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2026 INDUSTRY REPORT

Building Toward an AI-Native Ecosystem

A Canadian Industry Guide for Agencies, Marketers, AdTech and Publishers



Prepared in collaboration with IAB Canada AdTech, Agency, Marketer and Publisher Committees with reference to IAB Tech Lab's Agentic Advertising Management Protocols (AAMP) and IAB's AI Transparency & Disclosure Framework V2

Published September 2026

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Foreword

WHY THIS REPORT, AND WHY NOW

AI is rapidly becoming part of the operating layer of digital advertising, changing how media is planned, bought, created, measured and discovered across the value chain.

In early 2026, IAB Canada brought together agencies, marketers, AdTech and infrastructure providers, and publishers in four separate workshops. We asked each group the same fundamental question: what does it mean to operate, compete and earn trust in a market where AI increasingly touches every transaction?

The conversations were different, but the themes were remarkably consistent.

Across the ecosystem, companies are working to define the value they bring beyond simply using AI tools. Business models, staffing structures and pricing were largely built for a pre-AI market and are now being tested. Performance signals are becoming noisier just as governance, explainability and provenance are becoming commercial expectations. And many of the challenges ahead will require industry-wide solutions.

This report brings those perspectives together into one view of the Canadian market.

It is designed to complement the global technical and disclosure work already underway. IAB Tech Lab's Agentic Advertising Management Protocols (AAMP) are building the infrastructure for how AI agents plan, negotiate and transact media, including the Agentic Real-Time Framework, Agentic Audiences, the Agent Registry, and open Buyer and Seller Agent SDKs. IAB's AI Transparency & Disclosure Framework is establishing a baseline for how AI involvement in advertising is disclosed and how those expectations intersect with emerging regulation around the world.

Our focus here is Canada: what agencies, marketers, AdTech companies and publishers need to understand and prioritize as this infrastructure develops.

The goal is to give the Canadian market a shared reference point, with four perspectives and a common vocabulary for navigating what comes next. Global standards will continue to mature. Canadian regulation will evolve. Business models will change with them. Having a common understanding of the issues gives us a much better chance of moving forward together.

This is a working reference, and we expect it to evolve. IAB Canada will revisit it as the technology, standards and regulatory environment continue to develop.

About This Report

ORIGIN AND SCOPE

Between January and March 2026, IAB Canada convened four stakeholder workshops with agencies, marketers, AdTech and infrastructure providers, and publishers to examine how AI is reshaping each group's role in the digital advertising value chain.

Each session produced a focused SWOT and a set of priorities. This report brings those perspectives together, with chapters that can be read independently or as one view of Canada's emerging AI-native advertising ecosystem.

What this report covers:

Market State	A snapshot of how AI is affecting each part of the digital advertising value chain.
Stakeholder SWOT	The strengths, weaknesses, opportunities and threats identified by each group, largely in their own words.
Strategic Direction	The implications emerging from those discussions and where each group should focus over the next 12 to 24 months.
Standards Alignment	How those priorities connect to global work already underway, particularly IAB Tech Lab's AAMP and IAB's AI Transparency & Disclosure Framework.
The Role of Global Standards	Much of the infrastructure needed for an AI-native advertising ecosystem is already being developed globally. AAMP is addressing agentic transactions, the AI Transparency & Disclosure Framework is establishing expectations for consumer-facing disclosure, and TCF frameworks provide established approaches to consent and transparency.

Rather than create parallel Canadian versions, this report connects that work to the realities of the Canadian market and considers what alignment and adoption mean for each part of the ecosystem.

How to use this report

Start with the chapter that reflects your role for a focused view, or read the report end to end to see how the pieces connect.

The conclusion brings all four perspectives together, highlighting the priorities that cut across the ecosystem and the areas where coordinated action will matter most.

Part One: Agencies

FROM MEDIA OPERATORS TO ORCHESTRATOR OF INTELLIGENCE

Agencies sit at the intersection of brands, platforms, publishers and AdTech, with a combination of strategic, creative and operational expertise that remains highly valuable in an AI-driven market. The opportunity now is to make that value unmistakable.

Market Overview

AI is already embedded in the tools agencies use every day, from forecasting and audience building to creative development, optimization, reporting and attribution. At the same time, platforms are putting increasingly sophisticated AI capabilities directly into advertisers' hands and new competitors are using automation to deliver services faster and at lower cost.

For agencies, this changes where value sits.

Execution alone will become harder to differentiate as more of it is automated. The stronger position is as an orchestrator: connecting strategy, creative, media, data and technology while applying the human judgment and governance needed to make those systems work together.

Platform power and in-housing

Platforms continue to move up the value chain with AI-enabled planning, optimization and creative tools. Advertisers are also building more capability internally. Together, these shifts are forcing agencies to be clearer about where their expertise creates value that cannot easily be replicated in-house or within a single platform.

Automation changes the operating model

AI is absorbing work that has historically required significant manual effort, including basic planning, trafficking, optimization and reporting. That creates efficiencies, but it also puts pressure on staffing models and commercial structures built around hours and headcount. Agencies will need to rethink how expertise is organized, deployed and valued.

Trust becomes part of the value proposition

Synthetic audiences, AI-generated content and evolving fraud patterns are adding complexity to an already noisy performance environment. Brands still need to understand what is working, why it is working and whether they can trust the result. Agencies are well positioned to provide that interpretation, establish guardrails and bring accountability across an increasingly automated ecosystem.

What We Heard

Strengths & Weaknesses

The agency workshop revealed a clear tension. Agencies have strong strategic and orchestration capabilities, deep cross-channel knowledge and an important position between brands and the broader ecosystem. At the same time, many are carrying cost structures, staffing models and ways of working that were built for a very different market.

AI makes that tension increasingly difficult to ignore.

STRENGTHS

- Proven ability to orchestrate complex plans across channels
- Operational leverage from AI-augmented planning, buying and reporting
- Human interpretation of culture, nuance, and brand strategy
- Cross-client, cross-channel visibility into what works

WEAKNESS

- Limited control over client first-party data and tech stacks
- Legacy staffing models optimized for manual workflows
- Rising costs for AI tools, APIs, and compute
- Organizational change fatigue and skills gaps

Threats & Opportunities

The recurring theme is structural misalignment: agencies are being pulled toward higher-order orchestration and consulting roles while still resourced and paid for manual execution.

THREATS

- Disintermediation — platforms and in-house teams bypassing the agency relationship
- Commoditization — automation reducing core planning and buying to undifferentiated functions
- Synthetic audiences and AI-generated signals undermining trust in reported performance
- Global, AI-augmented competitors undercutting on cost at scale
- Procurement pressure — cost-focused clients squeezing fees as AI appears to replace effort

OPPORTUNITIES

- AI general contractor — an elevated consultative role orchestrating AI capabilities for brands
- Creative amplification — rapid ideation, testing, and optimization via AI-augmented workflows
- Governance leadership — owning AI ethics, brand safety, and responsible-use frameworks
- Agentic orchestration — end-to-end supervision of agentic workflows across platforms

What This Means

Taken together, the market dynamics and workshop findings point to four implications for agencies over the next two years.

1 **Agencies can own the role of AI orchestrator.**

Agencies already have many of the ingredients this role requires: cross-channel expertise, visibility across clients and platforms, and the ability to connect strategy, creative, media, data and technology. The opportunity is to formalize that role and make its value clear to clients.

2 **The operating model needs to change.**

Staffing, fee structures and processes built around manual work will come under increasing pressure as AI changes how work gets done. Capturing the value of AI will require agencies to rethink how teams are structured, how expertise is deployed and how that value is priced.

3 **Data and technology decisions are becoming strategic.**

Access to client first-party data and influence over technology choices will increasingly determine how effectively agencies can design, execute and govern AI-driven strategies. Agencies need a meaningful seat at that table.

4 **Trust can become a competitive advantage.**

As brands navigate questions around AI safety, transparency, provenance and increasingly noisy performance signals, agencies have an opportunity to provide the governance and accountability that an automated ecosystem requires. Those that can set clear expectations across partners and platforms will strengthen their strategic value to clients.

Where to Focus

Four areas offer agencies the clearest path from execution to orchestration, and each can begin now.

1. Own the orchestration role

As execution becomes increasingly automated, agencies need to be clear about where they create value: strategy, integration, cross-channel intelligence and judgment.

In practice:

- Define what orchestration means for your agency and use that language consistently with clients.
- Work with clients to clarify where the agency leads, where in-house teams lead and where AI can take on routine execution.

2. Rebalance skills and operating models

AI-augmented workflows will change the mix of skills agencies need and how those skills are deployed.

In practice:

- Invest in practical AI training for planners, traders, creatives and analysts, grounded in the work they actually do.
- Assess AI tools and APIs against cost, risk, performance and client needs before embedding them into delivery.
- Review whether existing staffing and commercial models still reflect where agency value is being created.

3. Make governance a capability

Brands will increasingly expect clear answers about how AI is being used, who is accountable and what safeguards are in place. Agencies can provide that clarity.

In practice:

- Establish clear internal principles for the use and disclosure of AI-assisted and AI-generated work, aligned with IAB's AI Transparency & Disclosure Framework.
- Create clear accountability for AI governance so clients receive consistent guidance across teams and partners.

4. Build fluency in agentic advertising

Agentic systems are beginning to change how media is planned and transacted. Agencies that understand how these systems are configured, verified and supervised will be better positioned to maintain strategic oversight.

In practice:

- Understand how platform and AdTech partners are approaching agentic advertising and emerging standards such as AAMP.
- Develop agency expertise in setting objectives, constraints and oversight for agents acting on behalf of clients.
- Consider openness, auditability and interoperability as part of technology and partner evaluation.

Connecting to Standards Already in Motion

Agencies have a strong foundation to build from.

IAB's AI Transparency & Disclosure Framework provides a risk-based approach to transparency around AI involvement in advertising. On the transaction side, IAB Tech Lab's AAMP and supporting infrastructure, including the Agent Registry, are establishing open approaches to agent identity, verification and interaction across the media supply chain.

For Canadian agencies, alignment with these frameworks provides a practical starting point for internal policy, partner evaluation and client conversations. It also helps ensure that Canadian practices remain connected to the global standards increasingly shaping AI-enabled advertising.

The agency opportunity is ultimately bigger than adopting AI more effectively. It is to become the trusted layer between increasingly powerful technology, and the business outcomes clients are trying to achieve.

> *As more of advertising becomes automated, what will clients rely on your agency to do that technology alone cannot?*

Part Two: Marketers

FROM CAMPAIGN OWNER TO ORCHESTRATOR OF GROWTH

Marketers sit at the intersection of customer insight, first-party data, product, experience and investment, giving them the clearest line between AI-enabled marketing and business outcomes.

Market Overview

AI is already embedded in many of the tools marketers and their partners use every day. IAB research found that more than half of marketers were already using generative AI for creative content and audience targeting in 2025, with nearly all planning to expand their use.

From segmentation and creative development to experimentation, journey orchestration, media optimization and performance reporting, AI is increasingly part of the marketing infrastructure. Platforms are putting more powerful AI capabilities directly into advertisers' hands, while internal teams are developing their own pilots, tools and martech investments.

For marketers, the opportunity is to connect these capabilities around the customer and the business outcome. First-party data, brand strategy, customer insight and investment decisions become considerably more powerful when they operate as part of the same AI-enabled system.

The expectation for relevance is rising

AI-driven experiences across commerce, entertainment and services are changing what consumers expect from brands. Relevance, speed and consistency across touchpoints are becoming increasingly important, putting pressure on marketers to connect data, content, media and customer experience more effectively.

Efficiency pressure is accelerating adoption

Economic pressure is pushing organizations to find productivity and cost savings through AI. That can accelerate adoption, but it can also encourage a collection of short-term pilots without building the capabilities, data foundations and operating models needed for longer-term value.

Trust and data quality matter more

AI-generated content, synthetic audiences and evolving fraud patterns are adding noise to an already complex environment. At the same time, regulators, boards and consumers are asking harder questions about privacy, security and responsible AI use. The quality of the data feeding these systems, and the governance around how they are used, will increasingly shape the quality of the outcome.

What We Heard

Strengths & Weaknesses

Marketers enter the AI transition with significant structural advantages: direct customer relationships, valuable first-party data, deep brand knowledge and a clear connection to business outcomes.

The bigger challenge is fragmentation. Data, technology, media, creative and customer experience often sit across different teams, systems and partners. That makes it harder to connect AI initiatives, establish clear accountability and turn individual experiments into enterprise capability.

In many organizations, the opportunity is already there. The pieces simply need to work together.

STRENGTHS

- Ownership of high-value first-party and transaction data
- Executive mandate and budget to explore AI
- Significant efficiency and speed gains from workflow automation
- Direct line-of-sight to business outcomes and customer experience

WEAKNESS

- Slow, complex internal structures and approval processes
- Limited AI literacy across marketing, legal, and procurement
- Siloed pilots without shared infrastructure or governance
- Tension between cost-cutting and long-term capability building

Threats & Opportunities

The recurring theme is fragmentation: AI activity is happening across teams and vendors, often without a cohesive strategy, shared language, or clear operating model for how AI supports the brand.

THREATS

- AI-enabled fraud - synthetic users and noisy signals undermining campaign integrity
- Eroded consumer trust from misused synthetic content or poor personalization
- Talent displacement from mismanaged restructuring, creating capability gaps
- Data exposure - heightened security and privacy risk as AI tools proliferate

OPPORTUNITIES

- Hyper-personalization- continuous engagement systems driven by first-party data
- AI-assisted innovation in product, pricing, and experience at scale
- Closed-loop measurement - linking spend directly to revenue and lifetime value
- Distinctive brand experiences from thoughtfully governed generative AI

What This Means

Four implications emerge from the workshop findings and broader market context.

1

Marketers are well positioned to orchestrate AI-enabled growth

Marketers already sit closest to many of the inputs that matter most: customer insight, first-party data, brand strategy and investment decisions. Connecting those assets across media, creative and customer experience gives marketing an increasingly important role in how AI contributes to growth.

2

Fragmentation is becoming a barrier to progress

AI pilots spread across teams, platforms and vendors can create duplication, inconsistent governance and an incomplete view of impact. The next stage of adoption will require marketers to connect individual experiments into a more coherent strategy.

3

Data stewardship and governance are now part of the marketing remit

AI increasingly touches customer data, content and experiences. Marketing therefore has an important role alongside legal, technology and other functions in establishing how these systems are used and where accountability sits.

4

Capability will matter as much as efficiency

AI can deliver meaningful productivity gains, but longer-term advantage will come from teams that know how to brief, evaluate and improve AI systems in line with brand strategy, customer expectations and business objectives.

Where to Focus

Four areas can help marketers turn individual AI initiatives into a more connected growth capability.

1. Define marketing's role in AI-enabled growth

Marketing has an opportunity to connect customer understanding, brand strategy, data and investment around a common set of business outcomes.

In practice:

- Clarify roles across marketing, data, creative, media, technology and customer experience as AI becomes more deeply embedded in each.
- Bring that model into planning, investment and capability discussions across the organization.

2. Connect AI initiatives around clear outcomes

The proliferation of pilots makes it increasingly important to understand what is being tested, why and how it contributes to the broader strategy.

In practice:

- Map existing AI initiatives across teams, data sources and partners to identify duplication, gaps and dependencies.
- Establish clear objectives and measures of success for new initiatives, with an emphasis on business and customer outcomes.
- Use what works to build repeatable capabilities rather than a growing collection of disconnected experiments.

3. Take an active role in AI governance

Decisions about personalization, content generation, targeting and measurement have a direct impact on the customer relationship. Marketing needs a voice in the guardrails governing those decisions.

In practice:

- Establish clear principles for AI use and disclosure, informed by IAB's AI Transparency & Disclosure Framework and applicable Canadian privacy requirements.
- Bring marketing, legal, procurement, technology and other relevant teams together around shared expectations for acceptable use, accountability and escalation.

4. Treat signal quality as a strategic asset

First-party and transaction data give marketers significant leverage in an AI-enabled market. The quality, structure and responsible use of those signals will directly affect the systems built on top of them.

In practice:

- Establish clear approaches for structuring and responsibly sharing first-party data with agencies, publishers and AdTech partners.
- Work with measurement and media partners toward greater consistency in signal definitions and taxonomies.
- Consider data quality, provenance and permissions as part of AI readiness, not simply measurement hygiene.

Connecting to Standards Already in Motion

Marketers already have global frameworks they can draw from.

IAB's AI Transparency & Disclosure Framework provides a risk-based approach to transparency around AI involvement in advertising that can inform brand policy and consumer-facing practices. IAB Tech Lab's AAMP, including its work on Agentic Audiences, is developing the infrastructure for how audience signals can be used by AI agents as agentic planning and activation become more common.

For Canadian marketers, these frameworks provide a starting point for governance, data strategy and partner conversations while keeping Canadian practices connected to the global ecosystem.

The opportunity for marketers is to bring the pieces together: customer insight, trusted data, brand strategy, technology and investment. Done well, AI becomes more than a collection of tools and efficiencies. It becomes a connected capability for creating better customer experiences and driving growth.

> *Are your AI initiatives building toward a connected capability, or simply adding more technology to an already fragmented system?*

Part Three: AdTech

FROM OPTIMIZATION STACK TO AGENTIC INFRASTRUCTURE

AdTech already provides much of the automation and infrastructure that keeps digital advertising moving. As AI becomes more deeply embedded in how media is bought and sold, its opportunity is to become the interoperable and trusted layer connecting an increasingly agentic ecosystem.

Market Overview

AI is already deeply embedded in the infrastructure of digital advertising, powering bidding, pacing, creative optimization, fraud detection, identity and measurement. The next phase goes further, with AI agents beginning to participate directly in planning, decision-making and transactions across the media supply chain.

For AdTech, that evolution creates both pressure and opportunity. Automation alone becomes less differentiating as AI capabilities become widely available. Greater value will come from connecting environments, making signals usable, enforcing rules and providing the transparency and interoperability needed for increasingly automated transactions.

Direct connections are changing the value equation

Large buyers and sellers are investing in direct integrations, clean rooms and proprietary AI capabilities. That puts pressure on intermediaries to demonstrate where they add distinct value, whether through intelligence, access, interoperability, efficiency or trust.

Better AI requires better signals

As buying becomes more intelligent and automated, the quality and consistency of the signals feeding those systems become increasingly important. Buyers are looking for stronger audience, identity, attention and performance signals across channels, creating an important role for infrastructure that can make those signals reliable and usable across environments.

Trust needs to travel with the transaction

AI systems will increasingly make decisions and take actions on behalf of buyers and sellers. That raises the importance of knowing which systems are acting, what authority they have, what information they are using and how decisions can be understood or audited. Privacy, transparency, security and responsible AI use therefore become part of the infrastructure itself.

What We Heard

Strengths & Weaknesses

The AdTech workshop surfaced a clear gap between capability and confidence.

The sector brings deep technical expertise, sophisticated automation and an established role connecting buyers, sellers, data and media. These are significant advantages as advertising becomes more agentic.

At the same time, complexity has contributed to persistent questions around transparency, explainability and value. As AI takes on a larger role in transactions, closing that credibility gap becomes increasingly important.

The technology is moving quickly. Trust in how it works needs to move with it.

STRENGTHS

- Deep expertise in automation, bidding, and optimization
- A foundation in industry protocols such as OpenRTB, identity frameworks, and measurement standards
- Strong relationships with agencies and publishers in Canada
- Engineering cultures capable of building AI-native infrastructure

WEAKNESS

- Black-box AI and limited explainability in decisioning
- A shortage of machine learning and AI safety skill sets relative to roadmap ambitions
- High cost of compute-heavy experimentation
- Distance from the day-to-day pain points of traders and strategists

Threats & Opportunities

The common thread is a credibility gap: core capabilities are strong, but trust, explainability, and alignment with user needs lag behind.

THREATS

- Direct pipes — major buyers and sellers bypassing intermediaries entirely
- Consolidation — independent and Canadian players absorbed by global stacks
- Regulatory burden — growing AI and privacy compliance costs compressing margins
- Talent drain to global platforms and other sectors
- Value migration to the proprietary stacks of a few global platforms

OPPORTUNITIES

- Becoming the transaction and interoperability layer for AI-driven media (the “agentic layer”)
- Acting as neutral financial, auditing, and fraud-control infrastructure
- Connecting retail media, CTV, search, social, and sponsored answers
- Leading on real-time, outcome-based measurement and attention analytics

What This Means

Four implications emerge for AdTech and infrastructure providers.

1

AdTech has an important role in the agentic ecosystem

AdTech already brings deep expertise in automation, protocols and real-time decisioning. As AI agents take on more planning and transaction activity, that expertise becomes highly relevant. The opportunity is to translate it into infrastructure that connects buyers, sellers, platforms and signals across the ecosystem.

2

Explainability and trust are becoming as important as performance

Performance will remain fundamental, but increasingly automated decision-making brings greater expectations around transparency and accountability. Buyers and sellers will want to understand how systems make decisions, what they optimize for and how those decisions can be verified.

3

Interoperability becomes a source of value

As buyers, sellers and platforms develop their own AI capabilities, the ability to operate across systems becomes increasingly important. Infrastructure that can connect environments, standardize signals and support open protocols has an opportunity to become more valuable as the ecosystem becomes more complex.

4

Technology needs to stay close to the people using it

AI capability alone will not determine adoption. Products that solve real workflow challenges for traders, strategists and operators will have an advantage over technology developed without a clear connection to how media is actually planned, bought and measured.

Where to Focus

Four areas can help AdTech and infrastructure providers strengthen their role as advertising becomes more agentic.

1. Define your role in agentic advertising

The emergence of agentic advertising creates new roles across planning, activation, transactions and measurement. AdTech companies should understand where their products fit and where they create distinct value.

In practice:

- Assess how existing products and roadmaps connect to AAMP components, including the Agentic Real-Time Framework, Agentic Audiences, and Buyer and Seller Agent capabilities.
- Follow the development of the Agent Registry and understand how agent identity and verification will affect your products and partnerships.
- Be clear with customers about the role your technology plays within an increasingly automated transaction chain.

2. Build explainability into the product

As AI systems take on more decision-making, transparency needs to become part of product design.

In practice:

- Be able to explain what systems optimize for, the signals they use, their known limitations and how important decisions can be reviewed.
- Build AI governance and accountability into product development and release processes.
- Give buyers, sellers and operators meaningful visibility into how AI-driven decisions are being made.

3. Design for interoperability

The value of AdTech increasingly lies in its ability to connect systems, signals and environments.

In practice:

- Align product development with open global protocols and emerging standards wherever possible.
- Consider interoperability across channels and environments as a core product requirement.

- Contribute evidence and case studies showing where better connectivity improves outcomes, efficiency or transparency.

4. Keep innovation grounded in real workflows

AI development will move quickly, making disciplined experimentation and close connection to users increasingly important.

In practice:

- Bring traders, strategists and AdOps professionals into AI product development early.
- Focus experimentation on clearly defined workflow and business problems.
- Share non-proprietary learnings across the industry where doing so can accelerate responsible adoption and reduce unnecessary duplication.

Connecting to Standards Already in Motion

AdTech is particularly well positioned to build on the technical standards already emerging.

IAB Tech Lab's AAMP extends established digital advertising protocols into an agentic environment, creating a common foundation for how agents interact across the media supply chain. Supporting initiatives such as Agentic Audiences, Buyer and Seller Agent capabilities and the Agent Registry address important questions around signals, interoperability, identity and verification.

For Canadian AdTech and infrastructure providers, participating in and aligning with this global work offers a more effective path than developing parallel approaches. It also gives buyers and sellers greater confidence that agentic systems can work across partners, markets and platforms.

The opportunity for AdTech is to make an increasingly automated ecosystem work together: connecting systems, carrying trusted signals and providing the transparency needed to understand what happened and why.

> *As machines take on more of the transaction, what does your technology make possible that a direct connection cannot?*

Part Four: Publishers

FROM CONTENT FUEL TO SIGNAL ADVANTAGE

Canadian publishers bring valuable content, trusted audience relationships, first-party data and contextual signals to an increasingly AI-driven market. Capturing that value will depend on making those assets visible, usable and protected as discovery and media buying become more automated.

Market Overview

AI is changing both sides of the publisher equation, reshaping how audiences discover and engage with content and how advertisers evaluate and buy media. Recent IAB research found that 95% of publishers surveyed said LLMs were already meaningfully reshaping their business.

For publishers, the challenge is increasingly one of translation: ensuring the value they create can be recognized by the systems making discovery and buying decisions, while maintaining appropriate control over how their content and data are used.

Discovery patterns are changing

AI-driven search, recommendation and answer experiences are changing how audiences find and consume content. Referral patterns are becoming less predictable, increasing the importance of direct audience relationships and a clear understanding of where and how publisher content creates value.

Signals are becoming part of the value proposition

Automated buying is becoming increasingly signal-driven. Context, audience, attention, identity and performance signals can help buyers understand the quality and relevance of an impression beyond basic inventory characteristics. Publishers that can make those signals consistent and accessible are better positioned to differentiate their media.

Content and data require clearer governance

As AI systems use content and data in new ways, questions around intellectual property, permissions, provenance and value exchange are becoming more important. Publishers need greater clarity over how their assets can be accessed, used and commercialized across both advertising and emerging AI environments.

Standards will shape how value travels

Work is already underway across IAB Tech Lab and the broader global ecosystem on signals, identity, attention and agentic advertising. For publishers, these standards will increasingly determine how inventory and audience value are expressed and understood by automated buying systems.

What We Heard

Strengths & Weaknesses

The publisher workshop surfaced a familiar challenge in a new context: publishers hold significant value, but that value is not always easy for buyers, technology partners or even internal teams to see and transact against consistently.

Trusted content, direct audience relationships, first-party data and rich contextual understanding are meaningful advantages in an AI-driven market. Fragmented systems, inconsistent signals and uneven approaches to data and content governance can make those advantages harder to translate into commercial value.

As buying becomes more automated, what publishers know about their audiences and environments needs to become easier for the market to understand and act on.

The value is there. The opportunity is to make it legible.

STRENGTHS

- Ownership of premium content and IP that fuels AI systems
- Control of first-party and contextual data from logged-in and direct environments
- Deep contextual intelligence linking content to sentiment, intent, and outcomes
- Continuous, high-volume content streams generating fresh, high-quality signals

WEAKNESS

- AI pilots not consistently anchored to clear commercial outcomes
- Fragmented experimentation across editorial, subscriptions, and ad operations
- Legal uncertainty around IP, consent, and AI training rights
- Limited adoption of provenance standards (e.g., C2PA) and legacy ad stacks not built for real-time, agentic orchestration

Threats & Opportunities

The common pattern is fragmentation: value is present, but it is hard for buyers, partners, and even internal teams to see, measure, and transact against it consistently.

THREATS

- AI intermediaries and low-quality AI-generated content degrading user and brand trust at scale
- IP exploitation - publisher content used for training without compensation
- Disintermediation - creators and platforms bypassing publisher relationships
- Agentic bypass - direct agent-to-inventory connections bypassing legacy sales

OPPORTUNITIES

- AI-driven yield - smarter management, pricing, and inventory packaging
- Contextual commerce - shoppable content and commerce-linked experiences
- Signal products - monetizing context, intent, and engagement as distinct offerings
- Standards leadership - defining “publisher-grade” AI and contextual standards

What This Means

Four implications emerge from the workshop findings and broader market context.

1

Publisher assets need to be recognized as signals of value

Trusted content, context, first-party data and audience relationships are increasingly valuable inputs to AI-enabled advertising. Publishers have an opportunity to make those assets more visible and commercially meaningful while maintaining appropriate control over how they are used.

2

Signal quality is becoming as important as scale

As buying becomes more automated and intelligent, the quality and consistency of publisher signals will increasingly influence how inventory is evaluated. Clear signals around context, audience, attention and performance give buyers and their systems a better understanding of what they are buying.

3

AI experimentation needs a commercial purpose

Publishers are testing AI across editorial, advertising, operations, commerce and audience development. Connecting those initiatives to clear business outcomes will help turn experimentation into lasting improvements in revenue, efficiency and product.

4

Content and data governance are becoming strategic

AI introduces new questions around content rights, crawler access, data permissions and provenance. Clear policies in these areas can help publishers protect their assets, strengthen trust and make more informed decisions about where and how value is exchanged.

Where to Focus

Four areas can help publishers translate their existing strengths into greater value in an AI-enabled market.

1. Make publisher signals easier to understand and use

Content, context, audience and engagement signals become more valuable when buyers and automated systems can interpret them consistently.

In practice:

- Review how inventory is classified and described against relevant IAB Tech Lab taxonomies and signal standards.
- Identify the contextual, audience and engagement signals that most clearly differentiate publisher environments.
- Package premium and signal-rich inventory in ways that make its value clear to buyers and their technology partners.

2. Connect AI initiatives to business outcomes

Experimentation is important, but the strongest initiatives will solve a defined business, audience or operational problem.

In practice:

- Map AI use cases across editorial, AdOps, yield, commerce, insights and audience development.
- Establish a clear objective and measure of success for significant AI initiatives.
- Use successful experiments to build repeatable capabilities across the organization.

3. Establish clear content and data governance

Publishers need a deliberate approach to how their content and data can be accessed and used by AI systems.

In practice:

- Establish policies for crawler access, content permissions and the use of publisher data by AI partners.
- Understand how provenance standards such as C2PA can support transparency and the identification of authentic content.
- Make ownership, permissions and accountability part of commercial discussions with AI and technology partners.

4. Prepare for more automated buying

As agentic buying develops, publisher inventory will increasingly need to be discoverable and understandable by systems acting on behalf of buyers.

In practice:

- Work with SSPs, DSPs and measurement partners to understand the signals and metadata automated buying systems use to evaluate inventory.
- Follow the development of AAMP, Agentic Audiences and related specifications as expectations for machine-readable signals evolve.
- Consider how publisher inventory, audiences and commercial terms will be represented when more buying decisions occur with limited human intervention.

Connecting to Standards Already in Motion

Several global initiatives are particularly relevant to publishers.

IAB Tech Lab taxonomies and signal standards provide common approaches to describing content and inventory, while AAMP and Agentic Audiences are developing the infrastructure through which AI agents can interpret and transact against signals. Provenance initiatives such as C2PA can support greater transparency around the origin and authenticity of content, while IAB's AI Transparency & Disclosure Framework provides broader guidance around transparency in AI-enabled advertising.

For Canadian publishers, engaging with these frameworks can help ensure that their content, audiences and inventory remain visible and understandable as discovery and buying become more automated, while providing a stronger foundation for protecting and communicating their value.

The publisher opportunity is to make valuable assets legible to an increasingly automated market while remaining clear about how those assets can be used. Trusted content, audience relationships and rich signals remain powerful advantages when the systems evaluating them can recognize their value.

> *Could an automated buyer understand what makes your inventory valuable today?*

Conclusion

A SHARED FOUNDATION FOR TRUST

What Connects All Four Chapters

Each chapter looks at AI from a different point in the digital advertising value chain. Agencies bring judgment and orchestration. Marketers connect customer insight, data and growth. AdTech provides the infrastructure that allows increasingly automated systems to work together. Publishers bring trusted content, audience relationships and signals that give those systems value.

Read together, they describe one market moving through the same transition from four different starting points.

Four themes cut across the entire ecosystem.

AI is changing where value sits.

As execution becomes increasingly automated, value shifts toward judgment, trusted data, differentiated signals, interoperability and the ability to connect technology to meaningful business outcomes.

Operating models need to catch up.

Staffing structures, commercial models, technology stacks and ways of working were largely designed before AI became embedded in everyday workflows. Every part of the ecosystem is now determining what needs to change and what remains uniquely valuable.

Trust is becoming infrastructure.

Transparency, explainability, provenance, privacy and accountability increasingly affect whether AI-enabled systems can be confidently used and scaled. These are becoming commercial requirements alongside performance.

Shared standards matter more in an automated market.

AI agents and automated systems need common ways to identify one another, interpret signals, understand permissions and transact across environments. Global initiatives including IAB Tech Lab's AAMP and IAB's AI Transparency & Disclosure Framework provide an important foundation for that work.

For Canada, the opportunity is to build on that foundation while addressing the realities of this market.

IAB Canada's role is to bring the ecosystem together, translate global developments into the Canadian context and help agencies, marketers, AdTech companies and publishers develop a shared understanding of what responsible AI-enabled advertising looks like in practice.

The more automated the market becomes, the more important that common understanding will be.

Where Each Stakeholder Can Start

AGENCIES	A snapshot of how AI is affecting each part of the digital advertising value chain. Define where human judgment, integration and cross-channel orchestration create distinct value, and build governance into the way AI-enabled work is delivered to clients.
MARKETERS	Connect AI initiatives around clear business and customer outcomes, with stronger alignment across data, technology, media, creative and governance.
ADTECH	Build for interoperability, explainability and agentic workflows, and engage with global standards as the infrastructure for agent-to-agent advertising develops.
PUBLISHER	Make content, context, audience and engagement signals easier for automated systems to understand, while establishing clear governance around how content and data can be accessed and used.

A Shared Foundation

No part of the ecosystem can navigate this transition independently. Marketers need agencies that can apply judgment across increasingly complex systems. Agencies need trusted technology and signals. AdTech needs interoperable connections to buyers and sellers. Publishers need their content, audiences and environments to be understood and valued by the systems making buying decisions.

The opportunity is to make those connections work better.

Canada's role in developing the future of AI-enabled media must not be underestimated. Canada should apply and contribute to global standards in ways that reflect the Canadian market. While Canada does not need a parallel AI advertising ecosystem, it does need a market that leans in and understands and contributes to work being done internationally in order to apply

interoperable infrastructure effectively in the Canadian context. This provides a path to create a trusted ecosystem that responds flexibly to future technology changes affecting how advertising is created, bought, sold and measured.

That is the shared foundation for what comes next.

At a Glance

Stakeholder	Core Opportunity	Where to Focus First	Standards to Track
AGENCIES	Trusted orchestration	Judgment, integration and governance	• AAMP Agent Registry • IAB AI Transparency & Disclosure Framework V2
MARKETERS	Connected AI-enabled growth	Customer, data, technology and outcomes	• IAB AI Transparency & Disclosure Framework V2 • AAMP Agentic Audiences
ADTECH	Trusted, interoperable infrastructure	Agentic systems, signals and explainability	AAMP • ARTF • Agent Registry • Buyer/Seller SDKs
PUBLISHERS	Legible and protected value	Signals, content governance and automated buying	• IAB Content Taxonomy 3.0 • C2PA provenance • AAMP Agentic Audiences

Appendix: Reference Frameworks

FOR READERS WHO WANT THE UNDERLYING DETAIL

IAB Tech Lab Agentic Advertising Management Protocols (AAMP)

AAMP is IAB Tech Lab's umbrella initiative for agentic advertising. It builds on established digital advertising standards, including OpenRTB, AdCOM, OpenDirect and the Deals API, with protocols, tools and open-source reference implementations designed to help AI agents discover, negotiate, exchange signals and transact across the advertising ecosystem.

Key components include:

Agentic Real-Time Framework (ARTF) - provides a technical foundation for agent services operating within host platforms, including standardized approaches to real-time bidstream processing and service-agent execution.

Agentic Audiences - formerly the User Context Protocol (UCP), an open standard for exchanging identity, contextual and reinforcement signals between intelligent advertising agents.

Agent Registry - provides a framework for agent identity, verification and disclosure, helping counterparties understand which agents they are interacting with and the organizations behind them.

Buyer and Seller Agent SDKs - open-source SDKs and reference implementations that help buyer and seller systems build interoperable agentic workflows using established industry standards.

AAMP continues to evolve rapidly. Recent releases have expanded enterprise deployment capabilities and incorporated privacy diligence into the Buyer Agent layer. Canadian stakeholders should track the initiative directly through IAB Tech Lab as specifications, tools and implementation guidance continue to develop.

IAB AI Transparency & Disclosure Framework V2

IAB's AI Transparency & Disclosure Framework establishes an industry baseline for when and how AI involvement should be disclosed in consumer-facing advertising and marketing content.

Version 2 takes a risk-based, materiality-driven approach, calling for disclosure where AI materially affects authenticity, identity or representation while avoiding blanket labelling that could contribute to disclosure fatigue. The framework applies across a range of AI-enabled content and experiences, including generated or assisted text, images, video, audio, synthetic voices and AI-powered interactions.

The framework is designed to give advertisers, agencies, publishers, platforms and technology partners a shared industry baseline as AI transparency regulation develops across jurisdictions. It complements, but does not replace, applicable law.

IAB Transparency and Consent Frameworks

IAB transparency and consent frameworks provide established approaches for communicating data-use purposes, consent and user preferences across the digital advertising ecosystem.

For the Canadian market, TCF Canada provides a policy and technical framework designed around Canadian privacy requirements while supporting interoperability with the broader global advertising ecosystem.

As AI-enabled and agentic systems become more deeply integrated into advertising, these established approaches to consent, transparency and accountability provide an important foundation for how data permissions can be communicated and respected across increasingly automated transactions.

IAB Tech Lab Content Taxonomy

IAB Tech Lab's Content Taxonomy provides a standardized common language for describing digital content. It is widely used to support contextual targeting and brand safety and suitability across the advertising ecosystem.

As automated and agentic buying develops, consistent content classification becomes increasingly important because machines need structured, interoperable ways to understand the environments and inventory they are evaluating.

Publishers, AdTech providers, agencies and marketers should follow the current version and implementation guidance directly through IAB Tech Lab as the taxonomy continues to evolve.

C2PA and Content Provenance

The Coalition for Content Provenance and Authenticity (C2PA) develops technical standards for establishing the source and history of digital media through Content Credentials.

C2PA provides a way to associate verifiable provenance information with digital content, including information about its origin and subsequent modification. As AI-generated and AI-assisted media becomes more common, provenance standards can support greater transparency around how content was created and changed.

For advertising and publishing, provenance can complement broader disclosure and governance frameworks by helping establish a more reliable record of content origin and modification.

Glossary

Agentic infrastructure — the protocols, identity mechanisms, tools and transaction capabilities that allow AI agents to act on behalf of buyers, sellers and other participants in digital advertising.

Agentic advertising — the use of AI agents to perform or support advertising activities such as planning, discovery, negotiation, activation and transactions on behalf of buyers and sellers.

AAMP — IAB Tech Lab's umbrella initiative for developing interoperable protocols, tools and reference implementations for agentic advertising.

C2PA — the Coalition for Content Provenance and Authenticity, which develops technical standards for establishing the source and history of digital media through Content Credentials.

Content Taxonomy — IAB Tech Lab's standardized common language for describing digital content, used across contextual targeting and brand safety and suitability.

Explainability — the ability to describe, in terms a non-specialist can understand, how or why an AI-enabled system reached a particular decision or outcome.

Machine-readable signal — content, audience, contextual or other data expressed in a structured form that automated systems and AI agents can interpret and act on.

Provenance — information about the origin and history of digital content, including how it was created or modified.

TCF Canada — IAB Canada's Transparency and Consent Framework, providing policy and technical specifications for communicating data-use purposes, consent and user preferences in the Canadian digital advertising ecosystem.

Acknowledgement

This research draws on collaboration and expert insights from IAB Canada's Ad Tech, Agency, Marketer and Publisher Councils. It examines ongoing developments in AI and their implications for Canada's digital marketing industry.

IAB Canada thanks these councils for contributing their time, expertise and perspectives to this project.

To learn more about joining IAB Canada's councils, contact committees@iabcanada.com.

About IAB Canada

Interactive Advertising Bureau of Canada is a national trade association for digital media advertising, serving as the connective tissue between buyers, sellers, platforms, and technology providers across the Canadian market.

Comprised of roughly 250 leading media, technology, agency and brand companies that are responsible for buying, selling, delivering and optimizing digital advertising or marketing campaigns. Together, our members account for over 80% of the estimated $21 Billion dollars spent in the digital advertising industry in Canada.

IAB Canada's Role

- Canadian market research & advocacy
- Global standards adoption and localization
- Workforce education and certification
- Industry connection and collaboration
- Ecosystem health and innovation

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