

wave 6 | may 2026

# video advertising state of the nation report

**iab.**  
australia

# iab australia video council



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# introduction

The **IAB Australia Video Advertising Council** was formed in 2014 to help support a fast-growing, multi-platform ecosystem—now accounting for 29% of total internet ad spend\*. The Council collaborates on projects in relation to advertising standards, best practice, creative and research of streaming ads in all environments across consumer screens.

The Council have developed a range of resources to support industry understanding of measurement, ad formats and ad buying. Most recently the Council have created the Video Measurement Framework, a comprehensive guide to improving video campaign effectiveness, outlining key measurement approaches across audience reach, brand safety, viewability, and attention. It provides a clear view of available methodologies, enabling media agencies and marketers to make informed decisions, optimise performance, and drive measurable outcomes.

The **IAB Australia Video State of the Nation 2026** report provides an analysis of the digital video advertising landscape, highlighting ongoing growth, evolving challenges, and emerging opportunities across the market. The study offers a timely pulse check on investment trends, formats, measurement, and technological innovations shaping the video advertising ecosystem and assists in setting the direction of future Council initiatives.

\*Source; IAB Australia Internet Advertising Revenue Report, prepared by PwC for CY2025



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head of marketing and membership  
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# methodology

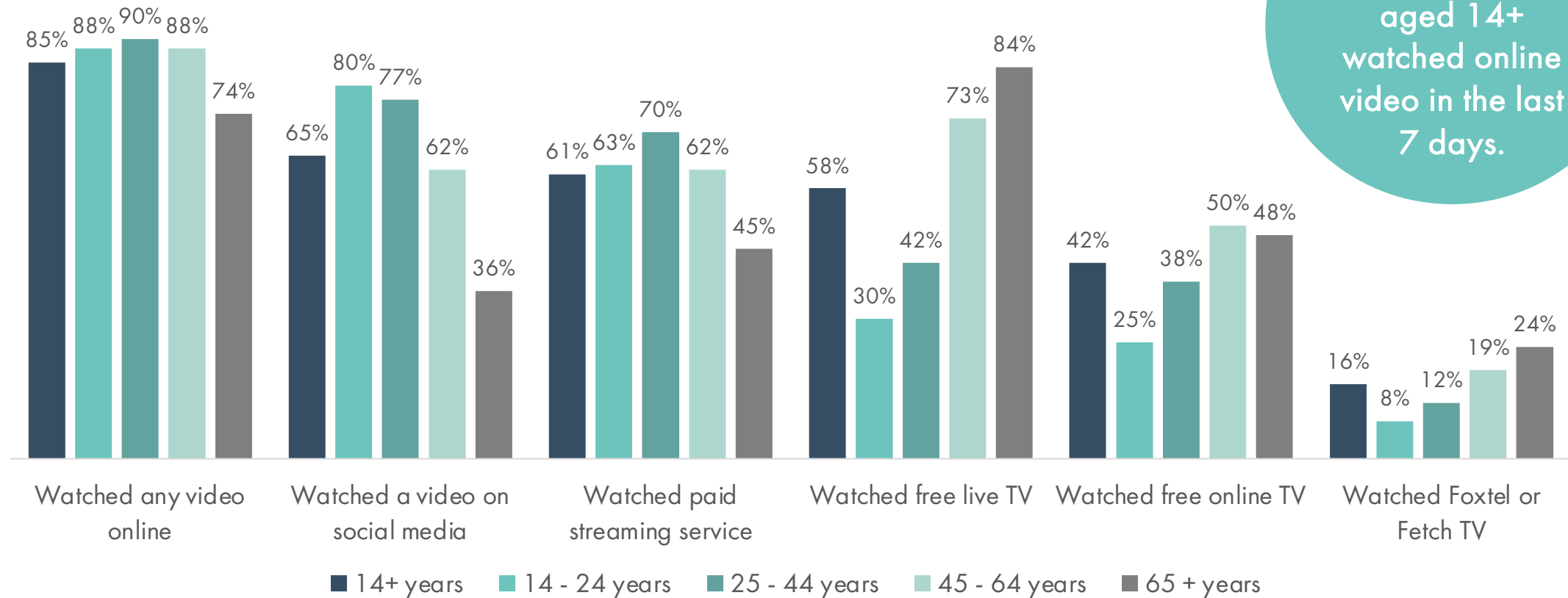
- The IAB Australia Video State of the Nation online survey was carried out in April 2026.
- 78 advertising agency decision makers completed the survey.
- Respondents are senior representatives across independent and major holding group agencies, who are responsible, or influence advertising decision making for their company or clients and have previously bought digital video advertising.
- The survey gathered industry information on video advertising that appears on connected devices such as connected TV, computers (desktop/laptop), smartphone or tablets. This included video advertising in all varieties of long-form and short-form digital content and social platforms.
- This is the sixth annual IAB Australia Video Advertising State of the Nation survey (previous reports can be found on the IAB website).

# executive summary

- Video advertising continues to demonstrate **strong growth and strategic importance**, with expenditure outpacing the broader market. Despite this momentum, **macroeconomic pressures have increased** as the leading concern for 2026, overtaking cross-media measurement challenges.
- Advertisers are increasingly focused on driving sales and conversions this year, while also maintaining investment in brand-building, signalling a continued **need for balanced brand and performance-based strategies**.
- Emerging video formats and capabilities are attracting interest and investment. **Ad-supported subscription streaming platforms are a key growth area**, strong expectations from ad buyers to increase spend. **Programmatic CTV is also evolving**, with a strong focus on frequency control, activation efficiency, and optimisation. Additionally, **advertising in live streaming events and creator-led content are gaining traction**, with the majority of buyers already engaging in these environments and treating creators as core media assets.
- **Video and Retail Media will continue to converge**. Currently the opportunity is being driven by usage of first-party shopper data for video targeting. While interest in closed-loop measurement using retail media infrastructure is high, adoption remains limited, indicating a gap between capability and execution.
- The video ecosystem is becoming even more complex. While there is widespread adoption of holistic cross-platform campaign planning, **fragmentation continues to present challenges for cross-screen measurement**. There is growing emphasis on advanced measurement techniques such as **market mix modelling**, however there are **inconsistencies in outcomes measurement input data** available across different types of video platforms.
- Ad buyers also note **inconsistent definitions of metrics** such as reach, frequency, and viewability across platforms that continue to limit comparability and hinder optimisation. The industry is calling for standardised metrics and **improved cross-platform measurement frameworks** to enable more effective, outcome-driven decision-making.
- **Artificial intelligence is expected to play a transformative role, particularly in measurement**, with the potential to unlock significant additional media investment by improving the accuracy of performance attribution.
- Overall, the market is characterised by strong growth, increasing complexity, and a clear need for standardisation and integration—particularly in measurement—to fully realise the value of video advertising in a multi-platform environment.

# content and screens are driving high video audience consumption

media consumption in last 7 days by age



85%  
of all people  
aged 14+  
watched online  
video in the last  
7 days.

Source: Ipsos iris Establishment Survey, March 2026 n=12.000 aged 14+, Digital Landscape Report

# representing 29% of digital advertising expenditure, video continues to be the strongest performing subsector

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The total Australian internet  
video advertising market in 2025

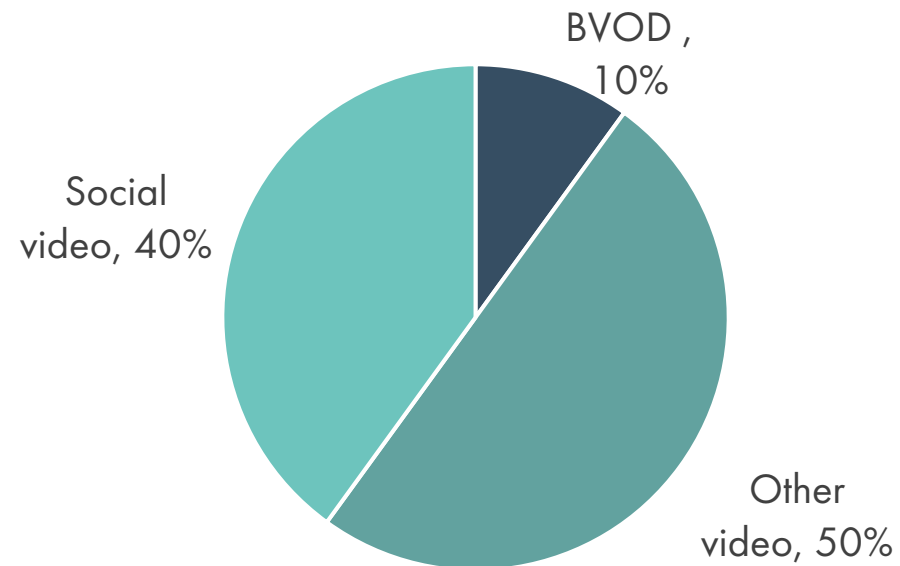
**\$5.4bn**

**19.8%**

year on year growth on CY 2024

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Total video expenditure by video platform  
for the calendar year 2025



Source: IAB Australia Internet Advertising Revenue Report, prepared by PwC for quarter ending December 2025 and CY 2025

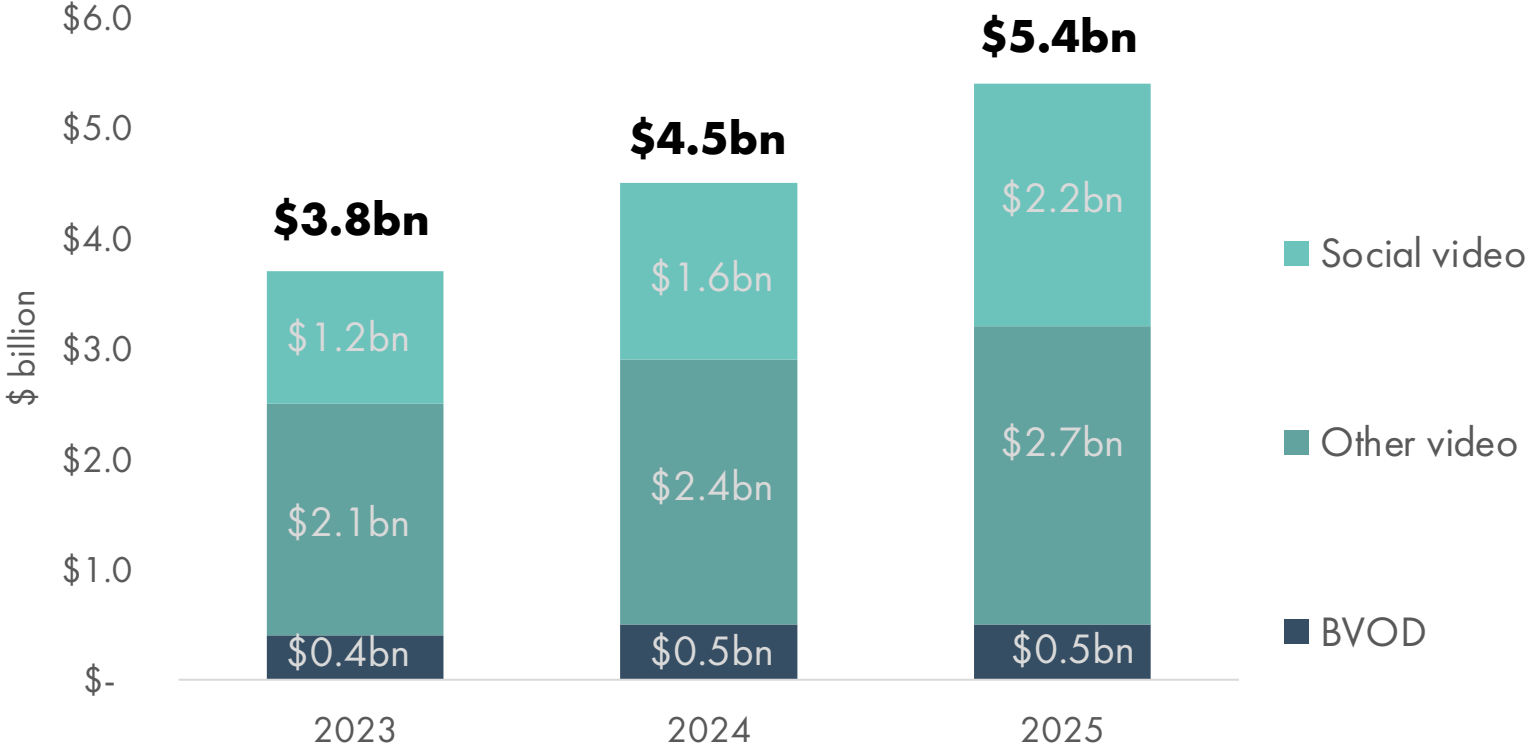
Broadcaster Video on Demand (BVOD) Video comprises expenditure on video ads displayed on 7Plus, 9Now and 10Play  
Other Video comprises expenditure on video ads displayed on YouTube, SBS On Demand, Foxtel, short form editorial video and other video formats  
Social Video comprises expenditure on video ads displayed on Meta platforms, TikTok, Snapchat, Pinterest, LinkedIn and X

# video advertising expenditure grew 19.8% year on year, outpacing the overall general display market

## Video advertising expenditure by CY

Video advertising expenditure is up 19.8% year-on-year.

Social Video continues to outperform the total Video advertising market up 35.1% year-on-year. Other video grew 12.2% and BVOD grew 7.1%.



Source; IAB Australia Internet Advertising Revenue Report, prepared by PwC for quarter ending December 2025 and CY 2025

Broadcaster Video on Demand (BVOD) Video comprises expenditure on video ads displayed on 7Plus, 9Now and 10Play  
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## internet advertising expenditure

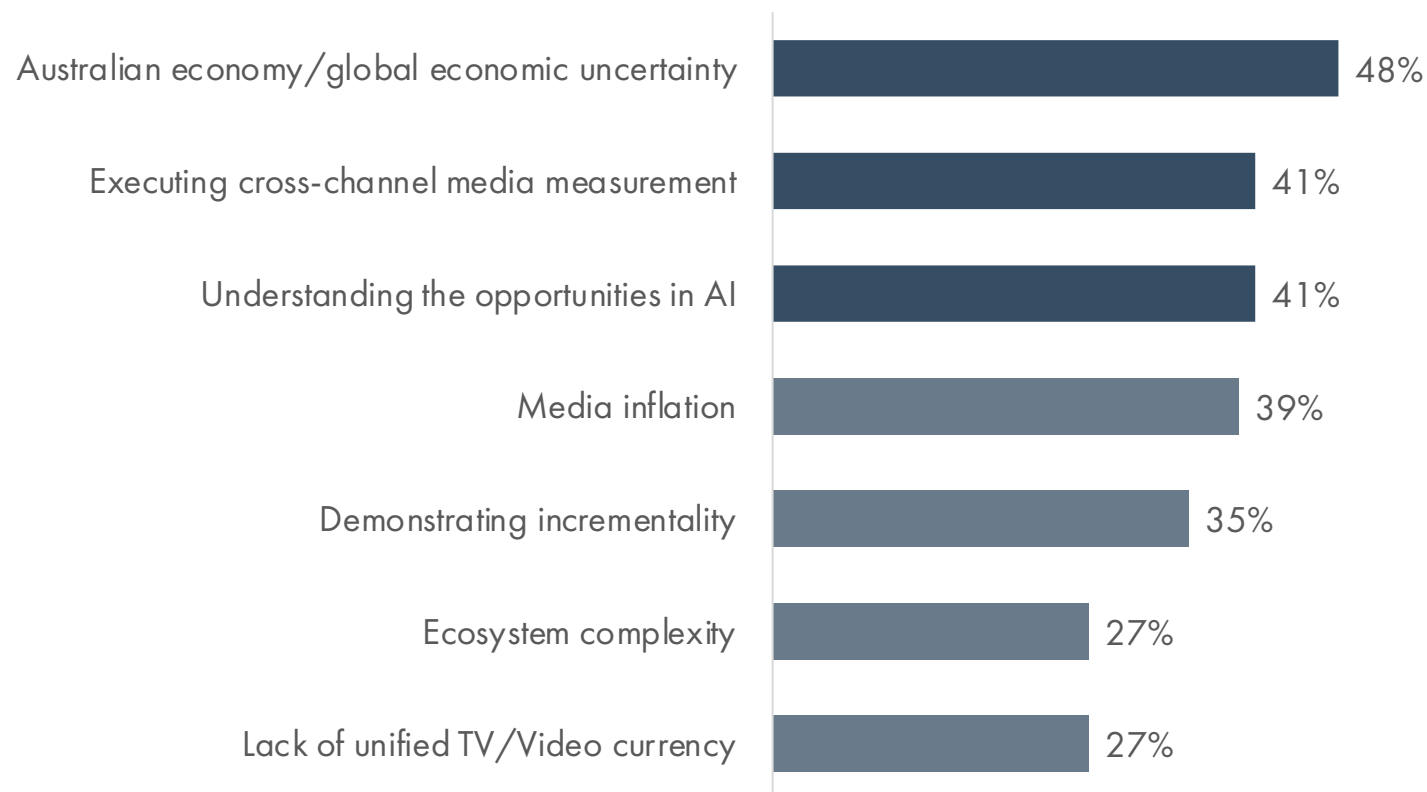
### CAGR 2019-2025

**12.0%**  
**total internet  
advertising**

**21.8%**  
**video advertising**

**however, a slowing  
economy is a key  
challenge for 2026...**

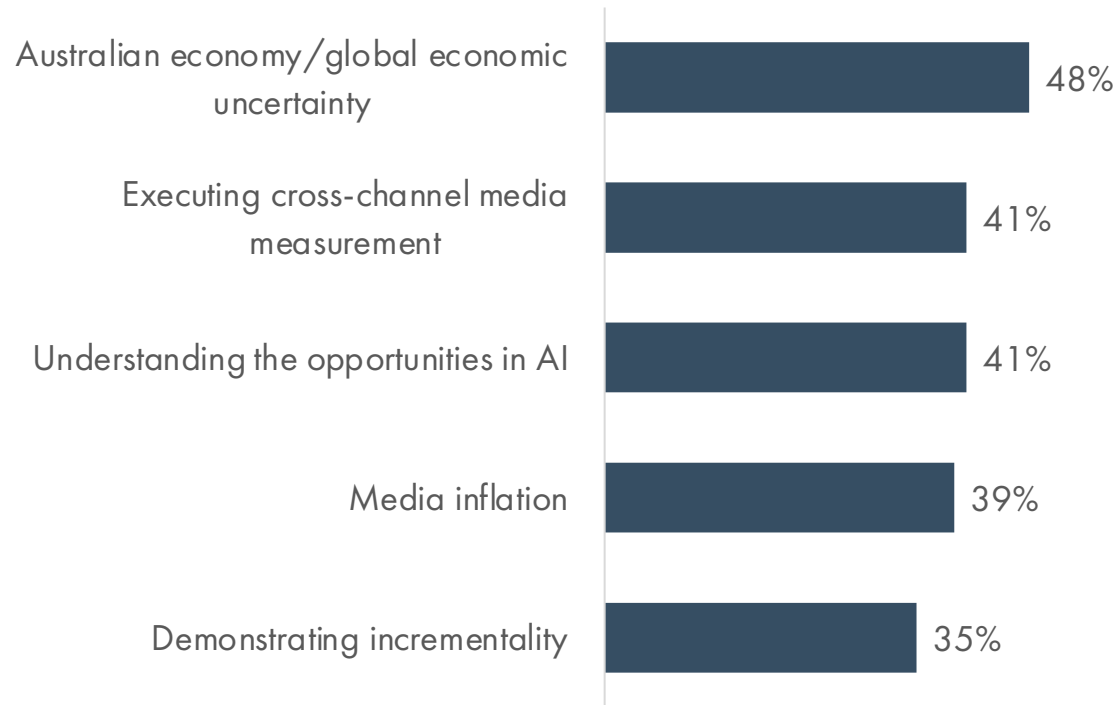
## greatest concerns or challenges regarding marketing and advertising investment in 2026



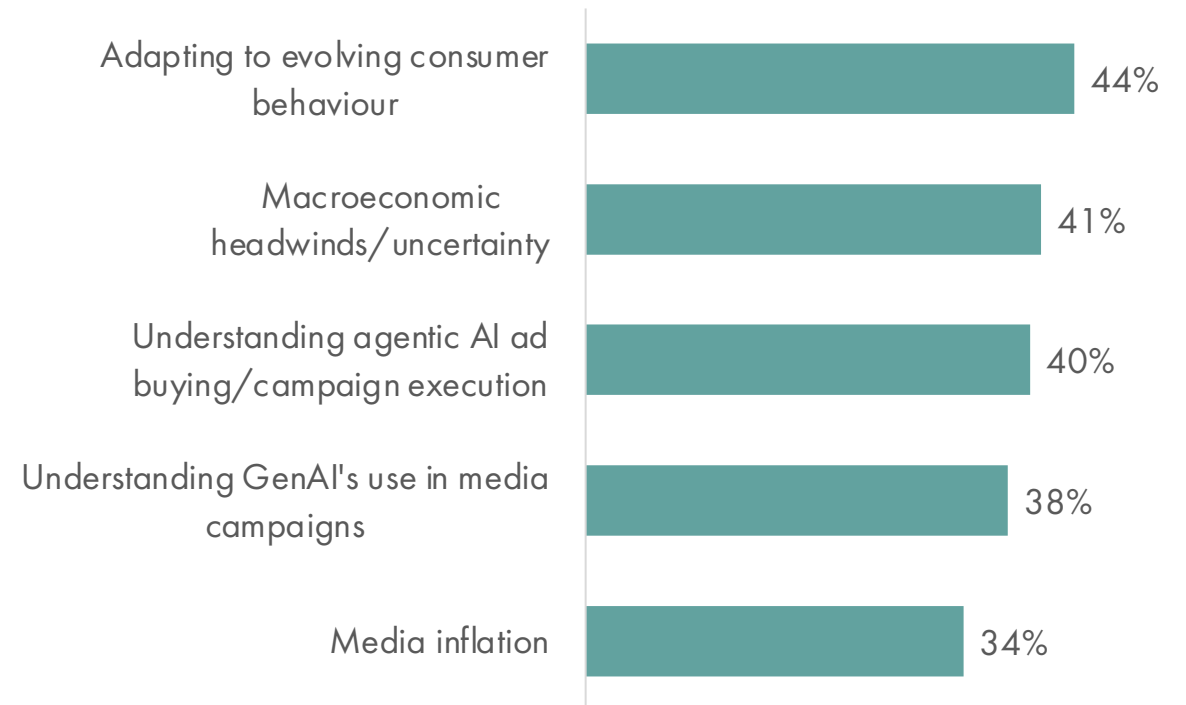
# marketing and ad investment challenges 2026

In Australia, the economy has risen as the main concern compared to last year when cross-media measurement was the #1 challenge. The IAB US Outlook study conducted January 2026 found that for US ad buyers, understanding AI's use in ad campaigns and adapting to AI driven consumer behaviors rose as challenges this year, above cross-channel measurement that was considered the #1 challenge in 2025.

## Australian market



## US market



Sources; IAB Australia Video Advertising State of the Nation 2026 n=78; IAB US 2026 Outlook Study n=205

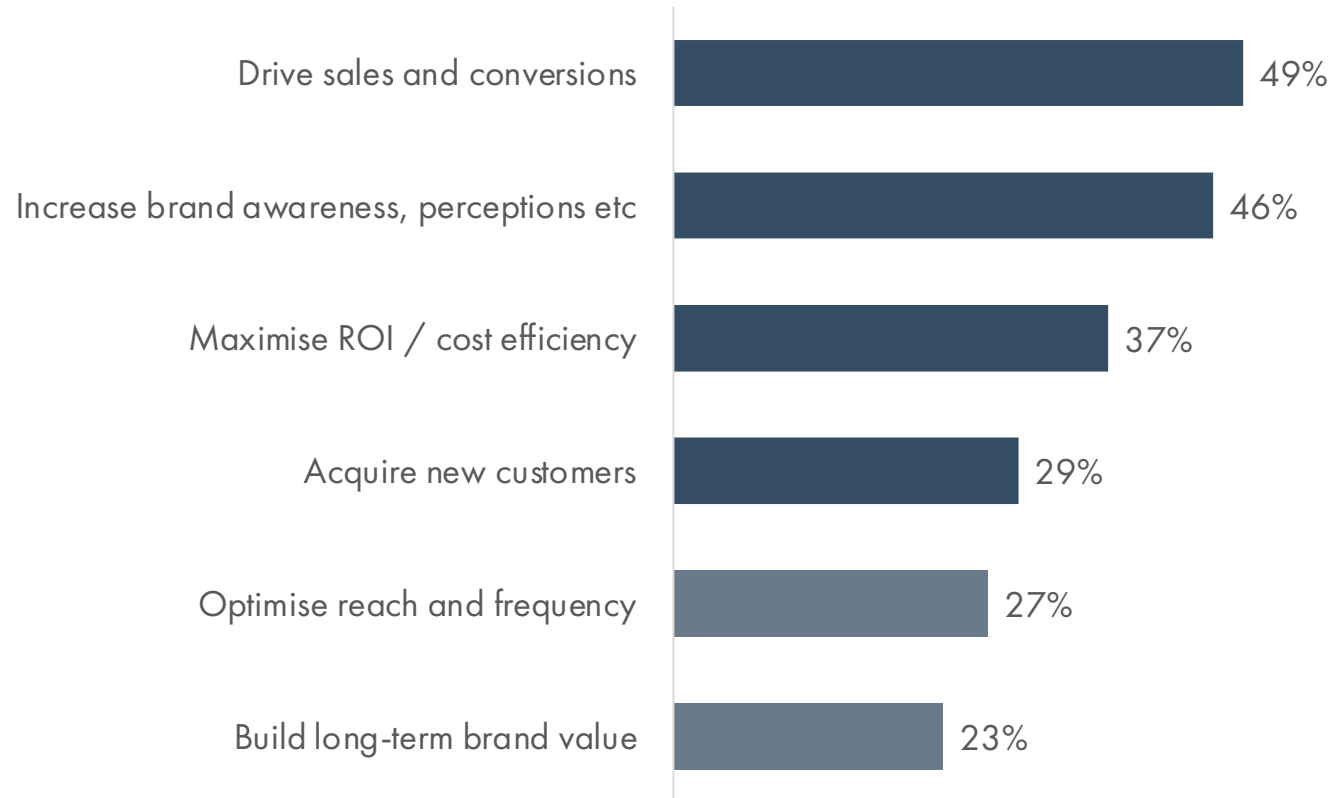
Q - What are your greatest concerns and/or challenges regarding marketing and advertising investment in 2026? Select all that apply.

## driving sales and conversions is the top goal for media investment in 2026

Driving sales and conversions followed by increasing brand metrics are the top goals for media investment.

In terms of changes in the share of expenditure on brand versus performance, 42% of ad buyers surveyed said they will spend more on brand advertising this year, while 28% say they will spend more on performance this year.

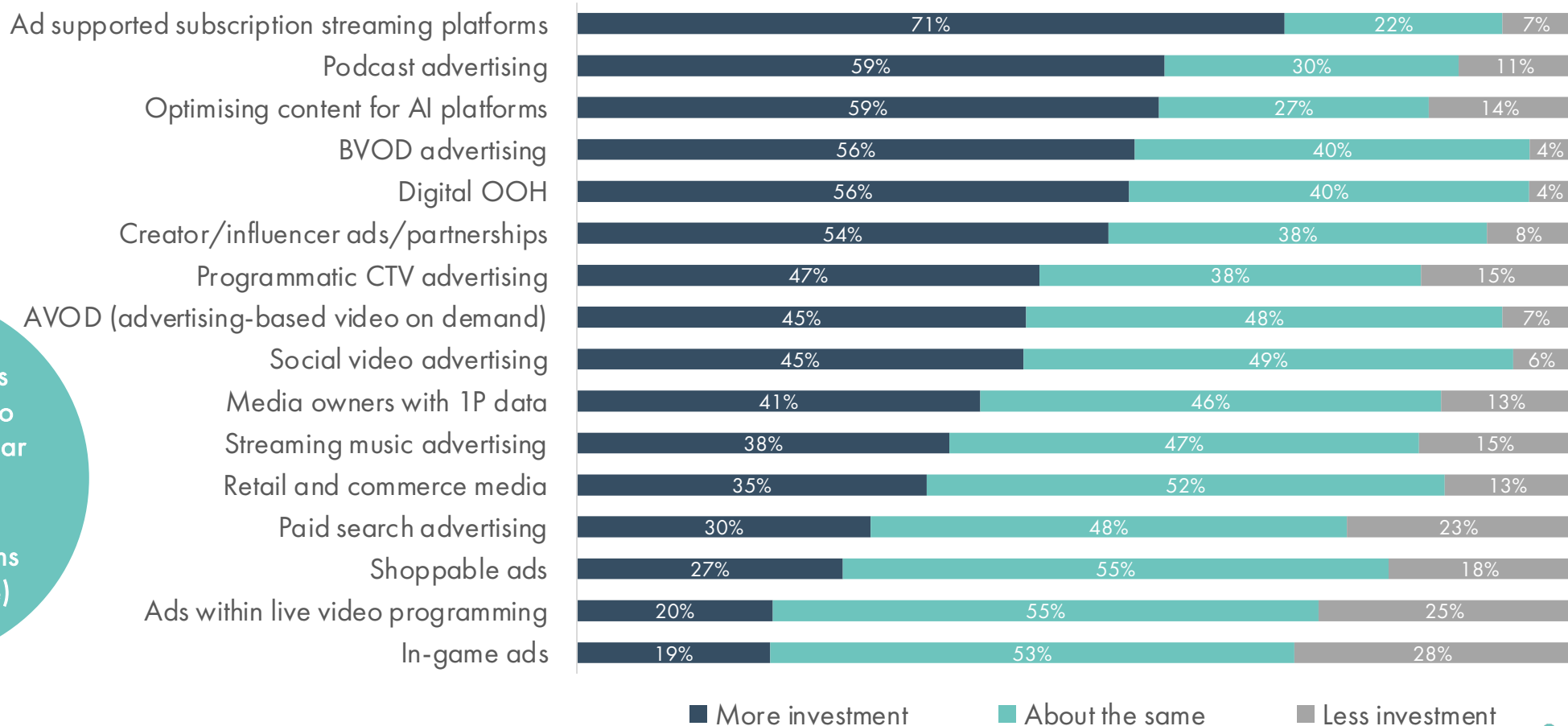
### top 3 goals for media investments in 2026



# investment changes across digital ad formats in 2026

ad buyers' expectations of investing more, less or about the same in 2026 (compared to 2025) on various advertising and media formats

71% of ad buyers surveyed expect to spend more this year on ad supported subscription streaming platforms (eg Netflix, Prime)

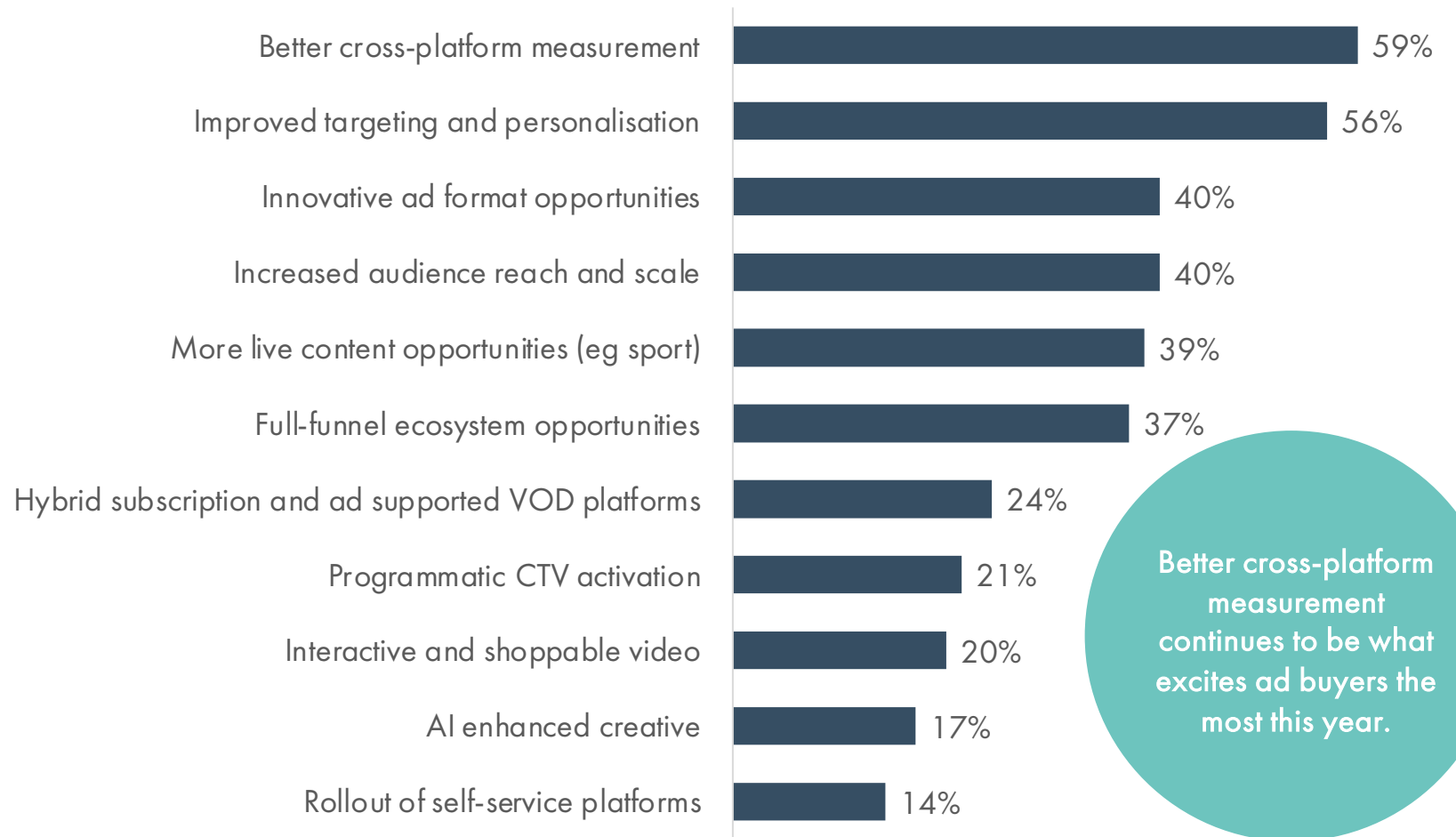


Sources; IAB Australia Video Advertising State of the Nation 2026 n=78;

Q - Do you expect to focus more, less, or the same amount of investment in 2026 (vs. 2025) on the following advertising and media formats? Please select one response in each row.

# top areas of excitement around the growth of the video streaming ecosystem

## what excites agencies the most about the continued growth and evolution of the video streaming ecosystem

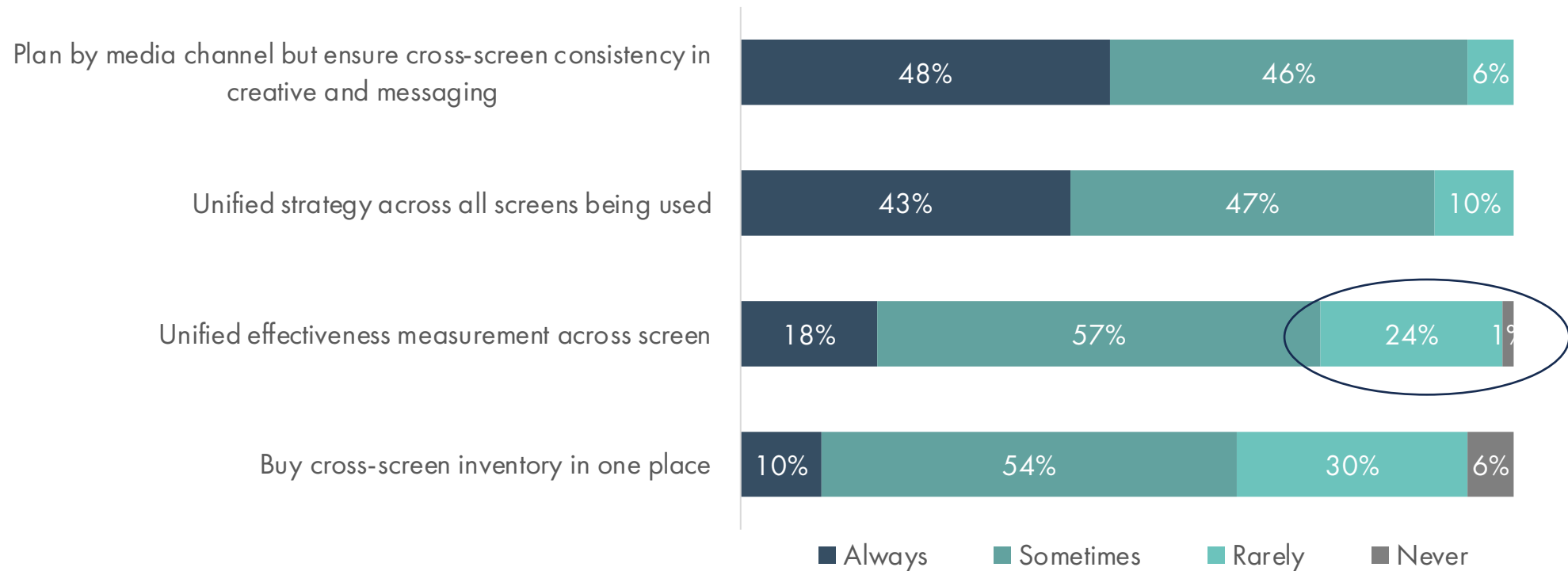


Sources; IAB Australia Video Advertising State of the Nation 2026 n=78

Q - What excites you most about the continued growth and evolution of the video streaming ecosystem (incl. CTV / online video / social video)? Please select all that apply

# 9 in 10 agencies have a unified strategy across screens, however, 25% rarely or never unify measurement across screens

agency approach to planning and buying advertising across screens  
(including combinations of advertising on TV, mobile, computer, retail, outdoor or cinema screens)



Source: IAB Australia Video Advertising State of the Nation 2026 n=78

Q - How do you approach planning and buying advertising across screens (including combinations of advertising on TV, mobile, computer, retail, outdoor or cinema screens)? Please select one response in each row.

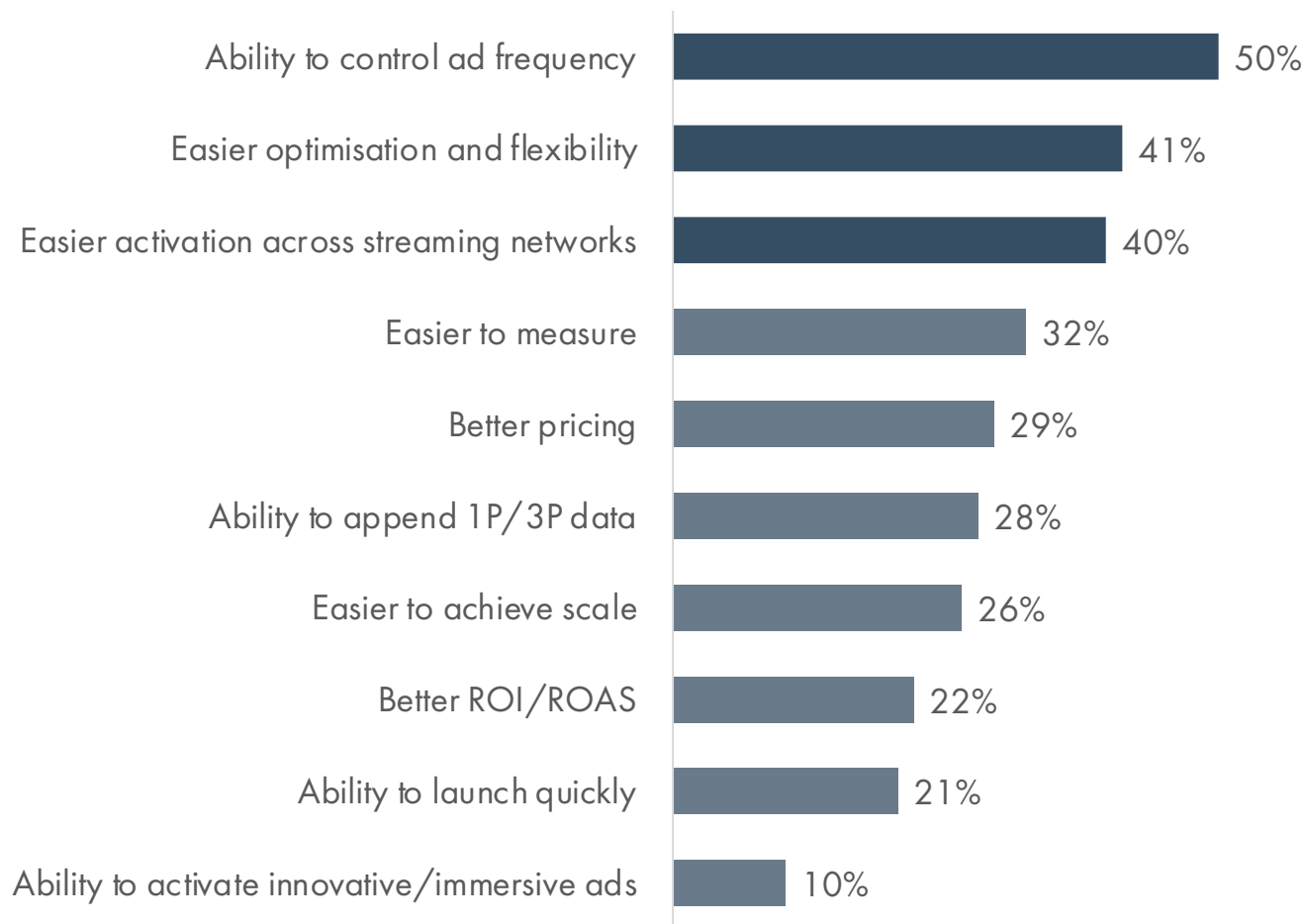
# expectations for programmatic CTV

46% of respondents indicated they intend to increase investment in programmatic CTV in 2026. The ability to control ad frequency is the #1 expectation of ad buyers when buying CTV/OTT programmatically, followed by easy of optimisation and activation.

## IAB Tech Lab Resource: CTV Programmatic Guide

provides an overview of how a range of existing standards and approaches apply within CTV environments. It brings together guidance across OpenRTB, Open Measurement, SSAI workflows, identity, privacy and signal handling.

## top 3 expectations when buying CTV/OTT programmatically



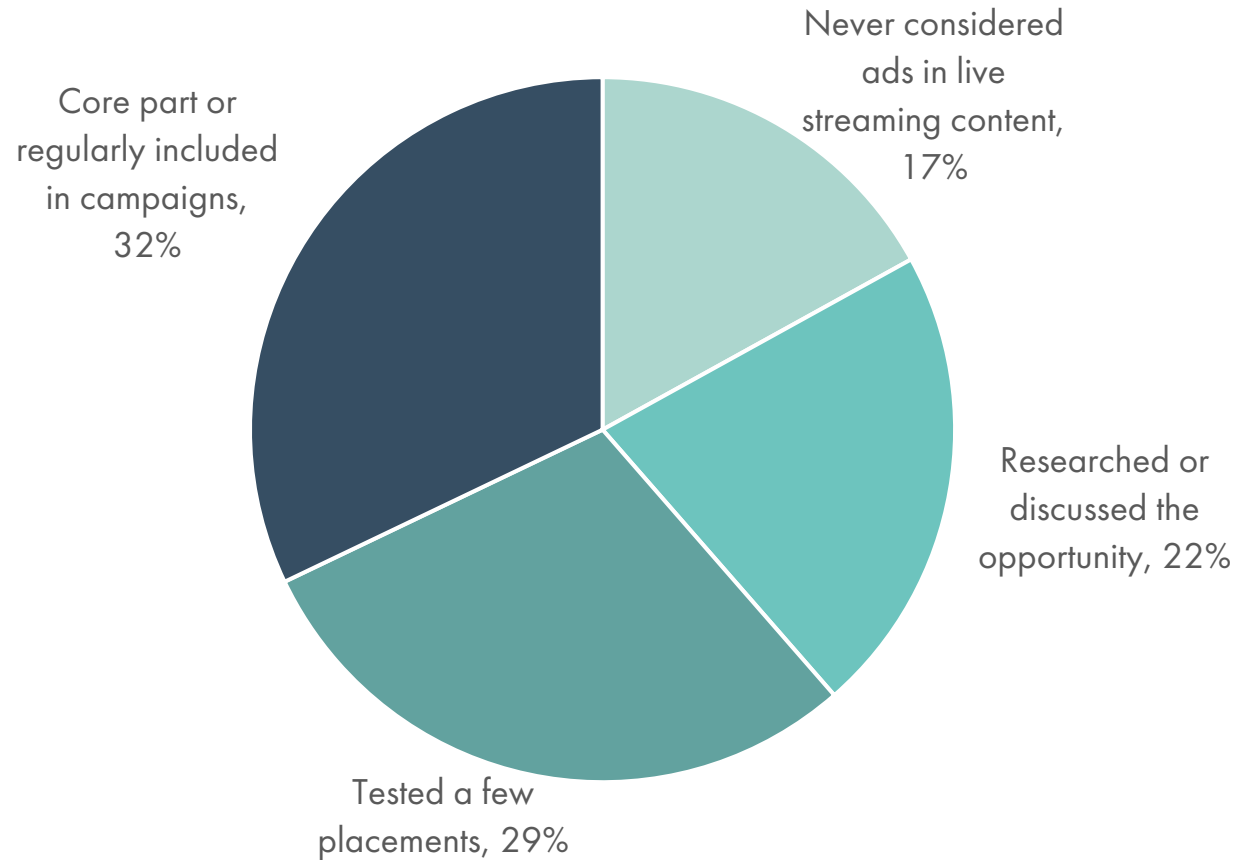
# experience placing ads in live streaming event content

6 in 10 ad buyers surveyed (61%) have placed ads in live event content on streaming networks/platforms.

## IAB Tech Lab Resource: Live Event Ad Playbook

is a series of technical recommendations and protocol enhancements aimed at enabling scalable, low-latency, and reliable ad delivery within live streaming environments.

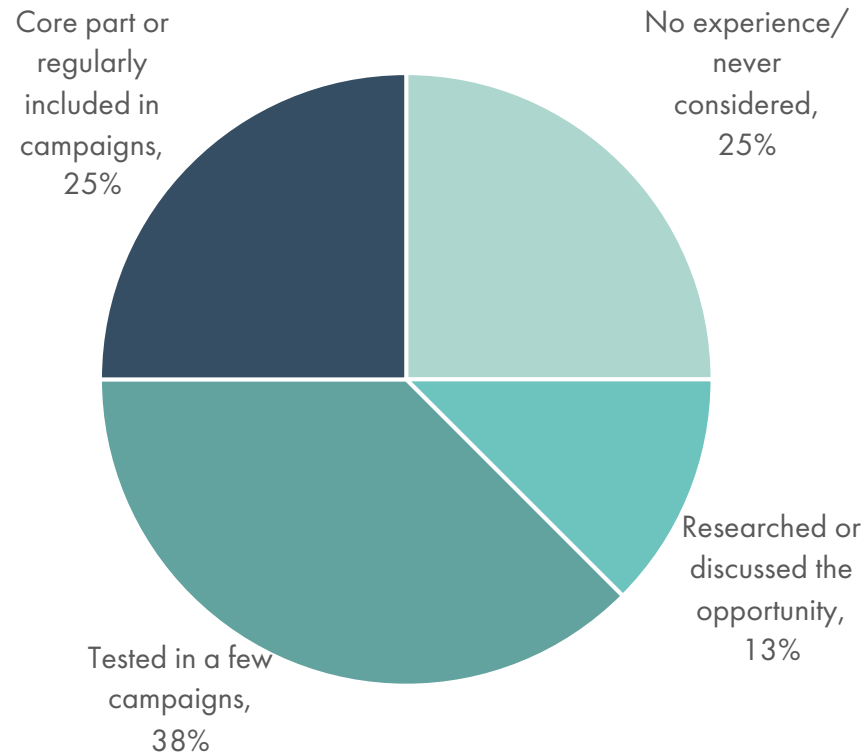
## experience to date placing ads in live event content on streaming networks/platforms



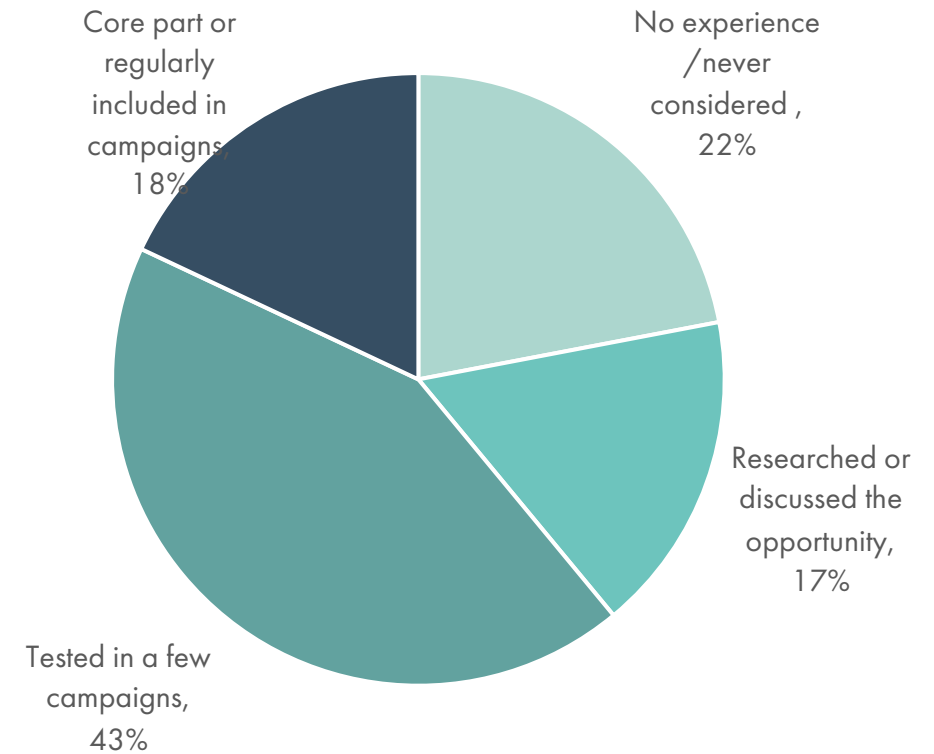
# experience using creators and talent

With creator economy ad spend growing faster than the broader media industry, marketers are treating creators as a primary asset. 6 in 10 (63%) digital video ad buyers have used video creators and talent as part of their creator marketing strategy. The IAB Australia Audio Advertising State of the Nation 2026, also found 61% of digital audio ad buyers have experience using podcast creators and talent as part of their creator marketing strategy.

## experience using video creators and talent



## experience using podcast creators and talent



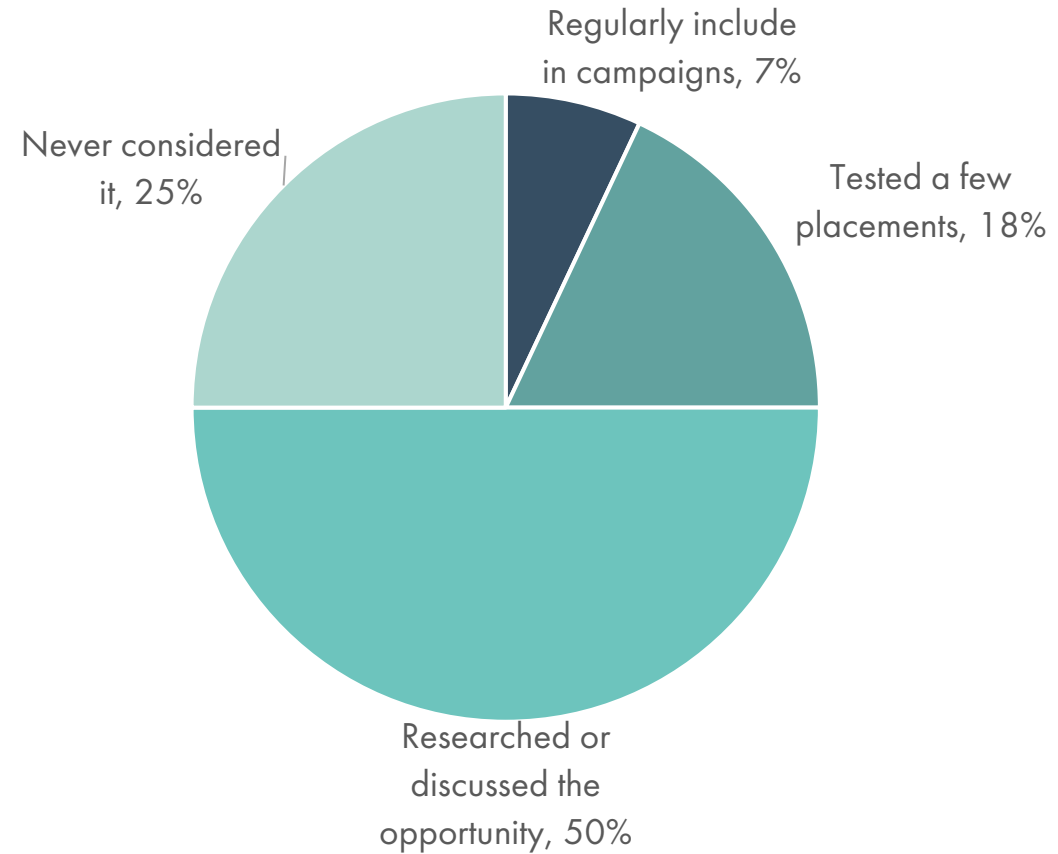
Source; IAB Australia Video Advertising State of the Nation 2026 n=78, Q What best describes your experience in using video creators and talent as part of your/your clients creator marketing strategy? Please select one.

\* Source; IAB Australia Audio Advertising State of the Nation Report wave 10 2026 n=128 Q- What best describes your experience in using podcast creators and talent as part of your creator marketing strategy? Please select one

# experience placing ads in video podcasts

The IAB Australia Audio Advertising State of the Nation 2026, also found that 25% of digital audio ad buyers had experience placing ads in video podcasts.

## experience placing ads in video podcasts



# experience with opportunities that connect video and retail media

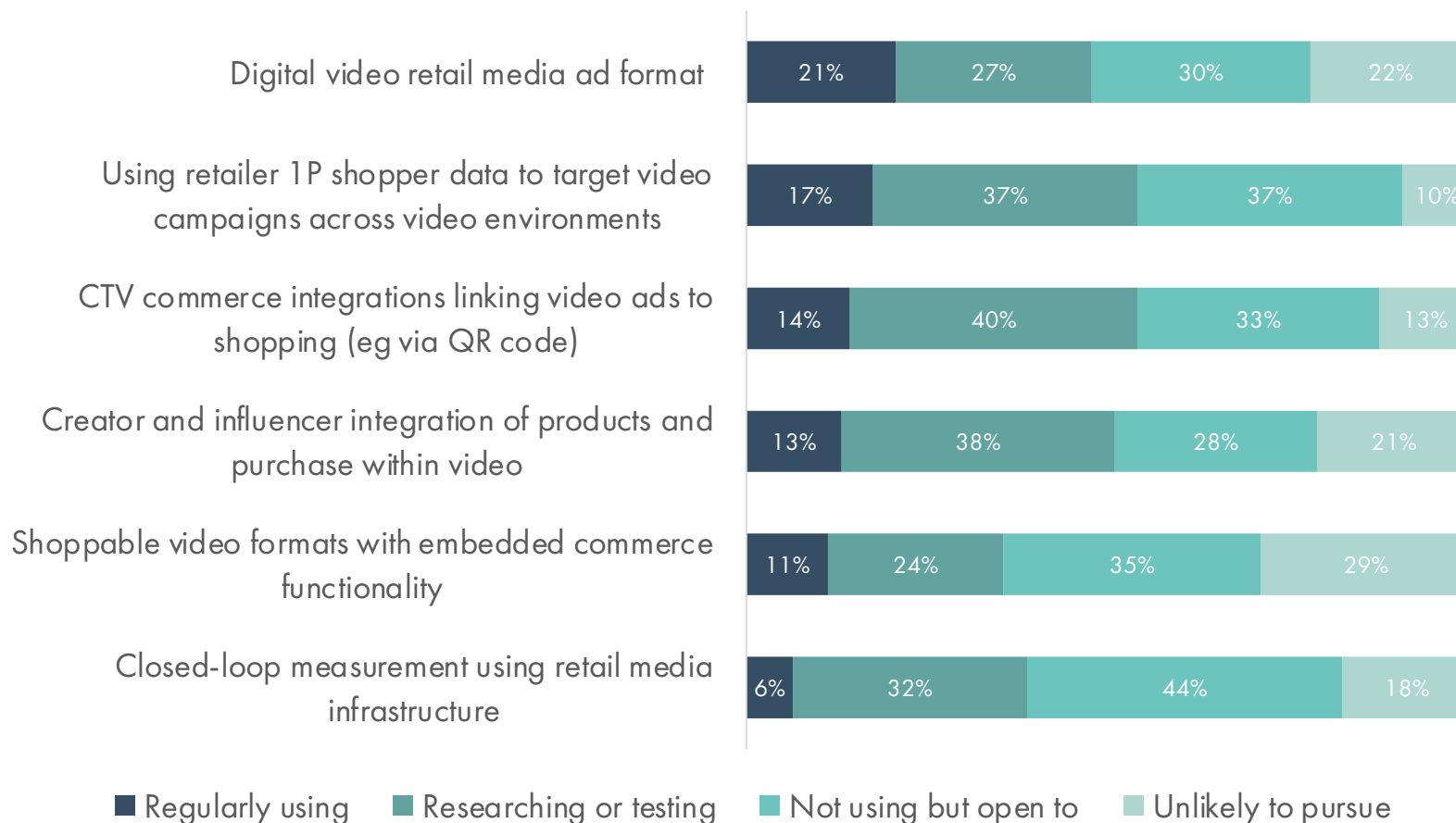
Retail and video are increasingly becoming connected.

54% of respondents are regularly using or testing retailer first party shopper data to target video campaigns across digital video environments.

54% are also regularly using or testing CTV commerce integrations linking video ads to shopping.

There is high interest but low current usage of closed-loop measurement connecting video impression to retail outcomes using retail media infrastructure.

## experience and interest in advertising opportunities that link video and retail or commerce media



Source; IAB Australia Video Advertising State of the Nation 2026 n=78

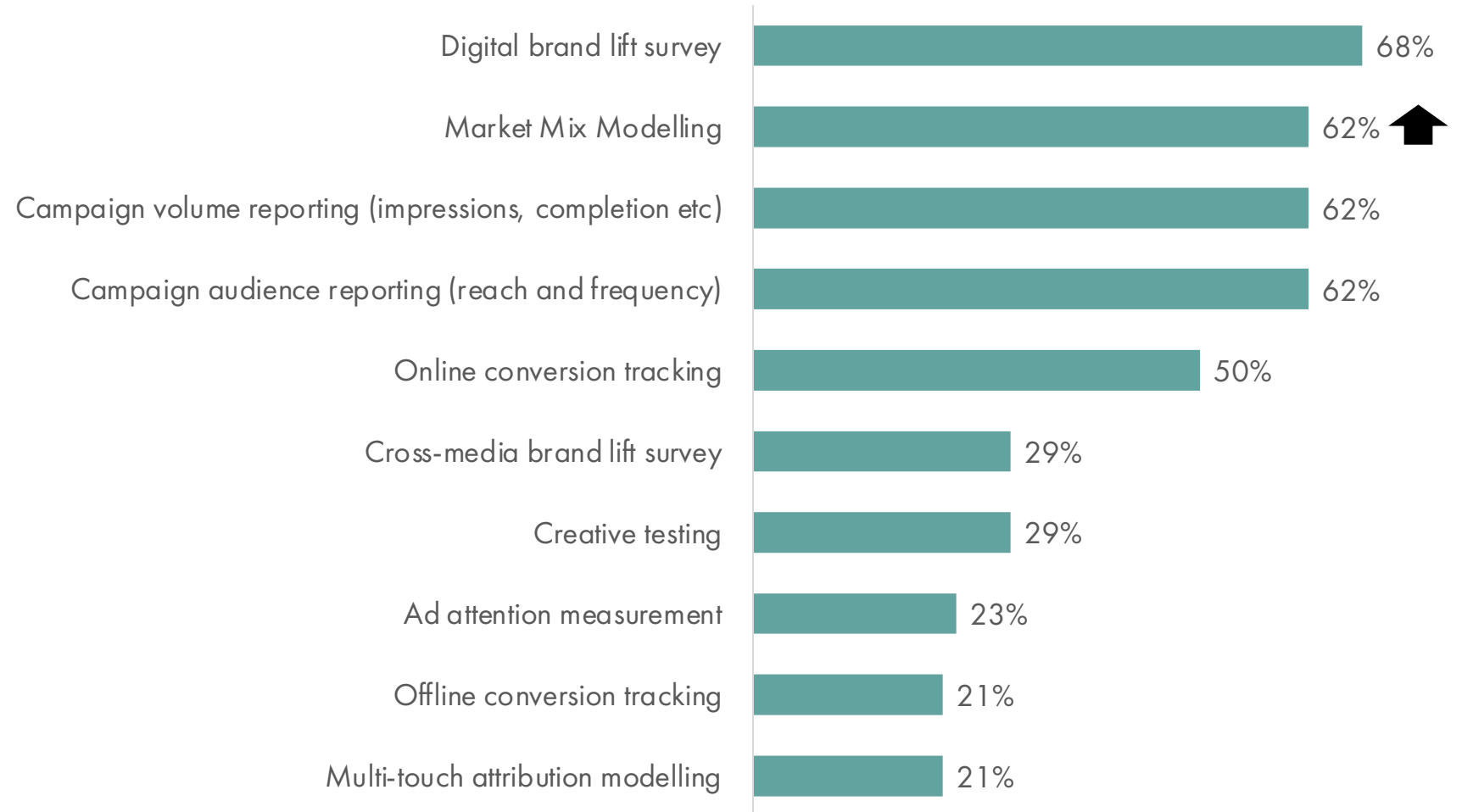
Q - What best describes your/ your clients interest in using the following advertising opportunities that link video and retail/commerce media? Please select one response in each row.

# ad effectiveness measurement tools

Digital brand lift studies continue to be the most used measurement tools to assess the effectiveness of digital video campaigns.

The importance of Market Mix Modelling has increased this year, compared to previous IAB Video State of the Nation surveys.

## measurement tools used by agencies and brand clients to assess the effectiveness of video ad investments



# key performance metrics

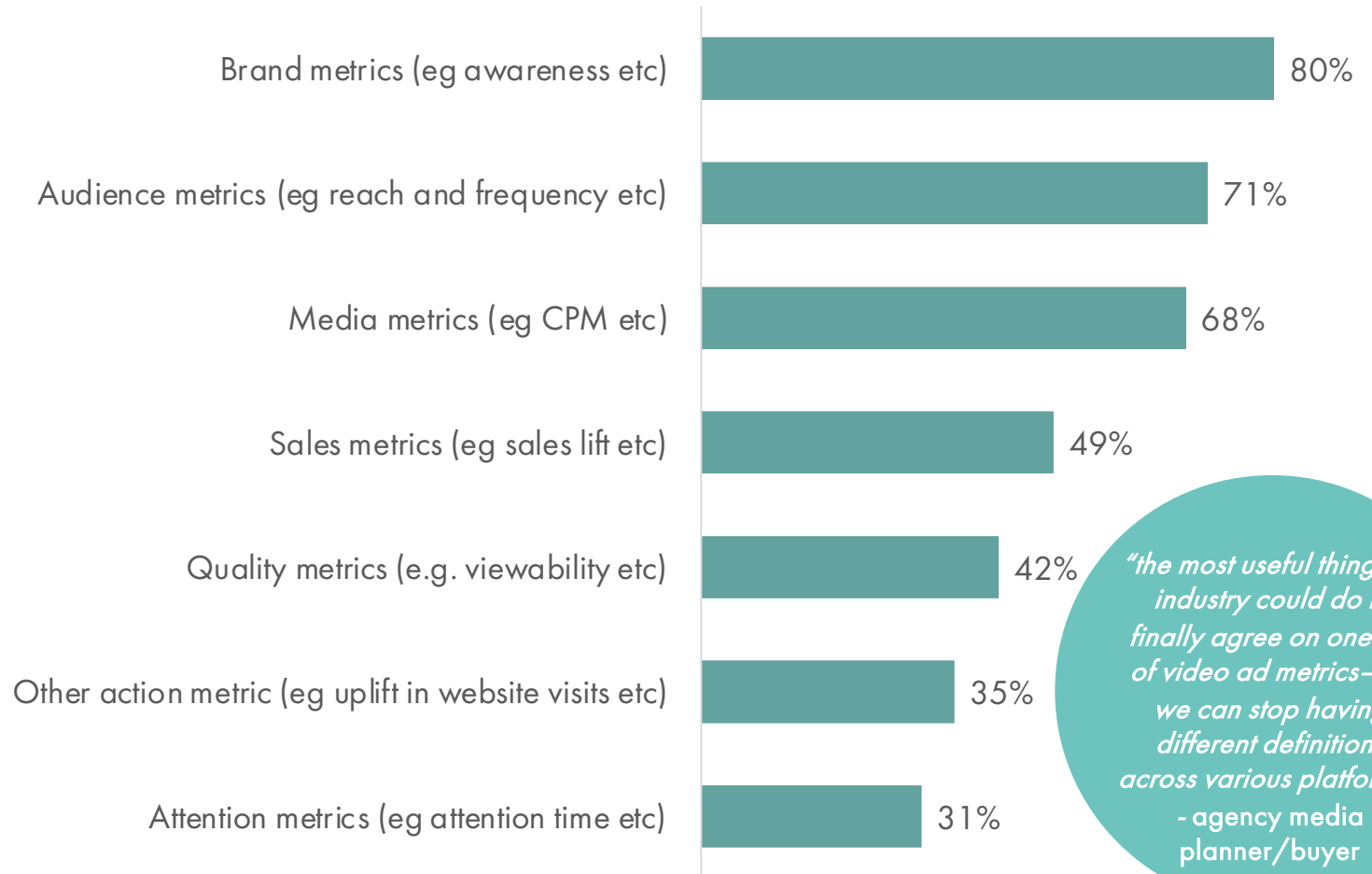
Brand metrics (such as brand awareness, perceptions, familiarity, purchase intent) are rated the most important to evaluate video advertising campaign success.

Audience metrics (such as reach and frequency) have been the most used key performance indicator for digital video advertising in previous surveys.

Despite sales and conversions being the most important goal for media investment this year, sales metrics are rated as important for evaluating campaign success by only 49% of video ad buyer respondents.

Respondents have highlighted the inconsistency in metrics definitions across platforms as a limitation on comparability.

## metrics rated as important by agencies to evaluate video advertising campaigns



*"the most useful thing the industry could do is finally agree on one set of video ad metrics—so we can stop having different definitions across various platforms"*  
- agency media planner/buyer

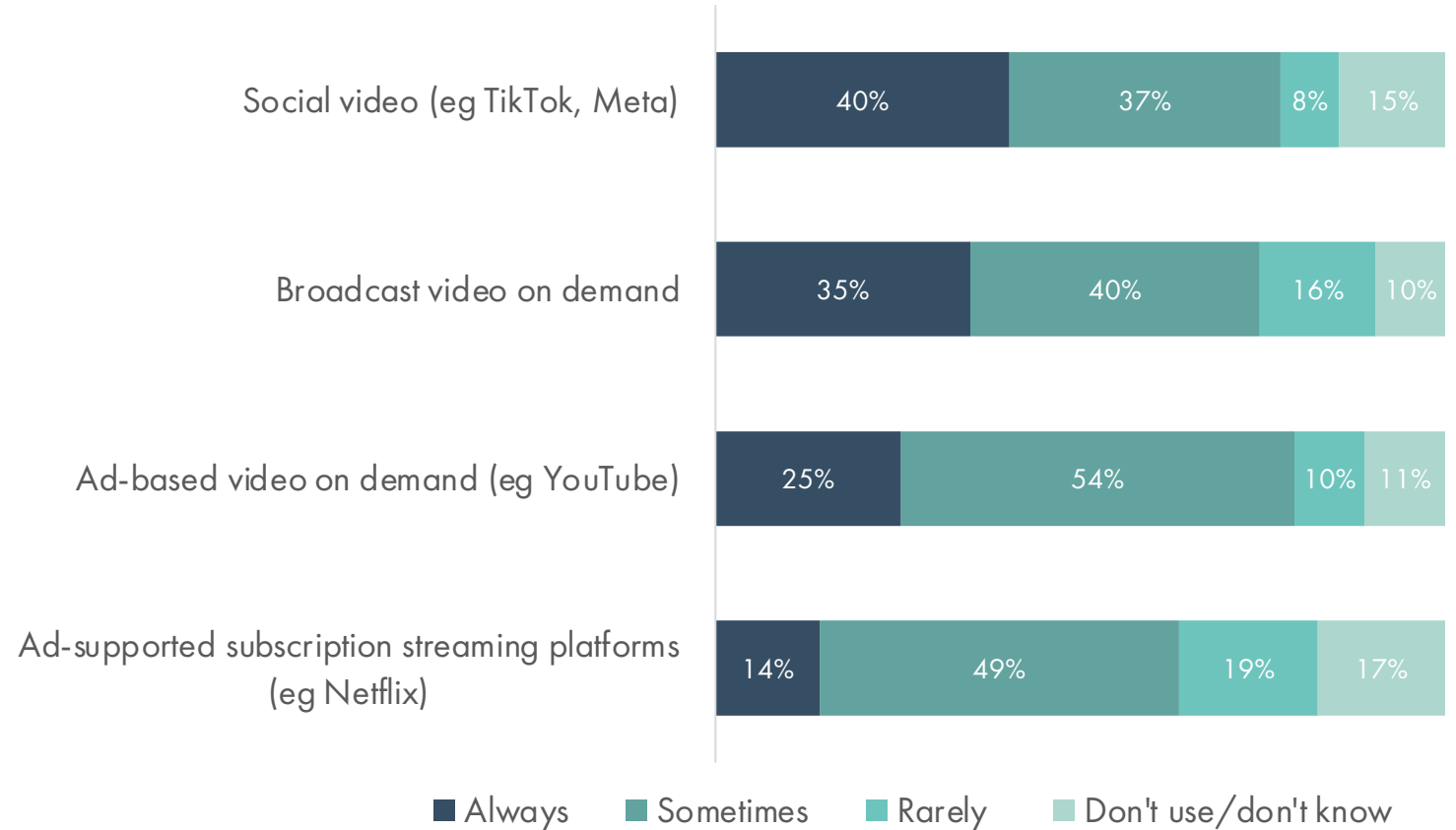
# data signals for outcomes measurement

Ad buyers are most consistently getting the data signals required for outcomes measurement (such as MMM and incrementality testing) to evaluate social video advertising.

79% are always/sometimes getting the data signals to evaluate ad-based video on demand (eg YouTube, Tubi), 77% for social video (eg TikTok, Meta), 75% for BVOD and 64% for ad-supported subscription streaming platforms (eg Netflix, Prime).

In last years' survey the quality, volume and granularity of data for MMM was considered a key measurement challenge.

## consistency in getting data signals required for outcomes measurement techniques (such as MMM, incrementality) to evaluate investment across different types of video advertising



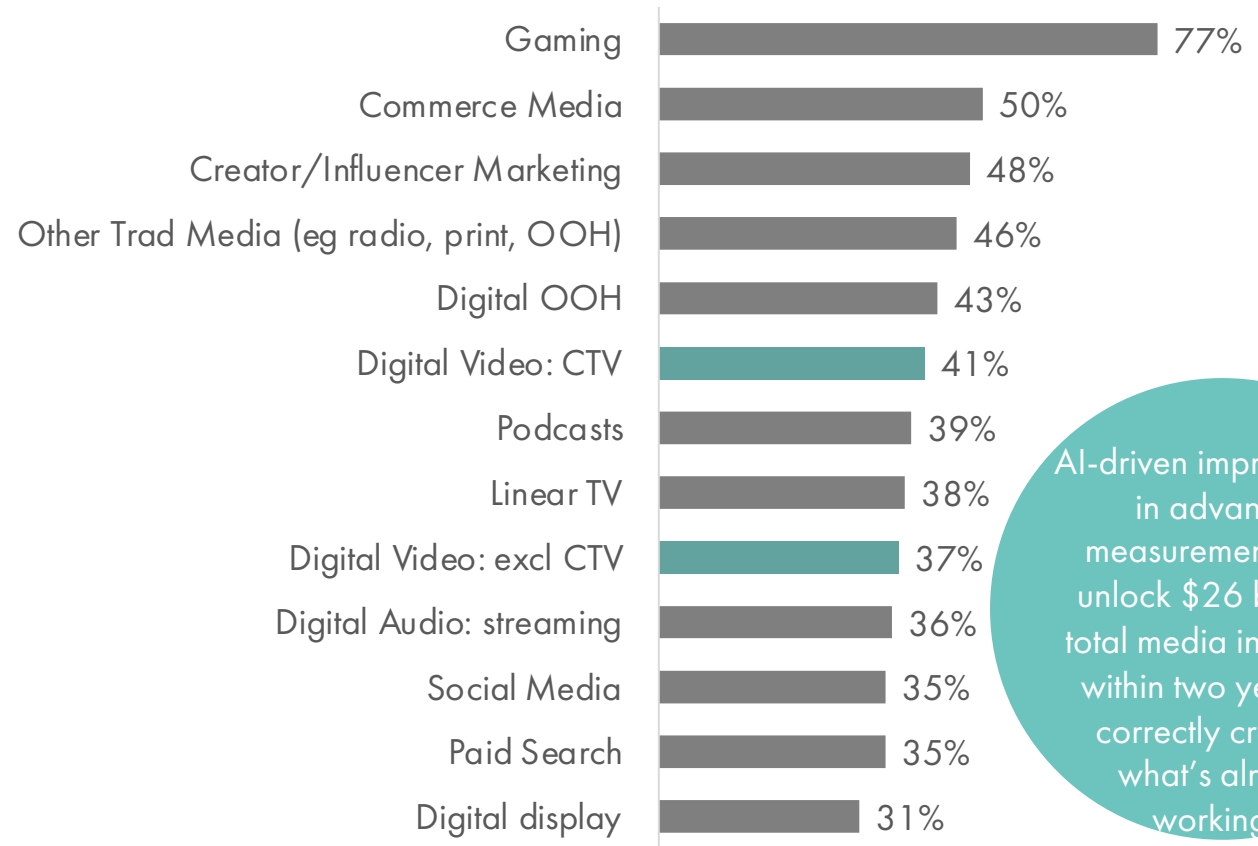
# unified, cross-platform measurement of campaign outcomes is still challenging

*"While video is planned and bought holistically, it's still assessed in silos, with each platform defining views, engagement and completion differently. This makes it difficult to compare or optimise investment with confidence." - Agency Director*

*"Video planning and assessment are fragmented by platform-specific metrics, inconsistent definitions of reach, frequency and viewability, and limited comparability across linear TV, BVOD, CTV, social and online video. This makes it hard to plan holistically, manage duplication, and understand true incremental reach and business impact." - Media Planner/Buyer*

*"The biggest thing the industry could do is be better aligned on how video is measured and reported across platforms. Right now it is too fragmented and inconsistent, which makes planning and assessing performance harder than it needs to be. Clearer standards around reach, attention and outcomes, with improved access to data, would make video easier to buy, easier to compare and more accountable overall." - Agency Director*

## IAB US State of Data 2026, % of US ad buyers who say channel is underrepresented in MMM\* (amongst MMM users with line of sight into each channel)



AI-driven improvements in advanced measurement could unlock \$26 billion in total media investment within two years, by correctly crediting what's already working.\*

Sources; IAB Australia Video Advertising State of the Nation 2026 n=78

Q - what do you think is the most useful thing the industry could do to address any challenges and improve the planning, buying and assessing of video advertising across all formats, platforms and devices?

\* Source; [IAB US State of Data 2026](#)

# AI opportunities

New forms of AI are expanding the use cases and ways agencies and advertisers can transform their ad planning, activation and analysis.

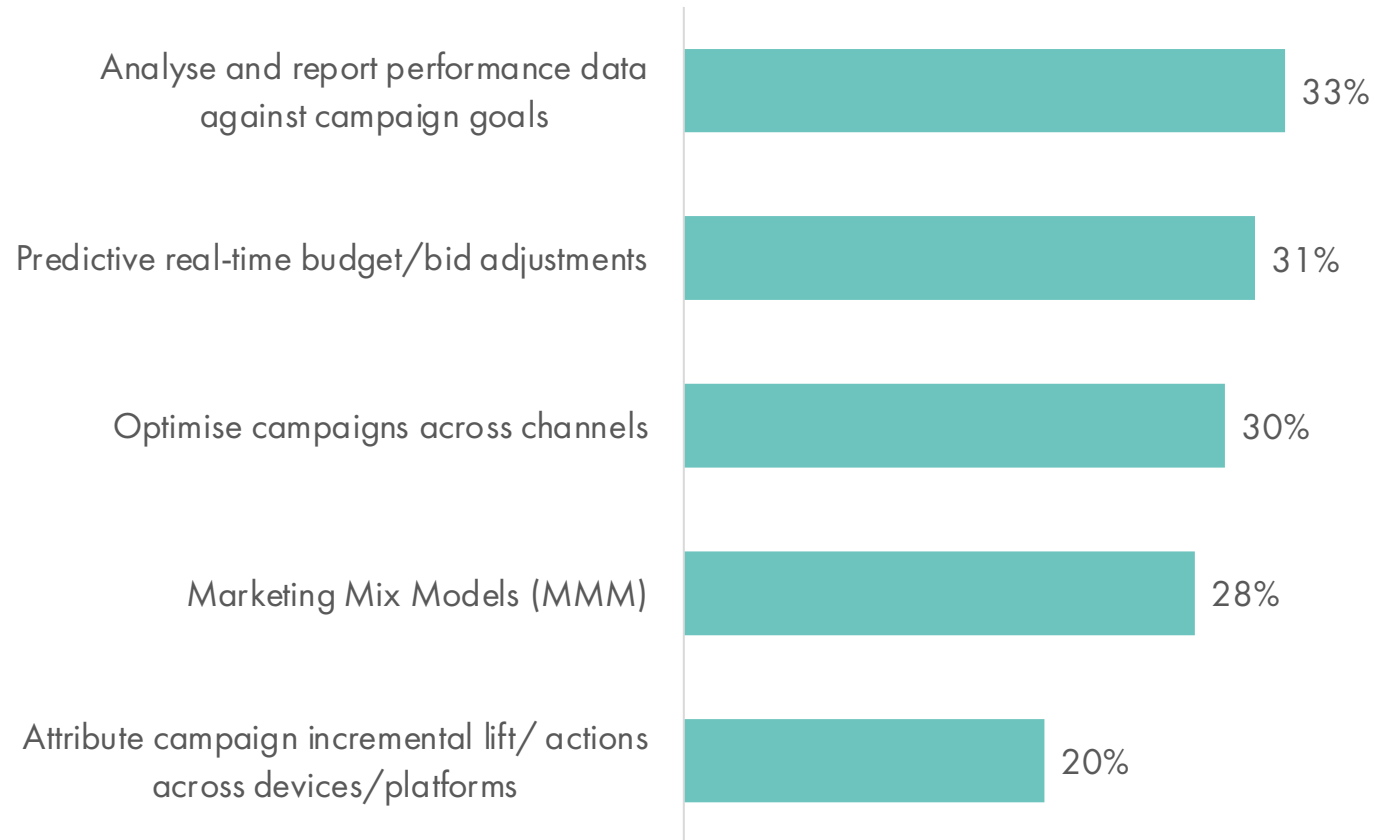
Agencies see some of the greatest opportunities for AI in the area of measurement including analysing and reporting performance data against campaign goals, Market Mix Modelling, attribution and incremental lift.

## IAB US Resource:

### AI-Powered Video Outcomes

is a series covering the impact of AI across the digital video ecosystem. The first edition breaks down how agentic AI works.

## greatest opportunities for agencies in incorporating AI into video planning, activation and analysis (select top 3)



# What can the industry do to improve the planning, buying and assessing of video advertising?

- Standardise cross-platform metrics and measurement across video environments
- Enhance data availability
- Provide greater transparency
- Simplify the trading ecosystem
- Understand opportunities for AI
- Experiment with the diverse range of formats and channels

# further resources

[a directory to video resources is available on the IAB Australia website](#)

