EMARKETER

Transparency, Not Reach, Now Decides Where Mobile Budgets Go

Advertisers and agencies are shifting budgets to independent mobile advertising partners, **and the driver is transparency.**

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Demand for supply-path and price transparency is fueling reallocation toward channels with measurable ROI, according to a new EMARKETER and Datum Intelligence survey of 166 agency and brand leaders.

These advertisers depend on independent partners to provide the transparency to confidently measure ROI according to marketers' trusted standards, regardless of a channel's payment method. Marketers prefer to keep their own score, and act on channels that exceed target return on ad spend (ROAS) and KPIs, even when payment was based on a non-performance method like CPM (cost per thousand).

The move to independent mobile advertising partners isn't just a zero-sum game. It's driving new mobile ad spend: among marketers who increased budgets on an over-performing channel, 42.2% said the new investment came from net-new incremental budgets.

When shifting existing ad budgets around, marketers are looking to trusted independent partners to prove ROI, and build on successful mobile ad campaign outcomes.

KEY SURVEY TAKEAWAYS:

1. Budget is shifting toward independent players. Marketers are demonstrating they prefer transparent, independent partners by shifting budgets now and in the future.

2. Buyers prefer transparent inventory. Transparency is a key requirement for most advertisers and agencies when selecting independent mobile partners. Supply-path and price transparency are among the top criteria in choosing partners.

3. Advertisers measure and reward ROI regardless of the buying model (CPM, cost per click, cost per impression). Marketers keep their own score, favoring independent partners whose transparency makes ROI provable.

4. When a channel beats its KPI goals, it earns incremental share of wallet. Some 42.2% reinvest from incremental net-new budgets. And the general trend across multiple scenarios is toward higher reallocation in channels that outperform.

1 Exiting walled gardens

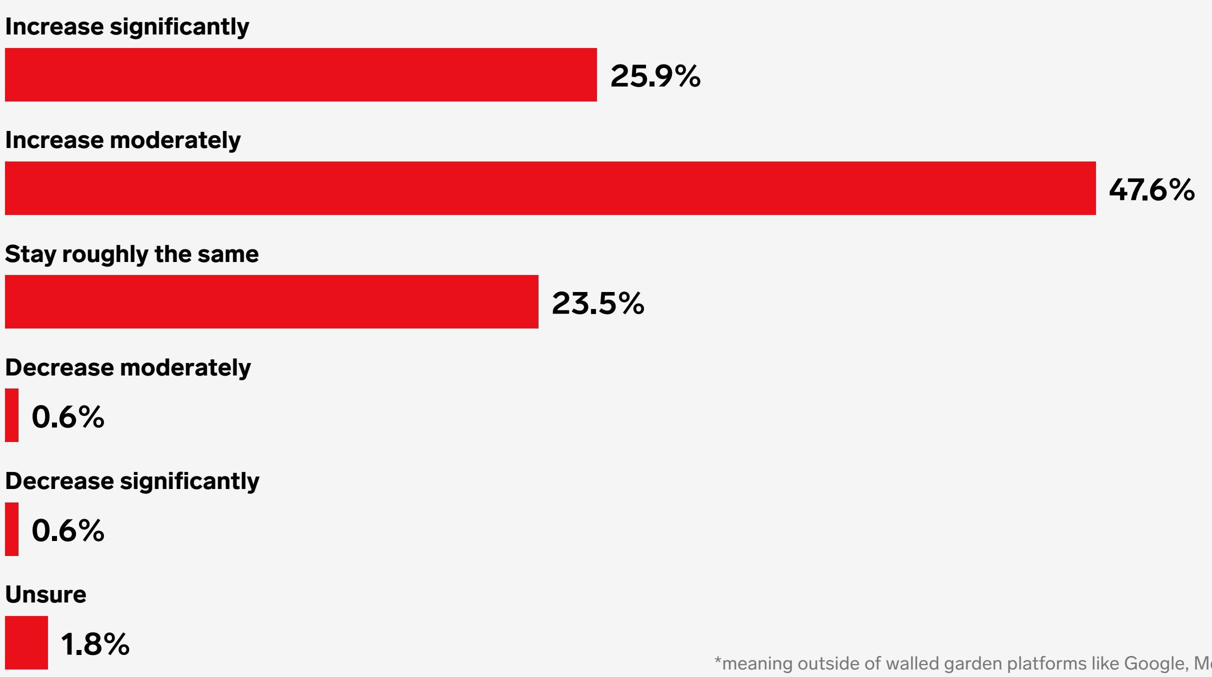
Advertisers and agencies are shifting budgets away from big platforms, toward independent mobile advertising channels. Nearly two-thirds (63.9%) of marketers said they reallocated mobile budgets from walled tech giants to the independents in the past 12 months, according to the EMARKETER and Datum Intelligence survey. Only 1.2% of respondents said they shifted money back to walled gardens.

That shift will continue. Nearly three quarters (73.5%) of respondents expect their organization's allocation to independent channels to increase over the next three years. A quarter (25.9%) expect to increase their investment "significantly."

The increased attention to independent partners comes as budgets for mobile ad spend show double-digit growth. US in-app mobile ad spend is expected to grow 12.0% in 2026, reaching $235.10 billion next year, according to EMARKETER's forecast.

Brands and agencies in the survey reflected this growing appetite for mobile advertising. Roughly half (49.4%) of respondents expect to increase in-app mobile budgets 5 to 10 percentage points over the next 12 months. And 19.9% expect a significant increase of over 10 percentage points for in-app mobile allocations in the same period.

Over the next three years, how do you expect your organization's allocation to in-app mobile advertising via independent channels* to change?



*meaning outside of walled garden platforms like Google, Meta, or TikTok
n=166. Source: EMARKETER and Datum Intelligence "Independent Mobile Advertising Survey," July 2026.

2 The demand for transparency

The ongoing shift to independent mobile advertising partners follows a widespread preference for supply-path transparency and price. All told, 90.4% of marketers called full supply-path transparency either “somewhat important” (49.4%), or an “essential requirement” (40.1%) for working with an independent mobile advertising partner.

Large technology companies like Meta, Google, and TikTok offer engagement with vast user audiences, but they keep their insights about users and their ad delivery paths behind a walled garden. That opacity is why full supply-path transparency now shapes how advertisers invest in mobile advertising partners, and will keep shaping it.

Marketers shifting budgets from the walled gardens to independent partners gain transparency, and those who already know where their budgets are headed are backing the established independents. Partners such as AppLovin, InMobi, and Liftoff are integrated directly into apps through their own software, so they can monitor the full supply path for ads and impressions and show this to advertisers.

Asked how mobile budgets over the next two years would split between established partners such as AppLovin, InMobi, and Liftoff and all other independents, respondents who knew their plans directed 57.1% of future budgets to the established group, versus 40.7% to the rest. That barely shifts from how marketers invest today, which is the point: the established independents hold their advantage.

How important is full supply-path transparency (knowing exactly where your ad ran and who it reached) when evaluating an independent mobile advertising partner?

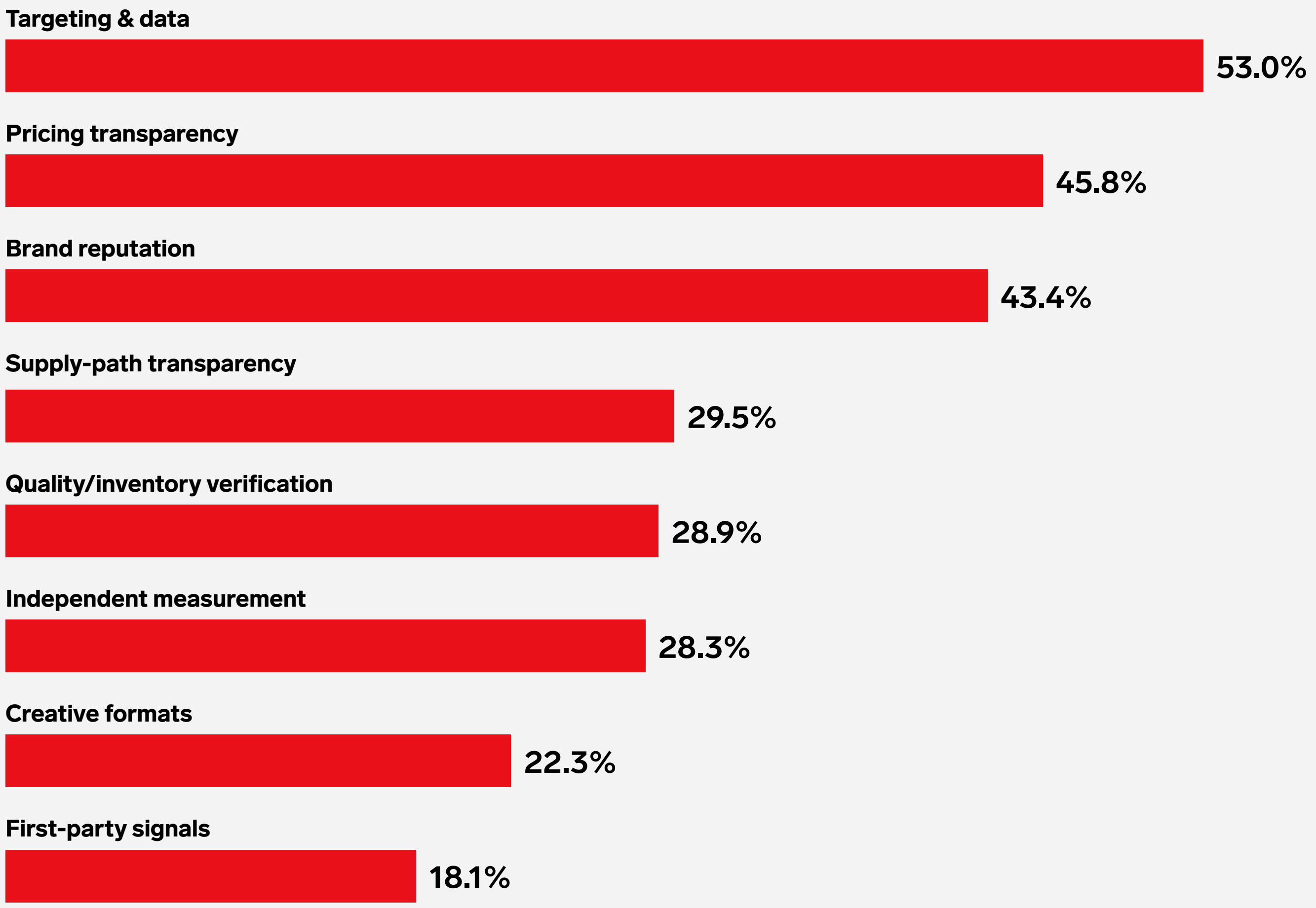
n=166. Source: EMARKETER and Datum Intelligence “Independent Mobile Advertising Survey,” July 2026.

"Transparency is a big draw for marketers," said Yory Wurmser, EMARKETER's principal analyst, advertising, media, and technology. "As walled gardens have increased the size and power of their automated optimization platforms, a lot of marketers are seeking more control and transparency, and they're finding it in independent channels. The added control also lets them target specific audiences that the walled gardens may not reach."

Transparency dominates the checklist marketers use to evaluate independent mobile partners. Price transparency (45.8%) and supply-path transparency (29.5%) rank among the top four criteria, behind data and targeting, the top option at 53.0%. Marketers who prize that data and targeting gain visibility into audiences they can't get inside the walled gardens.

> **"Transparency is a big draw for marketers."**
>
> — YORY WURMSER
> PRINCIPAL ANALYST
> AT EMARKETER

Which criteria most influence your decision when evaluating an independent mobile advertising partner?



n=166. Note: Respondents could select up to three.
Source: EMARKETER and Datum Intelligence "Independent Mobile Advertising Survey," July 2026.

3 Rewarding ROI

Advertisers measure and reward ROI regardless of the buying model, the survey found. When asked if performance accountability for a channel was the same regardless of how the advertiser pays for it (whether by CPM, CPC, CPI, or another method) a third (33.7%) said accountability was the same. Another 38.5% of respondents indicated that performance accountability was “mostly” the same regardless of how they paid.

Tested standards and benchmarks let brands and agencies tie campaign performance back to ROI. Measuring that return no matter how a partner is paid tells marketers exactly where their ad dollars work hardest.

For a complete assessment of ROI, every ad dollar must be accounted for, even those that are tied to non-performance models. Some 31.3% of marketers always measure channel-level ROI when they buy on non-performance models like CPM. And 41.6% of respondents do so “usually.” Only 5.4% said they never measure channel-level ROI on non-performance models.

31.3%

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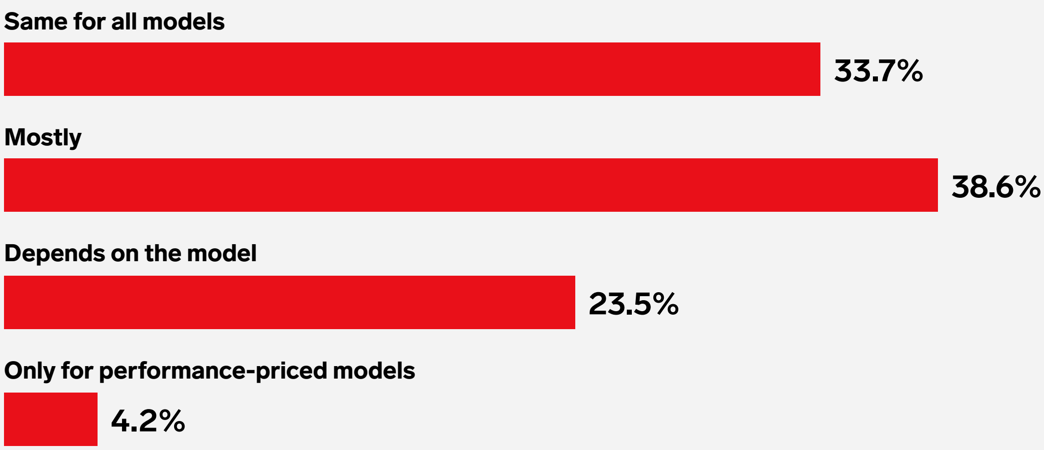
Is your performance accountability for a channel the same regardless of how you pay for it (CPM, CPC, CPI, or other)?



n=166. Source: EMARKETER and Datum Intelligence “Independent Mobile Advertising Survey,” July 2026.

Where ROI is measured and proven, advertisers act on outcomes by increasing their investment. In the past 12 months, 67.5% of marketers increased their spend with a partner paid on CPM because it delivered measurable ROI. Among this group, 28.3% said they increased their spend “significantly” with a partner resulting from measurable ROI.

Independent partners with a direct, integrated presence in apps—including AppLovin, InMobi, and Liftoff—provide access to the granular data advertisers need to prove ROI.

“A lot of independent mobile channels give advertisers granular data on placements, audience, and bid prices, ” said Wurmser. “When combined with their own performance data, they can get fine-tuned ROI. They can use this detailed ROI analysis to buy the exact ads and audiences they need.”

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4 Reallocating budgets

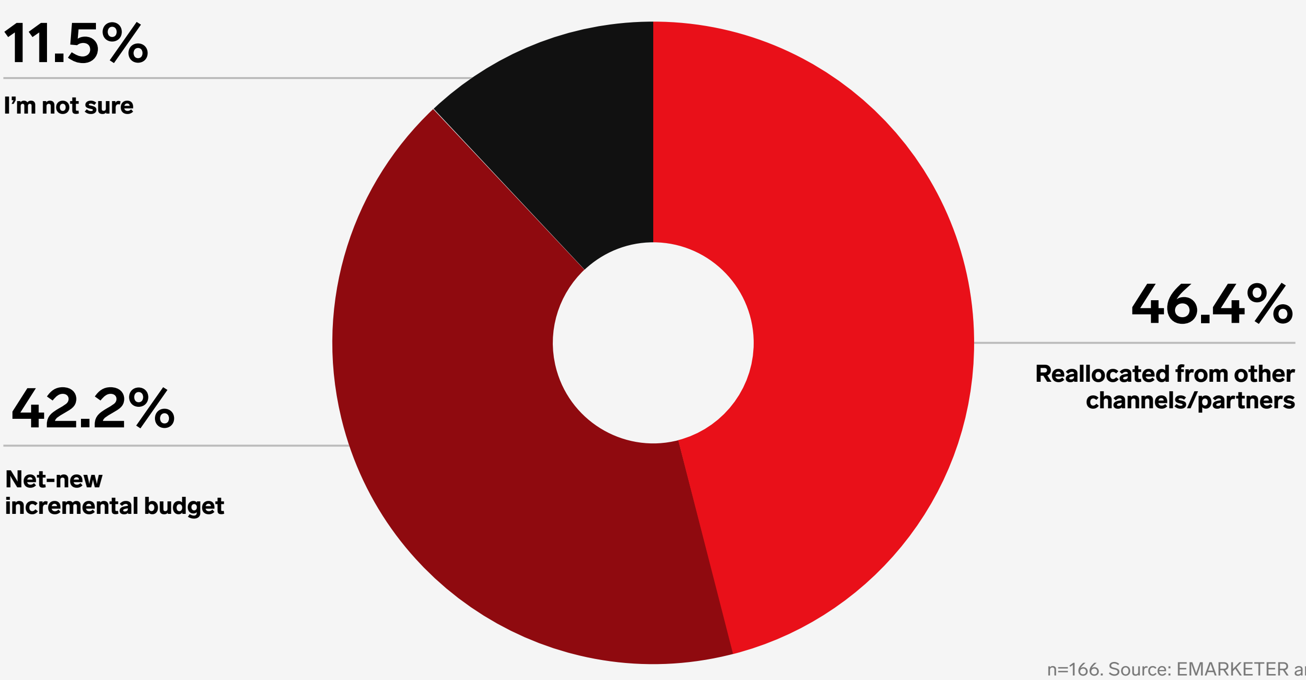
When a channel beats its KPI goals, it has a good chance of earning incremental share of wallet. Full transparency enables brands and agencies to measure ROI and act on positive outcomes by increasing spend, even when the payment model isn't performance-based.

Two-thirds (67.5%) of marketers increase spend with a partner paid on CPM, and when a channel proves its ROI, some of the money they add is net-new rather than reshuffled, according to EMARKETER's survey.

When marketers pour more into an over-performing channel, much of that money is fresh spend: 42.2% said the new investment came from net-new incremental budgets.

Net-new dollars are a major growth source for advertising partners, though 46.4% of marketers still reallocate from other channels or partners inside their existing budgets. Given visibility into what's working, many marketers choose to fund fresh, incremental growth.

When you increase budget for an over-performing channel, where does that money mainly come from?



n=166. Source: EMARKETER and Datum Intelligence "Independent Mobile Advertising Survey," July 2026.

Marketers reward outperformance even when the margin is thin. Budget increases hold steady across many of the survey's growth scenarios, with advertisers and agencies raising spend on a channel whose KPIs are beaten by as little as 10%.

For example, a channel that exceeds its KPI or ROAS target by a modest 10% prompts many advertisers to raise their investment in it by 1% to 10%, and in some cases more.

Bigger wins draw bigger commitments. When a channel beats its KPI or ROAS by more than 80%, 28.9% of respondents said they would increase spend 26% to 50%, and 16.3% would reallocate more than 50% into the channel.

Even proven ROI doesn't move every buyer. In each of the three scenarios, a segment of advertisers held their budgets flat regardless of the returns. Higher proven returns push more marketers to reallocate at higher rates, chasing the ROI they can measure.

"A lot of independent mobile channels give advertisers granular data on placements, audience, and bid prices."

— YORY WURMSER
PRINCIPAL ANALYST
AT EMARKETER

If an independent mobile advertising channel exceeded your target KPI/ROAS, how much would you adjust its budget in the next cycle at each level of outperformance?

	No change	+1%–10%	15–25%	+26%–50%	+50% or more	Weighted Average
Channel beats target by +10%	22.9%	36.8%	12.1%	22.9%	5.4%	2.5
Channel beats target by +50%	11.5%	27.7%	30.1%	21.7%	9.0%	2.9
Channel beats target by +80%	13.9%	20.5%	20.5%	28.9%	16.3%	3.1

n=166. Source: EMARKETER and Datum Intelligence "Independent Mobile Advertising Survey," July 2026.

4 When planning a mobile advertising campaign:

- **Identify independent mobile measurement solutions.** Choose independent partners that can verify KPI and target ROAS measurement for the full campaign, and consult agencies with proven measurement and reporting.
- **Approve budgets that are flexible and don't hamper growth.** Review scenarios where campaign outcomes exceed KPIs, and have a plan to reallocate spend to build on success in specific channels.
- **Evaluate mobile partners that provide supply-path and price transparency.** Choose the partners offering the highest transparency, so your mobile team can measure campaign results independently.
- **Ensure independent measurement to prove ROI so you can build on success.** With independent mobile partners that support transparency, review the full supply chain and pricing method for ad delivery throughout the campaign. Make sure audiences match your target customer profiles and segments. Confidently increase investment in successful, proven channels.

About the survey

The survey was developed and fielded by EMARKETER in collaboration with Datum Intelligence. We surveyed 166 agency and brand leaders with direct involvement in programmatic mobile advertising in independent channels.

About this report

Research for this report was compiled by members of the EMARKETER Studio team in partnership with Datum Intelligence, using reports, forecasts, and research by EMARKETER on marketers' shift to independent mobile advertising partners, and their willingness to reallocate budgets in pursuit of measurement and price transparency.

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