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STATE OF THE NATION 2026

CANADA'S DIGITAL MEDIA EXPO

KEYNOTE

The State of the Nation:
Growth, Resilience, and the Road Ahead

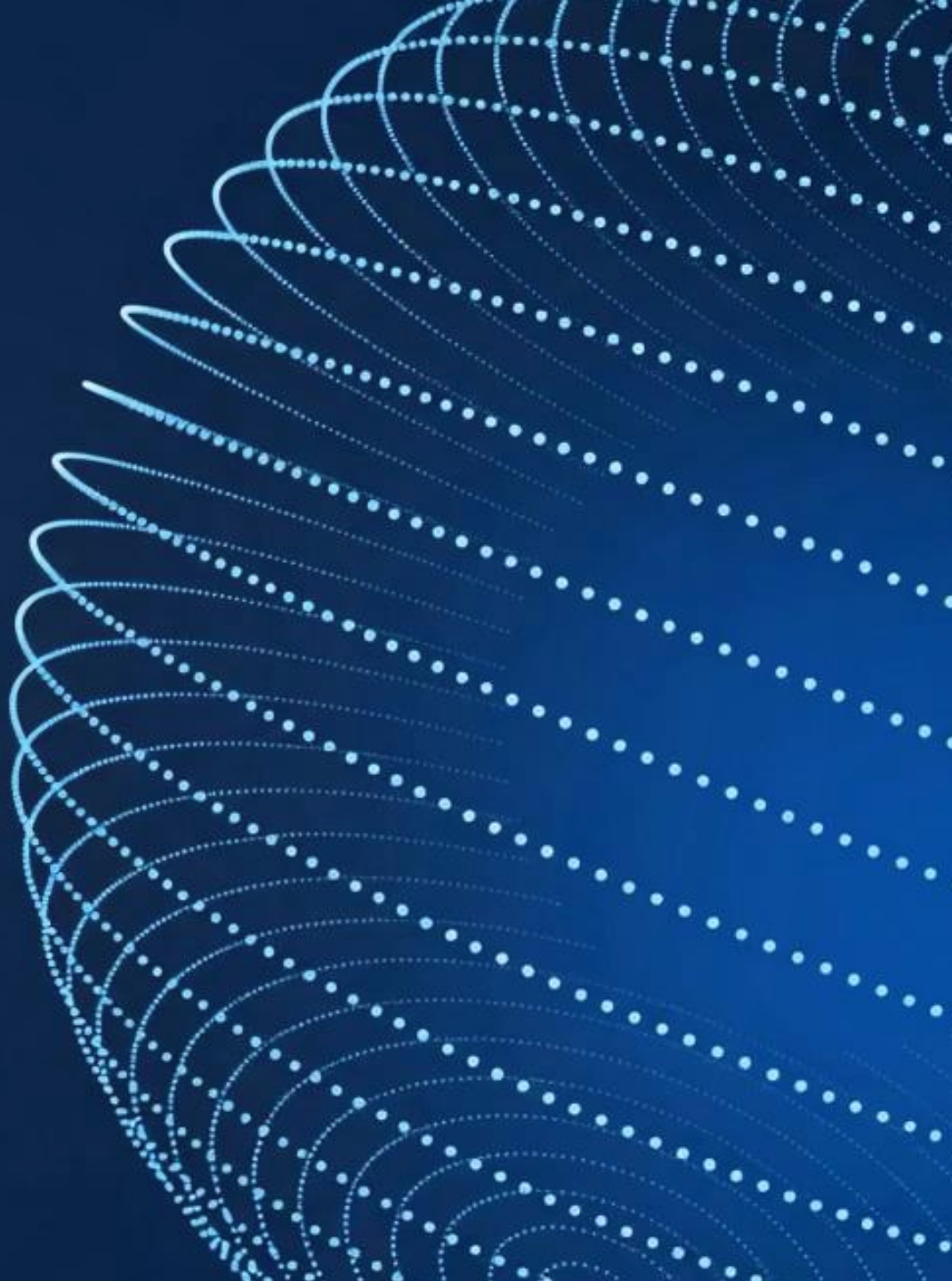


SONIA CARRENO
IAB CANADA

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Industry Level Set

Where are we now?
Where are we going?



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DIGITAL ADVERTISING REVENUE REPORT

The state of Canadian digital ad spend



The latest findings from IAB Canada's annual Digital Advertising Revenue Report.

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THE TOPLINE

$21 billion

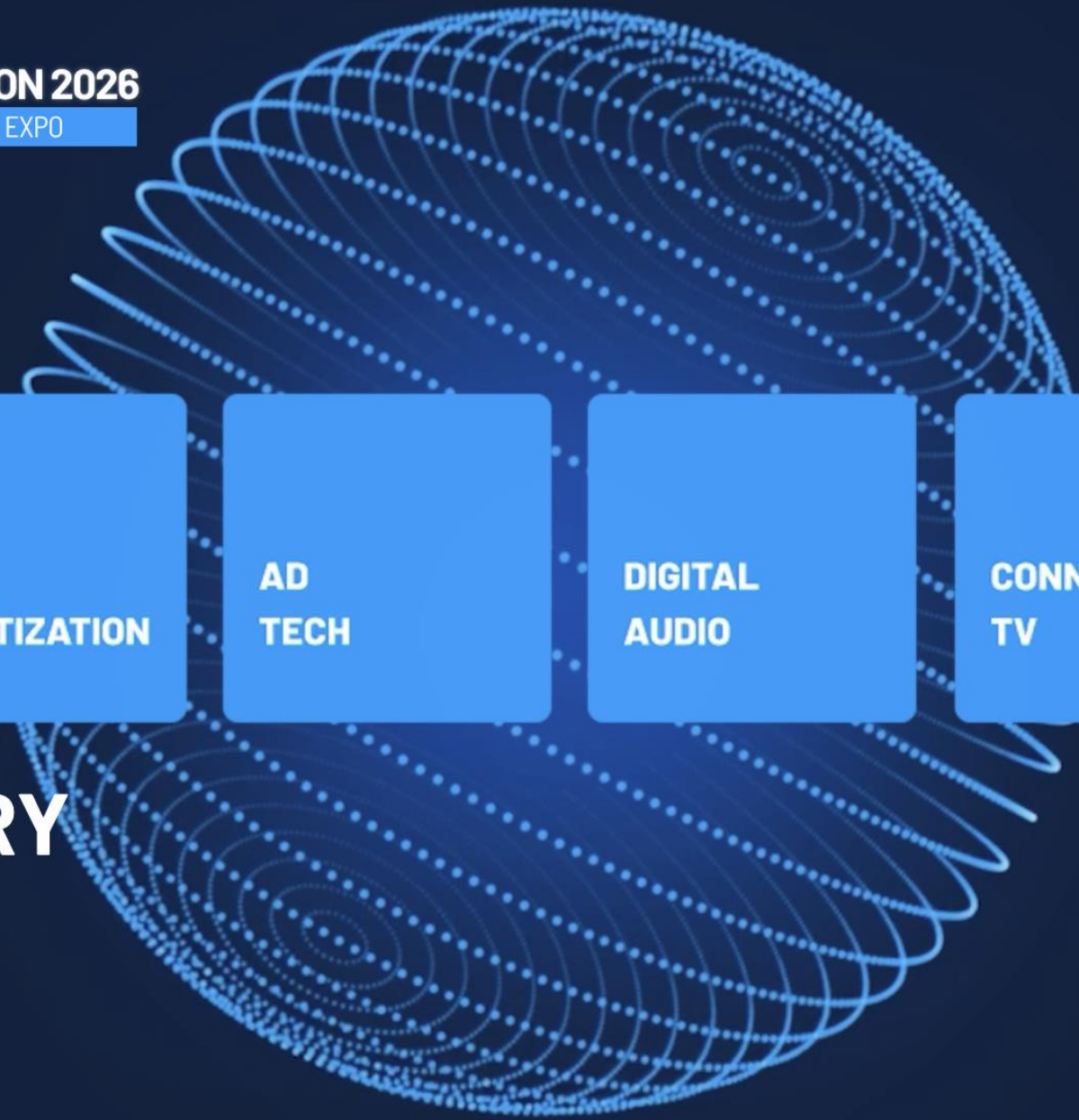
Measured digital advertising revenue, 2025

+16% year over year

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RETAIL MEDIA

DATA MONETIZATION

AD TECH

DIGITAL AUDIO

CONNECTED TV

EMERGING CHANNELS

AN INDUSTRY STILL EXPANDING

NEW THIS YEAR

Two categories enter the report for the first time

$727 M

Data Products & Services

New category tracked this year

$559 M

Ad Tech Products & Services

New category tracked this year

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A MAJOR ECONOMIC ENGINE

Digital advertising is now one of Canada's largest economic engines

$25 B

Total digital advertising economy

~1 %

of Canada's total GDP

30K +

Jobs supported across Canada

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REVENUE DIVERSIFICATION

From Search & Social to a broader story

Growth is no longer concentrated in two channels — it now spans five fast-rising drivers.

01

Retail Media

02

Data Monetization

03

Digital Audio

04

Digital Out-of-Home

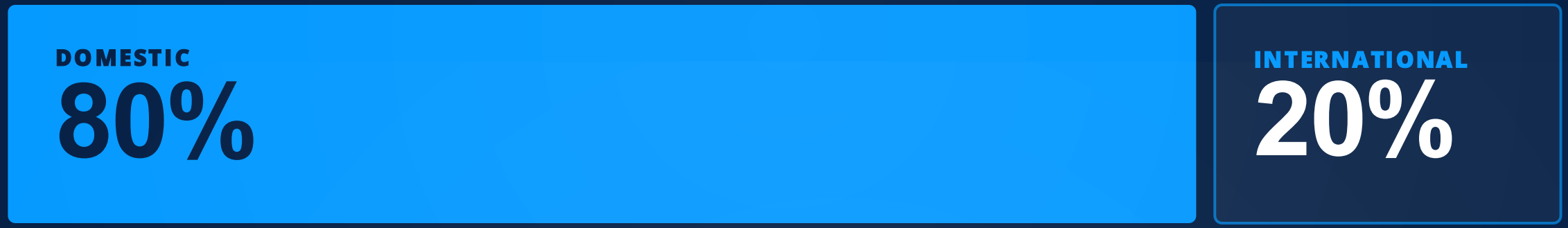
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Connected TV

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DOMESTIC VS. INTERNATIONAL

Eighty percent of revenue comes from Canadian advertisers



OPPORTUNITY **A significant untapped export opportunity beyond Canada**

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ON THE LEGISLATIVE AGENDA

Policy & Privacy

Canada is once again deep in conversation about privacy, data governance and online safety.

Bill C-36 **Bill C-34**

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THE VALUE WE CREATE

Advertising funds journalism

Advertising funds entertainment

Advertising funds innovation

Advertising helps small businesses compete

Advertising helps Canadian companies grow

Advertising creates jobs and opportunity

Advertising is a legitimate business interest.

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SOVEREIGNTY

Sovereignty is not isolation.
Sovereignty is influence.



THE RISE OF AI AGENTS

What agents can do — and what they require

AGENTS CAN

- Research
- Buy
- Negotiate
- Create
- Decide

AGENTS REQUIRE

- Standards
- Guardrails
- Transparency
- Accountability
- Human oversight

WHAT IT TAKES TO THRIVE

We need repeatable outcomes.
We need trusted measurement.
We need interoperable standards.
We need accountability by design.

And if sovereignty means maintaining control over our future, then **Canada must have a seat at the table** where those standards are being built.

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THE CHOICE AHEAD

Build the future — or inherit it?

Commoditization *or* **Value**

Dependence *or* **Capability**

Distraction *or* **Canadian talent**

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THE QUESTION BEFORE US

Participant

— or —

Architect

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TODAY'S AGENDA

01 The State of the Economy

02 Policy, Trade & Competitiveness

03 AI & Emerging Technology

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WHERE WE STAND

The state of our industry is strong.

The state of innovation is strong.

The state of Canadian talent is strong.

The state of our potential is strong.

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THE FULL PICTURE

Read the full report

The complete data behind Canada's **$21 billion** digital advertising market — methodology, channel breakdowns, and the year-over-year trends.



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STATE OF THE NATION 2026

Thank you.

Welcome to State of the Nation 2026.

