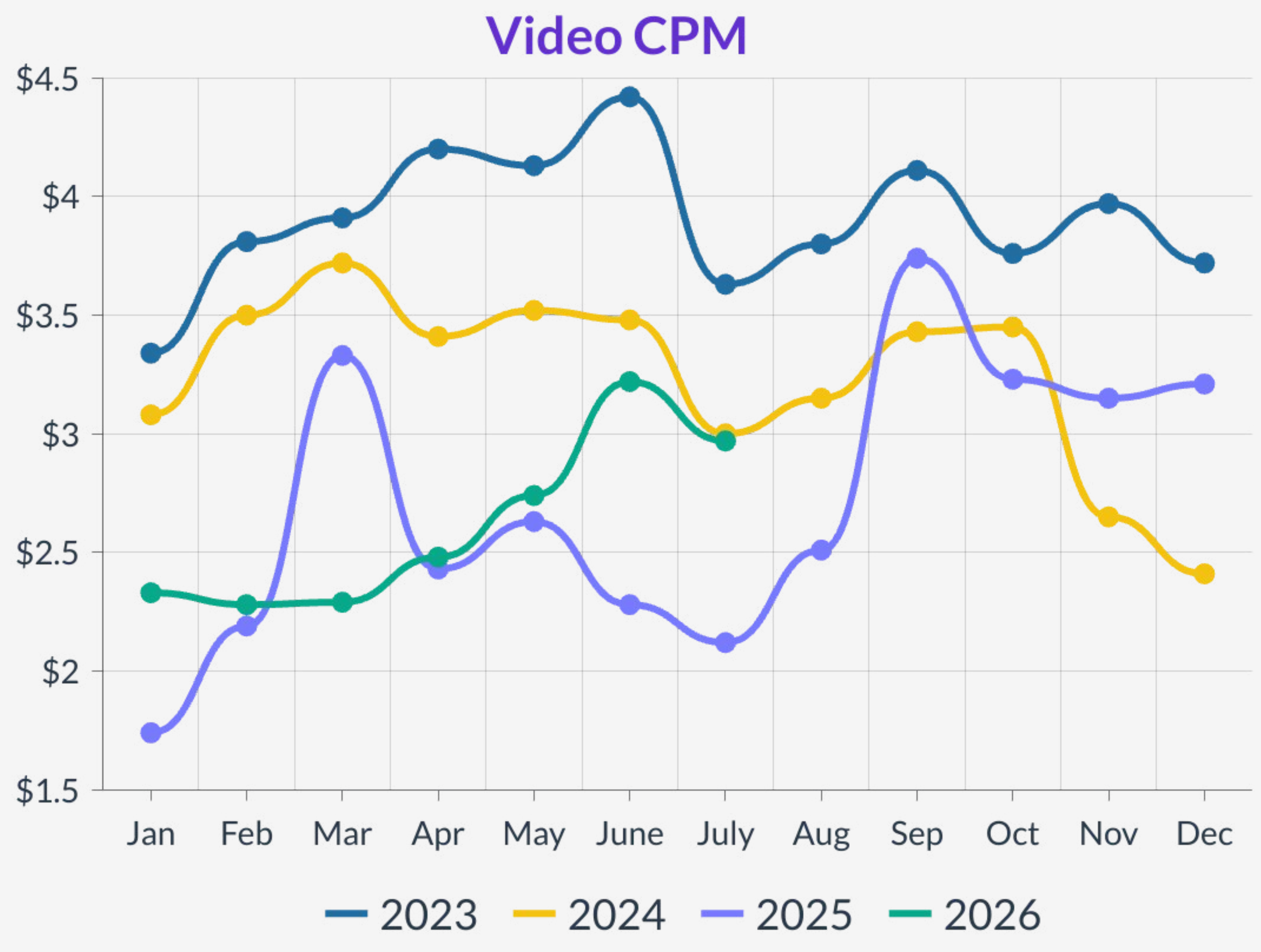


Display Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	53%	1	$1.10	-22.5%	42.9%
TTD	14%	3	$0.70	-20.5%	-27.1%
Index Exchange	11%	2	$0.95	-32.1%	-7.8%
Rubicon	8%	7	$1.37	-39.1%	30.5%
Ozone	6%	11	$1.27	-30.6%	36.6%
Kueez	5%	13	$1.20	-51.8%	8.1%
Pubmatic	1%	6	$0.97	-48.9%	-26.0%
Amazon	1%	4	$2.16	-13.9%	7.5%
Media.net	1%	5	$0.96	-25.0%	20.0%
Triplelift	1%	9	$1.02	-13.6%	1.0%

Video Trends

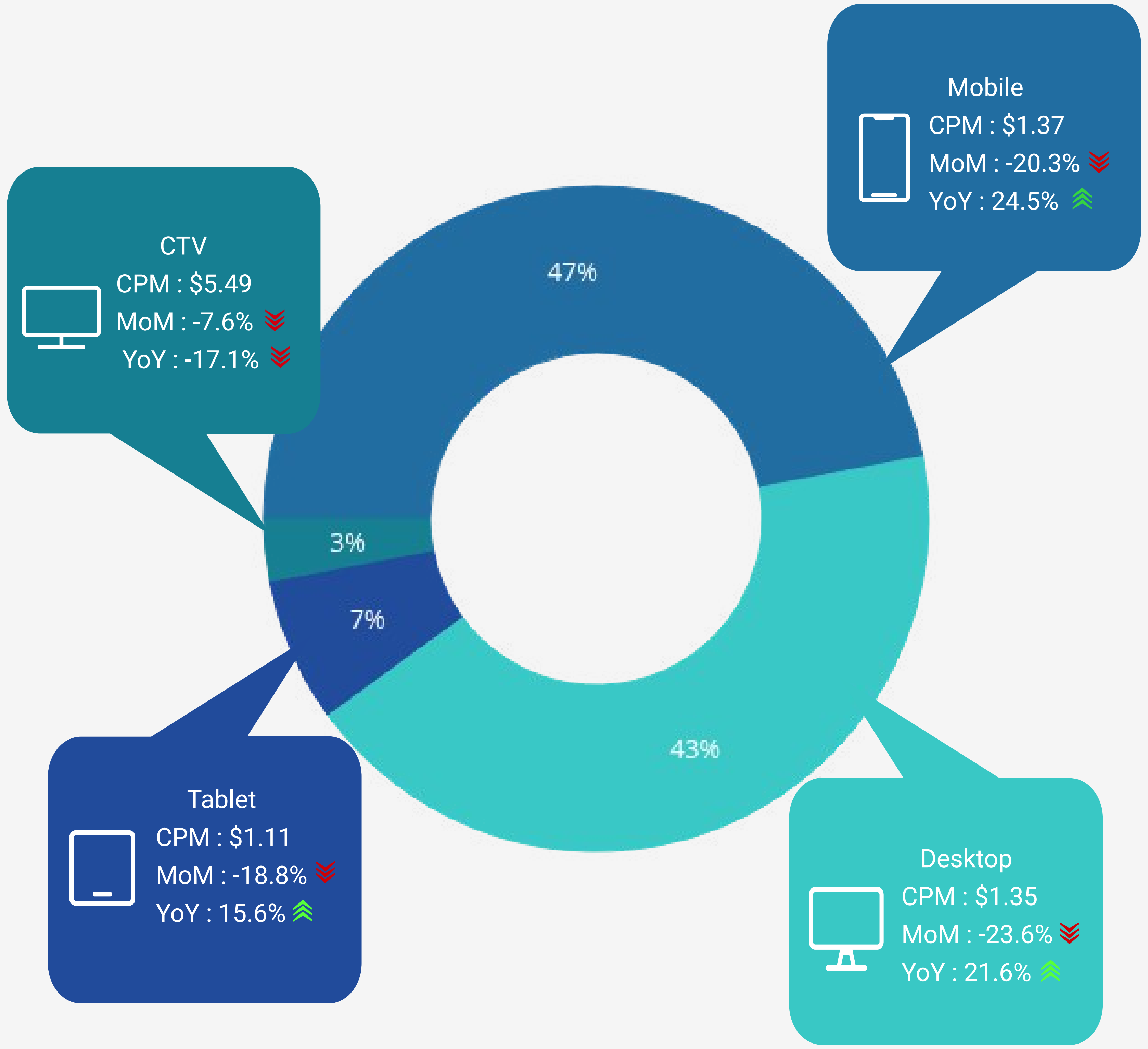
- Video CPMs eased 7.8% MoM yet surged 40.1% YoY, by far the strongest year-over-year performance across all formats. Video held up far better than display through the summer slowdown, indicating advertiser demand for video was less affected by the seasonal pause.
- In contrast to display, the month-over-month decline was concentrated in scaled supply, with Amazon (32% SOV) down 19.3% and Rubicon down 26.0%, while the largest partner, Ad Exchange, held far steadier. This points to the pullback coming mainly from high-volume open-auction demand.



Video Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	43%	1	$2.08	-4.1%	2.5%
Amazon	32%	2	$2.46	-19.3%	-7.5%
Rubicon	12%	3	$1.42	-26.0%	35.2%
Index Exchange	10%	4	$1.15	-13.5%	4.5%
OneTag	1%	11	$3.06	-7.0%	-3.5%
Pubmatic	0%	6	$1.61	-2.4%	42.5%
Kargo	0%	9	$3.15	-3.4%	-35.3%
OpenX	0%	8	$2.01	-3.8%	3.6%
LoopMe	0%	10	$0.95	-16.7%	5.6%
Triplelift	0%	15	$0.95	-28.6%	-44.1%

Device Trends



Mobile Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	50%	1	$1.24	-26.2%	26.5%
TTD	15%	3	$0.66	-19.5%	-13.2%
Rubicon	10%	11	$1.46	-32.7%	18.7%
Index Exchange	8%	5	$1.12	-23.3%	0.9%
Kueez	4%	2	$1.09	-26.4%	6.9%
Amazon	4%	4	$1.95	-25.6%	40.3%
Ozone	3%	8	$1.72	-15.7%	-11.3%
Pubmatic	2%	10	$1.28	-30.1%	0.0%
Nativo	2%	14	$2.79	-22.9%	68.1%
Triplelift	2%	12	$0.94	-23.0%	-36.5%

Desktop Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	49%	1	$1.05	-30.0%	12.9%
Index Exchange	11%	2	$1.02	-38.2%	-12.8%
Ozone	12%	5	$1.24	-29.1%	19.2%
Pubmatic	9%	6	$1.24	-41.1%	-27.7%
Amazon	4%	8	$1.02	-45.9%	-60.5%
Rubicon	2%	4	$1.12	-43.6%	-22.5%
Media.net	2%	3	$0.85	-29.1%	-11.7%
Triplelift	1%	13	$1.10	-37.9%	-56.5%
OpenX	1%	7	$0.83	-26.9%	-31.2%
Equativ	1%	11	$0.54	-33.9%	-17.2%

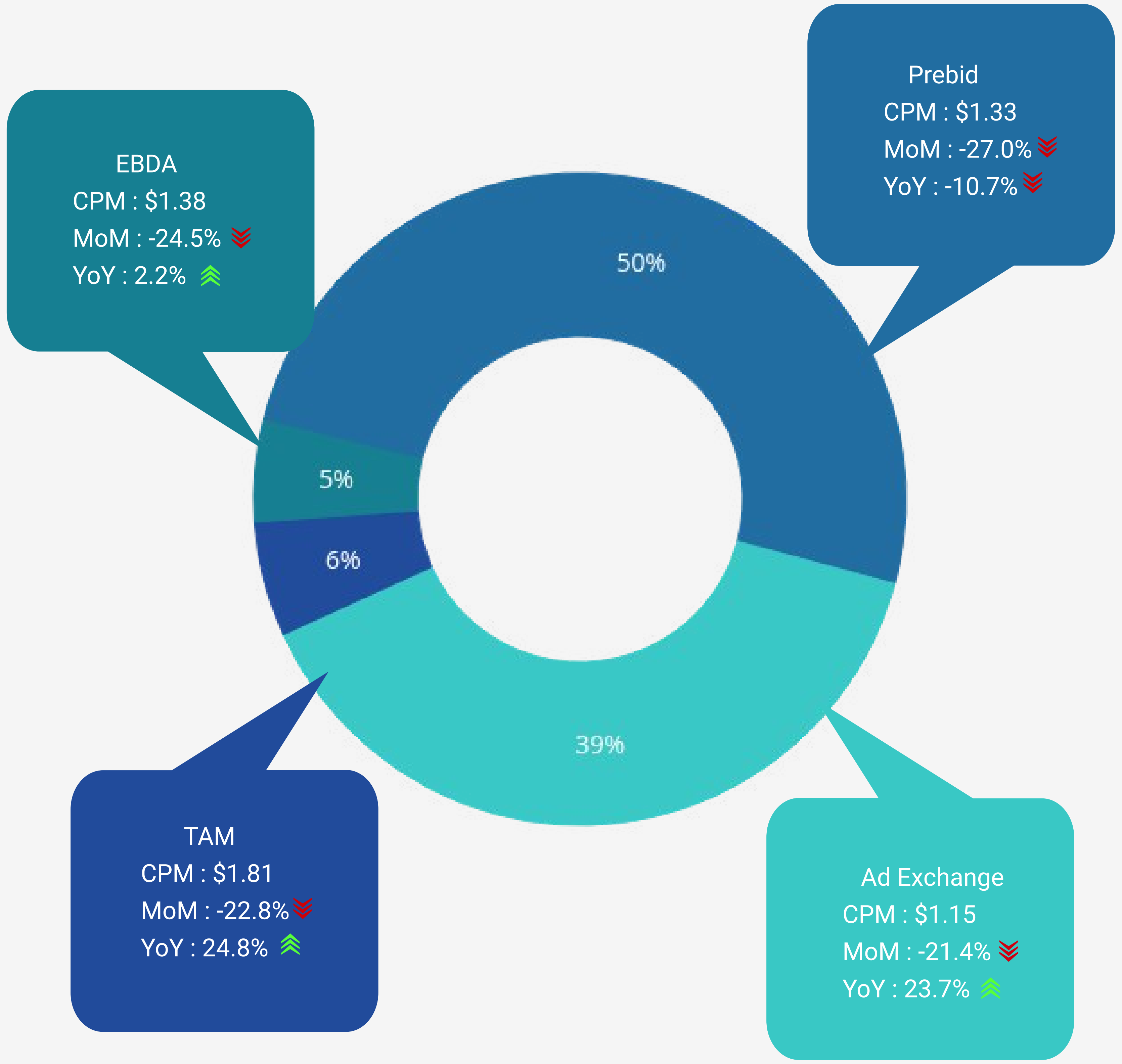
CTV Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	74%	1	$3.48	-8.4%	2.1%
Index Exchange	15%	2	$5.12	24.9%	6.2%
Amazon	4%	3	$5.23	86.1%	12.5%
Pubmatic	3%	7	$1.48	-23.7%	26.5%
RythmOne	1%	5	$4.05	0.7%	17.1%
Triplelift	1%	15	$4.31	24.6%	13.4%
InMobi	0%	4	$2.25	44.2%	44.2%
Ozone	0%	19	$0.89	-33.6%	-5.3%
TTD	0%	11	$0.82	-16.3%	2.5%
Rubicon	0%	10	$1.77	25.5%	45.1%

- Desktop CPMs fell hardest of any device MoM at -23.6%, well beyond Mobile (-20.3%) and Tablet (-18.8%). The decline was broad, all ten listed desktop partners fell, in a range of -26.9% to -45.9%, but its depth relative to other devices points to desktop-specific weakness rather than a uniform advertiser pause. At $1.35, desktop prices roughly at parity with mobile, and is up +21.6% YoY despite steep annual declines at Amazon (-60.5%) and Triplelift (-56.5%).
- CTV was the most resilient device MoM at -7.6%, holding well clear of the double-digit declines across other devices. The aggregate understates the underlying strength: Ad Exchange sits at 74% of CTV SOV and its -8.4% anchors the blend, while six of ten partners posted MoM gains, led by Amazon (+86.1%), InMobi (+44.2%), Rubicon (+25.5%), Index Exchange (+24.9%) and Triplelift (+24.6%). At $5.49, CTV remains the highest-priced device by a wide margin, though it sits -17.1% YoY, a mix effect from open-auction concentration rather than partner-level pricing weakness, with nine of ten listed partners up year-over-year.

Let's connect

Programmatic Integration Trends



Prebid Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Index Exchange	32%	1	$0.98	-29.0%	-12.5%
Rubicon	27%	4	$1.32	-36.2%	14.8%
Ozone	21%	3	$1.46	-22.8%	49.0%
Pubmatic	12%	2	$1.25	-33.2%	-7.4%
Triplelift	2%	7	$0.85	-28.0%	-37.5%
OpenX	1%	5	$1.17	-32.0%	-7.9%
Nativo	1%	8	$2.97	-24.0%	48.5%
InMobi	1%	9	$0.60	-6.3%	-18.9%
Media.net	1%	6	$0.83	-25.9%	2.5%
Kargo	0%	13	$2.07	-30.3%	0.5%

TAM Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Amazon	47%	1	$1.59	-32.3%	0.6%
Index Exchange	15%	2	$0.90	-27.4%	-26.8%
Rubicon	8%	3	$1.03	-14.2%	-42.5%
InMobi	4%	4	$1.11	1.8%	94.7%
Pubmatic	6%	8	$0.95	-22.8%	-52.7%
Triplelift	5%	6	$1.04	-20.0%	-41.9%
Nativo	3%	5	$1.65	-19.9%	18.7%
GumGum	5%	10	$2.26	-29.2%	-29.6%
Kargo	3%	13	$1.76	8.0%	-38.2%
MinuteMedia	3%	17	$1.06	-26.4%	-16.5%

EBDA Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Index Exchange	45%	1	$1.61	-13.0%	45.0%
Rubicon	16%	3	$1.86	-48.6%	32.9%
Pubmatic	9%	5	$1.33	-54.3%	15.7%
Triplelift	7%	4	$0.59	-29.8%	-59.9%
OpenX	5%	6	$2.68	-16.5%	32.7%
Nativo	6%	9	$1.86	31.9%	-2.6%
InMobi	2%	11	$0.55	-22.5%	-43.9%
RythmOne	1%	15	$0.82	-32.2%	-5.7%
Ogury	3%	14	$0.99	-14.7%	17.9%
Yieldmo	2%	18	$2.64	57.1%	78.4%

- Prebid held its market lead at 50%, with AdX at 39%, though CPMs fell across every integration MoM as the summer slowdown hit all demand paths simultaneously. The uniform decline shows this was a market-wide budget pause rather than buyers rotating between integrations, a reminder that seasonal demand shifts affect the entire auction stack at once.
- AdX (+23.7%) and TAM (+24.8%) led on aggregate YoY CPM, though TAM's gain sits against 7 of its 10 largest partners declining year-over-year, worth noting the aggregate is mix-driven. Prebid retained the largest share of demand at 50% despite a -10.7% YoY CPM, indicating the pressure is on pricing rather than volume. EBDA was near-flat at +2.2% in aggregate, with several of its largest partners posting strong annual gains.

AdX Buyer Trends

Advertiser Trends

- The top advertiser cohort broadly pulled back this month, with AdWords Small Businesses (-23%), Amazon Corp (-22%), and Alphabet (-21%) all declining as spend cooled after the Q2 close and the Prime Day retail cycle. The uniform softening across the largest recurring buyers signals a demand-cycle pause rather than any category-specific retreat, with budgets likely being held for the back-to-school and Q3 ramp.
- Against that backdrop, the enterprise and B2B advertisers stood out as the exceptions: SAP (+24%), Accenture (+11%), and Apple (flat) held or gained, pointing to steadier, less seasonal enterprise software and services demand. Comcast's sharp 48% drop reflects the expected unwind of heavy prior-month telecom and media campaign activity. For publishers, the takeaway is that consumer-driven categories drove the month's softness, while enterprise demand offered a more stable floor.

Bidder Trends

- Buy-side demand contracted across the board, with Google Ads (-21%) and DV360 (-18%) both easing, confirming the pullback ran through the largest managed and programmatic channels rather than any single platform. The synchronized decline across Google's stack points to a market-wide budget pause, not a shift between buyers.
- The steepest drops came from independent and commerce-focused platforms: Yahoo! (-44%), The Trade Desk (-37%), and Magnite (-35%) all fell hard, indicating open-internet and retargeting demand is the most exposed to seasonal softening. The Trade Desk's decline is worth watching given its typically resilient positioning, though it more likely reflects disciplined bid pacing through a slow demand window than any structural weakening. For publishers, the pattern is a reminder that independent and commerce demand tends to lead both the summer dip and the recovery that follows.

Top AdX Advertiser's

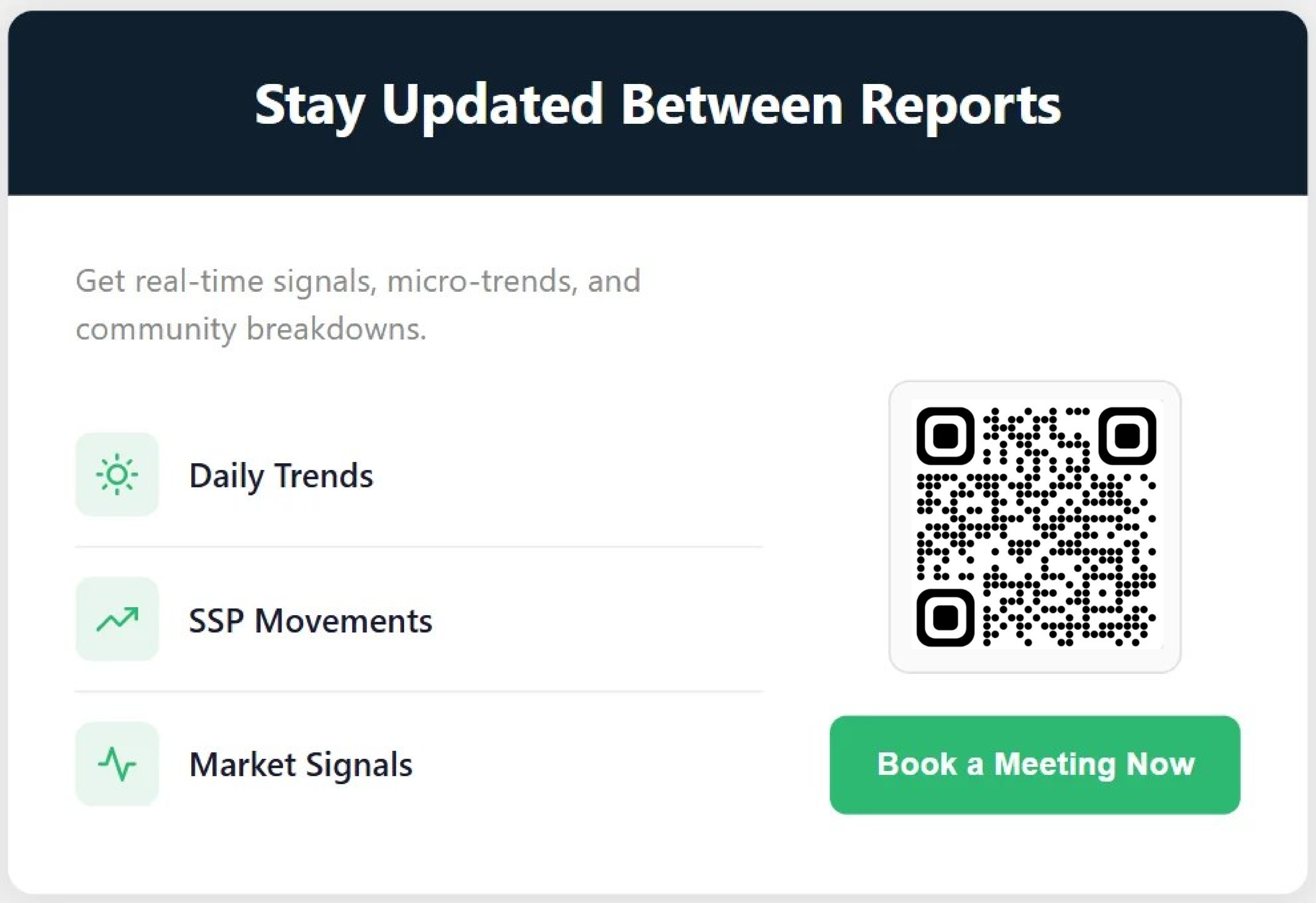
Advertiser	Rank	CPM	MOM%
AdWords small businesses	1	$3.86	-23%
Amazon Corp	2	$5.41	-22%
AT&T	3	$4.54	-5%
TEMU	4	$3.06	-14%
Alphabet	5	$4.36	-21%
SAP	6	$15.90	24%
Best Buy	7	$4.35	2%
Comcast Corporation	8	$3.30	-48%
Accenture	9	$30.68	11%
Apple	10	$8.06	0%

Top AdX Bidder's

Bidder	Rank	CPM	MOM%
Google Ads	1	$3.13	-21%
DV360	2	$3.03	-18%
The Trade Desk Inc.	3	$3.01	-37%
Index Exchange	4	$4.18	-21%
Magnite	5	$3.96	-35%
Facebook NB	6	$1.68	-19%
Criteo	7	$2.95	-11%
Smart AdServer (EB)	8	$1.90	-34%
TemuDSP	9	$6.34	-10%
Yahoo!	10	$2.83	-44%

Ready for More Than Just Reports?

Find your daily data trends and SSP movements. Be a part of our LinkedIn community.



Let's connect