iab canada

ENTERPRISE 2026

THE FUTURE, BY DESIGN REPORT



May, 2026

TABLE OF CONTENTS

Foreword 02

About this Report 03

Executive Summary 04

Survey Findings 06

Roundtable and Panel Discussion Findings 18

What Comes Next for the Canadian Market 22

Aknowledgement 23

About IAB Canada 24



FOREWORD

BY SONIA CARRENO, IAB CANADA PRESIDENT

Canada's digital advertising industry is moving quickly. AI is reshaping workflows, expectations around privacy and accountability continue to evolve, and the pressure to deliver better measurement and clearer value has never been higher. At the same time, the market remains fragmented. Teams are innovating rapidly, but often in parallel rather than in coordination.

Enterprise 2026: The Future, by Design was created to bring the industry together around these realities. The goal was not simply to identify challenges, but to better understand where alignment already exists, where gaps remain, and where more intentional collaboration is needed to move the market forward.

One of the clearest takeaways from this work is that progress will depend less on isolated innovation and more on coordination across the ecosystem. The future of digital advertising in Canada will be shaped by stronger partnerships, shared standards, practical approaches to AI adoption, and a collective commitment to trust and accountability.

What gives me confidence is that the momentum is real. Across every discussion, there was a clear willingness to engage, problem-solve, and build constructively together.

Thank you to everyone who contributed your time, perspectives, and candor to this initiative. Your input helped create a clearer picture of both the opportunities ahead and the work required to realize them.

The path forward is not about slowing innovation down. It is about designing a market that can move forward with greater clarity, confidence, and collaboration.

ABOUT THIS REPORT

Enterprise 2026: The Future, By Design brought together more than 200 leaders and practitioners from across Canada's digital advertising industry to examine where the market is gaining momentum, where systems remain under pressure, and where more coordinated industry action is needed.

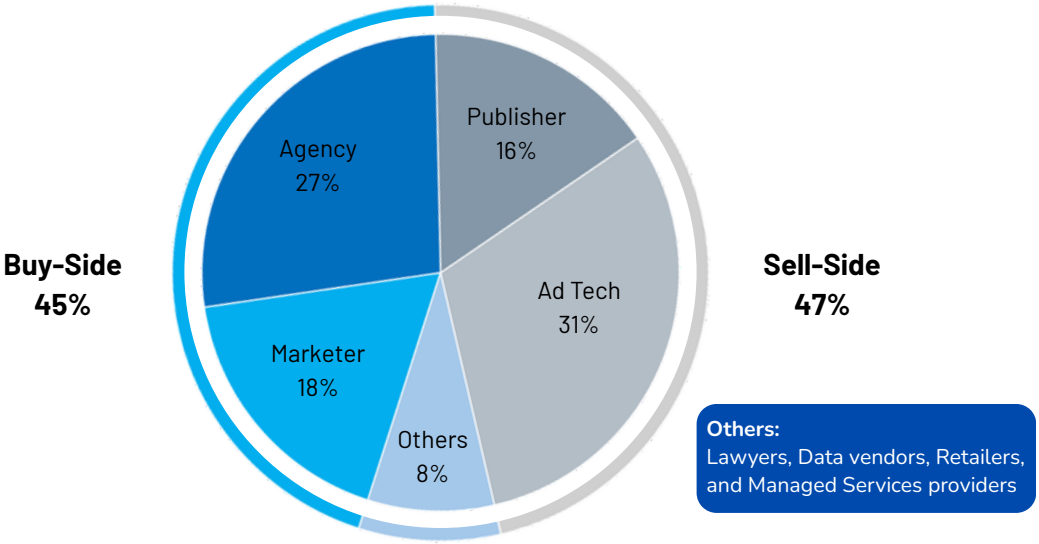




This report draws on two sources of data from Enterprise 2026:

- Survey results, based on responses from more than 150 industry stakeholders across the Canadian digital advertising ecosystem.
- Roundtable and panel discussions, based on conversations with more than 200 participants from across the industry, along with panel discussions featuring selected industry leaders.

The survey respondent base reflects a balanced cross-section of the market:



This gives the report a strong view across both buy-side and supply-side perspectives, including those responsible for media investment, planning, campaign decision-making, technology infrastructure, inventory, and audience relationships.

EXECUTIVE SUMMARY

1 Momentum is outpacing structure in Canada's digital ad market

When asked to describe the future of digital advertising in Canada in two words or less, respondents largely chose the term "Fragmented" (38.1%), followed closely by "Building momentum" (32.9%). On the ground discussions described a dynamic market that is increasingly being shaped by real-time moments, creator ecosystems, cultural events, and shifting demand. The tension reflected in the words of choice, can be attributed to the industry's challenge of adapting legacy infrastructure to meet this new flexible media supply chain reality. The industry is not short on energy or ideas. The work now is to turn that momentum into more consistent ways of planning, measuring, and creating value.

2 Measurement fragmentation is undermining accountability and alignment across the media ecosystem

Measurement fragmentation (24.5%) is the industry's most pressing structural gap, limiting comparability, trust, and performance clarity across the ecosystem. The issue is not a shortage of data, but a lack of shared definitions, consistent methodologies, and aligned incentives. Addressing this requires coordinated industry leadership to standardize measurement frameworks, improve data fluency, and create clearer links between activity and outcomes.

3 AI adoption will be widespread but human-led, requiring workflow redesign and new skills

AI is set to become a standard layer in everyday work, with most organizations expecting meaningful but not total integration across workflows. This signals a shift toward augmentation rather than full automation. Real value will depend on redesigning workflows, evolving roles, and investing in AI literacy, critical thinking, and system management capabilities. Human judgment remains central across creative, ethical, and strategic decisions, positioning AI as a force multiplier for a more capable and accountable workforce.

EXECUTIVE SUMMARY

4 The market is filtering AI hype for accountable, real-world applications

Industry sentiment reflects disciplined optimism toward AI. While high-potential areas like workflow augmentation are recognized, there is clear skepticism toward concepts that outpace governance and operational readiness, such as fully agentic transactions. This signals a maturing market that is prioritizing measurable impact, quality, and accountability over narrative. As AI-driven content scales, differentiation will increasingly depend on trust, transparency, and relevance, creating an opportunity to anchor AI adoption in standards, oversight, and real performance outcomes.

5 The market is demanding scale without compromising trust and quality

Our industry cited the most challenging trade-offs is Speed vs Quality. Growth in speed, automation, and personalization cannot come at the expense of quality, privacy, control, and trust. This reflects a shift toward more disciplined innovation, where performance gains are expected to coexist with stronger safeguards and accountability. The opportunity is to design systems, standards, and practices that embed these principles by default, enabling the industry to scale while maintaining credibility and consumer confidence.

6 Industry is conceding control to the consumers

The industry is signaling a clear rebalancing of control toward consumers, with advertisers positioned as key stewards of accountability. Supply side respondents also place consumers at the top of the list, while adding an important layer: publishers are seen as needing greater control in the future ecosystem, particularly as trusted environments, quality signals, and value creators become more important. This connects directly to the roundtable and panel discussions, where digital sovereignty, data governance, enforcement, and consumer trust all pointed to the same underlying question: who has control, and who is accountable for how that control is used? The opportunity is to build systems where control is visible, responsibility is clear, and value exchange is understood. Trust will increasingly depend on how well organizations operationalize accountability across data use, decisioning, and outcomes.

SURVEY FINDINGS

Momentum is building, as the market works toward alignment

Respondents describe an industry that is active, evolving, and full of opportunity, but not yet fully aligned in how it operates.

When asked to describe the future of digital advertising in Canada, the two most common responses were **"Fragmented" (38.1%)** and **"Building momentum" (32.9%)**. These answers are not contradictory. Together, they describe a market that is moving forward, but without fully consistent systems to support that movement.



SURVEY FINDINGS

When asked to describe the current state of the industry, respondents pointed to a market that is changing quickly, becoming more complex, and still working through significant fragmentation. Many described an ecosystem where platforms, measurement, data, and decision-making feel disconnected. Respondents also saw the current moment as one of opportunity, particularly for organizations that can adapt to AI, new operating models, and shifting expectations around privacy, performance, and accountability.

Theme	Quotes
Fragmentation Respondents frequently described the ecosystem, measurement, platforms, and data as disconnected.	*"Fragmented ecosystem and even more fragmented measurement for attribution."* *"So fragmented and complex."*
Rapid change Many responses referenced constant evolution, AI acceleration, and difficulty keeping up.	*"Moving faster than we can actually understand. More tools, more accessibility, but unclear outcomes."* *"Rapidly changing, to the point of confusion often — infinite possibilities but the challenge is direction and alignment."*
Uncertainty Economic pressure, privacy changes, AI adoption, and platform concentration contributed to uncertainty.	*"Tough economic times, AI adoption and rollout uncertainty."* *"There are both internal and external forces that are dramatically reshaping the space."*
AI disruption AI appeared as both an opportunity and a source of fatigue, hype, and confusion.	*"Lost in all the AI talk and innovation."* *"It is at a pivot point, where AI and the triopoly could either crush it or accelerate it."*
Opportunity Despite the concerns, several respondents saw the moment as exciting, open, or ready for improvement.	*"Industry is in a state of change. Massive opportunity for those who can capitalize on it."* *"Exciting times with lots of possibilities."*

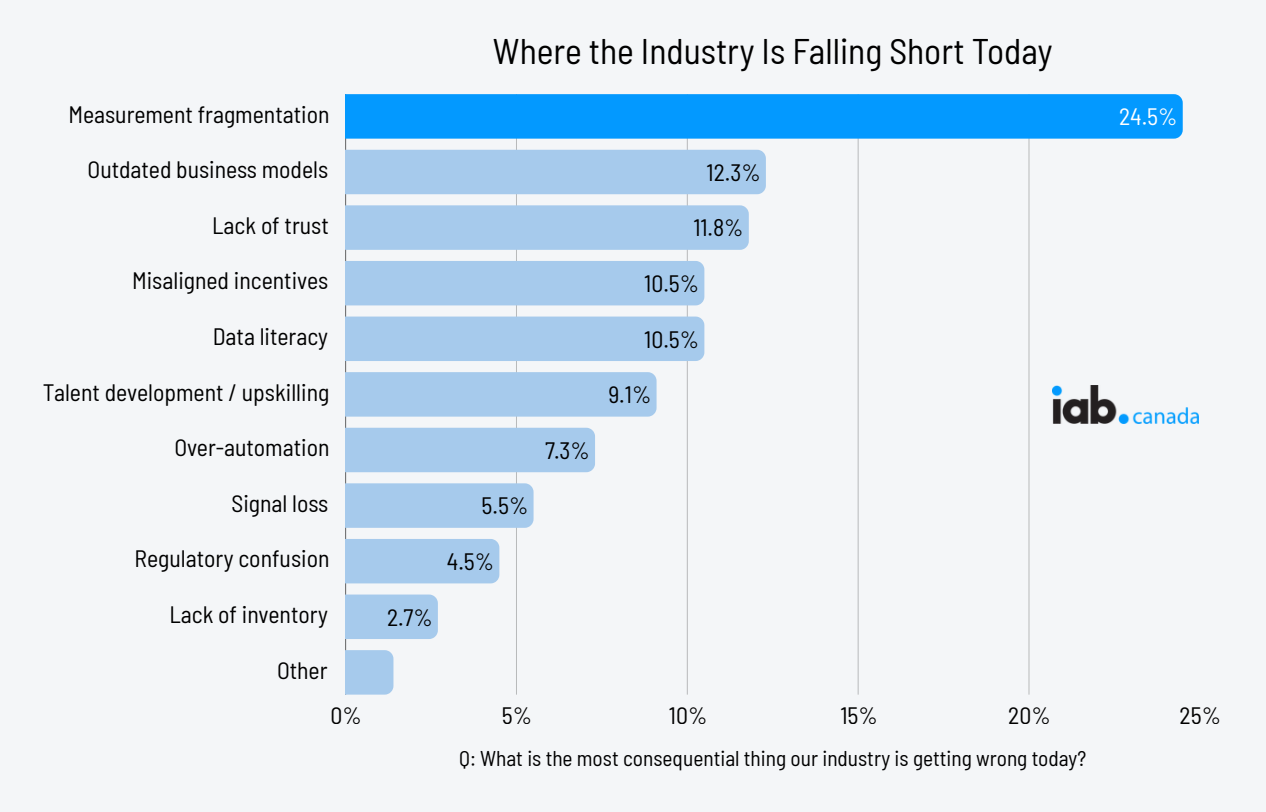
Q: How would you describe the current state of the industry?

SURVEY FINDINGS

The industry is ready to unlock better measurement and shared standards

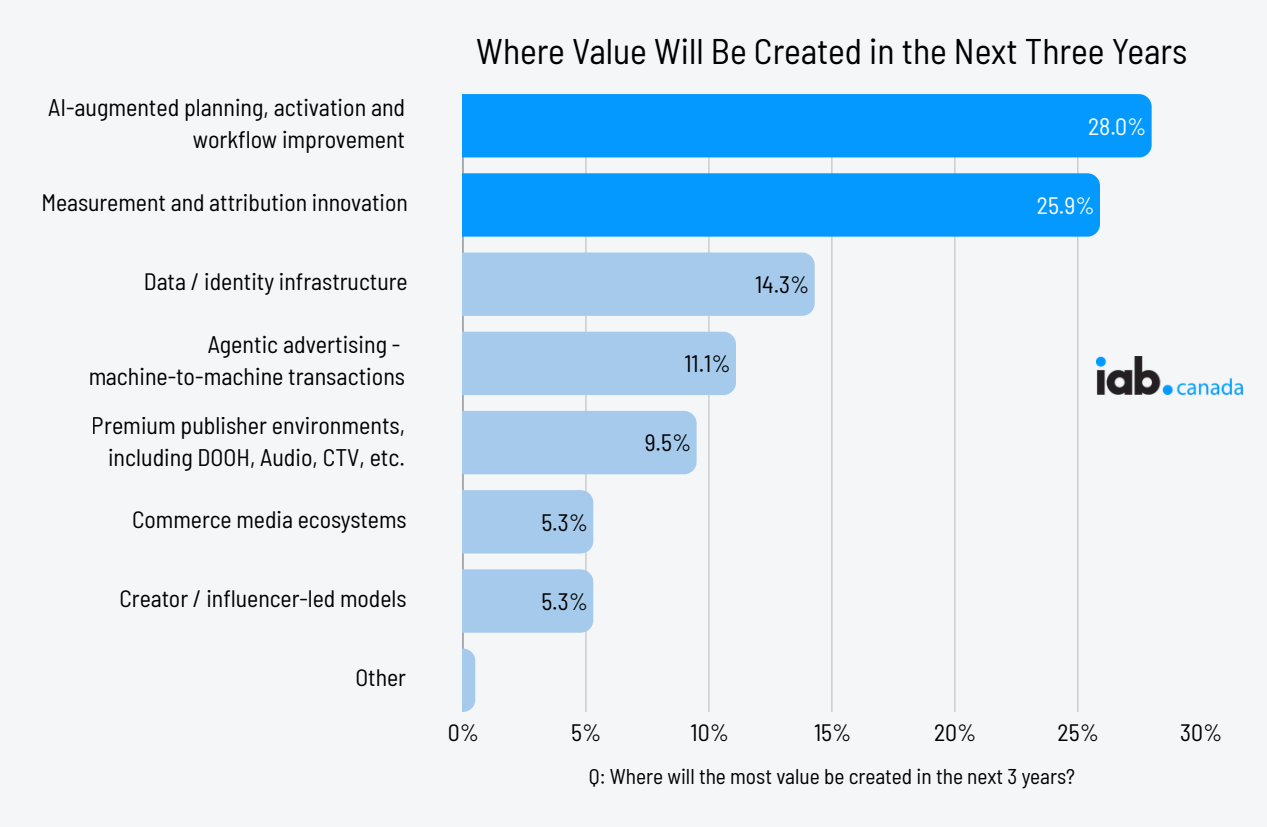
Measurement stands out as the clearest area where greater alignment could unlock progress across the ecosystem.

When asked what the industry is getting wrong today, the top response was **measurement fragmentation (24.5%)**, ahead of outdated business models, lack of trust, misaligned incentives, data literacy, and talent development. This shows that measurement is not just a reporting issue. It is a structural issue affecting confidence, comparability, and decision-making.



SURVEY FINDINGS

At the same time, respondents see measurement as a major value opportunity. **Measurement and attribution innovation (25.9%)** ranks as the second-highest area where value will be created over the next three years, behind AI-augmented planning, activation, and workflow improvement (28.0%). Together with data and identity infrastructure (14.3%), these responses suggest that the market sees future value in the connective systems that make the ecosystem work better.



SURVEY FINDINGS

Respondents also point to the need for clearer standards, more comparable reporting, and stronger links between media activity and business outcomes.

Theme	Quotes
Measurement and attribution Respondents want better cross-platform measurement, clearer attribution, and less false precision.	*"False attribution masquerading as incrementality."* *"Channel fragmentation — need a way to measure as a whole."*
Standardization Many responses called for common frameworks, shared practices, and simpler processes across the ecosystem.	*"Standardization across the industry."* *"Clarity and shared practices."*
AI literacy and talent Respondents pointed to upskilling, understanding AI capabilities, and protecting human contribution as AI adoption grows.	*"Adoption of AI on upskilling workers."* *"Establishing AI work vs. human work and its individual values."*
Data, identity, and privacy Responses referenced Canadian data, privacy, signal quality, identity, and consumer control.	*"Make it easy for consumers to understand their rights about data privacy and give easy control."* *"Access to quality Canadian data."*
Transparency and trust Several respondents called for more transparency from platforms, partners, and the broader supply chain.	*"Transparency within platforms."* *"More privacy and transparency for consumers."*
Incentives and market structure Some responses called out walled gardens, outdated business models, commoditization, and the race to the bottom.	*"Over-indexing on reliance on the walled gardens."* *"Remove boundaries between parts of the ecosystem and stop the race to the bottom."*

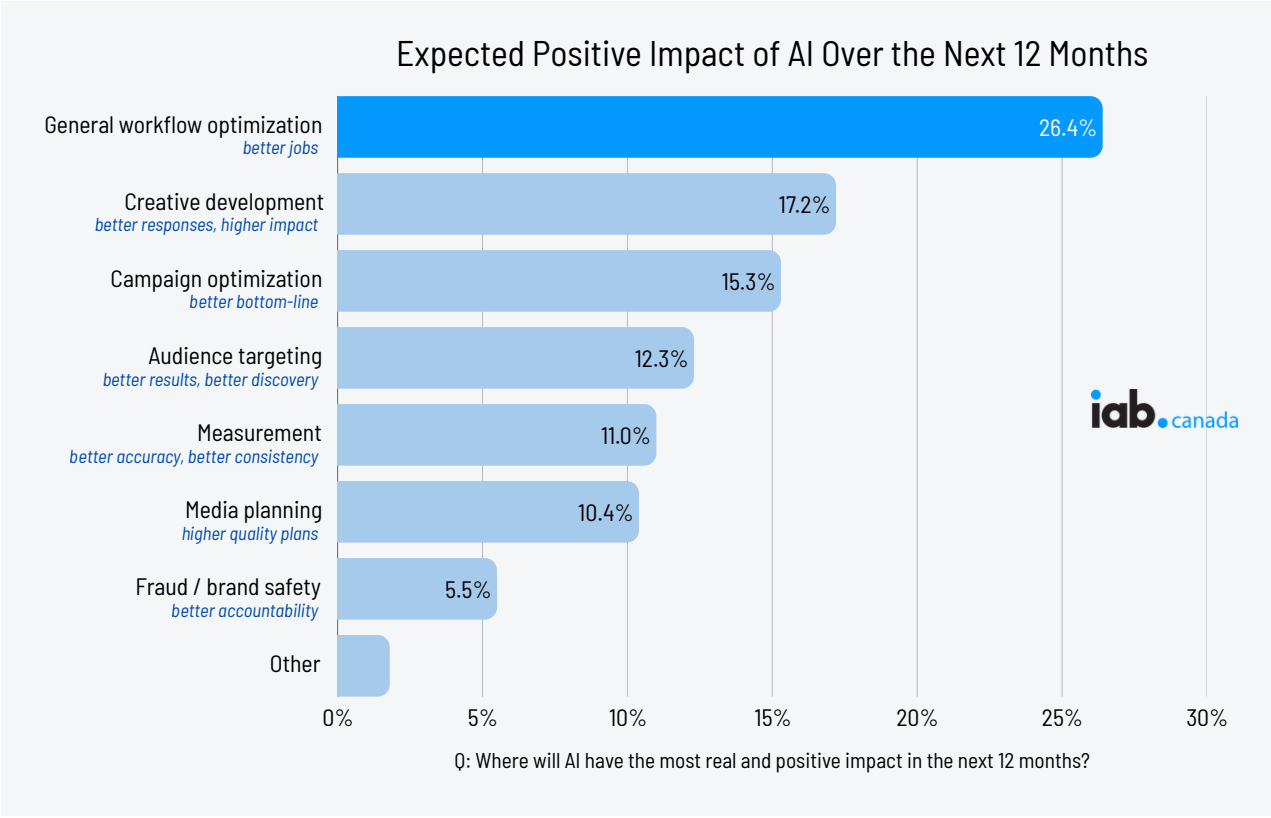
Q: If you could fix one thing in the ecosystem tomorrow, what would it be?

SURVEY FINDINGS

AI is creating practical value across workflows and capabilities

Industry is optimistic, with AI being widely recognized as a meaningful driver of near-term value, particularly in improving how work gets done across the ecosystem.

The strongest expected value area over the next three years is **AI-augmented planning, activation, and workflow improvement (28.0%)***. In the next 12 months, respondents expect AI to have the most positive impact on **general workflow optimization (26.4%)**, followed by creative development, campaign optimization, audience targeting, measurement, media planning, and fraud or brand safety.

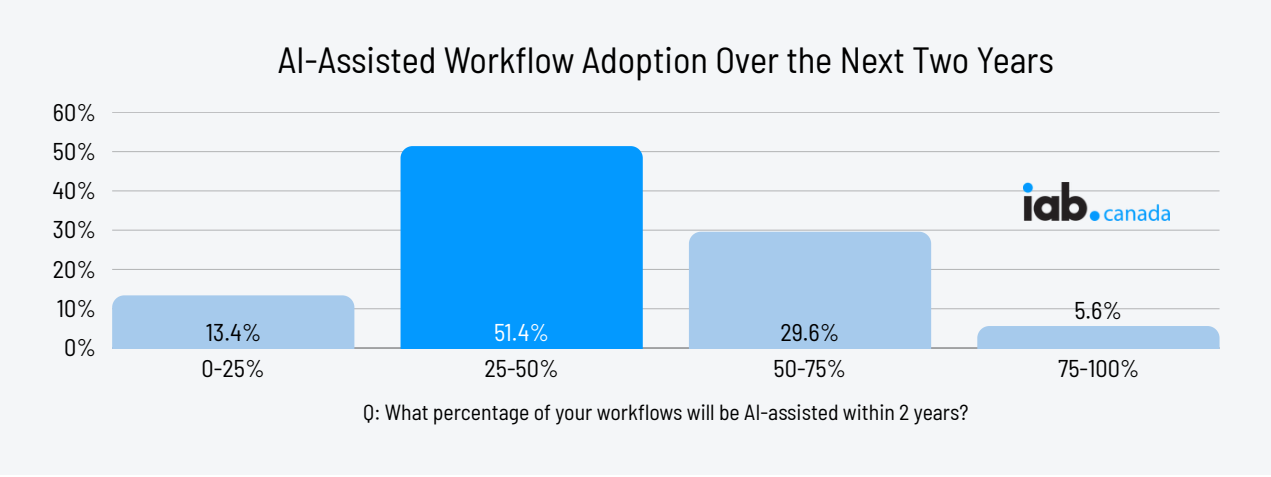


Overall, Industry maintains a pragmatic view of AI. Respondents are not primarily expecting AI to transform the market through fully automated transactions. They are expecting it to improve planning, workflows, creative development, optimization, and decision support.

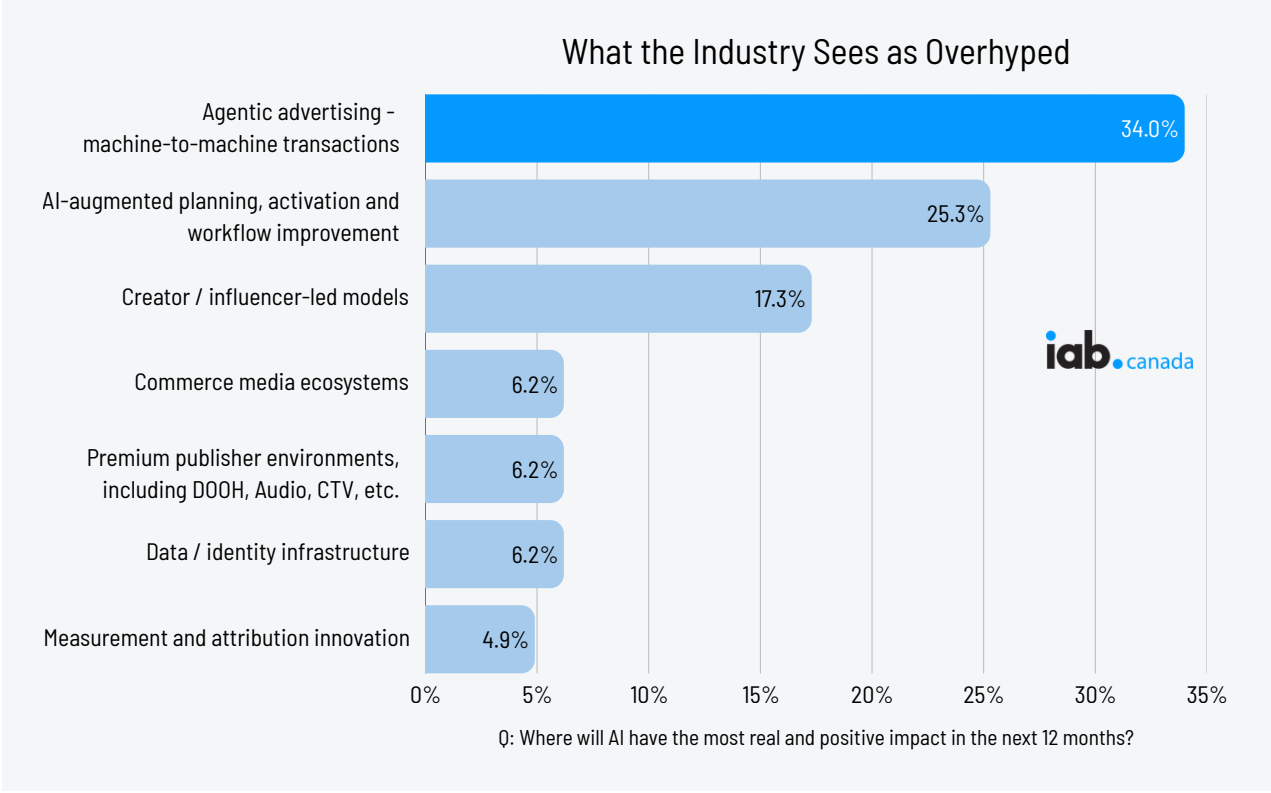
** See table in page __ - Where Value Will Be Created in the Next Three Years*

SURVEY FINDINGS

That practical view is also reflected in workflow expectations. A majority of respondents expect AI to assist a meaningful share of their work within two years:



At the same time, the market is filtering AI hype. **Agentic advertising**, or machine-to-machine transactions, was identified as the most overhyped area (34.0%). This suggests that the industry sees real value in AI but is also becoming more disciplined about separating practical applications from buzzwords.



SURVEY FINDINGS

Respondents also emphasize that AI should support human work, not replace human accountability.

> "A future where AI assists buying and planning, but a human sightline is required to ensure quality and accuracy in placements."

> "When AI isn't imposed as necessity, but used as a supporting tool to enhance performance."

> "We should design a future inclusive of human creativity and context and machine efficiencies."

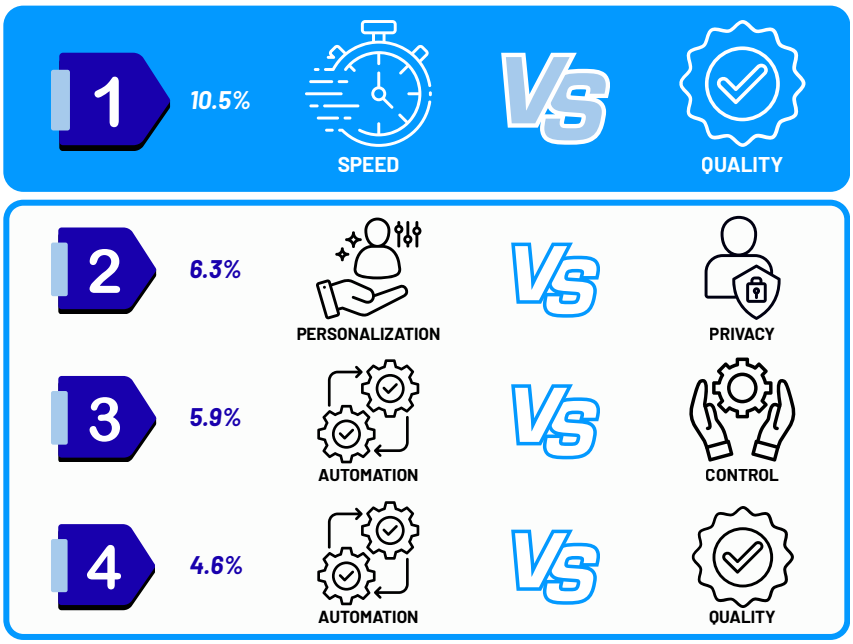
AI is becoming a standard layer of work, but the strongest opportunity lies in human-led workflow improvement, not unchecked automation.

The industry is actively navigating the balance between speed, scale, and quality

As capabilities expand, respondents are increasingly focused on managing the trade-offs that come with growth.

The trade-off cited most often was **Speed vs Quality**, followed by Personalization vs Privacy, Automation vs Control, and Automation vs Quality.

These concerns show that respondents are not resisting innovation. They are asking how innovation can scale without weakening the things that make the ecosystem credible.



Q: Which tradeoff are you most worried about?

SURVEY FINDINGS

This theme also appears in responses about the ideal future of digital advertising. Respondents called for consumer control, privacy, transparency, human oversight, better measurement, and stronger collaboration.

Theme	Quotes
Consumer control and privacy Respondents want responsible data use, clearer consumer choice, and a stronger value exchange between people and brands.	*"Consumers have real control over their data and brands reach real people with relevant messages through auditable systems."* *"Delivering business results to advertisers while respecting consumers and the value exchange."*
Better measurement Many respondents called for clearer attribution, cross-platform measurement, and stronger links between activity and outcomes.	*"More consolidated measurement across black box resources."* *"Universal measurement and holistic buying capabilities across platforms."*
Human-led AI Respondents generally support AI as a tool, but not as a replacement for human oversight, creativity, or judgment.	*"A future where AI assists buying and planning, but a human sightline is required to ensure quality and accuracy in placements."* *"Human powered, AI backed."*
Transparency and trust Several responses focused on auditable systems, clear accountability, and more honest communication across the ecosystem.	*"A future of clarity and accountability."* *"Transparent, honest models that allow for a cohesive ecosystem without duplication or sacrificing quality content."*
Collaboration and standards The ideal future includes common frameworks, shared standards, and stronger collaboration across agencies, marketers, publishers, and ad tech.	*"We need to continue to push for standards."* *"A more unified approach with more shared frameworks and collaboration for innovation."*
Canadian orientation Some respondents specifically referenced Canadian media, Canadian data, Canadian privacy expectations, and Canada-first solutions.	*"Canadian built and Canadian first."* *"Common language and methodologies that highlight the unique Canadian advantage."*

Q: describe the ideal future of digital advertising we should be designing for.

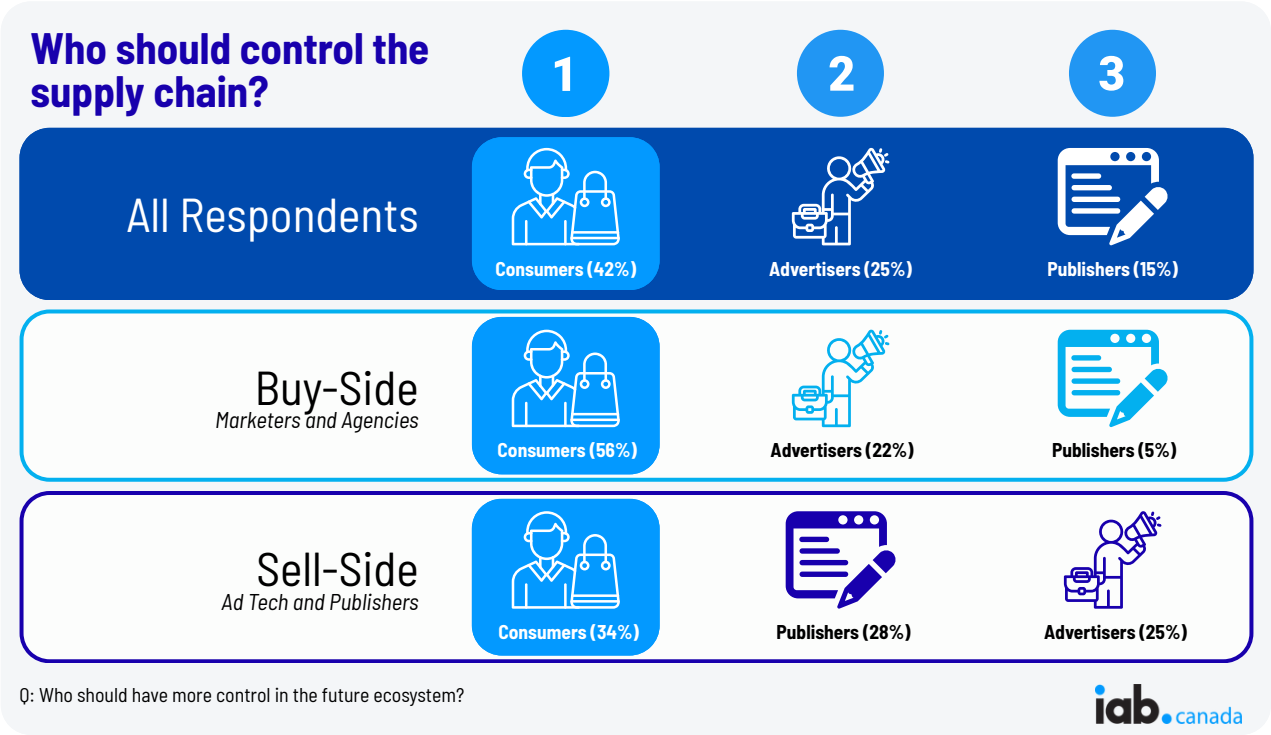
SURVEY FINDINGS

The ideal future respondents describe is not simply more automated or more technologically advanced. It is a future where innovation is supported by stronger measurement, clearer standards, human oversight, responsible data use, and a more transparent value exchange with consumers.

The survey shows that the industry has a clear sense of direction. The challenge is not whether to pursue speed, scale, personalization, and automation. The challenge is how to ensure those gains do not come at the expense of quality, privacy, trust, and control.

The industry is actively navigating the balance between speed, scale, and quality

As capabilities expand, respondents are increasingly focused on managing the trade-offs that come with growth.



Viewed by respondent type, the finding becomes more nuanced. Both buy-side and sell-side respondents rank consumers first, showing broad agreement on the need for greater consumer agency. However, sell-side respondents give publishers notably more weight, suggesting they see publisher control as more important to the future ecosystem.

SURVEY FINDINGS

That distinction matters. For buy-side respondents, greater consumer control connects closely to transparency, privacy, accountability, and value exchange. For sell-side and infrastructure respondents, the emphasis on publisher control points to a related but distinct priority: the need for trusted environments, clearer quality signals, and stronger recognition of publisher value in a market shaped by automation, platform concentration, and expanding supply.

This suggests that respondents want future control to sit closer to people and to the organizations directly accountable for outcomes. It also reflects broader expectations around privacy, digital sovereignty, transparency, trusted supply, and value exchange.

Respondents reinforce this direction in how they describe what would make the industry better. They repeatedly call for collaboration, standards, responsible AI, consumer-first thinking, better measurement, and greater accountability.

Theme	Quotes
Collaboration Respondents repeatedly called for the industry to work together rather than continue operating in silos.	*"Work together as an industry and establish standards."* *"Collaborate on a clear, aligned understanding of each partner's role and dependency for success and overall impact."*
Standards and shared expectations Many responses referenced common standards, clearer playbooks, and more consistent expectations across the ecosystem.	*"Establish playbooks and standards."* *"Have set standards, measurement, and expectations."*
AI governance Respondents called for thoughtful AI integration, stronger guardrails, and better understanding of AI capabilities.	*"Scale responsibility with AI governance and guardrails."* *"Integrate AI thoughtfully."*
Consumer-first thinking Several responses focused on consumer benefit, privacy, time, intelligence, and value exchange.	*"Focus on consumer benefit over value extraction. Adversarial relationship with consumer is unsustainable."* *"Respect consumers' intelligence, privacy, and time."*

SURVEY FINDINGS

Theme	Quotes
Measurement and outcomes Respondents want better ways to connect media activity to business value and real outcomes.	*"Hold major publishers and platforms accountable to tie back their metrics with business outcomes."* *"Focus on quality and real business outcomes."*
Transparency and accountability Several responses referenced honesty, revenue share, platform accountability, and clearer roles.	*"Keep having transparent conversations."* *"Be honest about the real problems."*
Canadian ecosystem Some respondents called for stronger Canadian media, Canadian solutions, and investment in the local supply chain.	*"Support Canadian media."* *"Create a unique Canadian solution."*

The closing responses are constructive, but not vague. Respondents are asking for collaboration with substance: clearer standards, better measurement, more accountable AI use, stronger consumer benefit, and a healthier Canadian digital advertising ecosystem. The future they describe depends less on any one technology and more on the industry's ability to align around shared expectations and responsible growth.

Together, these responses point toward an ecosystem that is becoming more consumer-centered and accountability-driven. Long-term value will depend not only on what the industry can automate or optimize, but on how clearly it can explain value, assign responsibility, recognize trusted environments, and build trust.

ROUNDTABLE AND PANEL DISCUSSION FINDINGS

Chamber One: Opportunities





Designing Markets, Media, and Value

Discussions in this chamber focused on adapting systems to reflect how media behaves today, including how value is defined, measured, and transacted in a less predictable environment.

1 Certainty no longer reflects how the market operates

The Opportunities chamber identified a mismatch between how media behaves and how it is bought. Media supply is increasingly shaped by moments, culture, creators, and real-time spikes. Buying systems, however, still prefer predictability and control.

This explains why Fragmented and Building momentum can both be true. The market is active, but it is also less predictable. If buying, planning, and measurement systems are still designed around older assumptions, the result feels fragmented even when the market is growing.

> *"The market sells probability, but we're still trying to buy certainty."*

ROUNDTABLE AND PANEL DISCUSSION FINDINGS

2 Measurement and value need stronger alignment

The discussion stated that the problem is not the absence of data. It is the absence of consistent definitions, connected systems, and aligned incentives. Stakeholders maintain different sources of truth, while attention and intention are emerging as important signals without a shared framework.

This maps directly to the survey, where Measurement fragmentation was the top issue, and to free-text responses that asked for cross-platform measurement, better attribution, standardization, and clearer frameworks.

> *"Everyone has their own source of truth, and none of them fully connect."*

3 AI is expanding supply and forcing a quality reset

AI-driven content creation is increasing available supply at scale, with a wide spectrum of quality. Participants identified originality, trustworthiness, contextual relevance, labeling, and accountability as emerging concerns.

This helps explain why respondents selected Agentic advertising as the most overhyped area while still seeing AI-augmented workflow as a major value creator.

> *"Content is becoming abundant and cheap. Quality is becoming the differentiator."*

4 Incentives are distorting the market

The discussion stated that misaligned incentives continue to shape outcomes, including open exchange environments that reward low-quality supply and measurement systems that may underrepresent premium media.

This connects to survey concerns about misaligned incentives, outdated business models, lack of trust, and responses about walled gardens, commoditization, false attribution, and the race to the bottom.

> *"We don't have a measurement problem. We have an incentive problem."*

ROUNDTABLE AND PANEL DISCUSSION FINDINGS

Chamber Two: Policy





Designing Systems, Safeguards, and the Human Future of the Industry
Discussions in this chamber focused on building systems that can support the industry over time, including aligning policy, infrastructure, talent, and governance with the pace of change.

1 Digital sovereignty remains undefined but material

The Policy chamber found broad recognition that digital sovereignty matters, but no single definition. Participants described sovereignty in terms of user data control, infrastructure, data flows, and corporate responsibility.

This connects strongly to Q12, where Consumers were selected as the group that should have more control in the future ecosystem.

> *"Digital sovereignty means different things depending on who you ask."*

2 Policy, markets, and enforcement must work together.

The discussion noted that legislation alone will not shift outcomes. Platform power, performance requirements, cross-border relationships, and enforcement gaps all shape what companies actually do.

This connects to survey concerns around regulatory confusion, misaligned incentives, lack of trust, and outdated business models.

> *"Policy can set direction, but markets decide behavior."*

ROUNDTABLE AND PANEL DISCUSSION FINDINGS

3 AI is reshaping work, but organizations are not fully ready

The Policy chamber identified changes in work structure, especially around junior roles, AI literacy, critical thinking, and emerging roles focused on AI systems and workflows. It also noted that many organizations are still using AI individually rather than integrating it into redesigned workflows.

This connects directly to survey findings on workflow optimization and AI-assisted workflows.

> *"If you don't fix the process first, AI just scales the problem."*

4 Human intelligence must be designed into AI systems

There was consistent support for human involvement across AI-driven processes, including creative direction, validation, ethical decision-making, and accountability.

This connects with survey responses calling for AI assistance with human oversight, and with tradeoffs such as Automation vs Control and Automation vs Quality.

> *"AI needs HI—human intelligence embedded across direction, validation, and accountability."*

5 Talent development and consumer trust are central to long-term stability

The Policy chamber identified two long-term stability issues: investment in people and consumer trust. Organizations are upskilling and creating room for experimentation, while consumers are more skeptical of content and more aware of how data is used.

This connects to survey concerns about data literacy, upskilling, and the preference for more consumer control.

> *"The audience is still the asset. If trust erodes, everything erodes."*

WHAT COMES NEXT FOR THE CANADIAN MARKET

The findings point to a Canadian digital advertising market that is moving forward but needs clearer operating rules for its next phase of growth. Across measurement, AI, trust, control, and talent, the common thread is accountability: how value is defined, how decisions are made, how technology is governed, and how confidence is built across the ecosystem.

Discussions at Enterprise 2026 culminated in the following imperatives for a sustainable Canadian digital media supply-chain.

1

Clearer accountability for control, data, and decisioning
The industry will need clearer shared definitions of who is responsible for data use, automated decisioning, and outcomes. This will become especially important as expectations around digital sovereignty, governance, and transparency continue to evolve.

2

A more transparent value exchange with consumers
Trust will increasingly depend on how clearly consumers understand why they are seeing advertising, how their data is being used, and what value they receive in return. Simpler and more accessible transparency will become a differentiator

3

Better alignment between measurement, value, and incentives
The market will need more consistent measurement approaches and clearer links between activity, outcomes, and business value. Progress will also depend on incentive models that reward quality and accountability, not just volume or efficiency.

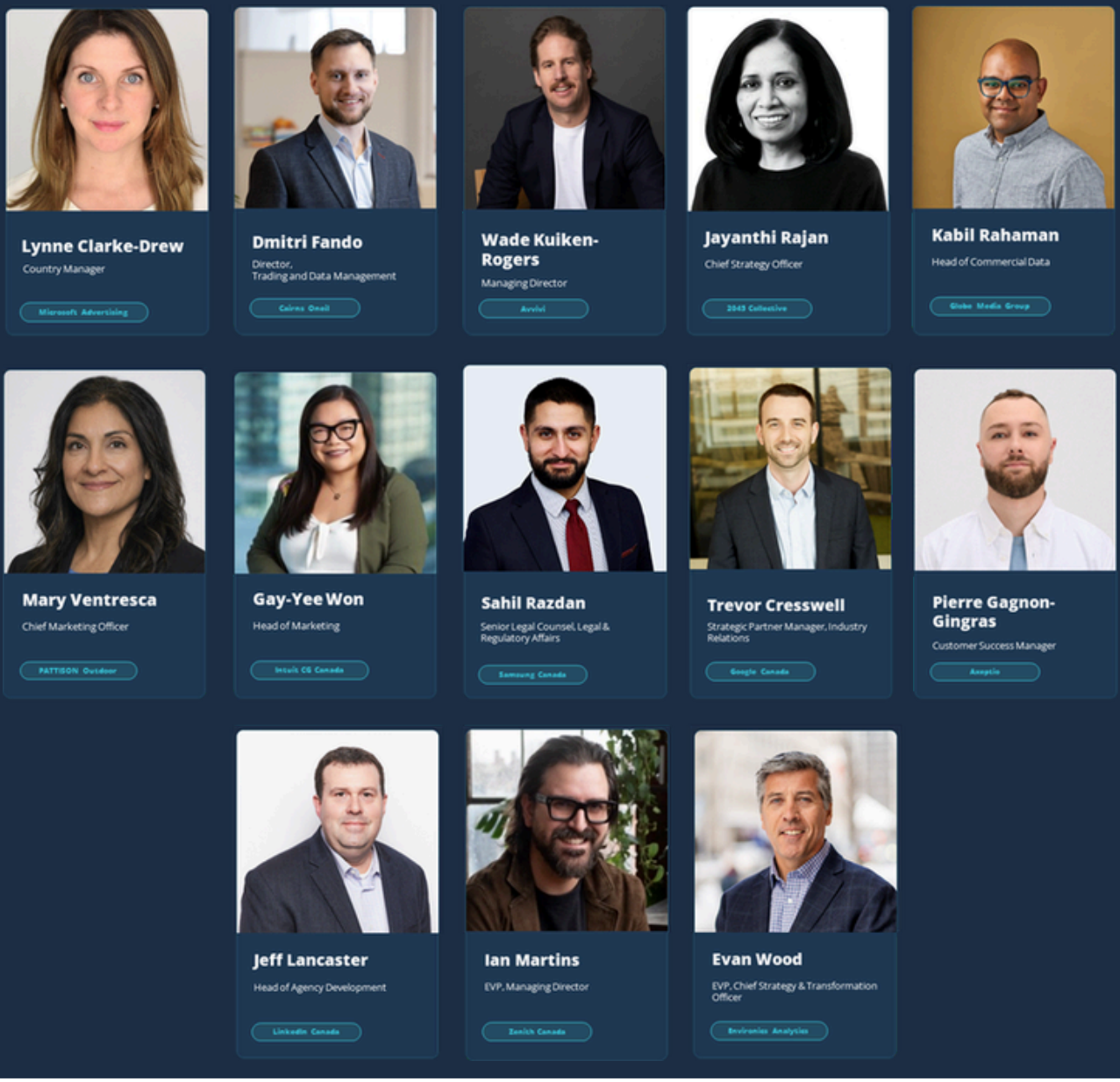
4

AI adoption grounded in oversight, workflow design, and talent development
As AI becomes embedded in workflows, organizations will need to balance automation with human judgment, governance, and quality control. This will require stronger AI literacy, critical thinking, and the ability to manage AI-supported work across roles.

5

Stronger signals for quality and trusted supply
As content and media supply expand, the market will need better ways to identify quality, relevance, originality, and trusted environments. This will be especially important as automation increases volume and makes quality harder to assess.

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Founded in 1997, the Interactive Advertising Bureau of Canada (IAB Canada) serves as the voice and thought leader of Canada's digital marketing and advertising industry. Representing over 250 stakeholders, including advertisers, agencies, media companies, and government associations, IAB Canada is the only national trade association dedicated exclusively to digital marketing and advertising. IAB Canada's members contribute to nearly 90% of the $21 billion digital advertising industry in Canada, including SMEs and large corporations across diverse sectors.

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