US Programmatic Trends

June 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 June 2026. The report benchmarks May 2026 results against both April 2026 and May 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 rose 5.9% and Video CPMs climbed up 10.5%, contributing to a 6.2% overall CPM gain.

Year-over-year, Display CPMs surged 10.6%, while Video CPMs increased 4.2%, producing a net overall CPM increase of 24.2%.

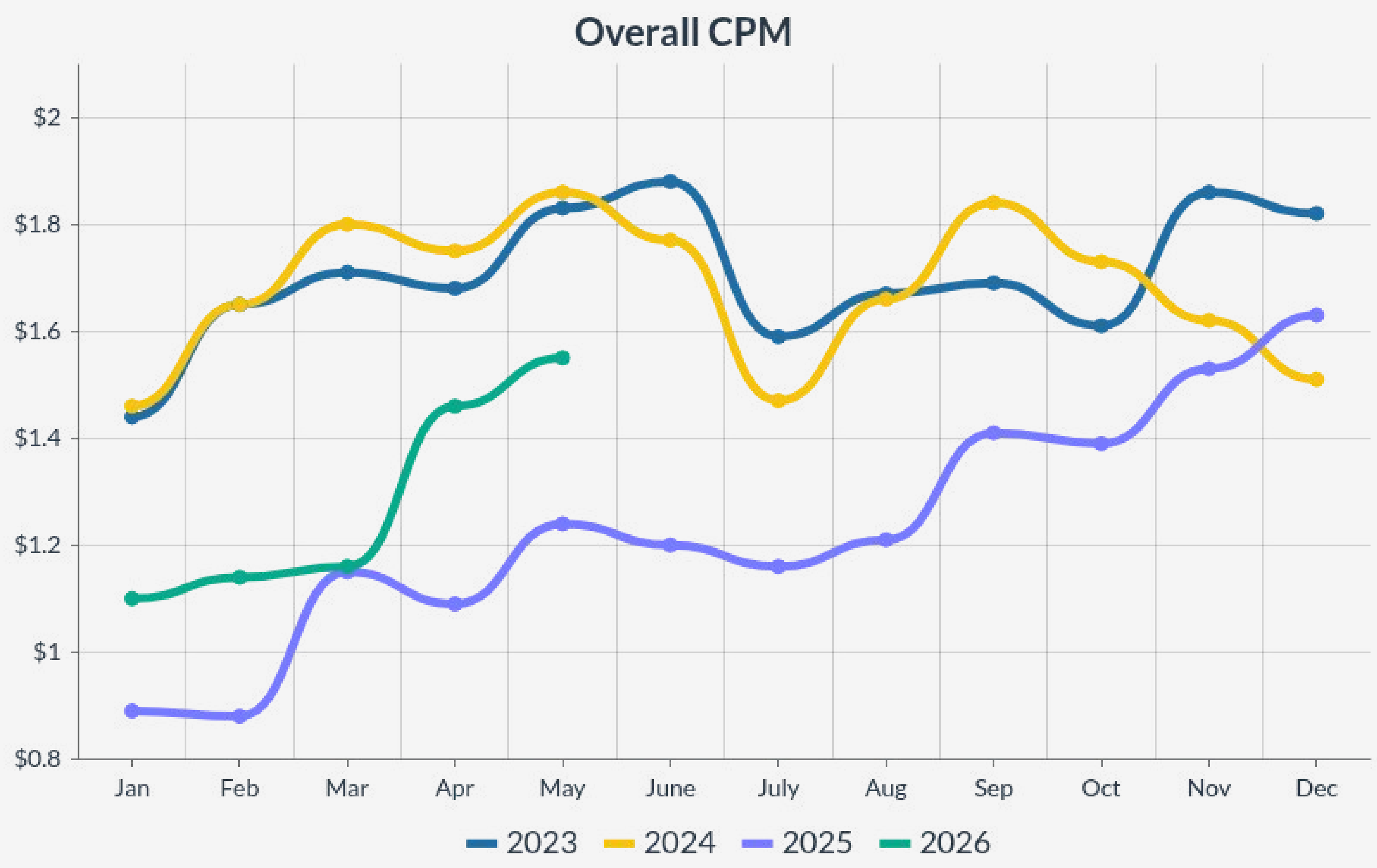
To sustain this momentum and maximize the current demand environment, publishers should focus on strengthening direct deals, optimizing floor prices, and leveraging header bidding to drive continued auction competition. Investing in high-performing ad formats and diversifying demand sources will be key to compounding these gains and building more resilient revenue through the months ahead.

Overall CPM
MoM +6.2%
YoY +24.2%

Display CPM
MoM +5.9%
YoY +10.6%

Video CPM
MoM +10.5%
YoY +4.2%

Prog Fill rate
MoM -3.7%
YoY +2.4%



Traffic Landscape

Traffic Trends:

PV / USERS	SESSIONS / USERS	ENGAGEMENT RATE	AVG SESSION DURATION
-7%	-6%	-3%	+19%
2.96 vs 3.19	1.92 vs 2.04	51.7% vs 53.5%	321s vs 270s

- Users visited less often and consumed fewer pages during each visit, with declines in Sessions/User (-5.9%), PV/User (-7.0%), however PV/Session remained relatively stable 1.54. This suggests that while audiences are still arriving, they are engaging with a narrower set of content and not developing strong consumption habits.
- Engagement Rate fell slightly (-3.2%), indicating that a larger share of visitors interacted less deeply with content compared to the previous month, likely reflecting an increase in lower-intent traffic.
- Despite a 19% increase in Average Session Duration, broader engagement metrics weakened, suggesting that longer visits alone were not enough to offset declines in visit frequency and content consumption.

Month-on-Month Shift in Traffic Sources :

CHANNEL	TRAFFIC SHARE	SESSIONS (JUNE VS MAY)	ENGAGEMENT RATE	PV / USER	SESSIONS / USER	KEY SIGNAL	STATUS
Organic Search	35.8% (-0.4%)	3.90%	49.40%	3.17	1.95	Search remains the largest traffic driver, but engagement quality continues to soften.	SHIFTING
Direct	27.1% (+1.2%)	11.10%	68.50%	3.21	2.1	Strong growth and engagement highlight the value of loyal, returning audiences.	STRONG
Organic Social	8.3% (-0.6%)	-2.50%	54.30%	1.84	1.61	Traffic decline suggests audience attention is shifting across social platforms.	SHIFTING
Email	2.7% (+0.2%)	19.00%	51.20%	3.64	2.61	Smaller channel, but continues to deliver highly engaged and valuable users.	STRONG
Referral	6.5% (+1.8%)	43.00%	53.70%	2.32	1.78	Rapid growth is expanding reach, though engagement quality remains mixed.	SHIFTING
Paid Social	1.4% (+0.7%)	86.30%	27.90%	1.36	1.2	Volume is increasing quickly, but traffic quality remains relatively weak.	WEAK

ChatGPT Referral Trends & Publisher Impact:

- ChatGPT continued to gain share as a referral source, with its contribution to total sessions increasing from 0.017% in April to 0.037% in May, while its share of referral traffic grew from 2.1% to 3.4%. This highlights the growing role of AI assistants in publisher discovery journeys.
- ChatGPT referral sessions surged 130.9% MoM, making it one of the fastest-growing traffic sources in the dataset. The increase closely aligns with OpenAI's May linking update, which began surfacing more direct publisher links within responses.
- Despite rapid growth, ChatGPT still contributes only a small share of overall referral traffic. Established sources such as Firefox New Tab, SmartNews, and Reddit continue to drive the majority of referral volume, while ChatGPT is emerging as an additional source of audience acquisition.
- The trend highlights the growing importance of being referenced by AI platforms. As AI assistants become a larger source of discovery, being referenced within AI-generated responses is becoming increasingly important for publishers seeking incremental referral traffic

How Agentic Buying Differs from Traditional Programmatic Buying

This month's theme explores the rise of Agentic Buying End-to-End in programmatic advertising and how it compares against traditional Non-Agentic buying across two key monetization metrics: CPM and fill rate. Unlike conventional buying that often buy across broader inventory pools and audience segments, Agentic Buying End-to-End take a more selective approach to inventory selection and audience targeting, focusing spend on opportunities that best align with campaign objectives. Rather than depending on manual campaign management, agentic workflows use coordinated AI agents to autonomously plan, execute, and optimize campaigns in real time. By continuously analyzing live performance signals, they can adapt bidding strategies, inventory selection, and budget allocation to maximize outcomes against predefined goals. We examine whether this approach translates into meaningfully different monetization outcomes for publishers using SSP marketplace data, including leading SSPs such as PubMatic, while highlighting how emerging solutions like AgenticOS are bringing agentic demand to market through autonomous, agent-driven campaign execution.

Comparing Agentic and Non-Agentic Demand Performance

Demand Performance :

Agentic Buying End-To-End delivers CPM and fill rate performance broadly in line with Traditional Buying. For a category still in early adoption, this indicates Agentic buying has evolved beyond a niche channel into a credible market participant. For publishers, it already represents a reliable source of yield, with further upside as adoption increases.

Competitive Bidding :

Agentic Buying CPMs are only slightly lower than Non-Agentic Buying CPMs despite participating in 86% fewer auctions. This suggests AI-driven buyers are targeting inventory more selectively while maintaining comparable pricing. Publishers should assess how Agentic buying influences auction competition, CPMs, and monetization across the inventory it targets.

Auction Efficiency :

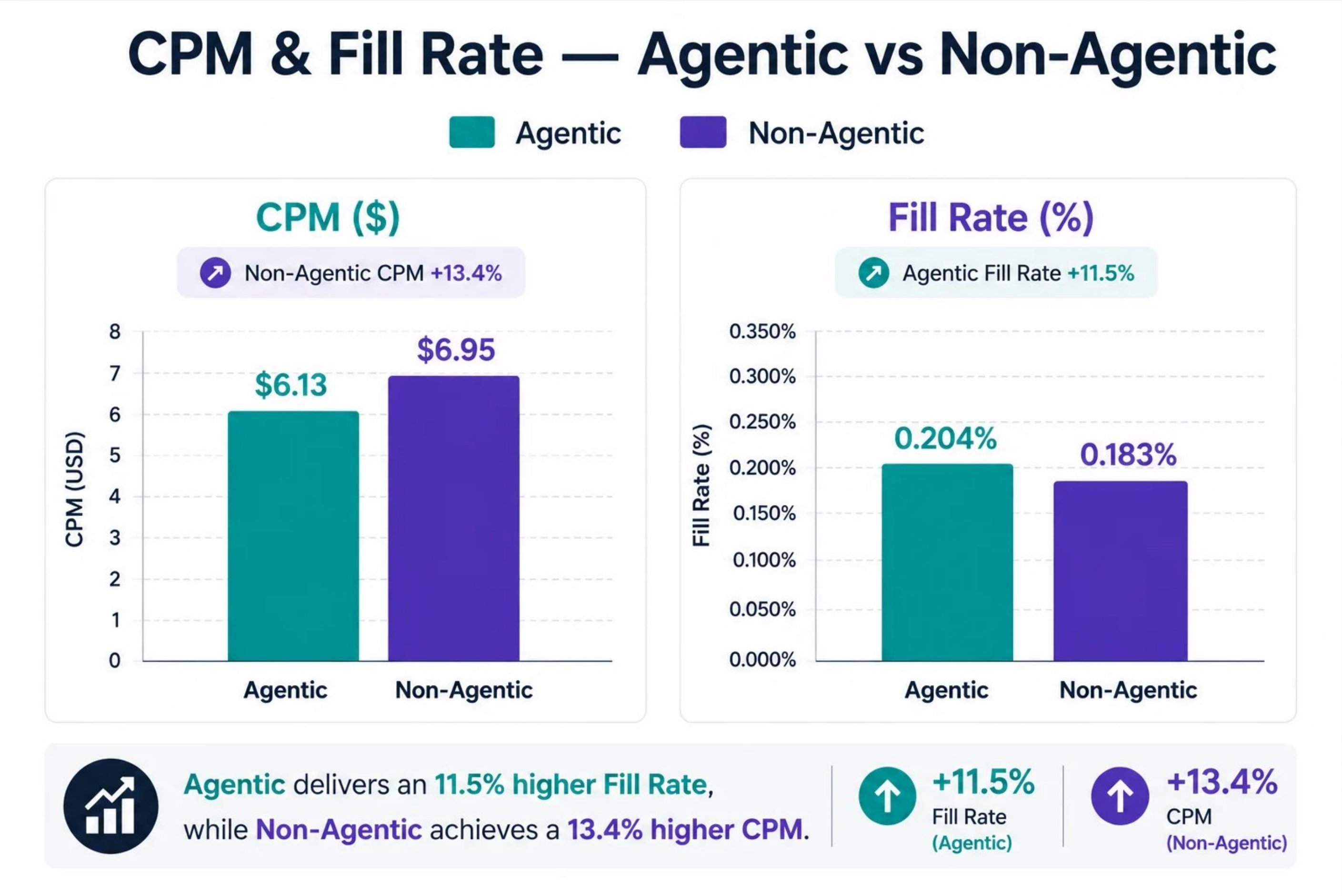
Despite participating in significantly fewer auctions, Agentic Buyer's achieve a higher fill rate than Non-Agentic Buyer's, indicating more efficient bidding and supply conversion. For buyer's, this suggests greater precision in impression selection. For publishers, the higher fill rate may signal stronger demand efficiency, though it is worth assessing whether this stems from inventory quality or win-rate optimization.

Performance at Scale :

Agentic Buying operates on a much smaller share of auction volume than Traditional Buying, yet maintains comparable CPM and fill rate performance. This suggests Agentic Buyer's can deliver consistent monetization outcomes despite limited scale, highlighting an efficiency advantage as participation grows.

Scalability :

Performance metrics suggest Agentic Buyer's has moved beyond the experimental stage. As more Buyer's adopt AI-driven buying, Agentic Buying is likely to become a larger contributor to publisher monetization.



The Shift Toward Efficient Buying

Agentic Buyer's are already matching Non-Agentic CPM and fill rate performance while participating in far fewer auctions, suggesting efficiency is becoming as important as scale. For Buyer's, this demonstrates the value of more selective bidding. For publishers, it highlights the need to understand how Agentic buyers evaluate inventory. As adoption grows, inventory quality and signal strength are likely to matter more than auction volume.

Let's connect

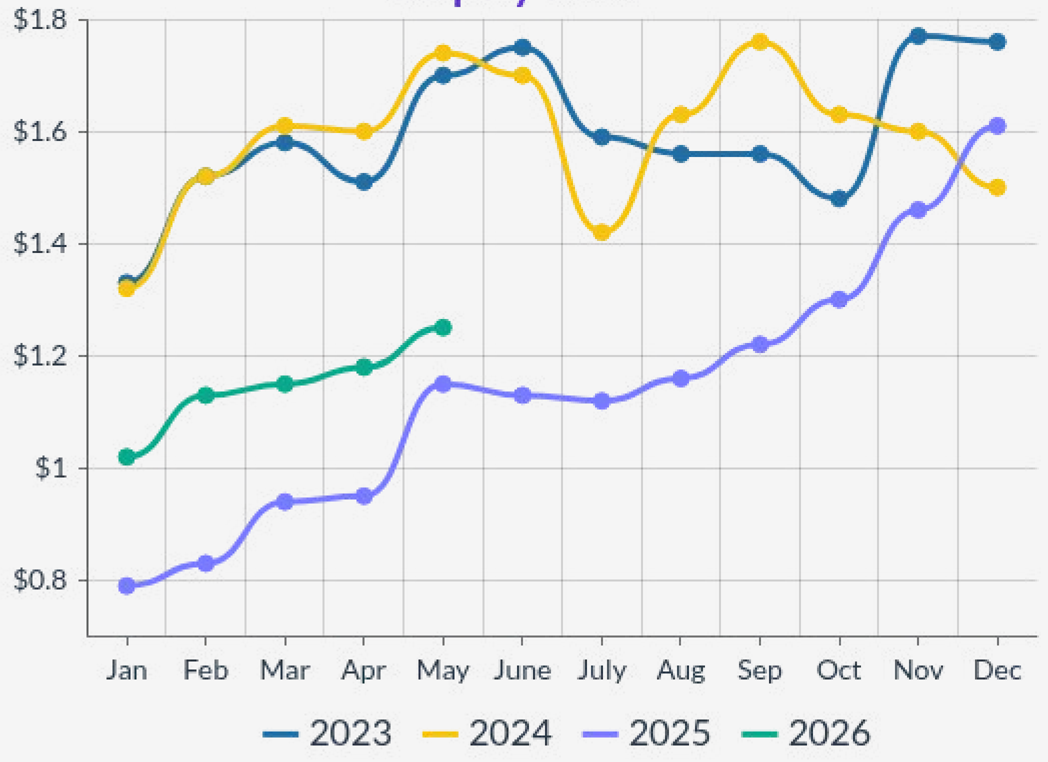
Here's a look at industry trends, broken down by inventory and demand.

Media Trends

Display Trends

- Display CPMs rose **5.9% MoM** and **10.6% YoY**, signaling that pricing is maturing into a more stable mid-year cadence after the sharp recovery-driven gains of prior months. The moderation in YoY growth reflects consolidation rather than weakness.
- Demand is increasingly concentrating among established, high-transparency supply partners, while mid-tier players continue to face structural pricing erosion, a pattern that reinforces the broader market shift toward quality-driven inventory allocation over open-market scale.

Display CPM



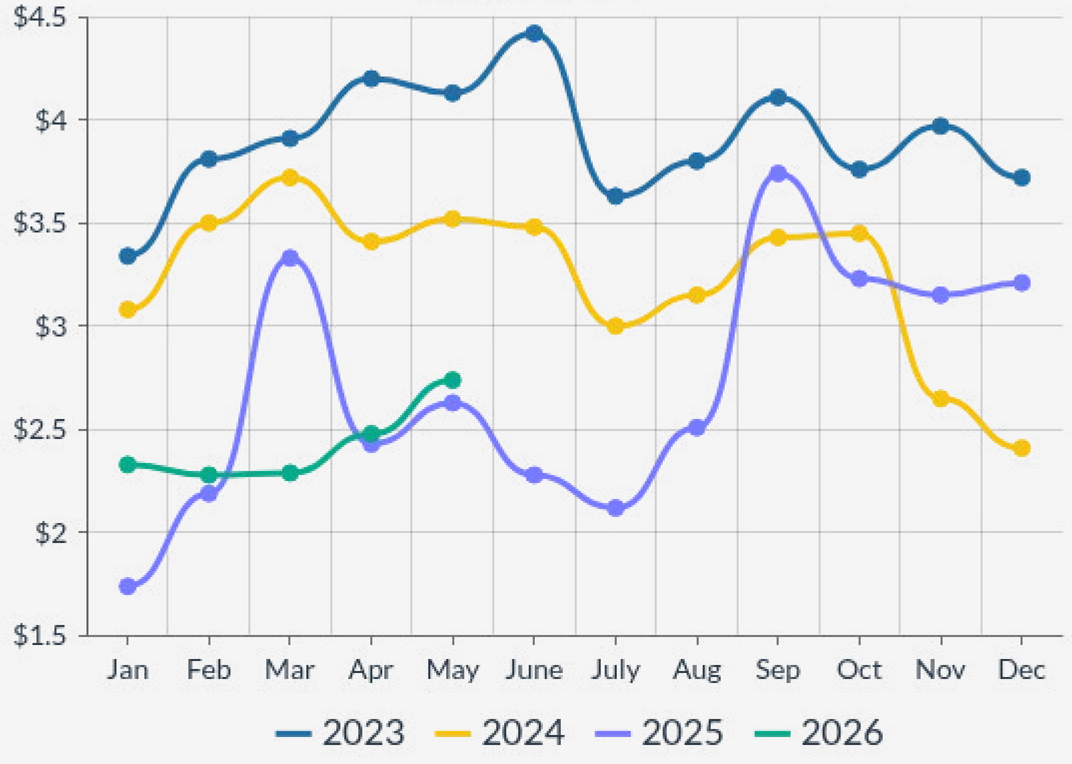
Display Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	48%	1	$1.20	0.0%	71.4%
Rubicon	14%	8	$1.53	40.4%	3.4%
OpenX	11%	2	$1.79	14.7%	62.7%
Index Exchange	8%	7	$1.35	-12.3%	42.1%
Nativo	6%	14	$2.16	32.5%	-16.3%
Amazon	4%	3	$2.13	77.5%	59.0%
Ozone	2%	17	$1.82	51.7%	93.6%
Pubmatic	2%	11	$2.43	43.8%	15.2%
Media.net	2%	12	$1.12	-39.8%	1.8%
Sonobi	0%	21	$0.25	-62.7%	-64.8%

Video Trends

- Video CPMs gained **10.5% MoM** and returned to positive **YoY** territory at **+4.2%**, building on last month's tentative recovery and suggesting the rebound is gaining traction rather than fading. The strengthening YoY trajectory indicates advertisers are gradually restoring confidence in video inventory, with summer content cycles and improved audience engagement signals driving renewed budget activation across the format.
- MoM momentum was broad-based across partners, though performance diverged at the partner level, reinforcing the ongoing split between SSPs with strong curated and programmatic-guaranteed pipelines continuing to capture disproportionate demand share, while open-auction dependent partners remain more exposed to pricing volatility and buyer selectivity.

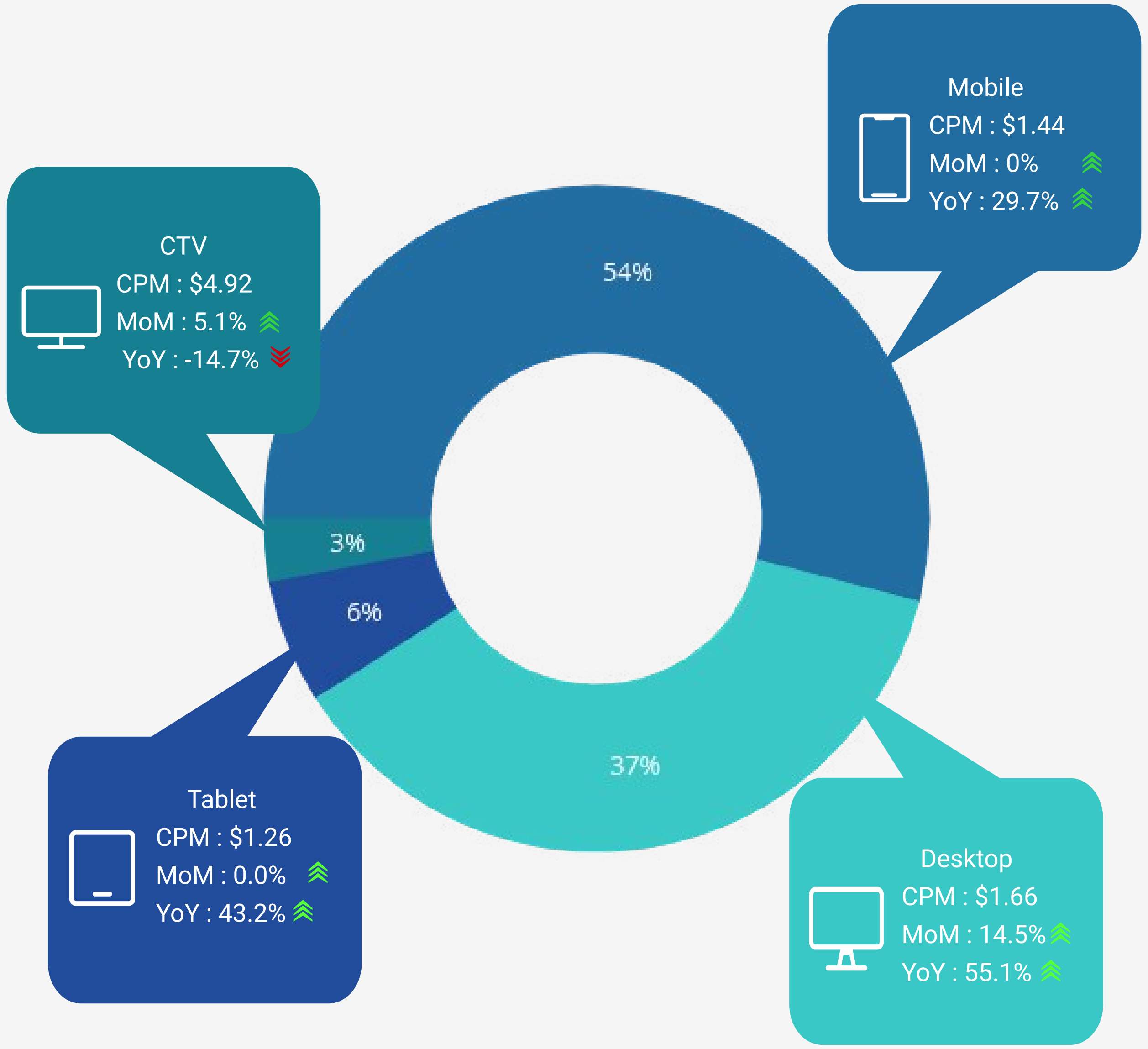
Video CPM



Video Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	43%	1	$4.76	49.7%	36.8%
Amazon	32%	2	$2.48	-8.1%	14.3%
Index Exchange	12%	4	$2.70	30.4%	16.4%
Rubicon	10%	3	$1.70	-41.2%	-38.8%
GumGum	1%	17	$3.40	11.8%	9.7%
Pubmatic	0%	6	$2.13	18.3%	60.2%
Equativ	0%	15	$0.65	-29.3%	-50.4%
InMobi	0%	19	$1.46	-24.4%	-42.3%
OpenX	0%	11	$5.13	3.6%	10.8%
LoopMe	0%	7	$0.72	-48.2%	-50.7%

Device Trends



Mobile Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	45%	1	$1.34	-2.2%	55.8%
Rubicon	15%	2	$1.52	7.0%	4.8%
Index Exchange	10%	4	$1.44	8.8%	51.6%
Nativo	9%	7	$2.17	34.0%	17.3%
Amazon	5%	2	$2.08	63.8%	6.7%
GumGum	4%	6	$3.62	33.1%	28.8%
Ozone	3%	14	$1.96	-26.9%	5.4%
Pubmatic	2%	9	$2.59	30.8%	13.1%
Triplelift	2%	12	$2.60	32.7%	23.8%
InMobi	2%	17	$0.78	-57.6%	-35.0%

Desktop Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	49%	1	$1.36	7.1%	65.9%
Amazon	11%	2	$1.05	-2.8%	-32.3%
Index Exchange	12%	3	$1.40	-10.3%	-39.9%
Rubicon	9%	5	$1.38	-47.1%	3.0%
Media.net	4%	6	$1.09	-27.8%	-3.5%
Ozone	2%	7	$1.62	60.4%	82.0%
Pubmatic	2%	4	$1.54	-9.9%	-1.9%
Triplelift	1%	9	$1.02	-16.4%	-1.0%
OneTag	1%	12	$0.93	-7.0%	34.8%
OpenX	1%	11	$1.31	-22.9%	-5.8%

CTV Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	74%	1	$5.46	3.2%	0.0%
OpenX	15%	2	$5.76	-3.5%	8.5%
OneTag	4%	3	$4.92	17.4%	56.2%
Rubicon	3%	4	$3.16	-17.1%	6.8%
Amazon	1%	5	$3.72	12.4%	25.7%
Index Exchange	1%	6	$4.99	7.1%	30.6%
LoopMe	0%	7	$5.52	2.2%	-7.7%
Pubmatic	0%	8	$6.87	5.2%	1.0%
Criteo	0%	9	$2.20	-6.4%	-12.0%
Media.net	0%	10	$3.10	-16.4%	2.6%

- Mobile CPMs held flat MoM at **$1.44** while Desktop surged 14.5% MoM to **$1.66**, with Desktop now commanding a meaningful CPM premium over Mobile. This divergence signals that advertisers are increasingly attributing higher value to desktop sessions, consistent with the broader trend of desktop inventory delivering stronger user intent and engagement depth relative to mobile's scale-driven but lower-intent traffic mix.
- CTV CPMs recovered 5.1% MoM to **$4.92**, offering a tentative stabilization signal after several months of contraction, though the format remains under significant YoY pressure at -14.7%. The partial MoM recovery may reflect seasonal demand entering the summer content cycle, but sustained pricing recovery will require meaningful supply-demand rebalancing across streaming platforms before CTV can reclaim its premium positioning.

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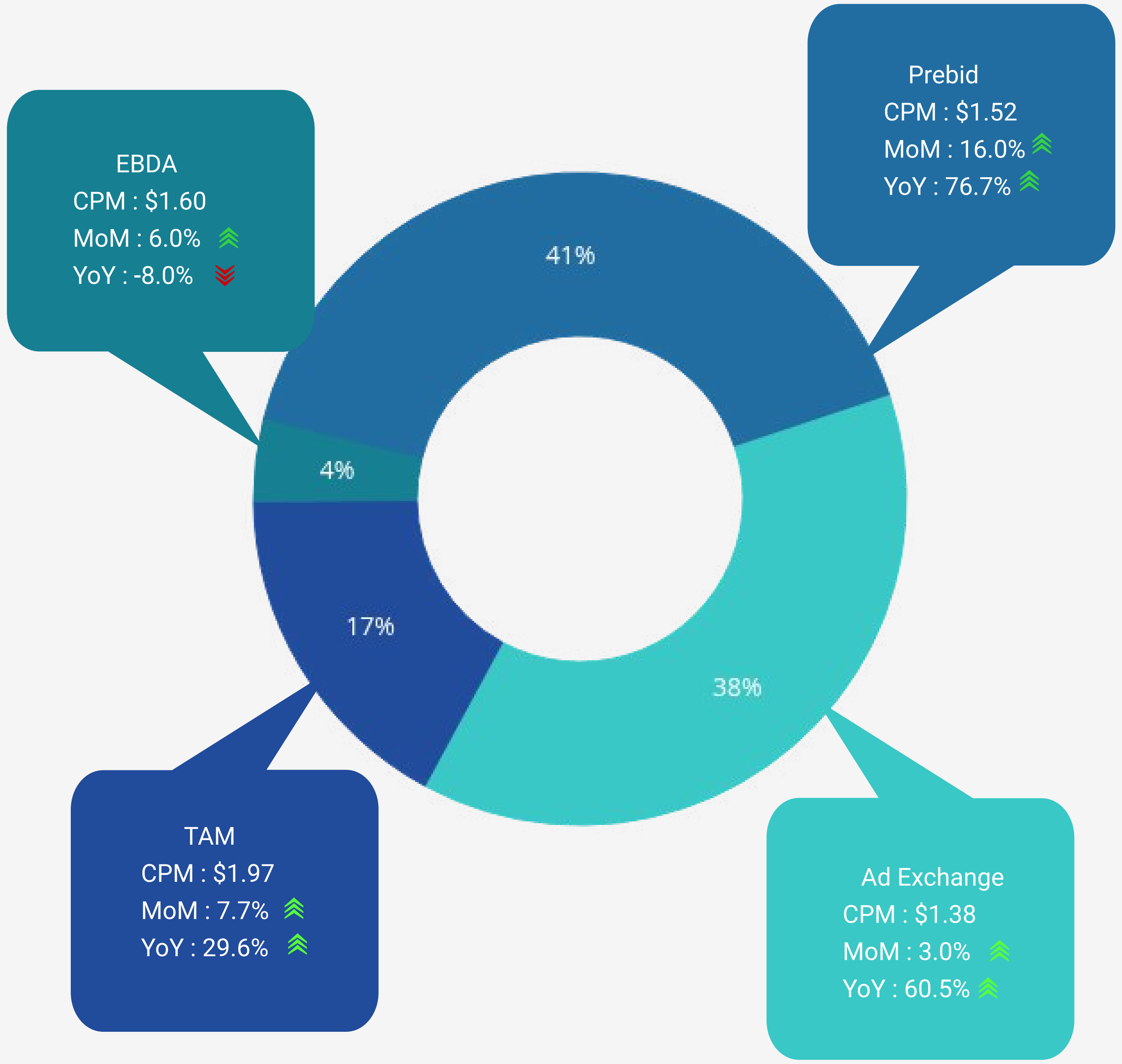
Programmatic Integration Trends



Prebid Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
TTD	33%	1	$1.50	17.2%	-5.7%
Rubicon	26%	2	$1.24	22.8%	4.2%
Index Exchange	16%	3	$2.20	37.5%	69.2%
Pubmatic	9%	4	$1.82	-16.5%	4.6%
Media.net	8%	5	$2.86	0.4%	48.2%
Nativo	2%	6	$2.11	-8.7%	38.8%
Triplelift	1%	7	$3.07	2.0%	33.5%
OpenX	1%	8	$1.53	2.7%	-15.5%
Ogury	1%	9	$2.09	2.0%	16.8%
Ozone	1%	10	$1.63	38.1%	58.3%

TAM Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Amazon	63%	1	$1.71	4.9%	37.9%
GumGum	8%	2	$3.52	89.2%	41.9%
Index Exchange	6%	3	$1.59	16.9%	44.5%
Rubicon	5%	4	$1.55	8.4%	13.1%
VRTCAL	3%	11	$1.27	41.1%	3.3%
Pubmatic	2%	8	$1.99	5.3%	-18.8%
Nativo	2%	5	$1.25	-4.6%	-0.8%
Triplelift	1%	13	$1.17	0.9%	15.8%
OneTag	1%	7	$1.41	2.9%	22.6%
InMobi	1%	17	$1.15	23.7%	-10.9%

EBDA Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Index Exchange	36%	2	$1.67	7.7%	44.0%
Media.net	22%	3	$1.22	24.5%	20.8%
Rubicon	18%	4	$2.81	-1.4%	8.5%
Pubmatic	13%	5	$1.82	12.3%	0.6%
Triplelift	6%	6	$0.83	22.1%	-48.8%
OpenX	1%	7	$4.19	43.0%	37.8%
OneTag	1%	9	$1.54	43.9%	97.4%
Nativo	1%	8	$1.33	-27.3%	-27.7%
Equativ	1%	15	$1.18	-58.9%	-44.6%
InMobi	0%	12	$0.67	-27.2%	-41.2%

- Prebid's share contracted further from 48% to 41%, while AdX expanded from 35% to 38% and TAM grew to 17%, reflecting an accelerating rotation of demand away from open header bidding toward more controlled, transparent supply paths. The simultaneous growth of both AdX and TAM suggests buyers are diversifying across curated channels rather than consolidating into a single integration.
- Ad Exchange posted the strongest YoY CPM gain at +60.5%, reinforcing its role as the preferred demand channel for quality-focused buyers. Prebid's +76.7% YoY CPM gain reflects improving floor price discipline across the open ecosystem, while EBDA's -8.0% YoY decline signals continued erosion of legacy exchange-bidding demand. TAM's strong +29.6% YoY recovery indicates Amazon's demand stack is regaining momentum after prior-period volatility.

AdX Buyer Trends

Advertiser Trends

- AdWords Small Businesses retained the top spot with CPMs rising 13% MoM, reflecting consistent reliance on programmatic for performance-driven acquisition. TEMU's entry at rank 3 with an 11% gain signals growing retail advertiser diversification beyond Amazon-led channels. AT&T's 16% rise indicates strengthening telecom demand, while Microsoft Corp posted the strongest CPM gain at 25%, suggesting renewed enterprise and software category investment. Nintendo's 43% decline reflects post-launch campaign normalization following prior-month elevated spend.

Top AdX Advertiser's

Advertiser	Rank	CPM	MOM%
AdWords small businesses	1	$2.76	13%
Amazon Corp	2	$2.32	-1%
TEMU	3	$3.93	11%
AT&T	4	$4.24	16%
Microsoft Corp.	5	$11.95	25%
Honda Motor Company	6	$1.99	-1%
Comcast Corporation	7	$3.31	-30%
Best Buy	8	$2.06	14%
Nintendo	9	$8.22	-43%
Altern Marketing	10	$2.01	30%

Bidder Trends

- Google Ads and DV360 sustained lead positions with 8% and 13% MoM CPM gains, confirming stable demand continuity across Google's buy-side stack. The Trade Desk posted the strongest independent platform gain at 38%, reinforcing its role as the primary open-internet buying alternative. Index Exchange rose 22% MoM, pointing to growing buyer preference for curated supply paths. Facebook NB's 25% decline and Smart AdServer's 19% drop suggest selective pullback from certain programmatic channels, while Criteo's 21% gain indicates a recovery in commerce-focused retargeting demand.

Top AdX Bidder's

Bidder	Rank	CPM	MOM%
Google Ads	1	$2.74	8%
DV360	2	$2.61	13%
The Trade Desk Inc.	3	$3.90	38%
Index Exchange	4	$1.91	22%
Magnite	5	$2.07	8%
Facebook NB	6	$3.27	-25%
Criteo	7	$2.82	21%
TemuDSP	8	$5.70	6%
Smart AdServer (EB)	9	$1.88	-19%
Media.Net (EB)	10	$1.04	7%

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