

US Programmatic Trends

February 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 [January 2026](#). This report provides a detailed comparison of January 2026's performance against both December 2025 and January 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

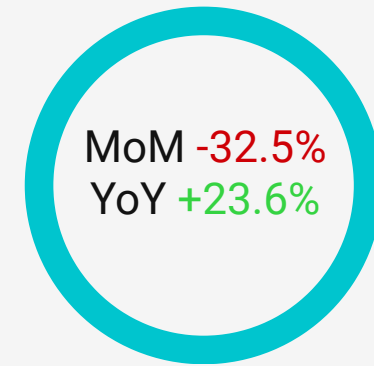
Key Highlights

MoM, Display CPMs decreased by 36.6%, Video CPMs decreased by 27.4%, resulting in 32.5% decrease in overall CPM.

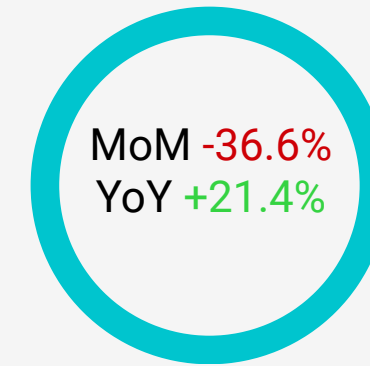
YoY, Display CPMs inclined by 21.4% and Video CPMs increased by 33.9%, leading to an overall CPM increase of 23.6%.

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.

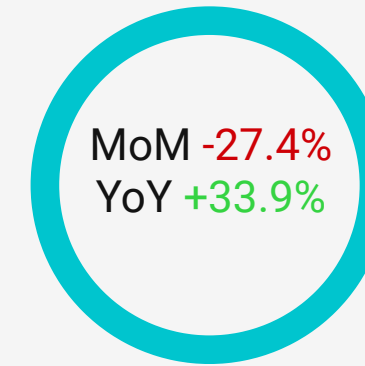
Overall CPM



Display CPM



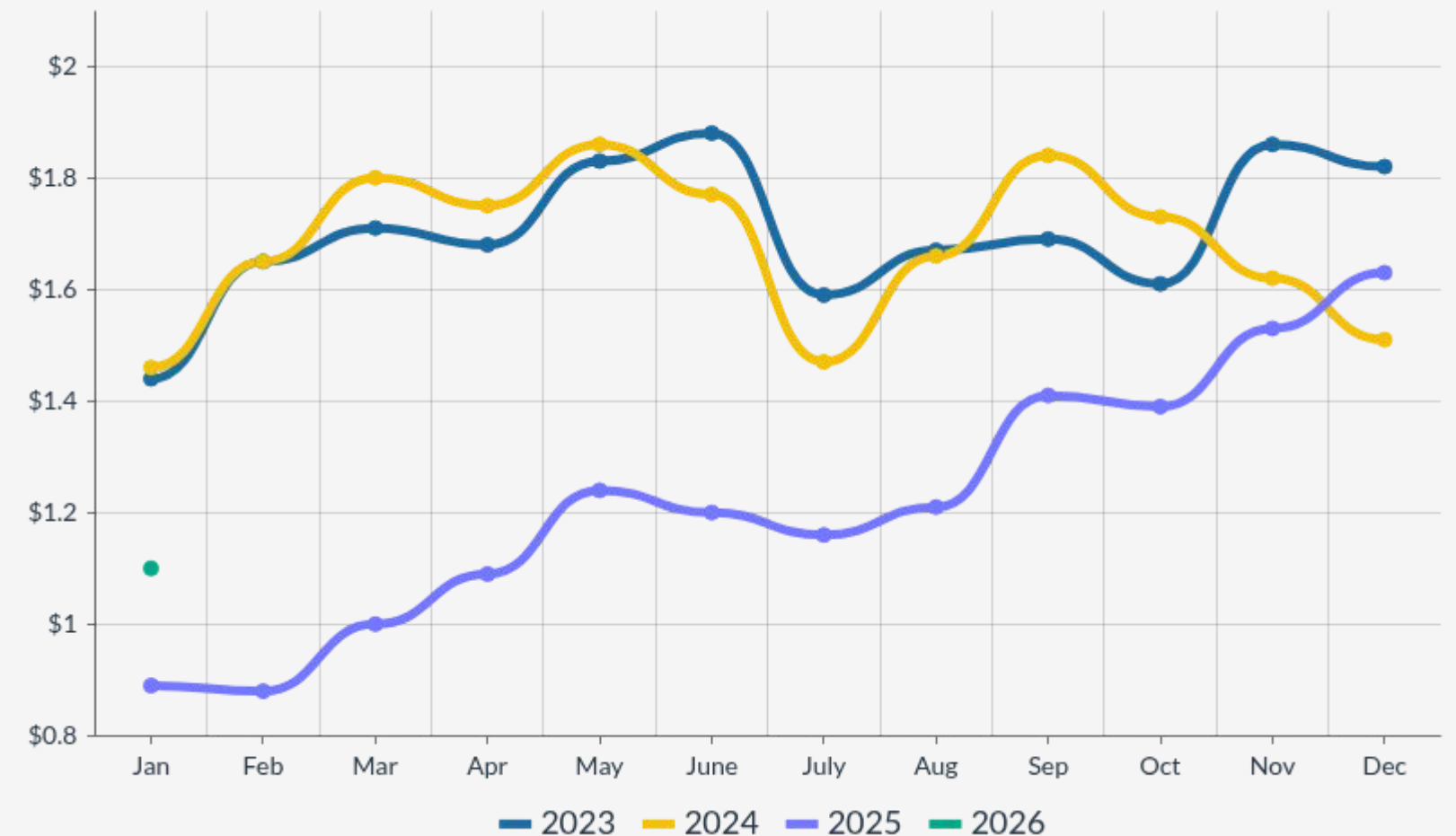
Video CPM



Prog Fill rate



Overall CPM



Understanding the Value of Secure Signals in Programmatic Auctions

This month's theme focuses on how secure signals are shaping programmatic performance, examining how AdX results differ when secure signals are present versus absent across Chrome and non-Chrome browsers, using CPM and fill rate as key indicators as buyers increasingly rely on trusted signals and transparency to guide bidding decisions.

Note: Sent to winner means the impression included secure signals for the winning bidder, while not sent to winner means the impression cleared without secure signals delivered.

Secure Signal Impact on AdX: Chrome vs Non-Chrome

Chrome

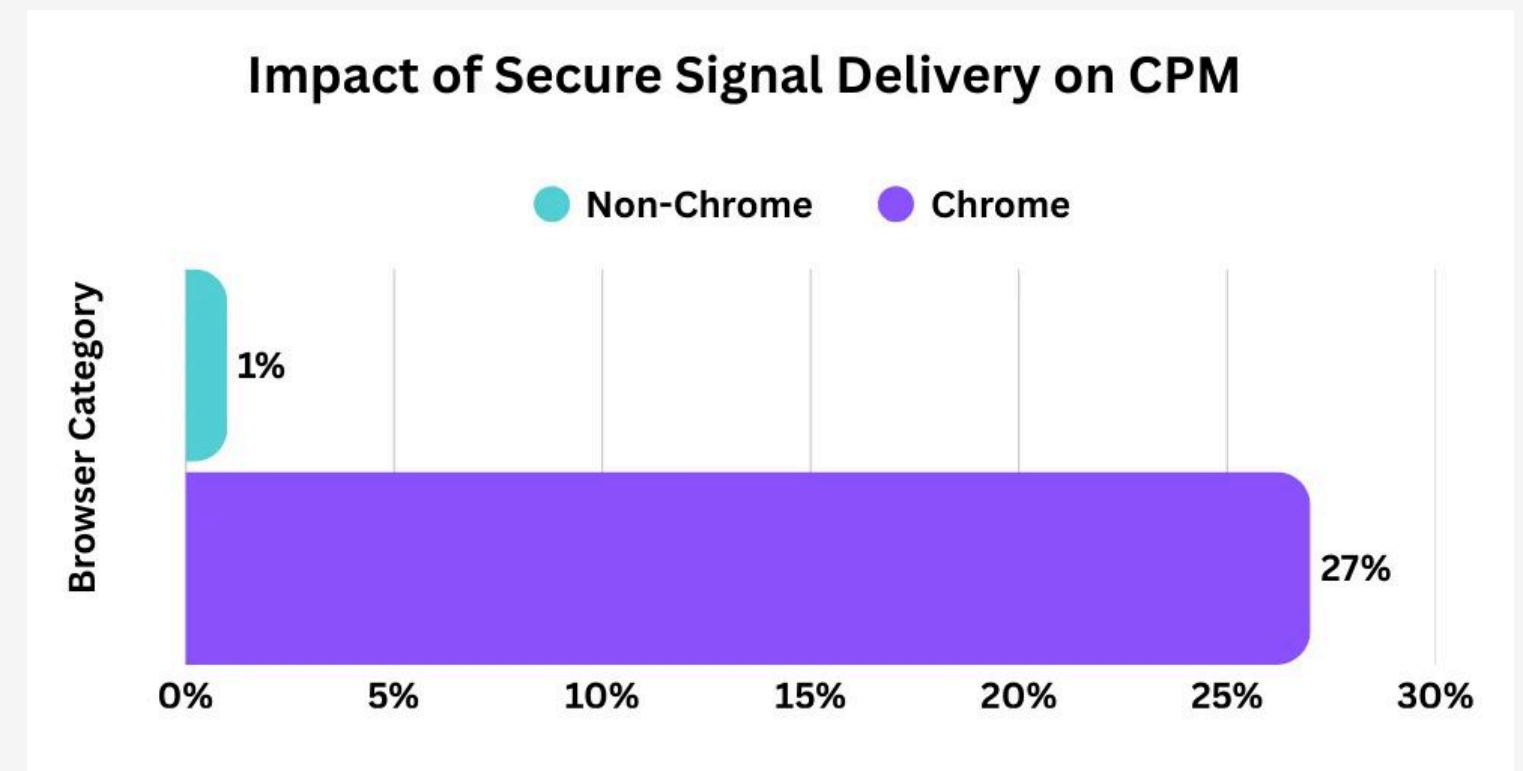
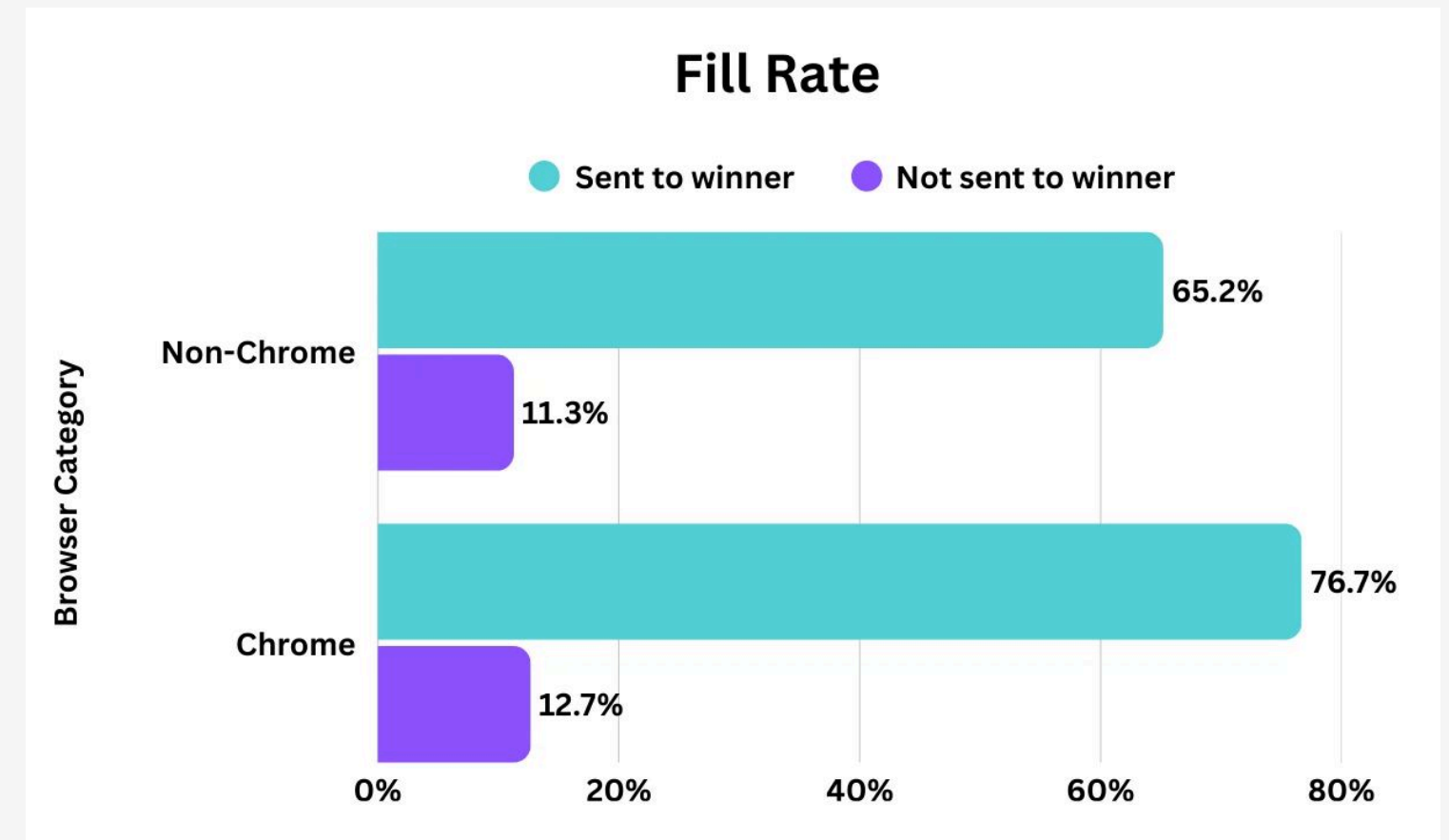
- On Chrome, secure signals work alongside third-party cookies and give bidders clearer information about the impression. As a result, CPM increases by 27%, showing that bidders are more confident about the value of the inventory and are willing to pay more when they understand who they are reaching.
- Secure signals also help more bidders participate consistently in auctions, leading to fill rate increasing from 12.7% to 76.7% as inventory that normally sees lower fills clears more reliably due to higher competition.

Non-Chrome Web Browsers

In non-Chrome environments, CPMs increase by only 1%, remaining close to baseline levels even when secure signals are present. In contrast, fill rates increase from 11.28% to 65.22%.

Probable Reasons:

- The non-Chrome environment has vast inventory availability, which naturally limits pricing pressure. Even with increased bidder participation, the scale of available supply means CPMs remain stable rather than increasing.
- In non-Chrome browsers, secure signals act as the primary targeting input due to the absence of third-party cookies, but they do not yet provide the same level of depth that cookies previously offered for pricing decisions.
- Secure signals provide enough information for bidders to confidently assess inventory and participate across this vast supply, which drives higher fill rates, but the information is not sufficient to support higher CPMs in the absence of cookies.
- As secure signals mature and accumulate more data over time, they are expected to improve bidder confidence and spending in non-Chrome environments, creating potential for future CPM growth.



Understanding the Value of Secure Signals in Programmatic Auctions

CPM Impact When Secure Signals Are Being Utilized by Bidder

When secure signals are sent to the winning bid, CPMs increase across all top-performing identity solutions. The level of uplift differs by ID, based on how widely the ID is recognized by buyers and how directly it supports addressable buying at the time of the auction.

Strong CPM uplift

- Unified ID 2.0 and Unified ID 1.0 show the highest CPM increase, indicating strong buyer trust and broad activation across demand platforms.
- These IDs are built on consented first-party data and are easy for buyers to use, which leads to higher bids when they are delivered to the winner.

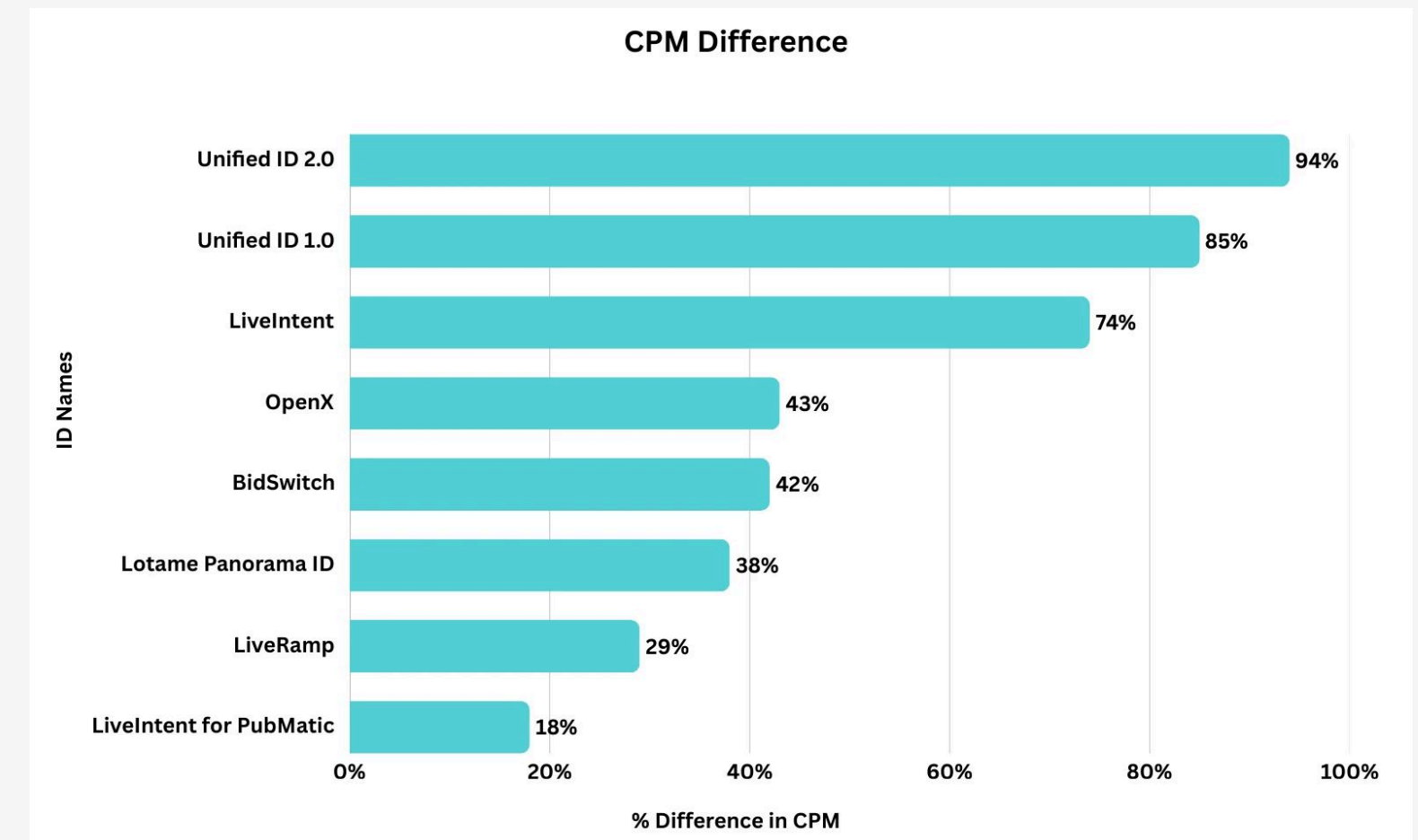
Meaningful CPM uplift

- LiveIntent and LiveRamp ATS show clear CPM gains, reflecting buyer preference for authenticated and email-based signals.
- These solutions perform well where publishers have direct user relationships and buyers can bid with more confidence.

Moderate CPM uplift

- BidSwitch and OpenX show moderate CPM improvement, aligning with their role in passing identity signals across the supply path rather than creating identity themselves.
- Lotame Panorama ID and LiveIntent for PubMatic show steady but smaller CPM gains, supporting cookieless and privacy-first buying at scale.

Overall, CPM uplift is strongest when secure signals are both trusted by buyers and delivered in a form they can actively use at the point of win. Authenticated and widely adopted IDs drive the largest gains, while infrastructure and exchange-level solutions add incremental value by improving signal reach and delivery.

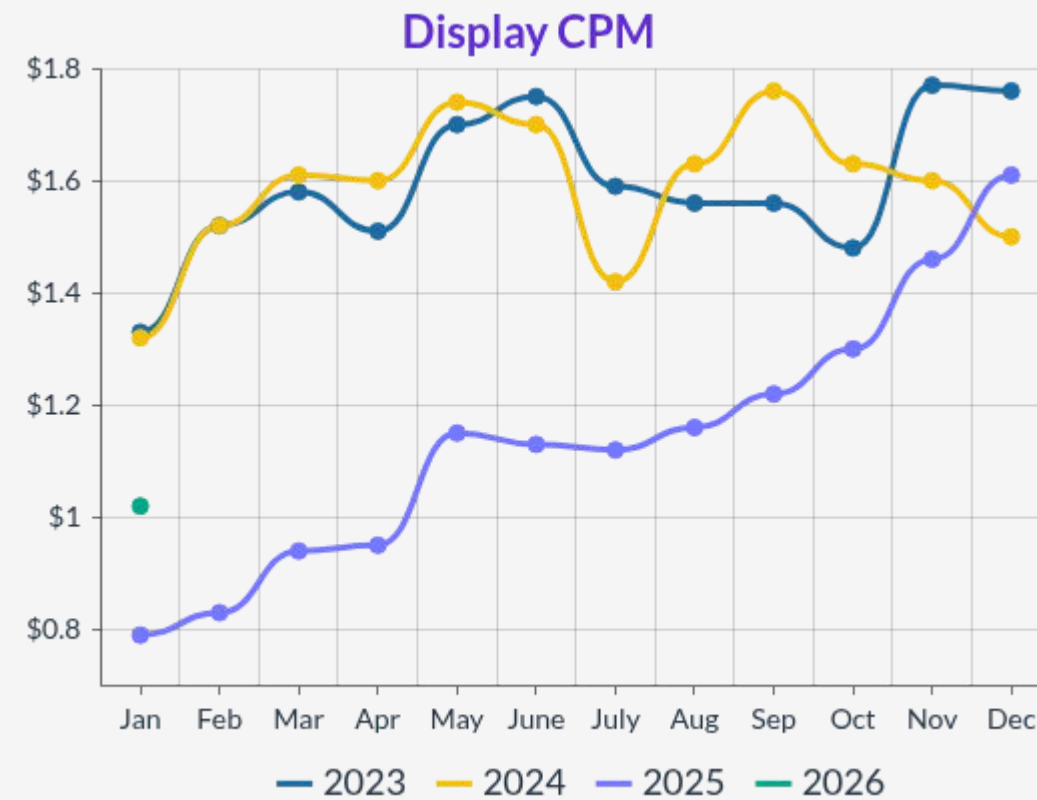


Here's a look at industry trends, broken down by inventory and demand.

Media Trends

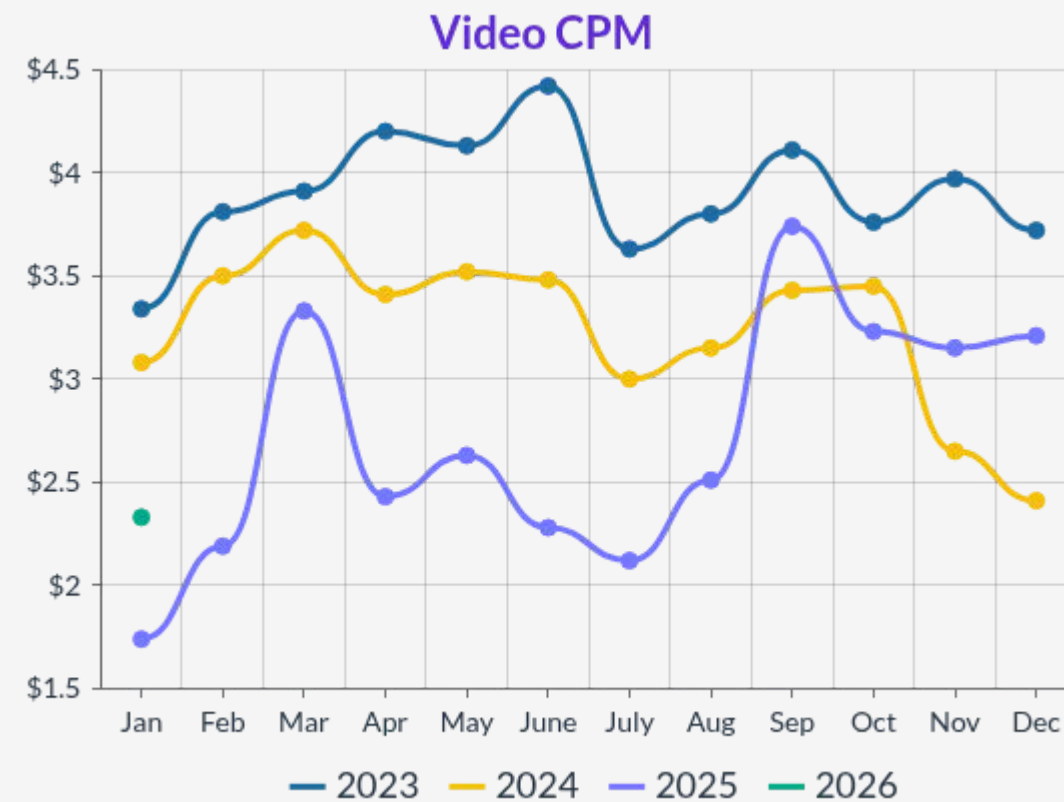
Display Trends

- **Display** CPMs went down by 36.6% month-over-month and experienced an 21.4% incline year-over-year.
- All SSPs saw a month-over-month CPM decrease. When looking at year-over-year performance, CPM inclined, with an exception to **VRTCAL**, **Nativo** and **Media.net**.



Video Trends

- **Video** CPMs went down by 27.4% month-over-month and experienced a 33.9% increase year-over-year.
- All the SSPs saw a month-over-month CPM decrease. When looking at year-over-year performance, almost all SSPs saw a year-over-year CPM decrease with an exception to **Ad Exchange**, **Amazon**, **Rubicon** and **InMobi**.



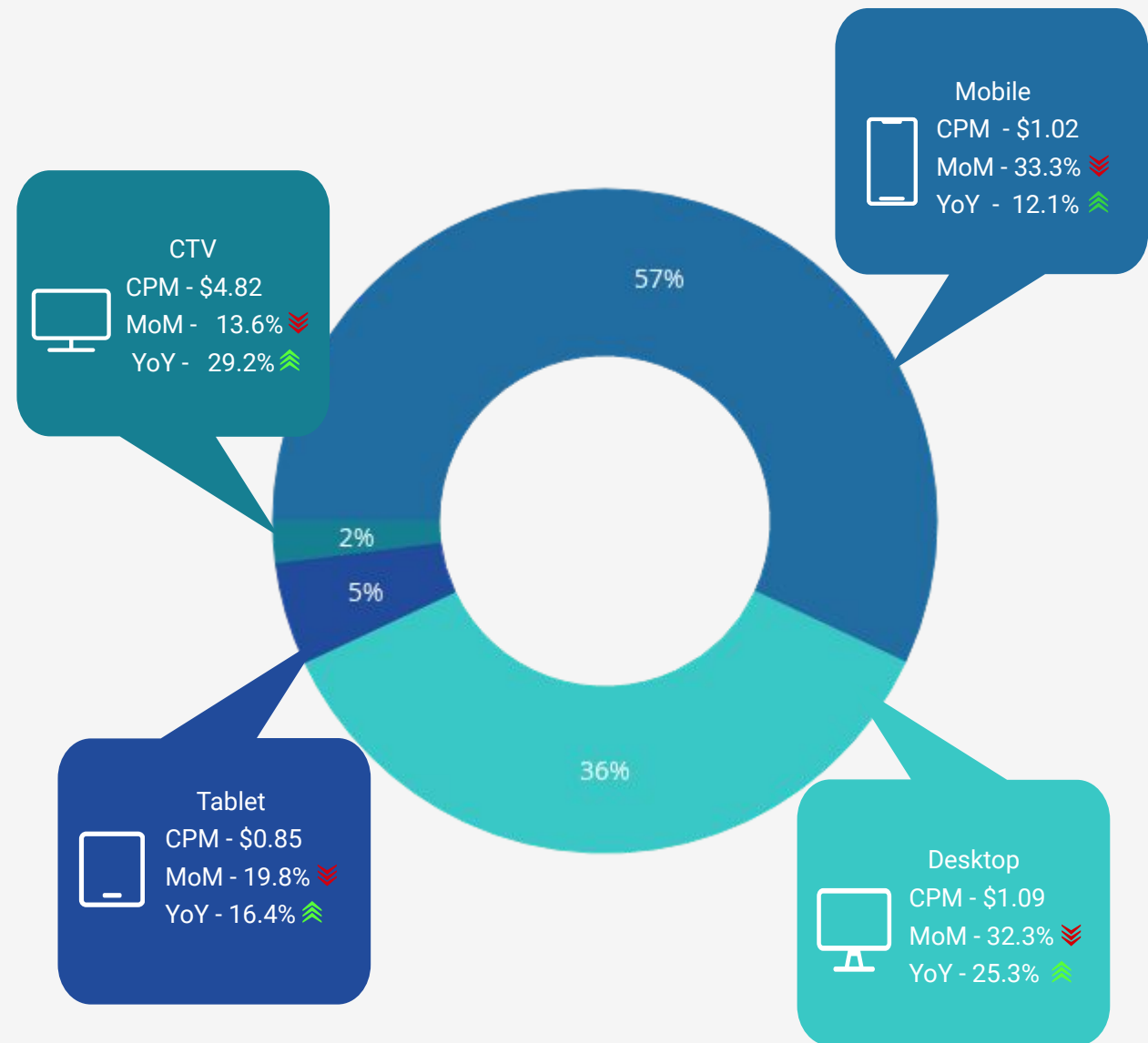
Display Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	33%	1	\$1.02	-42.0%	4.0%
Index Exchange	9%	2	\$1.40	-36.0%	30.0%
Amazon	5%	4	\$1.39	-39.0%	40.0%
Pubmatic	5%	5	\$1.53	-15.0%	26.0%
VRTCAL	5%	3	\$0.52	-9.0%	-10.0%
TTD	5%	7	\$2.34	-13.0%	10.7%
Rubicon	4%	6	\$1.63	-39.0%	38.0%
InMobi	4%	13	\$1.02	-26.0%	55.0%
Nativo	3%	9	\$1.31	-39.0%	-25.0%
Media.net	3%	17	\$0.86	-37.0%	-14.0%

Video Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	35%	1	\$2.95	-4.0%	24.0%
Amazon	16%	2	\$3.39	-45.0%	52.0%
Index Exchange	8%	3	\$2.75	-31.0%	-4.0%
Rubicon	8%	6	\$2.19	-52.0%	38.0%
Media.net	5%	5	\$0.79	-52.0%	-84.0%
Triplelift	4%	13	\$2.25	-16.0%	-37.0%
InMobi	3%	7	\$3.64	-19.0%	249.0%
OneTag	3%	10	\$0.80	-45.0%	-81.0%
Pubmatic	3%	9	\$3.87	-16.0%	-6.0%
GumGum	3%	4	\$2.71	-43.0%	-25.0%

Device Trends



- **Mobile** CPMs decreased by 33.3% and **Desktop** CPMs decreased by 32.3% month-over-month. Year-over-year increase was observed, with Mobile raising by 12.1% while Desktop raising by 25.3%.
- **CTV** CPMs decreased 13.6% month-over-month and went up by 29.2% year-over-year.

Mobile Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	30%	1	\$1.20	-37.0%	11.0%
Index Exchange	9%	2	\$1.37	-37.0%	4.0%
VRTCAL	6%	23	\$0.52	-10.0%	-8.0%
InMobi	5%	6	\$1.04	-27.0%	63.0%
Rubicon	5%	5	\$0.73	-15.0%	22.0%
Kueez	5%	21	\$1.57	-40.0%	11.0%
Pubmatic	4%	4	\$1.42	-12.0%	35.0%
Amazon	4%	3	\$1.42	-38.0%	68.0%
Nativo	4%	8	\$1.30	-40.0%	-29.0%
OpenX	3%	7	\$2.10	-24.0%	29.0%

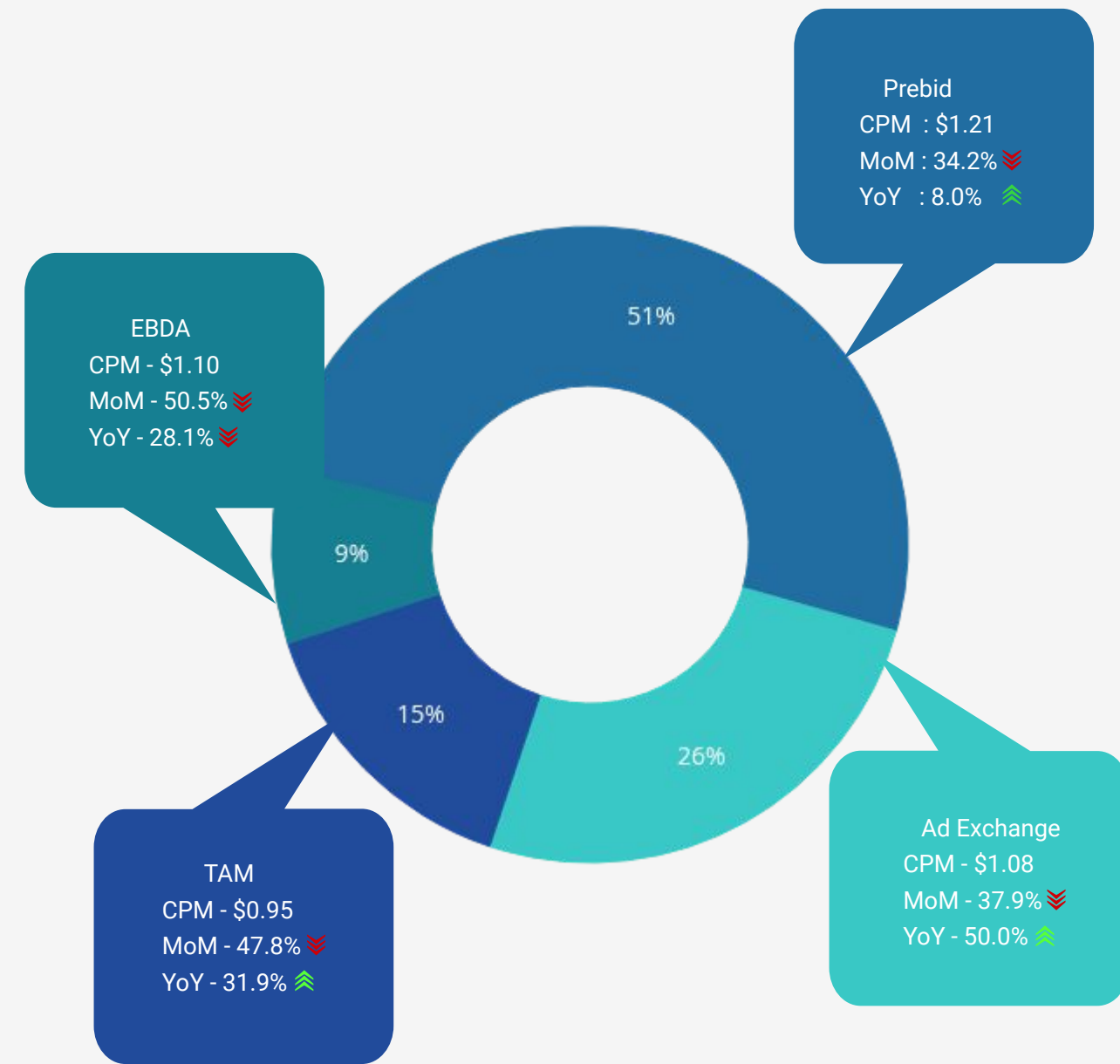
Desktop Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	36%	1	\$1.08	-43.0%	17.0%
Amazon	10%	5	\$1.54	-43.0%	28.0%
Index Exchange	8%	4	\$1.59	-31.0%	38.0%
TTD	7%	9	\$1.88	-19.0%	86.0%
Ozone	5%	8	\$2.02	-24.0%	-28.0%
Pubmatic	4%	6	\$1.90	-22.0%	41.0%
Media.net	4%	7	\$0.58	-46.0%	-30.0%
Rubicon	4%	7	\$1.77	-40.0%	33.0%
Dianomi	3%	10	\$0.38	26.0%	2.90%
Triplelift	3%	11	\$0.80	-33.0%	-28.0%

CTV Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	48%	1	\$7.87	-61.0%	17.1%
Telaria	15%	2	\$6.43	2.0%	35.9%
Index Exchange	12%	3	\$3.78	-18.0%	55.0%
OpenX	7%	4	\$4.08	-6.0%	19.8%
Amazon	6%	5	\$1.76	-69.0%	77.0%
InMobi	3%	13	\$2.15	-36.0%	-59.0%
Triplelift	2%	6	\$4.29	-10.0%	4.1%
Dianomi	1%	29	\$0.37	22.0%	2.30%
Rubicon	1%	8	\$8.23	48.0%	31.1%
Pubmatic	1%	9	\$1.15	2.0%	-27.0%

Programmatic Integration Trends



- **Prebid** leads the market with a 51% share, trailed by **AdX**, at 26%, **TAM** at 15%, and **EBDA** at 9%. While CPMs for all the integrations decreased month-over-month, year-over-year **EBDA** saw a decline in CPMs.

Prebid Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Index Exchange	18%	1	\$1.47	-35.0%	25.0%
TTD	13%	3	\$2.35	-13.0%	10.8%
Pubmatic	11%	2	\$1.62	-15.0%	27.0%
Rubicon	9%	4	\$1.53	-34.0%	25.0%
OpenX	5%	5	\$1.80	-22.0%	25.0%
Dianomi	5%	14	\$0.43	27.0%	12%
InMobi	5%	12	\$1.09	-44.0%	79.0%
Nativo	5%	9	\$1.84	-42.0%	-51.0%
Triplelift	4%	6	\$0.92	-38.0%	-23.0%
Media.net	3%	10	\$0.91	-37.0%	-13.0%

TAM Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Amazon	34%	1	\$1.46	-41.0%	36.0%
InMobi	14%	2	\$1.05	-16.0%	48.0%
Nativo	5%	3	\$0.88	-40.0%	-27.0%
Index Exchange	5%	5	\$1.40	-24.0%	5.0%
Rubicon	5%	7	\$1.79	-15.0%	-1.0%
Media.net	4%	12	\$0.81	-51.0%	-53.0%
Triplelift	4%	6	\$1.05	-27.0%	-32.0%
OpenX	3%	9	\$2.05	-14.0%	8.0%
GumGum	3%	8	\$3.18	-28.0%	81.0%
Pubmatic	2%	10	\$1.58	-13.0%	12.0%

EBDA Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Index Exchange	31%	1	\$1.30	-42.2%	-42.2%
Media.net	22%	2	\$0.72	-36.8%	-36.8%
Triplelift	10%	4	\$0.71	-52.7%	-52.7%
Rubicon	8%	3	\$1.98	-31.0%	5.9%
Nativo	8%	7	\$0.49	-67.1%	-67.1%
Pubmatic	8%	5	\$1.05	-53.9%	-53.9%
OpenX	5%	6	\$3.42	-4.7%	-2.0%
Sovrn	4%	8	\$0.77	-36.4%	-36.4%
Sharethrough	2%	9	\$1.23	-15.2%	-15.2%
InMobi	1%	13	\$0.57	62.9%	-51.7%

AdX Buyer Trends

Advertiser Trends

- AdWords Small Businesses stayed at the top this month, but CPMs fell by 44% MoM. Most major advertisers saw CPM declines, with sharp drops for Best Buy and AT&T, likely due to reduced brand spending. Microsoft and Dell saw smaller declines, pointing to more stable buying. Comcast was the only advertiser to grow, with CPMs up 14%. Retail and travel advertisers like Amazon, TEMU, and Marriott also saw CPMs fall, reflecting seasonal budget pullbacks.

Bidder Trends

- Google Ads remained the top buyer this month, but CPMs fell sharply by 43% MoM, with DV360 also down 36%, reflecting weaker overall demand. The Trade Desk continued to rank among the leading bidders despite a 28% CPM decline, while Index Exchange, Criteo, and Magnite saw moderate drops, pointing to softer buying activity. Media.net and TemuDSP recorded the steepest CPM declines at 60% and 75%, while PubMatic and ADMaster posted smaller decreases.

Top AdX Advertiser's

Advertiser	Rank	CPM	MOM%
AdWords small businesses	1	\$2.28	-44%
Best Buy	2	\$2.91	-52%
AT&T	3	\$4.05	-57%
Microsoft Corp.	4	\$4.42	-20%
Dell	5	\$2.87	-16%
Comcast Corporation	6	\$2.37	14%
Honda Motor Company	7	\$1.34	-25%
Amazon Corp	8	\$1.39	-63%
TEMU	9	\$2.22	-37%
Marriott International	10	\$8.91	-22%

Top AdX Bidder's

Bidder	Rank	CPM	MOM%
Google Ads	1	\$2.35	-43%
DV360	2	\$2.08	-36%
The Trade Desk Inc.	3	\$2.82	-28%
Index Exchange	4	\$1.60	-11%
Criteo	5	\$1.24	-30%
Media.Net (EB)	6	\$1.24	-60%
Magnite	7	\$1.47	-30%
TemuDSP	8	\$6.87	-75%
PubMatic (EB)	9	\$1.79	-13%
ADMASTER PRIVATE LIMITED	10	\$0.77	-5%

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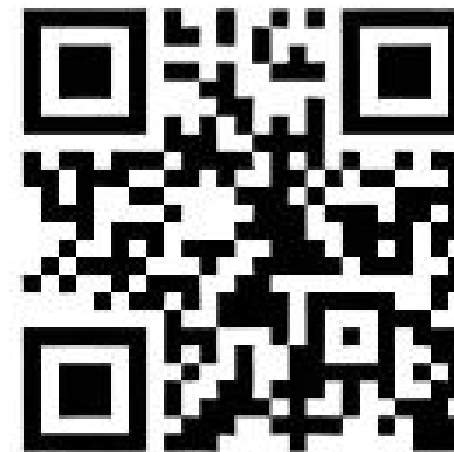
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