

US Programmatic Trends

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

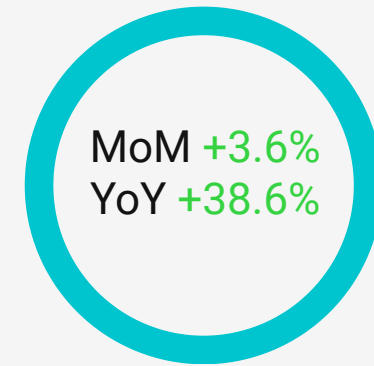
Key Highlights

MoM, Display CPMs increased by 5.8%, Video CPMs decreased by 2.1%, resulting in a 3.6% increase in overall CPM.

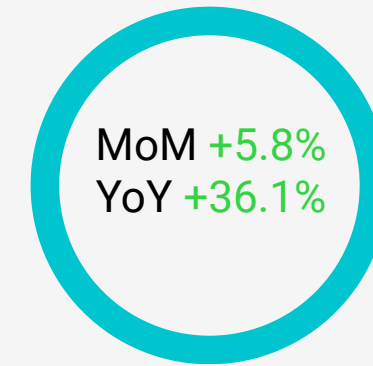
YoY, Display CPMs increased by 36.1% and Video CPMs increased by 4.1%, leading to an overall CPM increase of 38.6%.

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.

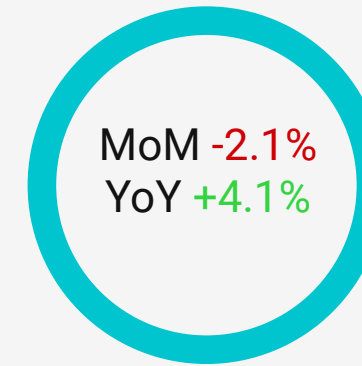
Overall CPM



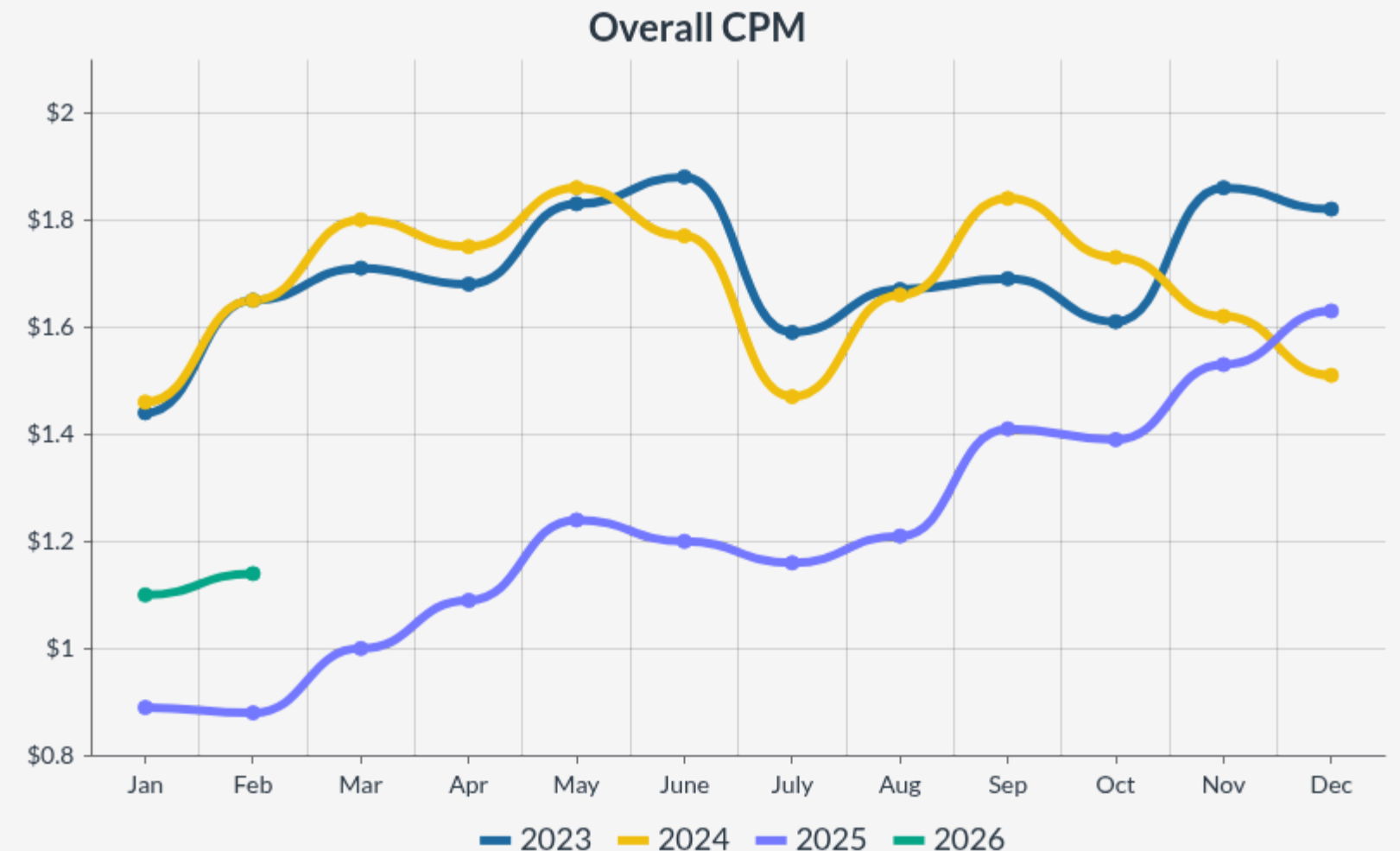
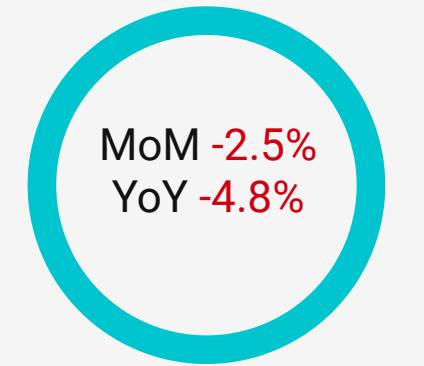
Display CPM



Video CPM



Prog Fill rate



Understanding IVT Across Inventory

This month's theme focuses on fraud exposure across digital inventory, analyzing how IVT rates differ between Direct and Programmatic deals across Web, AMP, and App environments, spanning both Display and Video formats, using IVT impression and click rates as key indicators as traffic sourcing, verification rigor, and auction dynamics increasingly influence where impression fraud and click fraud emerge within the ecosystem. Invalid Traffic (IVT) refers to non-human or fraudulent activity that inflates ad delivery metrics and distorts true campaign performance.

IVT by Type & Format

Web leads impression fraud at 2.23% IVT Imps

- Its open, crawlable structure allows bots to simulate page loads with minimal friction, making impression inflation structurally easier on web than AMP or app environments.

App shows the highest click IVT, reaching 28.06%

- Despite the cleanest impression rate (0.52%), App records the highest click IVT of all three types. Bots on app are click-optimized, bypassing impression detection via SDK-level manipulation.

AMP's IVT clicks sits at 15.76%

- AMP's limited JavaScript execution may be restricting fraud detection tags as much as it restricts fraud itself, creating blind spots in verification coverage.

App Video inventory shows the highest exposure to click IVT, reaching 35.47%

- Video's premium CPMs make it a prime target. In-app environments remove browser-based safeguards, enabling click fraud to operate at scale without triggering impression thresholds.

App Display is close behind at 27.52% IVT Clicks

- Confirming that click fraud on app is an environment-level problem, not isolated to a single format. When both video and display record click IVT above 27%, the signal points to the app environment itself rather than any individual placement.

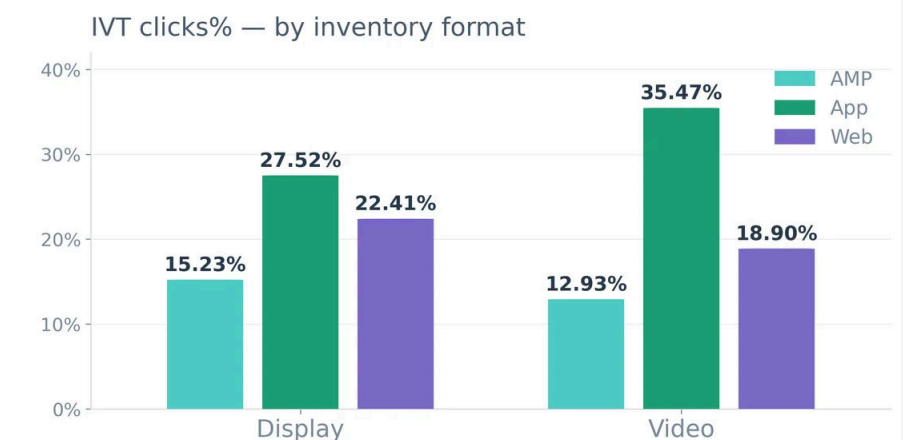
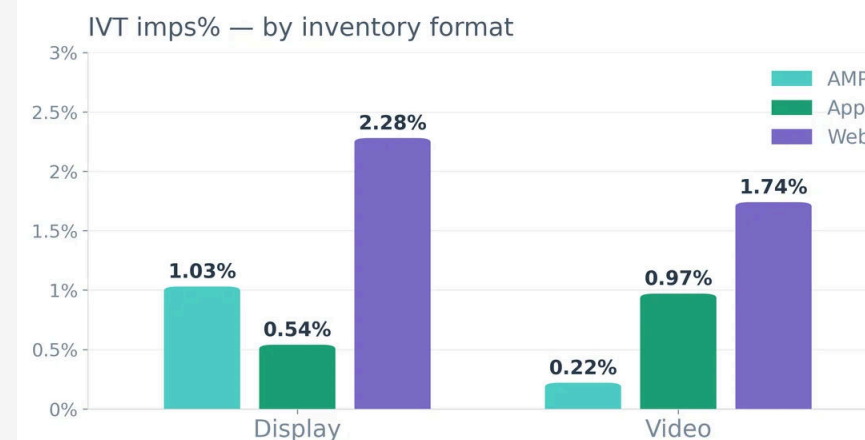
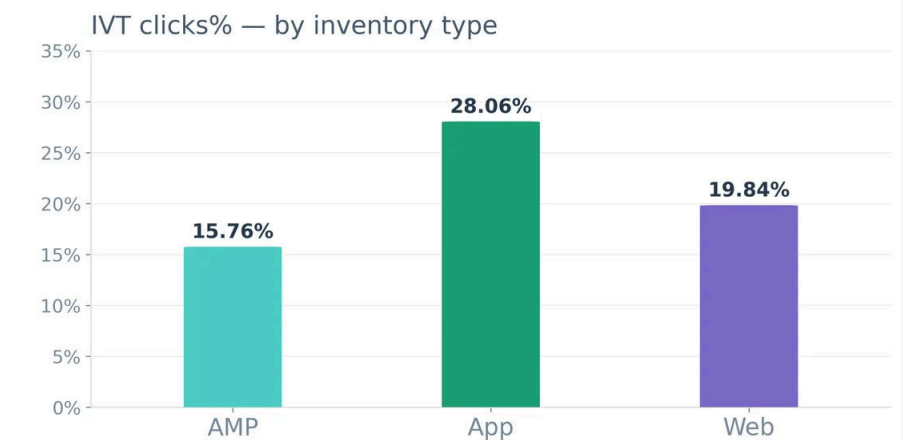
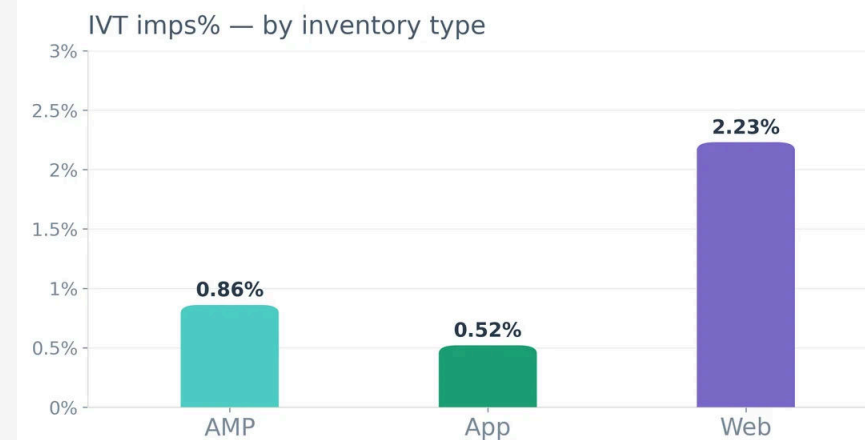
AMP Video is the cleanest format - 0.22% IVT Imps and 12.93% IVT Clicks

- Constrained AMP rendering limits bot entry points on video placements more effectively than on display, making it the least fraud-exposed format in the dataset.

Takeaway: Impression rates are a misleading proxy for traffic quality. App's 0.52% IVT Imps masks 28.06% click fraud, and Programmatic clean impressions conceal 58.23% IVT Clicks on AMP Display. With click IVT running 8 to 10x higher across every segment, fraud has shifted to the click layer, where impression-only verification falls entirely short.

IVT benchmark — inventory type & format

Grand total: IVT Imps% 2.06% · IVT Clicks% 22.39%



Note: Data collected from Google Ad Manager (GAM).

IVT Imps = Ad Server Unfiltered Downloaded Impressions – Ad Server Impressions

IVT Clicks = Ad Server Unfiltered Clicks – Ad Server Clicks

Understanding IVT Across Inventory

Web & AMP Direct

- Direct line items peak at 7.92% IVT Imps% on Web Display, nearly 4x the grand total average. Weak pre-bid verification and unvetted traffic sources on direct-sold web inventory are driving impression fraud far above benchmark. Direct deals carry more impression risk than commonly assumed.
- AMP Display Direct records 3.91% IVT Imps%, which is notably high for a format often considered low-risk, suggesting that the source of traffic being pushed into AMP direct deals warrants closer scrutiny.

Programmatic

- Programmatic consistently records the lowest IVT Imps% across every single segment. AMP Video Programmatic at 0.07% is the cleanest data point in the entire dataset, confirming that SSP-level filtering, ads.txt enforcement, and DSP brand safety controls are working effectively on impressions.
- However, Programmatic's clean impression numbers mask extreme click fraud. AMP Display Programmatic records 58.23% IVT Clicks%, the highest value in the entire dataset. Click-optimized bots in open auction deliberately keep impression footprints low to evade detection while generating high-volume fraudulent click activity.

App Direct

- App Video Direct (43.33%) and App Display Direct (39.32%) show compounding risk — elevated fraud on both impressions and clicks simultaneously. Fraudulent app traffic exploits the trust gap between deal type and verification rigor on direct-sold inventory.

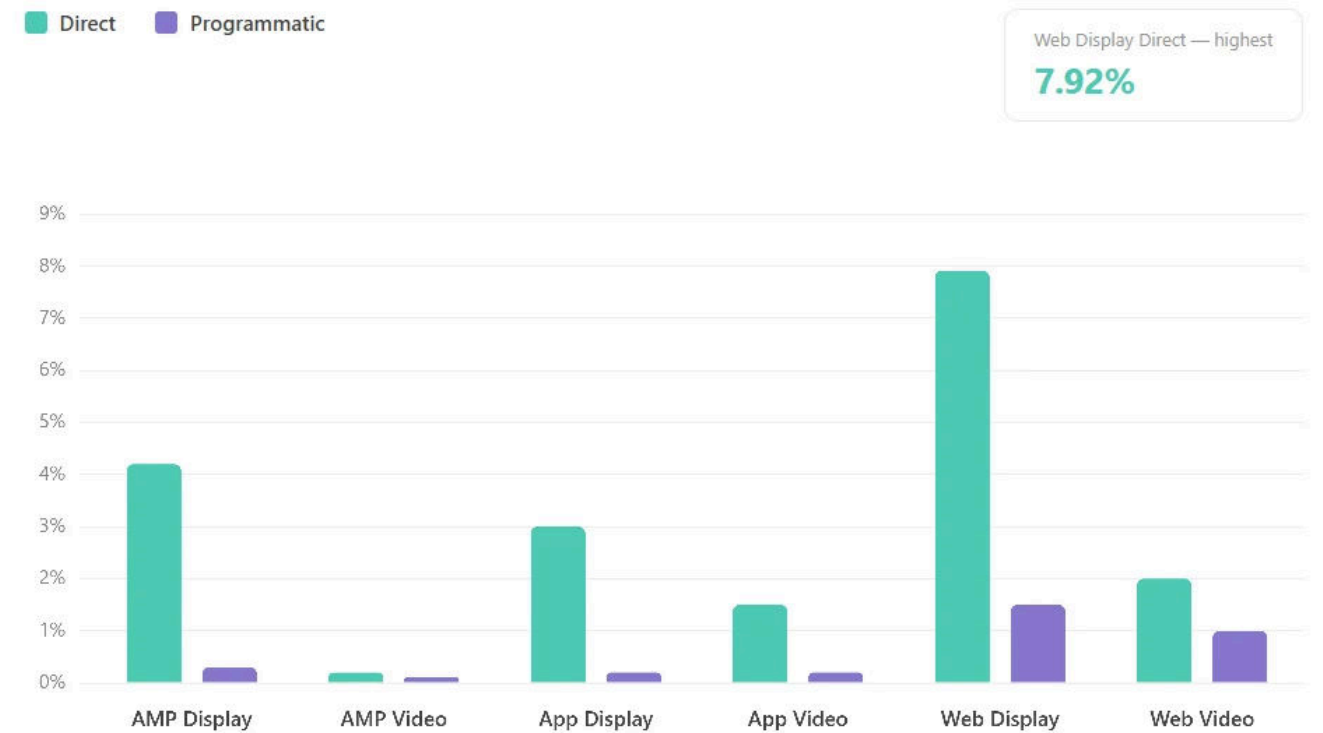
Overall

- Web Display Programmatic is the cleanest Web segment on both metrics (1.24% IVT Imps%, 1.32% IVT Clicks%), making it the internal benchmark for what controlled traffic quality looks like in this inventory set.

Takeaway: While Programmatic consistently records the lowest IVT impression rates, it masks extreme click fraud. AMP Display Programmatic peaks at 58.23% IVT Clicks, the highest in the dataset. App Direct compounds the risk from both sides, with App Video Direct at 43.33% and App Display Direct at 39.32% IVT Clicks, signaling elevated fraud on impressions and clicks simultaneously. Clean impression numbers alone are not a reliable indicator of traffic quality.

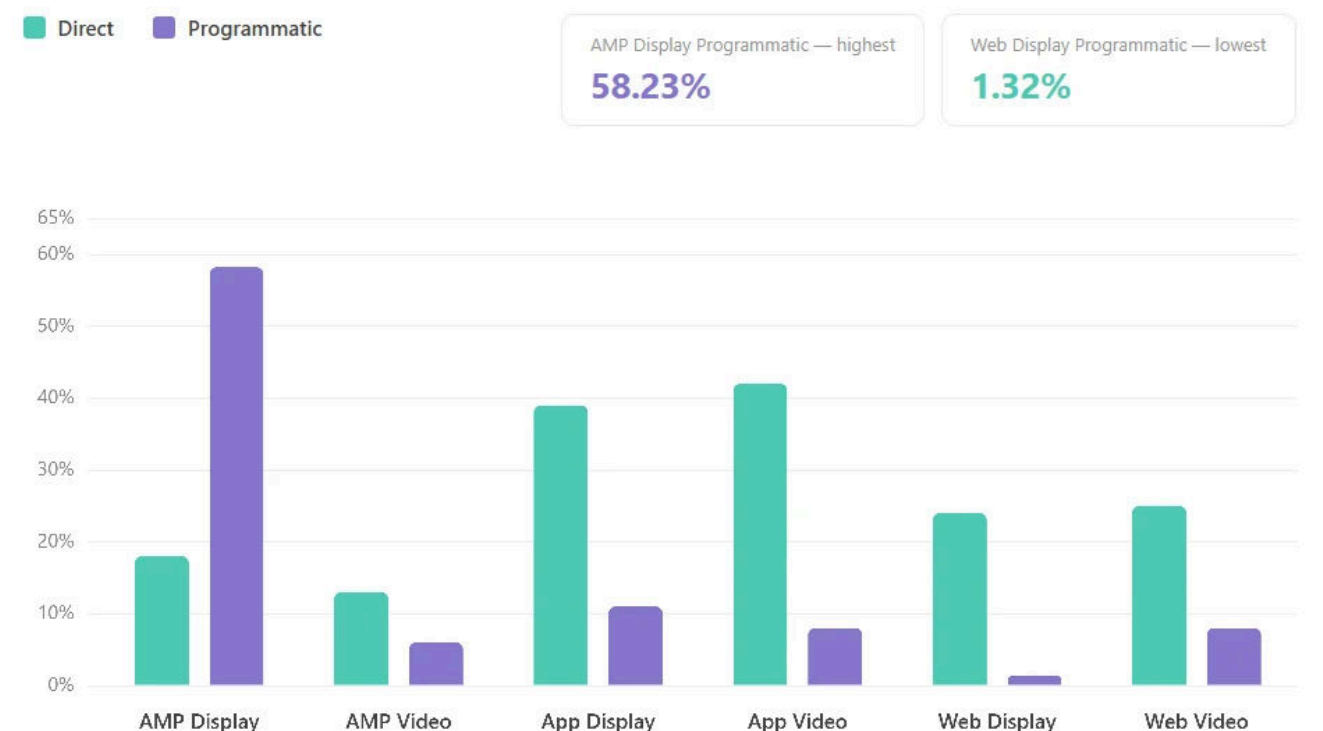
IVT Imps% — Direct vs. Programmatic

Web Display Direct peaks at nearly 4x the grand total average



IVT clicks% — Direct vs. Programmatic

Programmatic hides extreme click IVT behind clean impression numbers



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

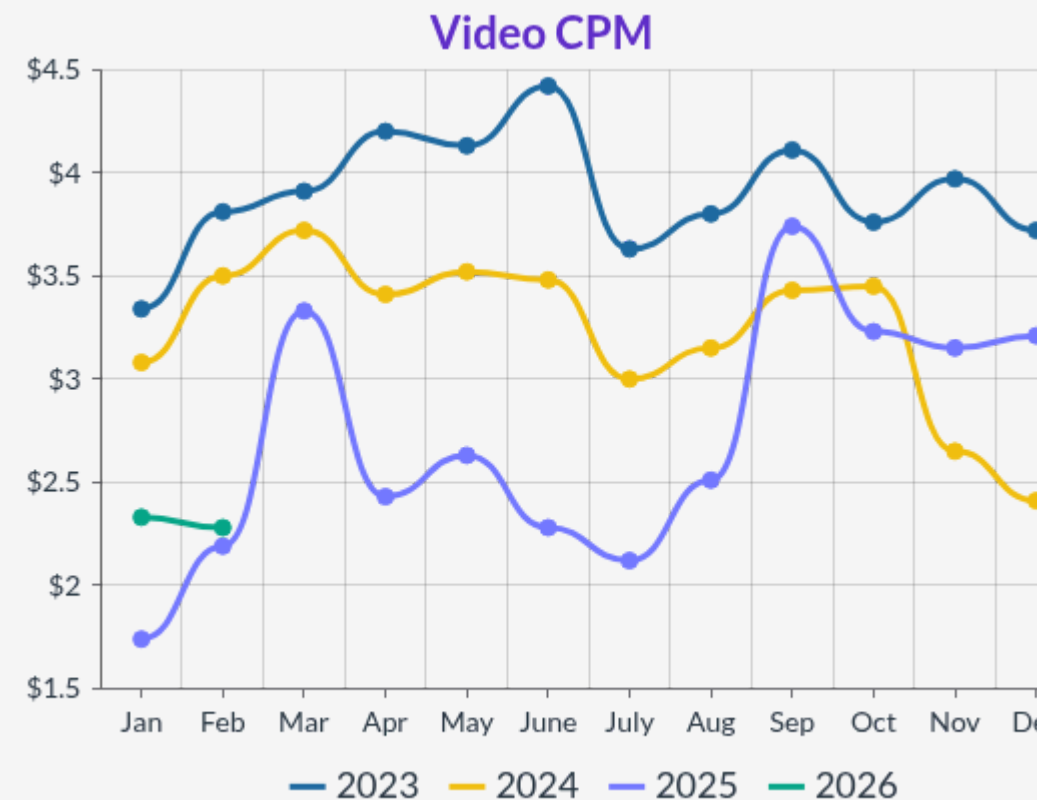
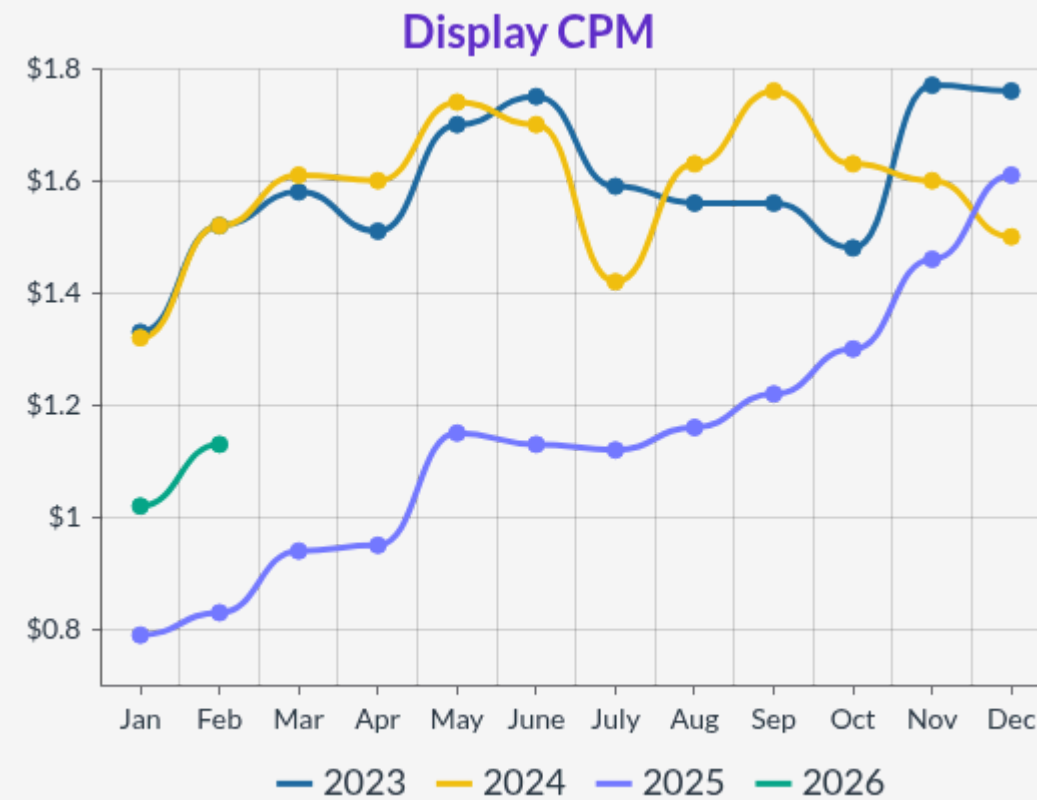
Media Trends

Display Trends

- **Display** CPMs went up by 5.8% month-over-month and experienced a 36.1% 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 **Triplelift** and **Media.net**.

Video Trends

- **Video** CPMs went down by 2.1% month-over-month and experienced a 4.1% increase year-over-year.
- Almost 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 increase with an exception to **Triplelift**, **Onetag**, and **Media.net**.



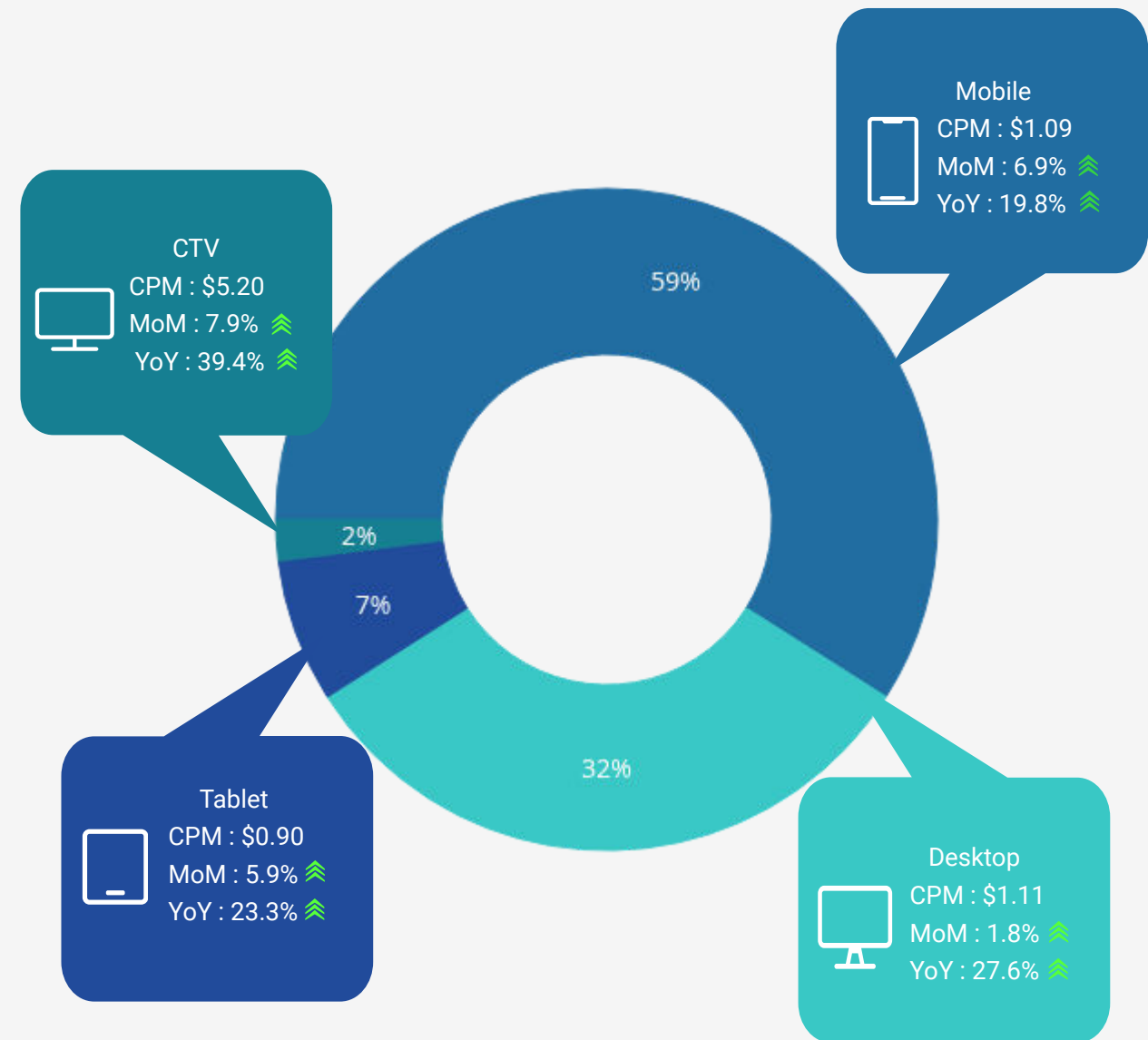
Display Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	41%	1	\$1.15	12.7%	85.5%
Index Exchange	9%	2	\$1.48	5.7%	41.0%
Rubicon	5%	7	\$1.57	12.9%	38.9%
Amazon	5%	3	\$1.60	4.6%	37.9%
Pubmatic	4%	4	\$1.47	11.4%	25.6%
InMobi	4%	8	\$1.44	7.5%	8.3%
Nativo	4%	9	\$1.40	-14.1%	68.7%
Triplelift	3%	11	\$0.97	-4.9%	-4.9%
Media.net	3%	14	\$0.78	-40.5%	-41.8%
OpenX	3%	17	\$1.60	86.0%	5.3%

Video Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	44%	1	\$2.73	-7.5%	11.4%
Amazon	16%	2	\$2.54	-25.1%	14.9%
Rubicon	9%	4	\$2.13	-22.5%	16.4%
Index Exchange	8%	3	\$2.79	27.4%	42.3%
Triplelift	4%	6	\$1.10	39.2%	-25.2%
OneTag	3%	8	\$1.27	-43.6%	-0.8%
OpenX	3%	11	\$2.62	-28.0%	32.3%
Media.net	2%	5	\$0.75	-6.3%	-3.8%
GumGum	2%	10	\$2.36	-39.0%	22.9%
Pubmatic	2%	9	\$4.24	56.5%	6.5%

Device Trends



- **Mobile** CPMs increased by 6.9% and **Desktop** CPMs increased by 1.8% month-over-month. Year-over-year increase was observed, with Mobile rising by 19.8% while Desktop rising by 27.6%.
- **CTV** CPMs increased 7.9% month-over-month and went up by 39.4% year-over-year.

Mobile Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	30%	1	\$1.24	3.3%	26.5%
Index Exchange	11%	2	\$1.19	-13.1%	13.3%
Rubicon	7%	5	\$1.34	11.7%	15.5%
InMobi	6%	4	\$0.86	-17.3%	-35.8%
Pubmatic	6%	7	\$1.45	98.6%	17.9%
Nativo	5%	9	\$1.52	-3.2%	25.6%
Amazon	5%	8	\$1.43	0.7%	40.2%
OpenX	4%	10	\$1.51	6.3%	93.6%
Triplelift	4%	12	\$0.93	-28.5%	-10.6%
Media.net	3%	13	\$1.51	-28.1%	58.9%

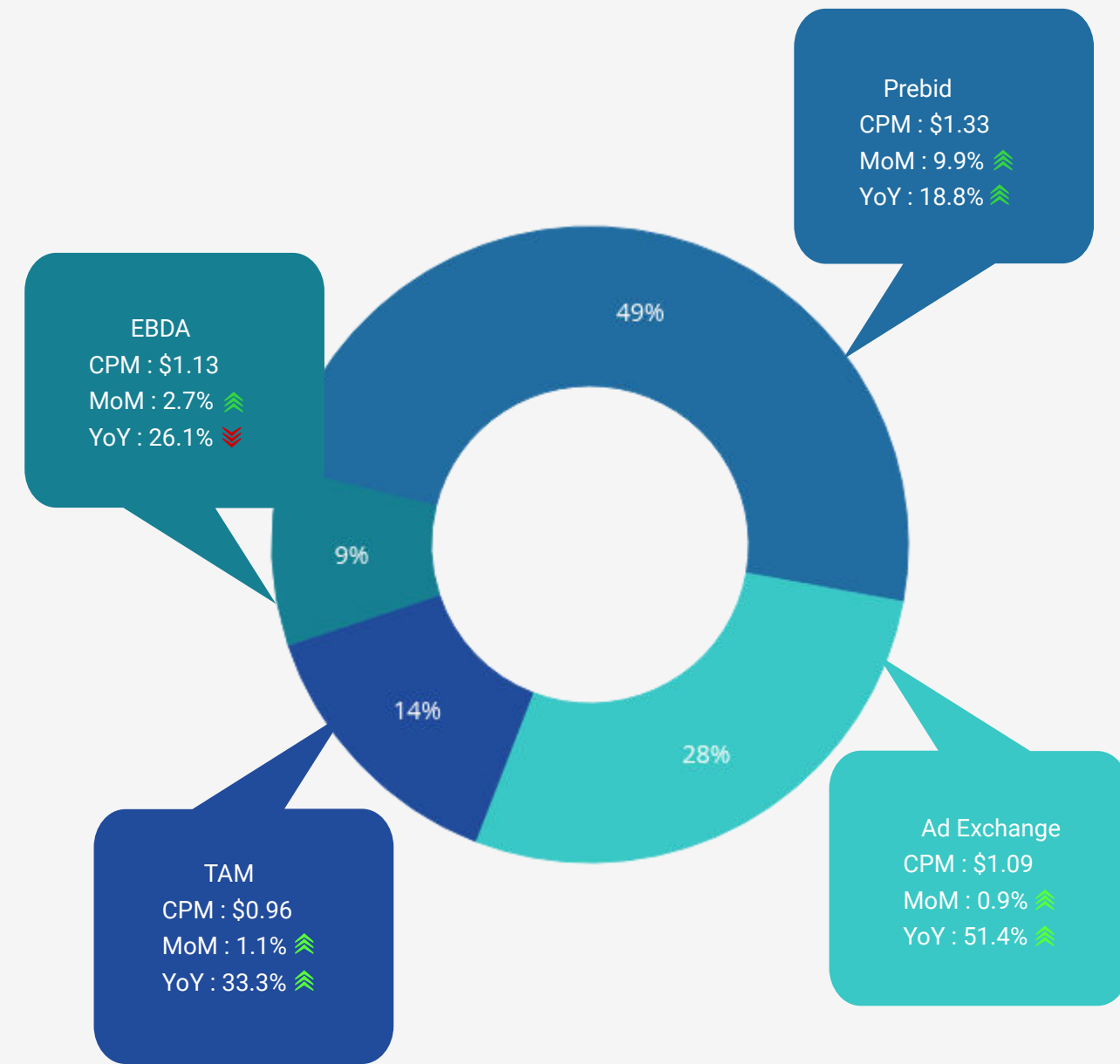
Desktop Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	43%	1	\$1.14	5.6%	39.0%
Amazon	9%	2	\$1.43	-7.1%	37.5%
Index Exchange	7%	3	\$1.39	-12.6%	7.8%
Media.net	7%	7	\$0.87	-53.7%	-40.8%
Triplelift	4%	10	\$0.93	-54.0%	-30.1%
Rubicon	4%	8	\$1.36	-28.4%	20.4%
Pubmatic	4%	6	\$1.89	53.7%	92.9%
Ozone	3%	5	\$1.73	-2.3%	74.7%
OpenX	2%	14	\$1.62	17.4%	19.1%
TTD	2%	4	\$2.01	70.3%	76.3%

CTV Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Ad Exchange	85%	1	\$5.18	-34.2%	-6.8%
Amazon	6%	5	\$7.25	12.8%	16.9%
Index Exchange	4%	3	\$4.49	18.8%	18.2%
OpenX	3%	4	\$3.28	-19.6%	-13.9%
Triplelift	2%	7	\$3.45	96.0%	228.6%
InMobi	1%	6	\$3.04	41.4%	19.2%
Rubicon	0%	9	\$5.14	19.8%	5.3%
Sharethrough	0%	19	\$10.98	5.9%	3.8%
Pubmatic	0%	10	\$3.86	-8.7%	18.0%
Media.net	0%	16	\$3.30	4.8%	13.4%

Programmatic Integration Trends



- **Prebid** leads the market with a 49% share, trailed by **AdX**, at 28%, **TAM** at 14%, and **EBDA** at 9%. While CPMs for all the integrations seem mixed month-over-month, year-over-year **EBDA** saw a decline in CPMs.

Prebid Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Index Exchange	26%	1	\$1.35	6.3%	21.6%
Rubicon	18%	4	\$1.40	3.7%	35.9%
Pubmatic	17%	3	\$1.30	6.6%	10.2%
OpenX	12%	5	\$1.36	-11.1%	22.5%
Triplelift	8%	9	\$1.28	-28.9%	-1.5%
TTD	5%	2	\$2.31	3.6%	9.5%
Kargo	2%	12	\$2.73	30.6%	35.1%
Criteo	1%	11	\$2.10	14.1%	18.6%
Seedtag	1%	18	\$1.92	0.0%	42.2%
GumGum	1%	17	\$1.38	51.6%	-57.0%

TAM Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Amazon	46%	1	\$1.39	-4.8%	28.7%
Index Exchange	10%	4	\$1.07	1.9%	9.2%
Triplelift	7%	7	\$0.84	-4.5%	13.5%
Rubicon	7%	5	\$1.03	-26.4%	10.8%
Pubmatic	4%	10	\$1.10	-38.5%	7.8%
OpenX	4%	8	\$1.59	96.3%	10.4%
GumGum	4%	9	\$2.01	91.4%	35.8%
MinuteMedia	3%	11	\$1.44	-29.8%	-7.1%
OneTag	2%	14	\$0.79	-75.2%	-29.5%
Kargo	2%	17	\$1.79	13.3%	-12.3%

EBDA Top SSPs

Partner	SOV	Prev Rank	CPM	MOM%	YoY%
Index Exchange	30%	1	\$1.37	5.4%	-12.2%
Media.net	20%	2	\$0.75	4.2%	-44.4%
Triplelift	10%	4	\$0.69	-2.8%	-75.2%
Rubicon	7%	3	\$1.74	-12.1%	24.3%
Pubmatic	7%	6	\$1.43	60.7%	-88.8%
Nativo	6%	5	\$0.70	-33.3%	-30.0%
Ad Exchange	6%	13	\$0.85	-75.1%	-59.1%
Sovrn	5%	8	\$0.53	-31.2%	-49.0%
OpenX	4%	7	\$2.06	67.5%	10.2%
Sharethrough	2%	9	\$1.12	96.5%	57.7%

AdX Buyer Trends

Advertiser Trends

- AdWords Small Businesses remained the top advertiser this month, with CPMs rising slightly by 5% MoM. Amazon Corp and Alphabet recorded strong CPM growth of 68% and 43%, likely driven by increased retail media activity and stronger digital advertising demand. In contrast, TEMU saw a sharp 50% CPM decline as the platform scaled back its earlier aggressive ad spending, while Comcast Corporation also recorded a 17% drop, reflecting reduced advertising activity during the month.

Bidder Trends

- Google Ads remained the top buyer this month, with CPMs rising by 8% MoM. Magnite and Media.net saw strong CPM growth of 63% and 58%, reflecting increased programmatic bidding through independent platforms and stronger open-web demand. Criteo and TemuDSP saw CPM declines of 31% and 24%, indicating lower bidding activity from commerce-focused advertisers during the month. In contrast, Amazon Advertising recorded the strongest growth, with CPMs rising sharply by 98% as advertisers increasingly used its retail media network and DSP for targeted campaigns.

Top AdX Advertiser's

Advertiser	Rank	CPM	MOM%
AdWords small businesses	1	\$1.68	5%
AT&T	2	\$2.53	18%
Amazon Corp	3	\$0.93	68%
Microsoft Corp.	4	\$4.05	11%
TEMU	5	\$1.61	-50%
Comcast Corporation	6	\$2.31	-17%
Honda Motor Company	7	\$1.34	29%
Alphabet	8	\$2.08	43%
Best Buy	9	\$1.68	17%
Adobe Systems	10	\$0.52	23%

Top AdX Bidder's




Bidder	Rank	CPM	MOM%
Google Ads	1	\$1.76	8%
DV360	2	\$1.63	1%
Index Exchange	3	\$1.81	31%
The Trade Desk Inc.	4	\$2.51	12%
Magnite	5	\$1.70	63%
Media.Net (EB)	6	\$0.93	58%
Criteo	7	\$0.87	-31%
PubMatic (EB)	8	\$1.65	-2%
TemuDSP	9	\$2.75	-24%
Amazon Advertising	10	\$3.16	98%


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