

US Programmatic Trends

April 2026

Report Overview

This month's [DataBeat Programmatic Trends Report](#) examines anonymized data from industry partners across the DataBeat network, highlighting U.S. programmatic advertising performance and trends for [March 2026](#). This report provides a detailed comparison of March 2026's performance against both February 2026 and March 2025, offering insights into month-over-month and year-over-year changes.

\$55+ Million
Monthly Revenue Tracked

35+ Billion
Monthly Impressions Tracked

200+ Bidders Tracked

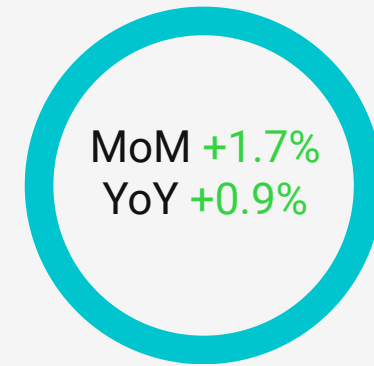
Key Highlights

MoM, Display CPMs increased by 1.8%, Video CPMs increased by 0.4%, resulting in a 1.7% increase in overall CPM.

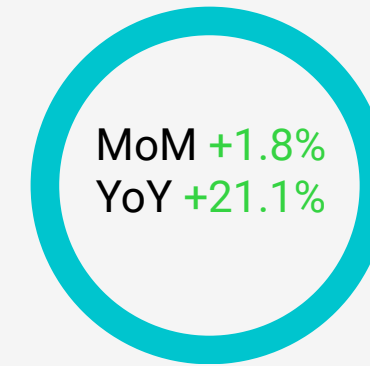
YoY, Display CPMs increased by 21.1% and Video CPMs decreased by 36.2%, leading to an overall CPM increase of 0.9%.

To mitigate the impact and drive recovery, publishers should focus on diversifying demand sources, optimizing floor prices, and leveraging header bidding to increase competition. Additionally, exploring high-performing ad formats and strengthening direct deals can help stabilize revenue in the coming months.

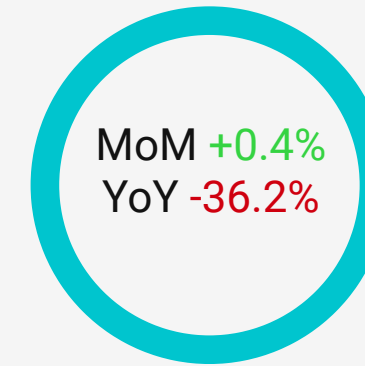
Overall CPM



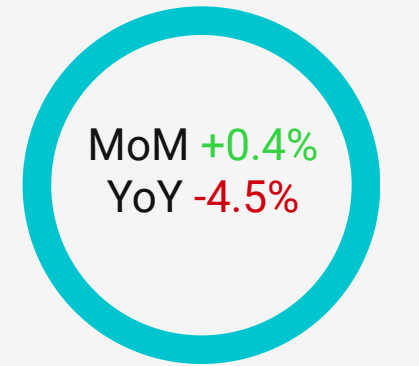
Display CPM



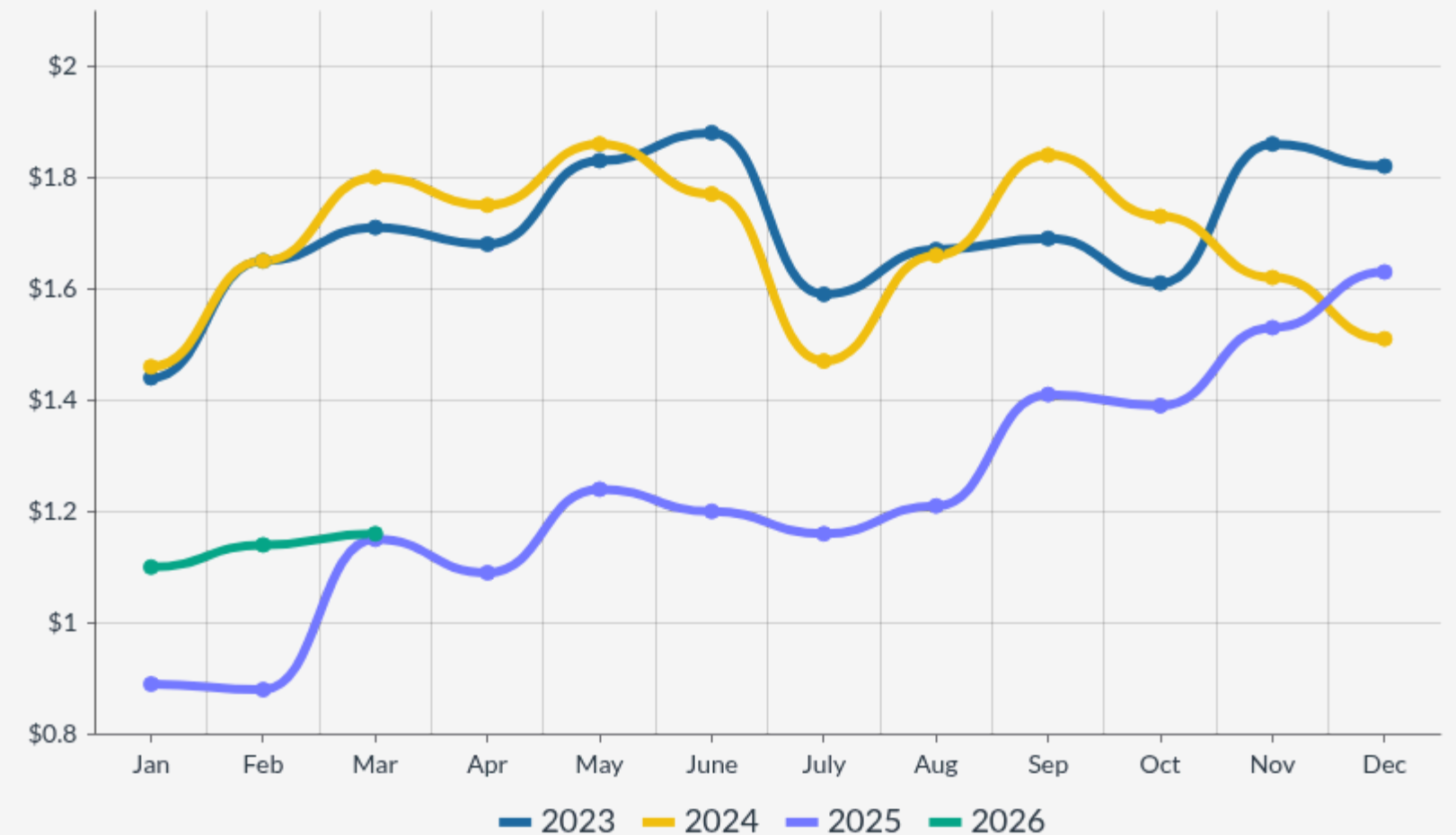
Video CPM



Prog Fill rate



Overall CPM



Q1 2026 vs. Q1 2025: Traffic Quality and Revenue Concentration Across Devices & Formats

Q1 2026 performance, based on GAM data, reflects a continued concentration of revenue across core devices and formats, while monetization trends shifted across secondary segments. Display and Mobile remained the largest contributors by scale, though pricing softened year-over-year. At the same time, Desktop gained a meaningful revenue share, and formats such as Native and Interstitial showed stronger CPM momentum, indicating improving demand across selected higher-value inventory segments.

Device Category Performance

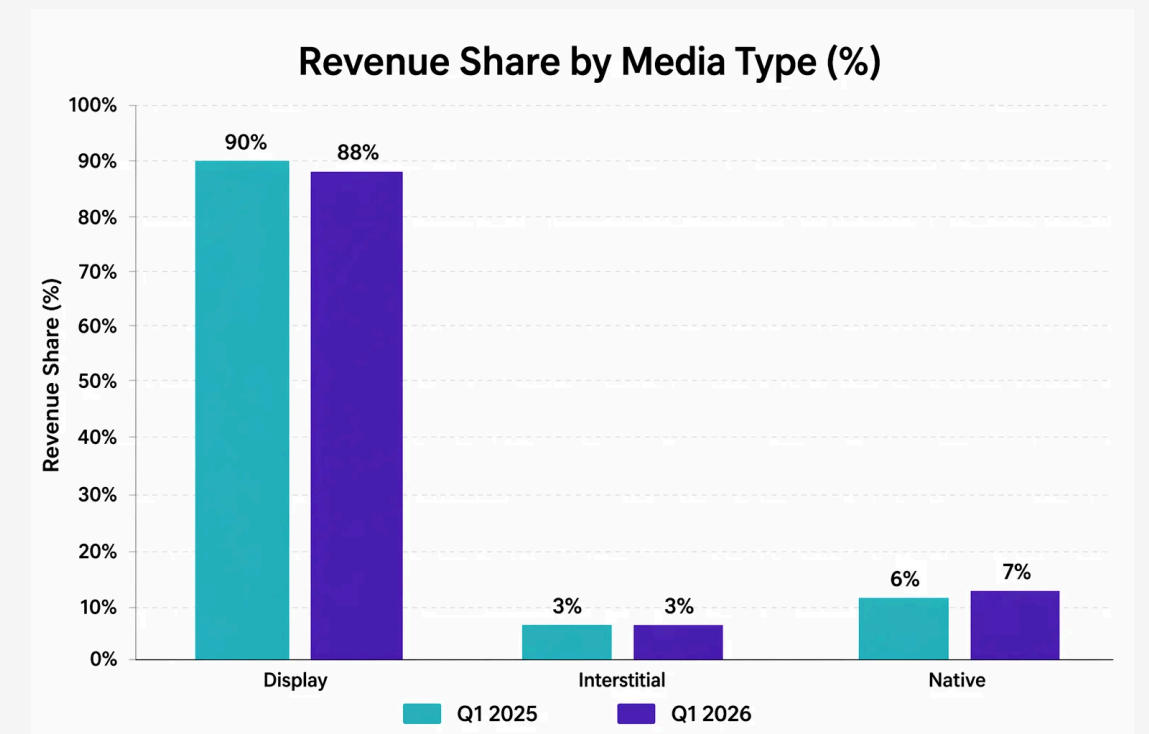
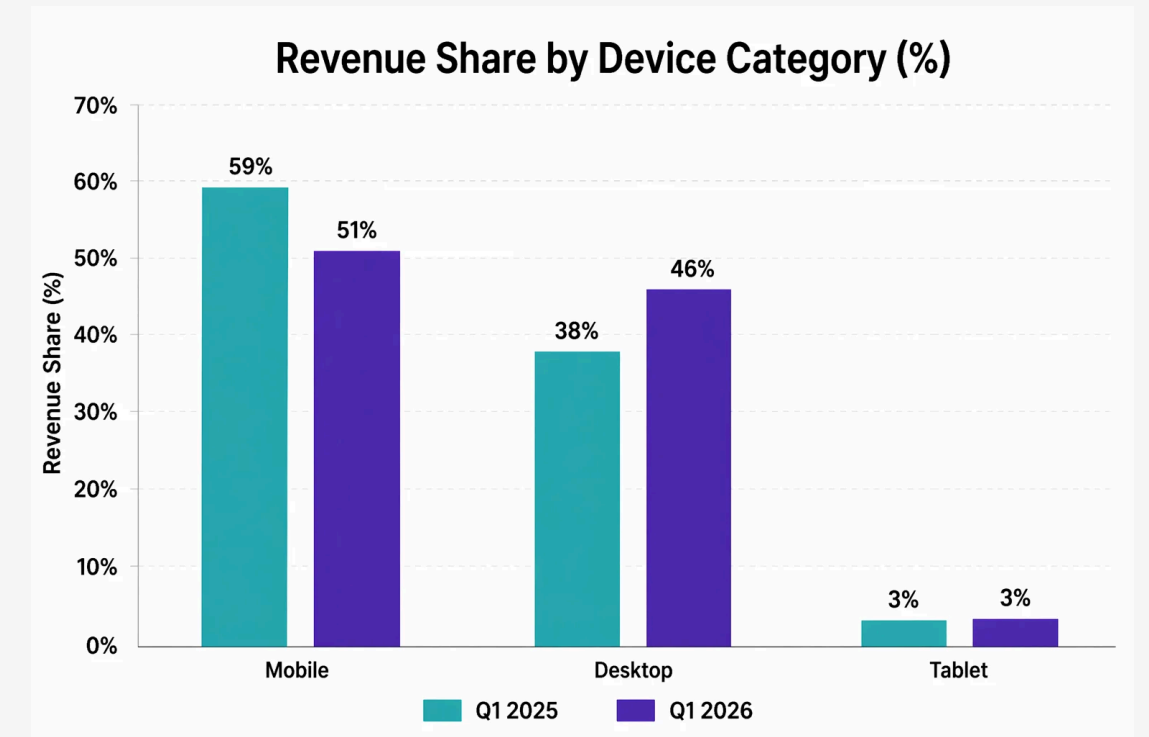
Revenue continued to be led by Mobile and Desktop, while Tablet remained stable.

- **Mobile:** Mobile remained the largest revenue contributor, though share declined from **59% in Q1 2025** to **51% in Q1 2026**. CPM softened from **\$1.50 to \$1.44**, reflecting slightly lower pricing against continued scale.
- **Desktop:** Desktop recorded the strongest share growth, increasing from **38% to 46% of revenue**. CPM remained relatively stable, easing slightly from **\$1.28 to \$1.26**, supported by stronger volume contribution.
- **Tablet:** Tablet maintained a steady **3% revenue share** across both periods. CPM improved from **\$1.18 to \$1.27**, indicating modest pricing strength.

Media Type Performance

Revenue remained mostly concentrated in Display, while Native recorded a modest share increase and Interstitial remained broadly stable.

- **Display:** Display continued as the primary revenue driver, contributing **88% of revenue share in Q1 2026 versus 90% in Q1 2025**. CPM declined from **\$1.37 to \$1.27**, indicating softer pricing despite continued scale.
- **Interstitial:** Interstitial maintained a steady **3% revenue share** year-over-year. CPM increased significantly from **\$6.39 to \$9.88**, reflecting stronger pricing for premium high-impact inventory.
- **Native:** Native revenue share improved from **6% to 7%**, while CPM increased from **\$1.12 to \$1.80**. This points to improving demand and stronger monetization across native placements.



Note: Insights shown above are based on GAM data.

Q1 2026 vs. Q1 2025: Traffic Quality and Revenue Concentration Across Devices & Formats

As publisher traffic dynamics continue to evolve, monetization is increasingly driven by traffic quality and pricing efficiency rather than scale alone. High-volume environments continue to generate impressions, but revenue capture is stronger in areas supported by higher user intent and healthier CPMs. This creates a widening gap between traffic contribution and monetization efficiency, while highlighting clear yield opportunities across stronger-performing devices and premium formats.

Mobile Scale Suffers from Low-Intent Traffic Inflow

Mobile drives the majority of impression volume but under-indexes on Revenue SOV, with CPMs in the **\$1.23–\$1.30** range. This aligns with broader traffic trends where **search and social now deliver lower-intent users (zero-click, passive discovery)**, leading to high scale but weaker monetization.

Desktop Benefits from Higher-Intent Traffic Sources

Desktop contributes a stronger share of Revenue SOV despite lower volume, supported by CPMs of **~\$1.45–\$1.51**. This reflects **more deliberate user behavior (direct visits, deeper engagement)**, making it better aligned with the shift toward quality-driven traffic.

Standard Display is Most Exposed to Traffic Quality Decline

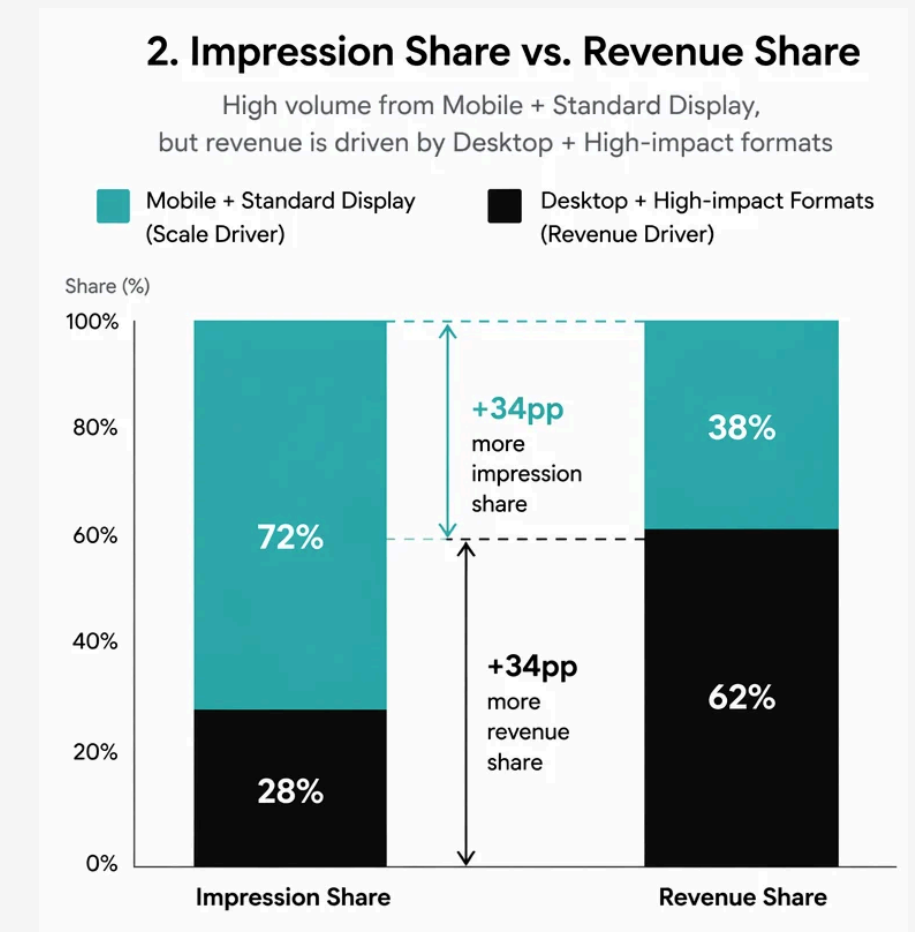
Standard display formats dominate volume but lag in Revenue SOV and CPM performance. As traffic from search and social weakens, these formats absorb the bulk of **low-engagement, low-value impressions**, amplifying monetization inefficiencies

High-Impact Formats Capture Value from Intent-Rich Users

High-impact formats command higher CPMs (**~\$1.45–\$1.51**) and stronger Revenue SOV contribution despite lower scale. These formats benefit from **more engaged sessions**, which are increasingly coming from **direct and emerging AI-driven traffic sources**.

Revenue is Shifting Toward Fewer, High-Quality Traffic + Inventory Combinations

With overall traffic becoming less reliable, Revenue SOV is increasingly concentrated in **Desktop + High-impact formats**, where user intent and advertiser demand are strongest. Meanwhile, **Mobile + Standard display** continues to scale impressions but contributes less incremental value.



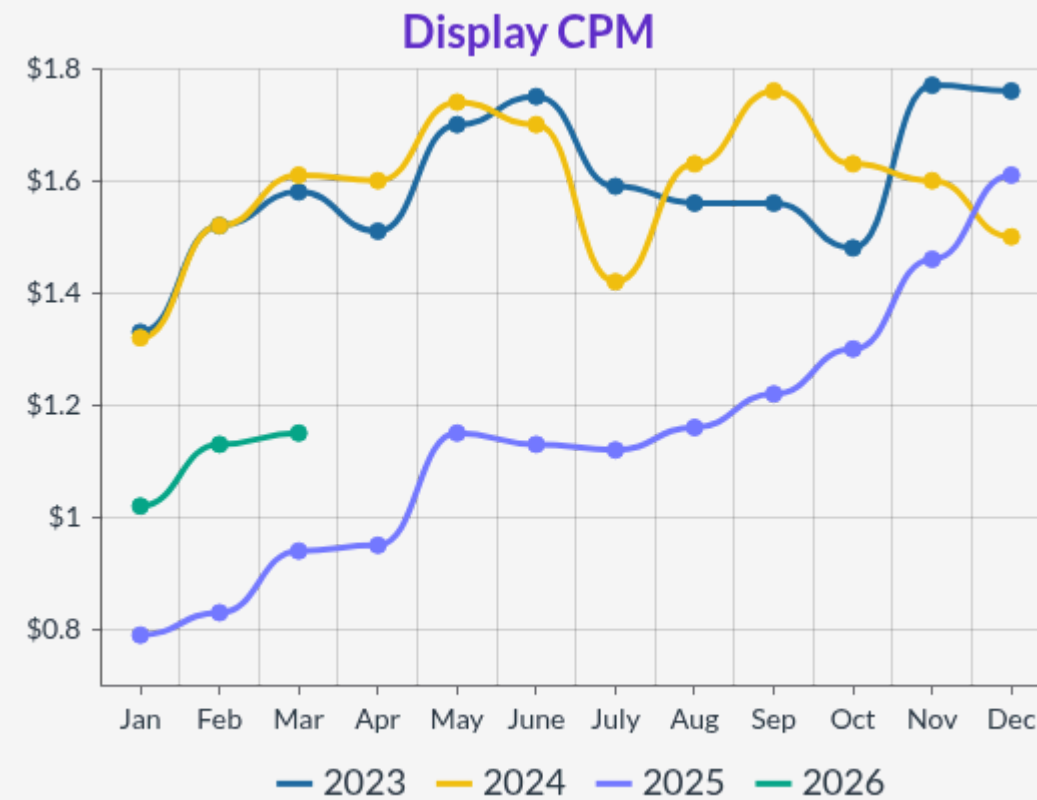
Note: Revenue data is based on GAM, while traffic data is sourced from multiple platforms.

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

Media Trends

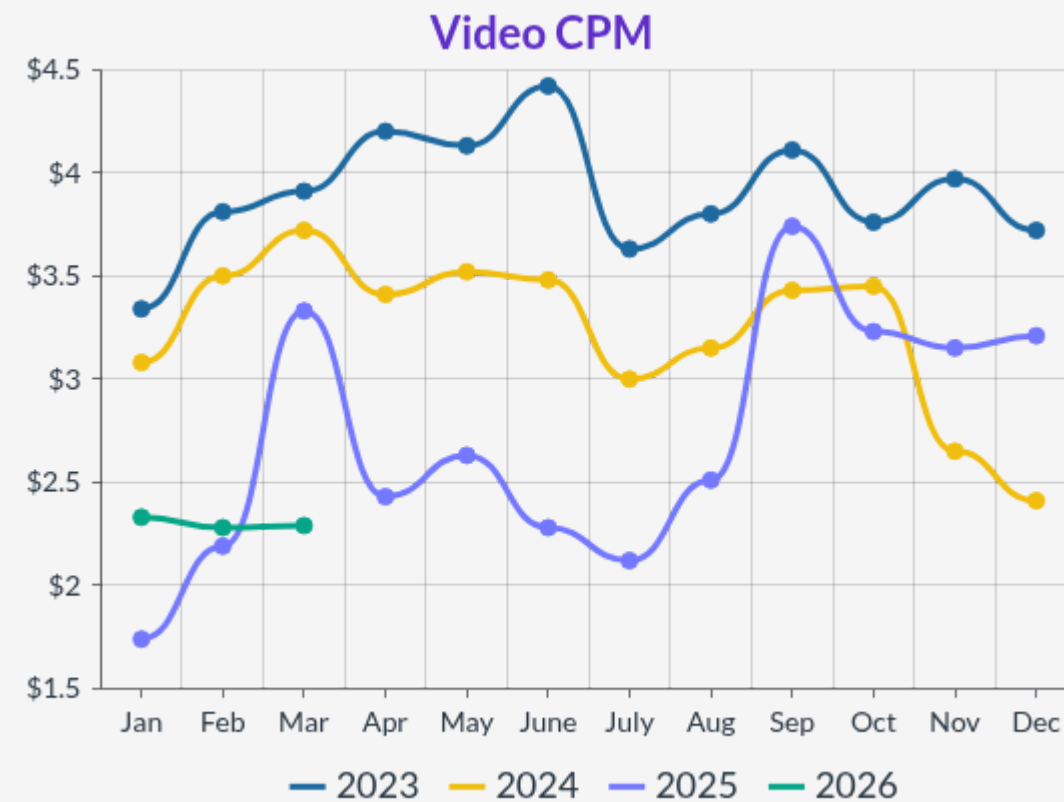
Display Trends

- **Display** CPMs went up by 1.8% month-over-month and experienced a 21.1% increase year-over-year.
- Most SSPs saw a month-over-month CPM increase. When looking at year-over-year performance, CPM increased, with an exception to **Amazon, Rubicon** and **Nativo**.



Video Trends

- **Video** CPMs went up by 0.4% month-over-month and experienced a 36.2% decrease year-over-year.
- When looking at year-over-year performance, CPM results were mixed, with about half of partners seeing increases and the other half seeing declines.



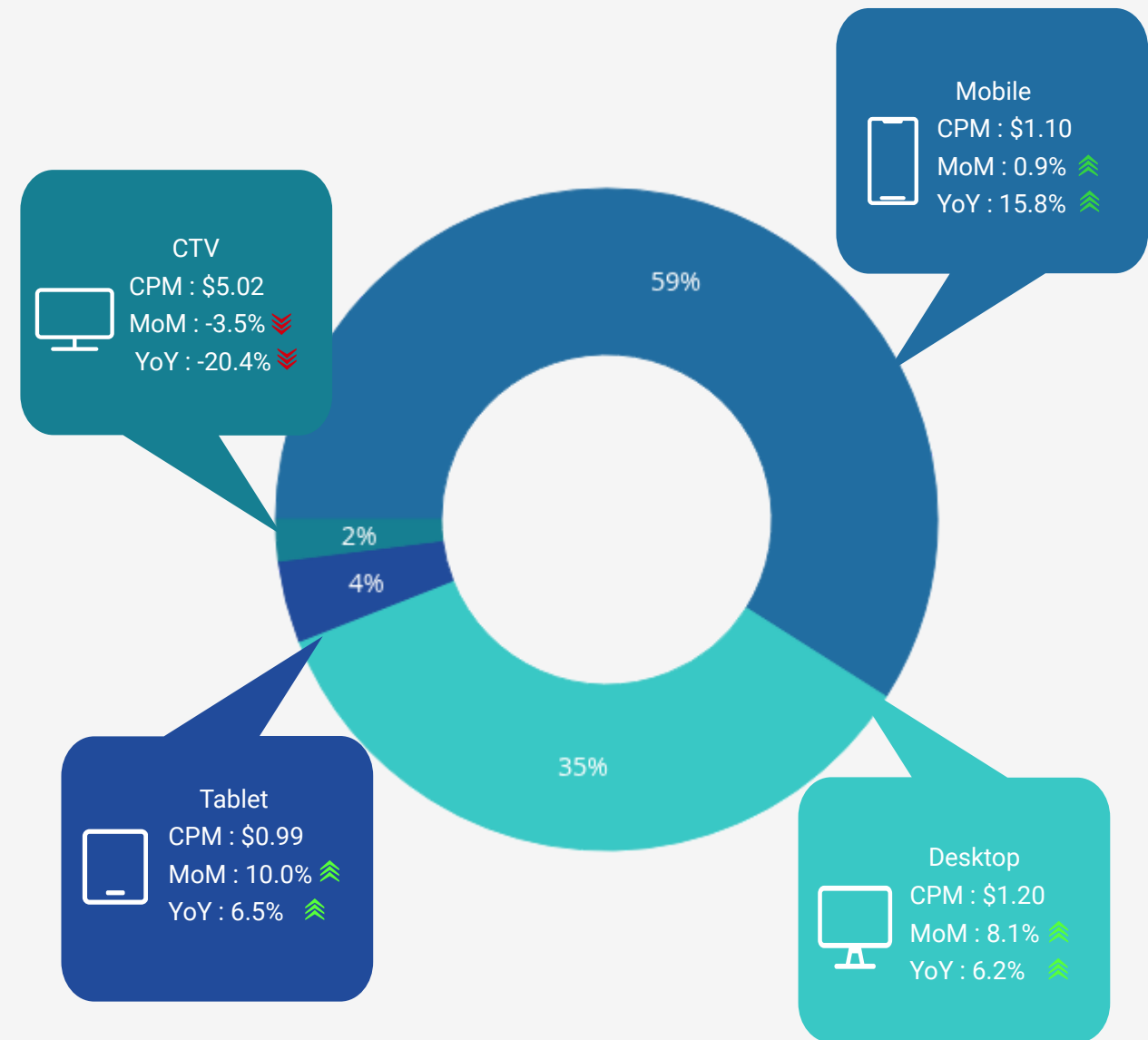
Display Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	41%	1	\$1.14	-0.9%	72.7%
Amazon	9%	2	\$1.48	2.7%	-6.3%
VRTCAL	5%	7	\$1.57	-6.4%	38.9%
TTD	5%	3	\$1.60	11.3%	19.4%
Index Exchange	4%	4	\$1.47	4.1%	0.7%
Rubicon	4%	8	\$1.44	-16.7%	-18.6%
Kueez	4%	9	\$1.40	-0.7%	42.9%
InMobi	3%	11	\$0.97	2.1%	0.0%
Nativo	3%	14	\$0.78	14.1%	-49.4%
Pubmatic	3%	17	\$1.60	-3.1%	138.8%

Video Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	61%	1	\$3.32	21.6%	34.4%
Amazon	13%	2	\$2.32	-8.7%	-35.9%
Index Exchange	8%	4	\$2.84	33.3%	1.4%
Rubicon	6%	3	\$3.52	26.2%	33.3%
GumGum	2%	9	\$1.18	7.3%	-61.1%
Equativ	1%	17	\$1.06	-16.5%	-16.5%
Kargo	1%	12	\$3.68	40.5%	64.3%
Media.net	1%	8	\$0.85	13.3%	-48.2%
LoopMe	1%	21	\$1.06	-55.1%	-71.4%
OpenX	1%	7	\$2.88	-32.1%	70.4%

Device Trends



- **Mobile** CPMs increased by 0.9% and **Desktop** CPMs increased by 8.1% month-over-month. Year-over-year increase was observed, with Mobile rising by 15.8% while Desktop rising by 6.2%.
- **CTV** CPMs decreased by 3.5% month-over-month and went down by 20.4% year-over-year.

Mobile Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	30%	1	\$1.14	-8.1%	39.0%
Amazon	11%	7	\$1.77	48.7%	-3.3%
TTD	7%	16	\$1.72	28.4%	27.4%
Rubicon	6%	3	\$1.30	51.2%	-15.6%
Index Exchange	6%	2	\$1.24	-14.5%	1.6%
InMobi	5%	4	\$1.58	3.9%	-36.0%
Nativo	5%	6	\$1.96	37.1%	24.1%
Pubmatic	4%	5	\$1.46	-3.3%	100.0%
OpenX	4%	8	\$1.36	46.2%	-27.0%
Media.net	3%	10	\$1.74	15.2%	-55.3%

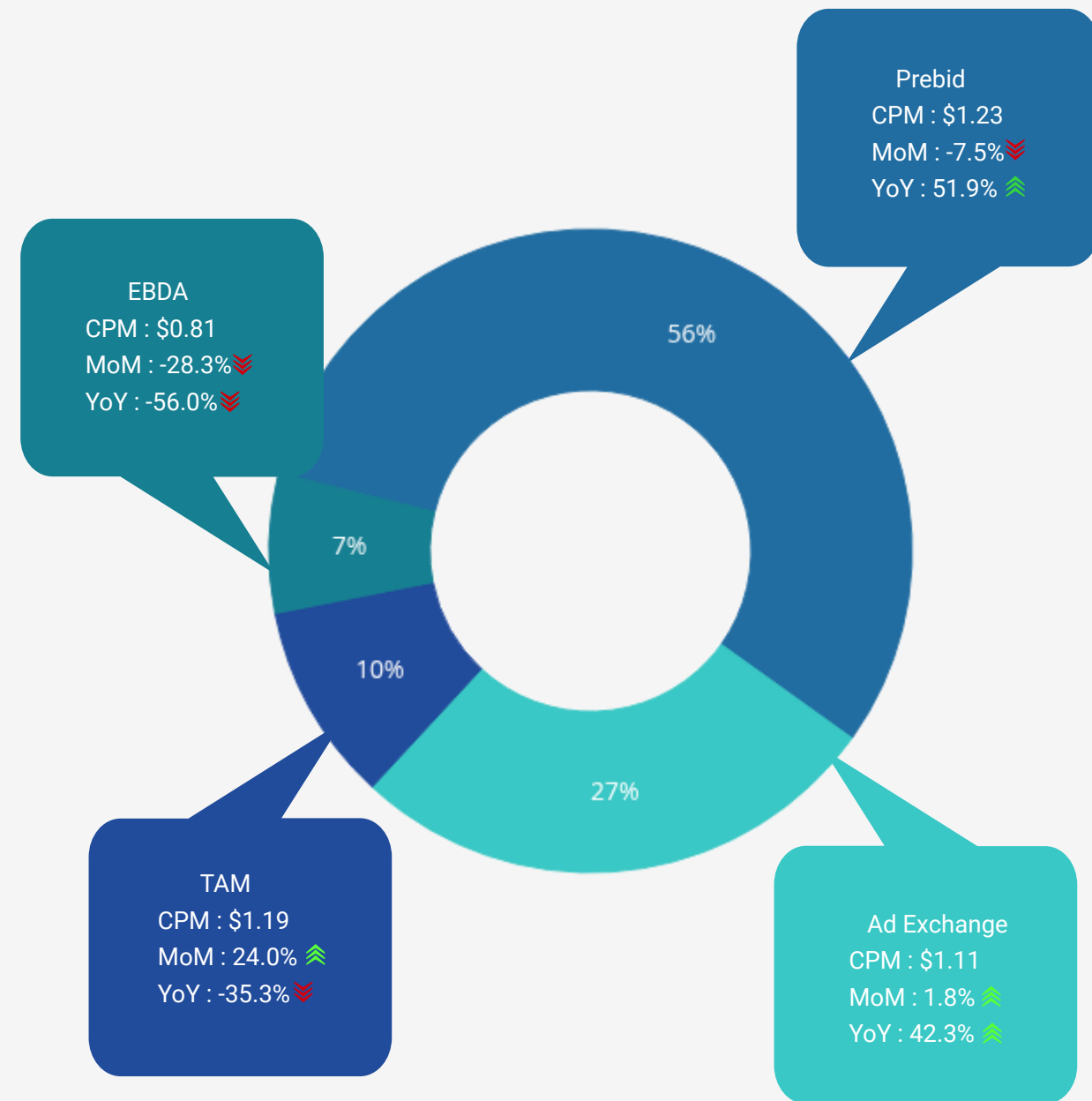
Desktop Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	43%	1	\$1.35	18.4%	87.5%
Amazon	9%	2	\$1.53	7.0%	24.4%
Index Exchange	7%	3	\$1.45	4.3%	14.2%
Media.net	7%	4	\$1.08	24.1%	-14.3%
Pubmatic	4%	7	\$1.26	35.5%	-6.7%
Rubicon	4%	6	\$1.70	25.0%	22.3%
Triplelift	4%	5	\$1.43	-24.3%	90.7%
TTD	3%	10	\$1.32	11.0%	79.4%
Kargo	2%	14	\$1.54	-4.9%	14.9%
LoopMe	2%	23	\$1.74	-13.4%	64.2%

CTV Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	85%	1	\$4.40	-15.1%	-19.4%
Amazon	6%	5	\$6.90	-4.8%	9.4%
Index Exchange	4%	3	\$4.31	-4.0%	36.8%
OpenX	3%	4	\$3.96	20.7%	33.8%
Triplelift	2%	7	\$3.86	11.9%	30.4%
InMobi	1%	6	\$3.08	1.3%	-19.4%
Rubicon	0%	9	\$5.65	9.9%	-5.5%
Sharethrough	0%	19	\$10.60	-3.5%	8.2%
Pubmatic	0%	10	\$2.84	-26.4%	13.6%
Media.net	0%	16	\$3.26	-1.2%	7.9%

Programmatic Integration Trends



- **Prebid** leads the market with a 56% share, trailed by **AdX**, at 27%, **TAM** at 10%, and **EBDA** at 7%. While CPMs for all the integrations seem mixed month-over-month, year-over-year **EBDA and TAM** saw a decline in CPMs.

Prebid Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
TTD	26%	6	\$1.28	-5.2%	29.5%
Rubicon	18%	2	\$1.39	-0.7%	16.8%
Index Exchange	17%	1	\$1.26	-3.1%	30.1%
InMobi	12%	12	\$1.45	6.6%	61.7%
Pubmatic	8%	3	\$1.18	-7.8%	49.9%
Nativo	5%	18	\$2.49	7.8%	63.8%
OpenX	2%	4	\$2.28	-16.5%	-0.9%
Media.net	1%	11	\$1.60	-23.8%	-11.6%
Triplelift	1%	5	\$1.80	-6.2%	0.6%
Equativ	1%	17	\$1.39	0.7%	35.0%

TAM Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Amazon	46%	1	\$1.70	22.3%	-44.1%
Index Exchange	10%	2	\$1.32	23.4%	-10.8%
Nativo	7%	29	\$1.12	33.3%	-18.8%
GumGum	7%	7	\$1.41	36.9%	2.9%
InMobi	4%	14	\$1.30	18.2%	-5.7%
Rubicon	4%	4	\$2.07	30.2%	-15.5%
Pubmatic	4%	5	\$1.24	-38.3%	-1.6%
Triplelift	3%	3	\$1.06	-26.4%	-5.0%
Media.net	2%	14	\$1.27	60.8%	-10.4%
Equativ	2%	22	\$1.16	-35.2%	-10.1%

EBDA Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	30%	1	\$1.02	-8.8%	-28.4%
Index Exchange	20%	2	\$0.96	-28.0%	-5.0%
Media.net	10%	4	\$0.85	-23.2%	-44.1%
Pubmatic	7%	3	\$1.13	-5.2%	-1.1%
Rubicon	7%	6	\$1.96	-37.1%	-21.0%
Nativo	6%	5	\$0.86	22.9%	-17.3%
Triplelift	6%	13	\$0.89	4.7%	14.1%
OpenX	5%	8	\$0.97	83.0%	15.5%
OneTag	4%	7	\$1.35	27.4%	19.5%
Sharethrough	2%	9	\$1.30	44.6%	42.1%

AdX Buyer Trends

Advertiser Trends

- AdWords Small Businesses remained the leading advertiser this month, with CPMs easing slightly by 3% MoM as smaller advertisers kept spend steady. Amazon Corp recorded a 24% CPM decline after last month’s strong growth, likely reflecting normalised retail media activity. AT&T saw an 18% increase, indicating stronger telecom campaign demand. Sony Corporation posted the biggest gain, with CPMs surging 110%, likely driven by major product and entertainment campaigns. In contrast, Microsoft Corp declined by 59%, reflecting lower buying activity during the month.

Bidder Trends

- Google Ads remained the leading buyer this month, with CPMs easing slightly by 4% MoM, while DV360 also recorded a similar 4% decline, indicating softer but stable demand across Google’s buying ecosystem. Magnite and Media.net moved lower by 26% and 12%, suggesting reduced bidding activity across independent programmatic platforms. Criteo declined by 17%, reflecting weaker commerce-focused demand, while TemuDSP was relatively stable with a 1% increase. Amazon Advertising recorded the sharpest decline, with CPMs down 42% after last month’s strong surge, indicating a pullback following elevated retail media activity.

Top AdX Advertiser's

Advertiser	Rank	CPM	MOM%
AdWords small businesses	1	\$1.86	-3%
Amazon Corp	2	\$1.88	-24%
AT&T	3	\$3.73	18%
Sony Corporation	4	\$11.20	110%
PDD Holdings	5	\$2.64	-39%
Microsoft Corp.	6	\$5.76	-59%
Honda Motor Company	7	\$1.52	29%
Comcast Corporation	8	\$2.86	3%
Best Buy	9	\$1.70	-12%
Adobe Systems	10	\$0.51	-22%

Top AdX Bidder's




Bidder	Rank	CPM	MOM%
Google Ads	1	\$1.98	-4%
DV360	2	\$1.92	-4%
Index Exchange	3	\$1.88	-14%
The Trade Desk Inc.	4	\$3.20	-19%
Criteo	5	\$1.47	-17%
Magnite	6	\$1.76	-26%
Media.Net (EB)	7	\$1.00	-12%
PubMatic (EB)	8	\$1.56	-13%
TemuDSP	9	\$3.84	1%
Amazon Advertising	10	\$3.60	-42%


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