

State and Trends of Programmatic Buying 2026

Programmatic Advertising Working Group

How is programmatic buying developing in Finland?

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Foreword

Programmatic advertising continues to grow in Europe. According to IAB Europe's latest AdEx Benchmark 2025 report, **programmatic advertising grew by 10.9% in 2025**. Growth was driven in particular by programmatic video, which grew by 19.8%, while other programmatic display advertising declined by 1.2%. At the same time, programmatic buying is expanding beyond traditional display into new channels such as digital out-of-home, audio, CTV and retail media.

For the fifth time, IAB Finland conducted the State and Trends of Programmatic Buying 2026 survey to find out what the programmatic advertising market looks like in Finland. The study examines programmatic buying from the perspectives of advertisers, publishers, digital and media agencies, and technology providers.

Methodology

The survey received 98 responses. Respondents were recruited through IAB Finland's channels, so the sample is weighted towards professionals working in programmatic advertising. The results have not been weighted to reflect the structure of the Finnish business landscape and should therefore be treated as indicative.

In this study, we examine:

- how programmatic advertising is used in Finland
- what its key benefits and challenges are
- which trends and new channels are shaping the market
- how AI is affecting programmatic advertising.

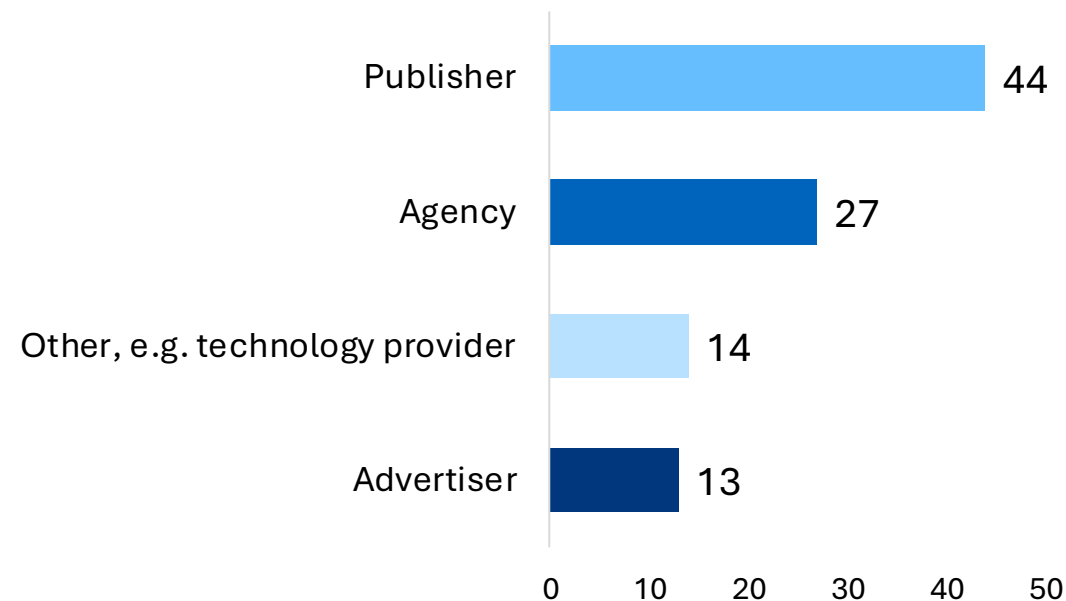
The study brings together the views of 98 industry professionals

- The study was conducted as an online survey in June–September 2026.
- Respondents were recruited through IAB Finland's member newsletter, social media channels and events. The sample is weighted towards IAB Finland's network and member companies and has not been weighted to reflect the structure of the Finnish business landscape.
- The study has been conducted annually since 2022. Results are compared with previous years where the questions and answer options are sufficiently comparable.
- IAB Finland's Programmatic Advertising Working Group was responsible for designing the questionnaire and reporting the results.

Agencies and publishers dominate the respondent base

- A total of 98 respondents took part in the survey.
- In this study, programmatic advertising refers to the automated buying and selling of digital ad inventory through technology platforms.
- The scope includes, for example, display, video, native, audio, pDOOH, CTV and retail media.
- Buying within social media and search advertising platforms is excluded from the study.

Respondents (n=98)



Five observations on the programmatic market in 2026



The importance of programmatic has grown

In most respondent organisations, the importance of programmatic has remained stable or grown over the past year. Only a small share of respondents report that it has decreased.



Programmatic is expanding into new environments

Display and video remain the foundation of programmatic, but buying is rapidly expanding into audio, pDOOH and CTV. The next wave of growth is expected especially from retail media and pDOOH.



Efficiency and data are at the core of programmatic

The key benefits of programmatic are speed of buying, the use of data and targeting, and optimisation and algorithms.



AI is moving from talk to practice

AI is used especially in reporting, analysis, planning and optimisation. The next step is even deeper process automation.



Gambling market opening brings new demand

The opening of gambling advertising is expected to grow the programmatic market, increase demand for inventory and price levels, and bring in new advertisers. The ultimate scale of the impact will depend largely on future regulation, market practices and the rules for responsible advertising.

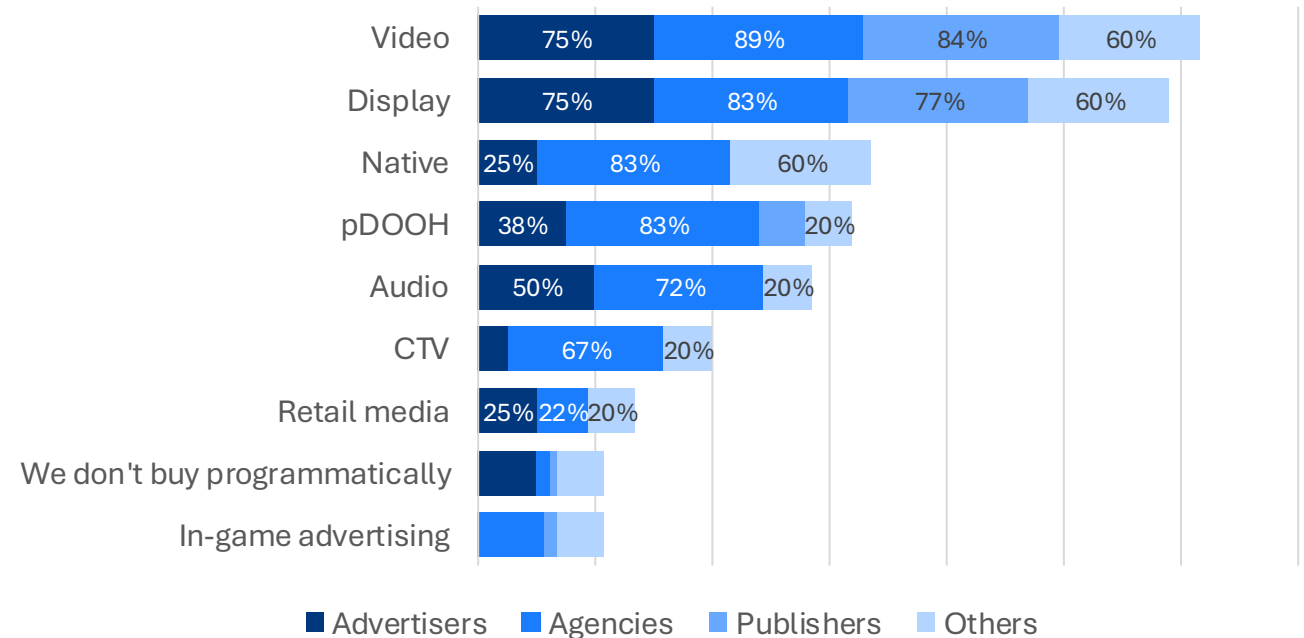
Section I

Volume of programmatic buying in Finland

Programmatic is expanding from display and video into new channels

- Video and display remain the most commonly bought and sold programmatic ad formats.
- However, programmatic buying already extends widely to audio, pDOOH, native, CTV and retail media.
- Every respondent group also includes a small number of respondents whose companies do not buy or sell programmatically at all.

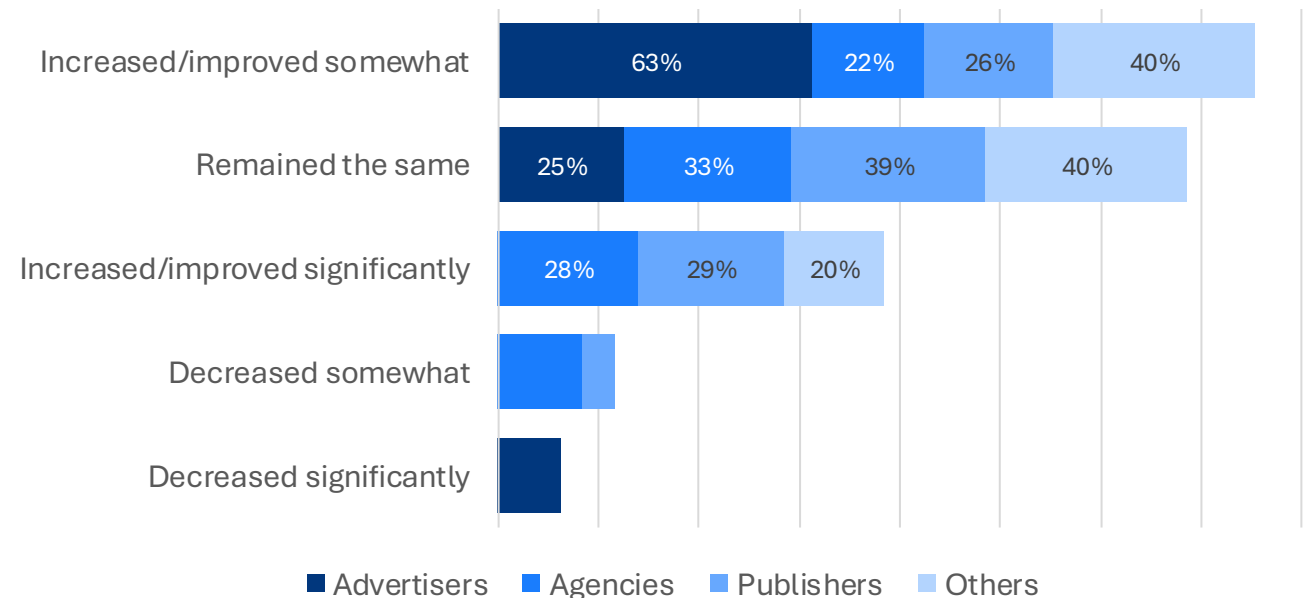
Question: Which advertising solutions does your company buy/sell programmatically?
(select all that apply)



The importance of programmatic has remained stable or grown

- The results point to programmatic gaining importance in respondents' organisations.
- Only a small share of respondents report that the importance of programmatic has declined over the past year.
- Among advertisers, the largest share report that programmatic has grown in importance in their own company.

Question: In your opinion, has the importance of programmatic buying in your company changed over the past year?



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The programmatic market has started to grow, and we are seeing it in increased spend as well.

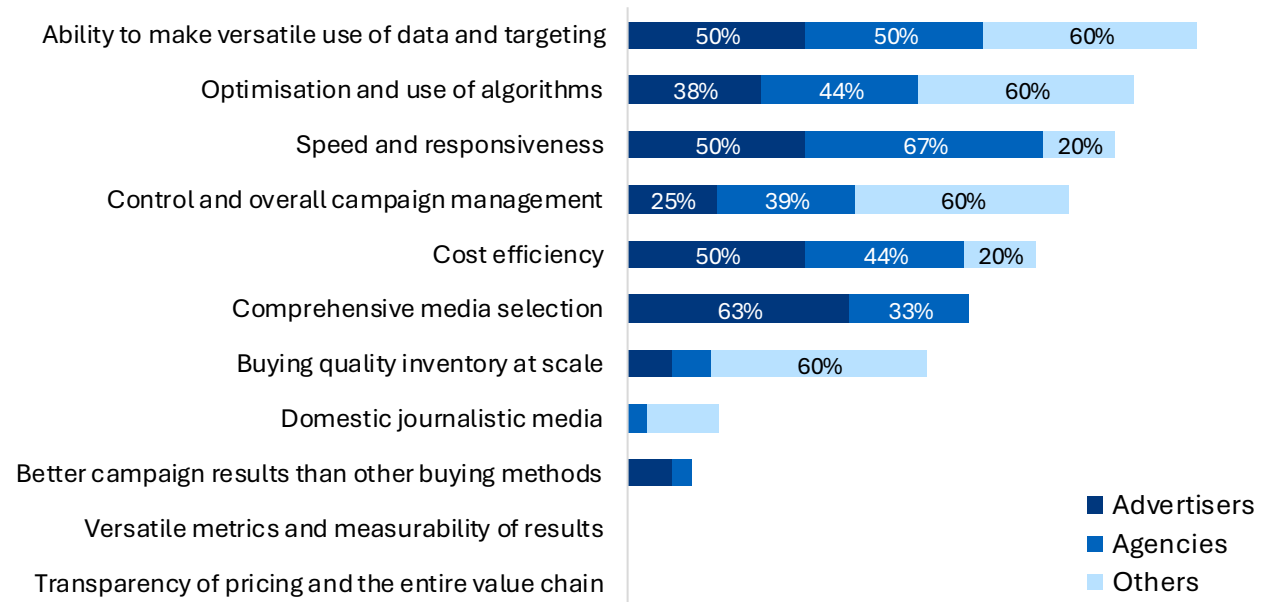
Section II

Benefits and challenges of programmatic buying

Data, optimisation and speed are the key benefits of programmatic

- Versatile use of data and targeting has been the buy side's most important perceived benefit since 2024.
- Speed and responsiveness made the top three for the first time and is number one among agencies (67%).
- Control and overall campaign management dropped out of the top three.
- Advertisers emphasised a comprehensive media selection (63 %)
- Not a single buy-side respondent chose pricing transparency or versatile metrics and measurability of results as a benefit.

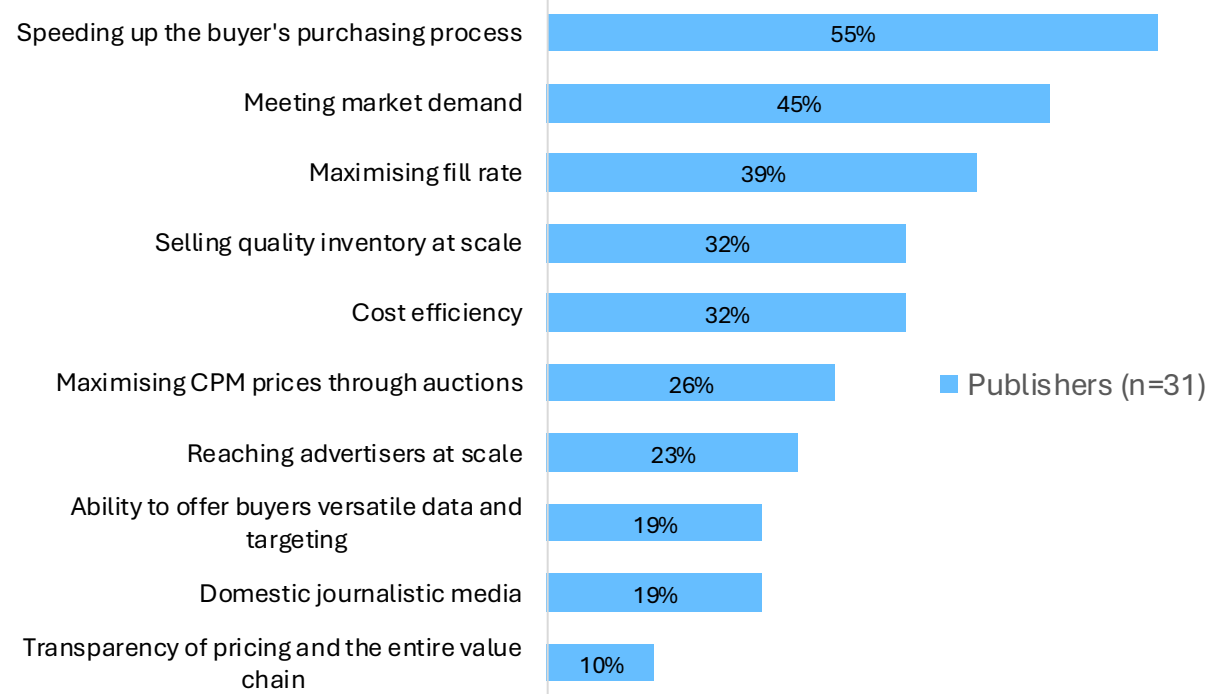
Question: In your opinion, what are the benefits of programmatic? (Agencies, advertisers & others) Select the three most important.



Speed now unites buyers' and publishers' experiences of programmatic

- For the third year running, publishers' top perceived benefit is speeding up the buyer's purchasing process.
- Agencies' top benefit this year is speed and responsiveness (67%). For the first time, publishers and agencies rank the same thing first, from two different angles.
- Meeting market demand rose from 29% to 45% among publishers.
- Maximising CPM prices through auctions rose from 17% to 26%.
- 19% of publishers ranked domestic journalistic media in their top three; on the buy side, only 0–6%.

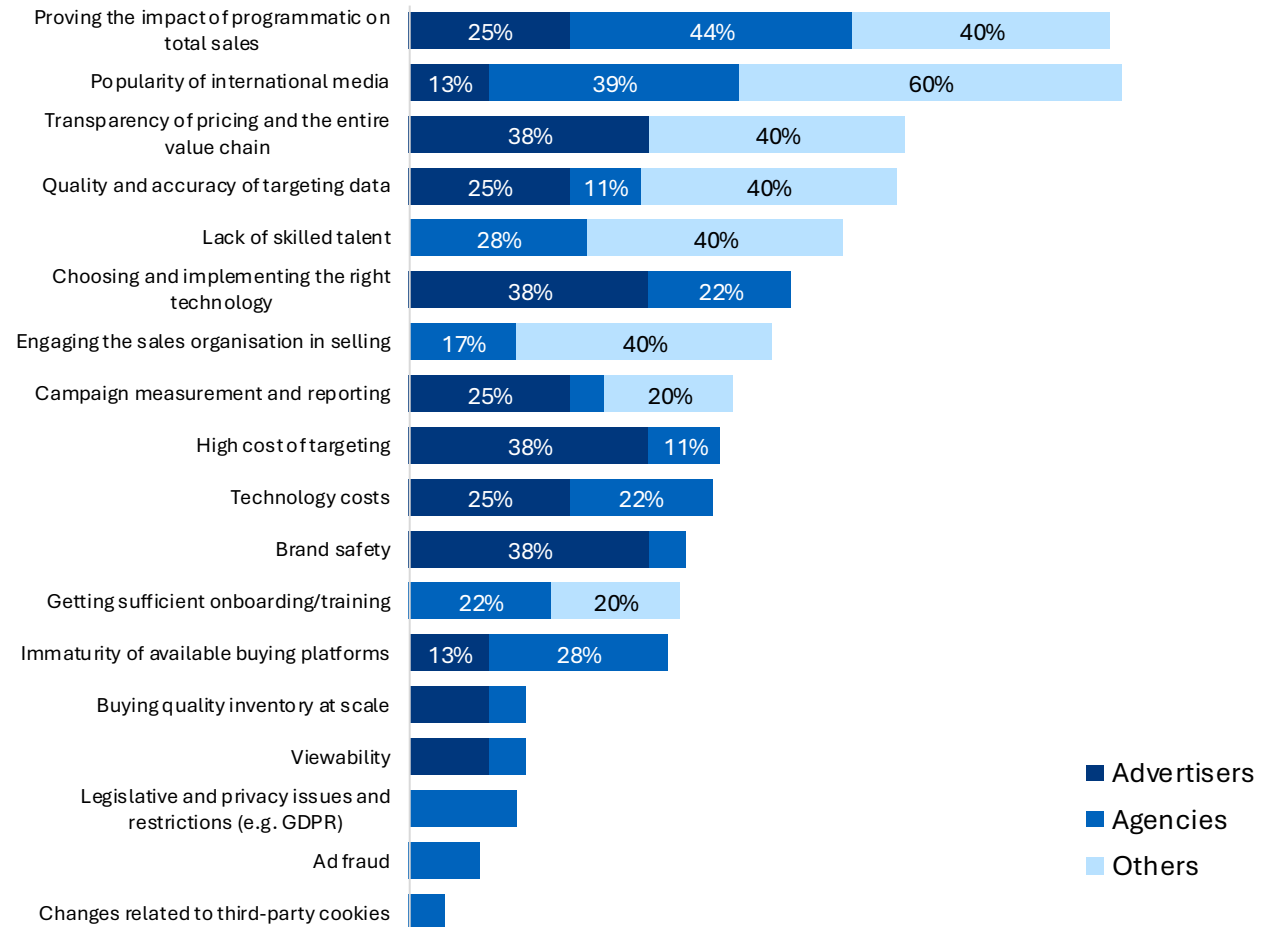
Question: In your opinion, what are the benefits of programmatic? (Publishers, n=31)
Select the three most important.



Proving impact emerges as the key challenge for programmatic

- Proving the impact of programmatic on total sales is agencies' biggest challenge (44%).
- The popularity of international media, a new answer option, immediately ranked among the key challenges.
- Lack of skilled talent has become less significant as a buy-side challenge, even though it topped the list in 2024 and 2025.

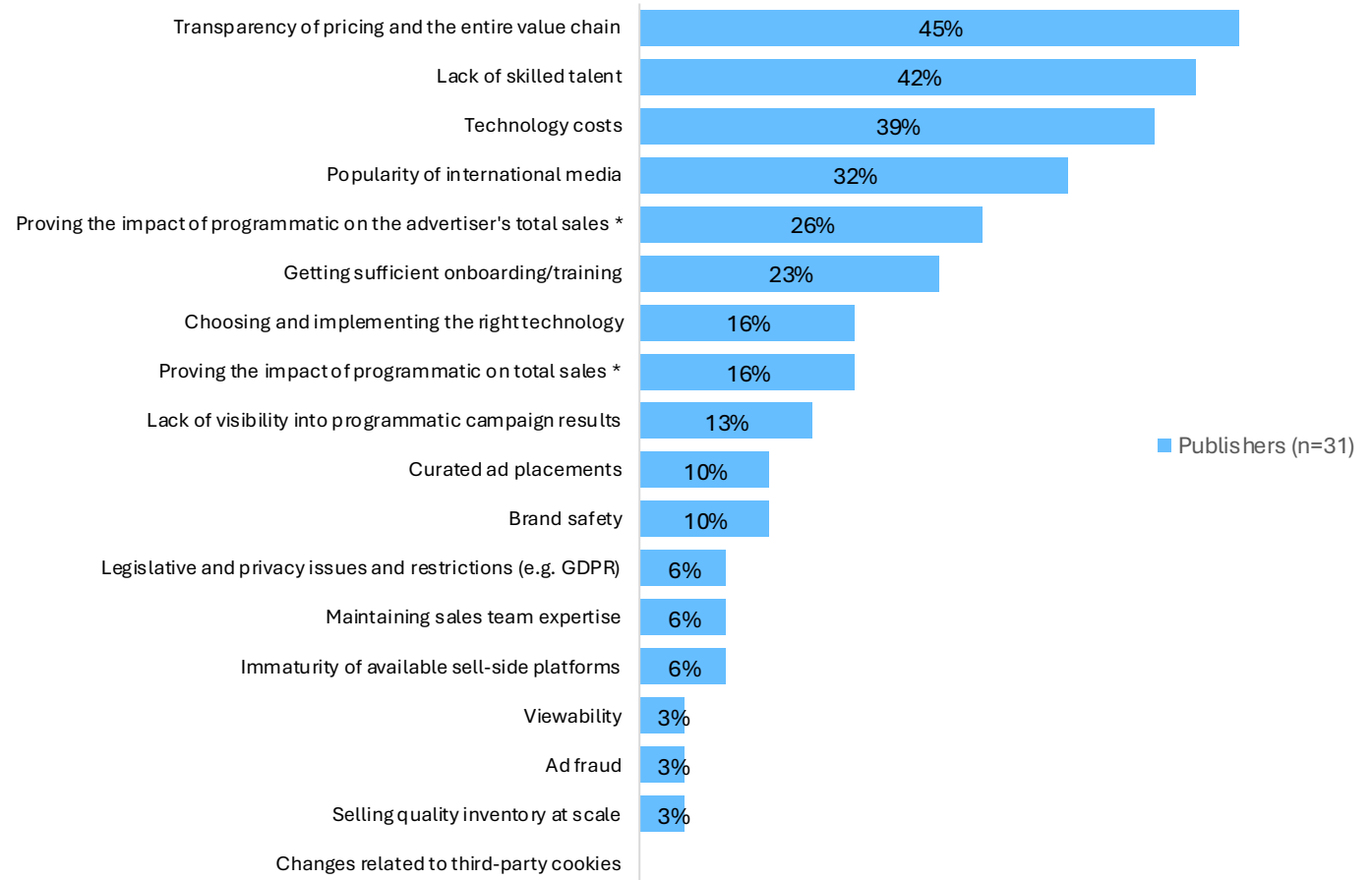
Question: In your opinion, what are the challenges of programmatic? (Agencies, advertisers & others) Select the three most important.



Value chain transparency is publishers' biggest challenge

- Transparency of pricing and the entire value chain has risen as a publisher challenge for four consecutive years.
- Lack of skilled talent remains a significant challenge.
- Technology costs rose from 13% to 39%.
- The popularity of international media, a new answer option, reached 32%.

Question: In your opinion, what are the challenges of programmatic? (Publishers, n=31) Select the three most important.



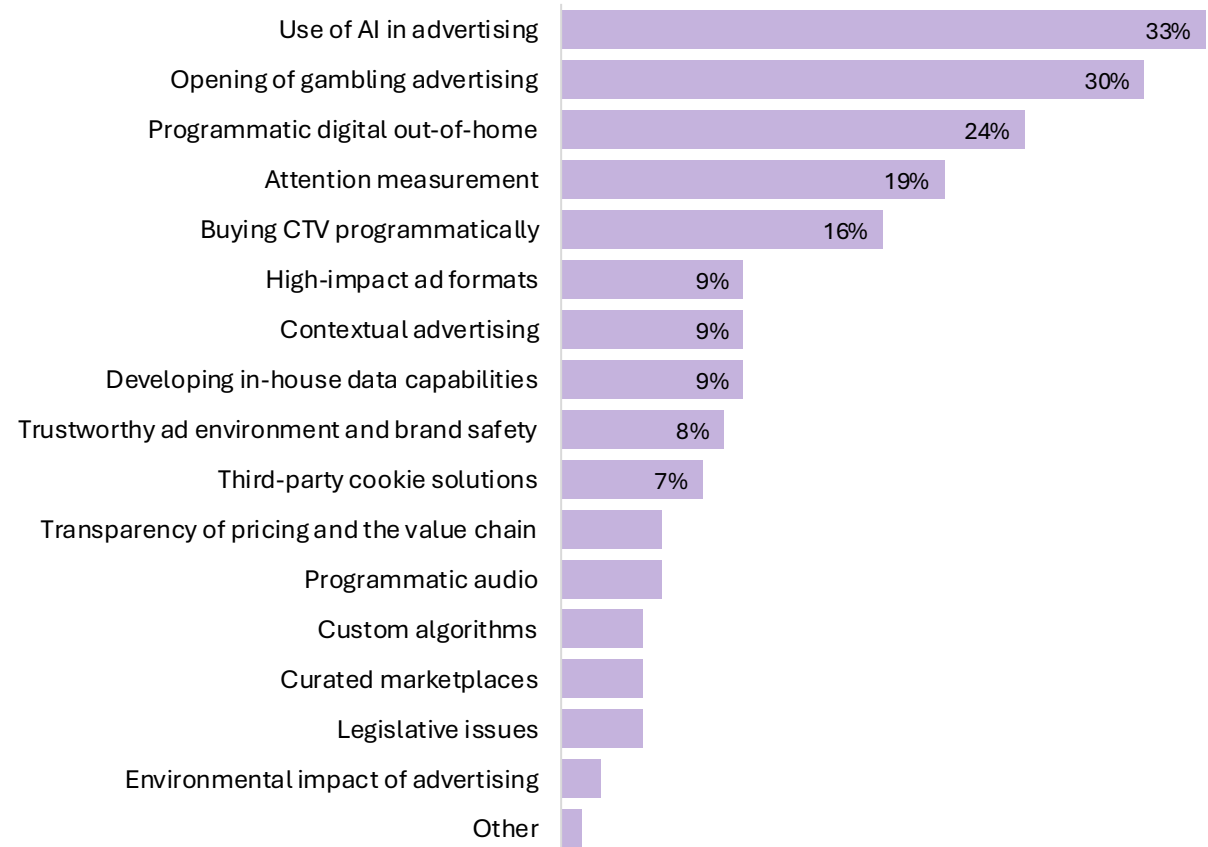
Section III

Programmatic buying trends

AI becomes the most interesting trend in programmatic

- AI is already widely used in practical work, especially in reporting, analysis and optimisation. It exceeded 30% in all groups except tech companies.
- The opening of the gambling market stands out as a strong new phenomenon. It rose almost level with AI among the most interesting trends, reflecting how topical the subject is in the programmatic market.
- Programmatic buying is expanding into new channels. DOOH, attention and CTV continued to stand out as key growth areas, although their importance varies by respondent group. Alongside AI, the same trends also ranked at the top last year.

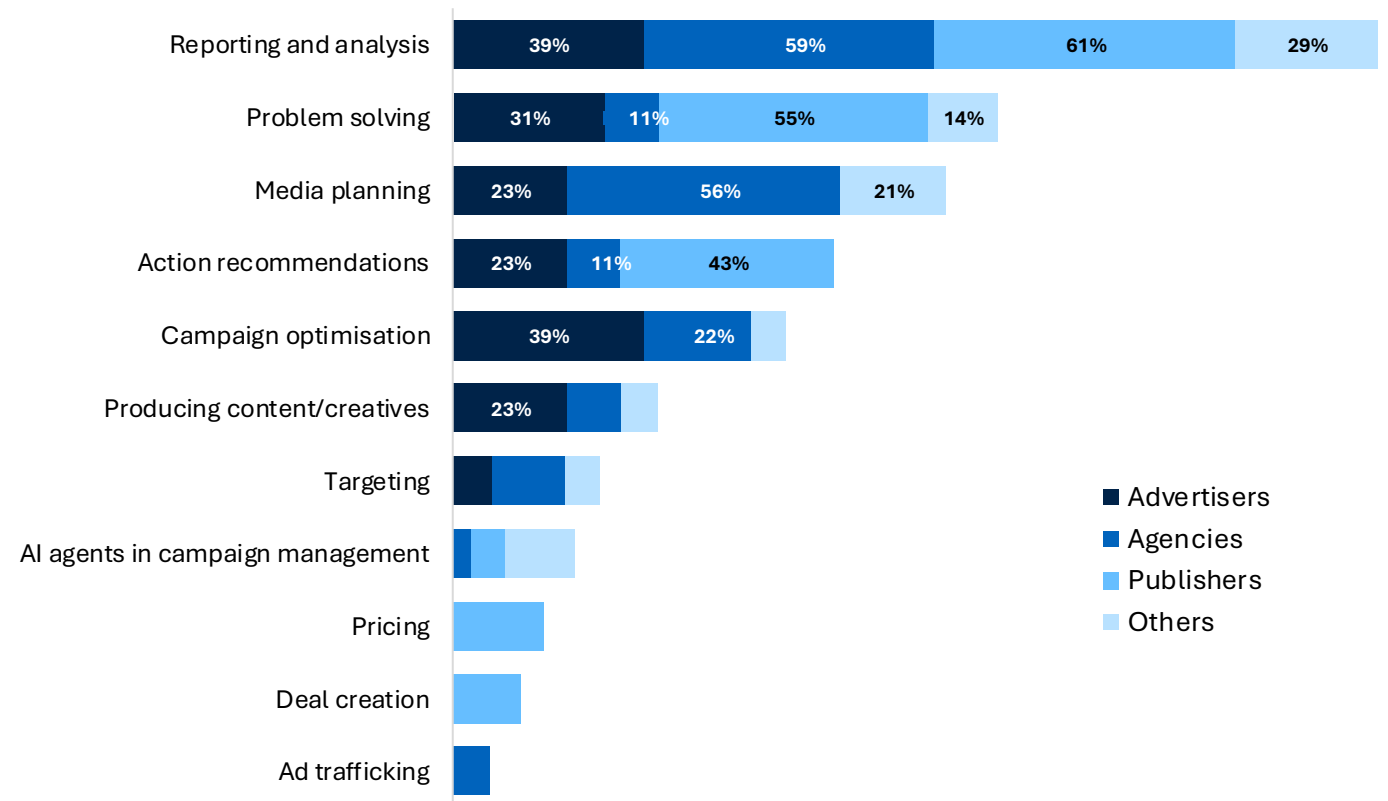
Question: In your opinion, what are currently the most interesting trends in programmatic? Select the three most important themes.



AI has moved from experiments to an everyday programmatic tool

- AI has moved from experiments to a practical tool, especially in analytics and optimisation.
- Use cases vary by role: publishers focus on operational efficiency, agencies on planning and advertisers on improving campaign performance.
- Wider adoption of AI agents is still ahead.
- AI has become part of everyday work. Compared with 2025, use appears to have shifted from individual use cases more broadly to analysis, planning and optimisation.

Question: What do you use AI for in programmatic advertising? Select the three most important



AI agents are taking programmatic towards more real-time and automated ways of working

Question: *What changes do you think AI agents will bring to programmatic advertising over the next 2 years? Summary of open-ended responses.*

- 1. Automation of work and more efficient processes:** AI agents are expected to reduce manual work, speed up campaign management and simplify processes.
- 2. Faster optimisation and real-time decision-making:** Responses emphasise faster optimisation, more effective responsiveness and quicker solutions.
- 3. Real-time management of inventory, buying and creative:** Respondents mentioned optimising buying based on inventory and performance, identifying under-delivery and real-time creative optimisation.
- 4. Planning, reporting and overall management:** AI agents are expected to speed up planning, reporting and analysis and make it easier to manage larger entities.
- 5. New opportunities, solutions and centralised management:** Responses mentioned cross-platform management, new advertising and testing opportunities, and the ability to manage buying platforms centrally.
- 6. Changing operating models, business benefits and risks:** AI agents are expected to change buying models and bring efficiency gains, but also to raise concerns about transparency.

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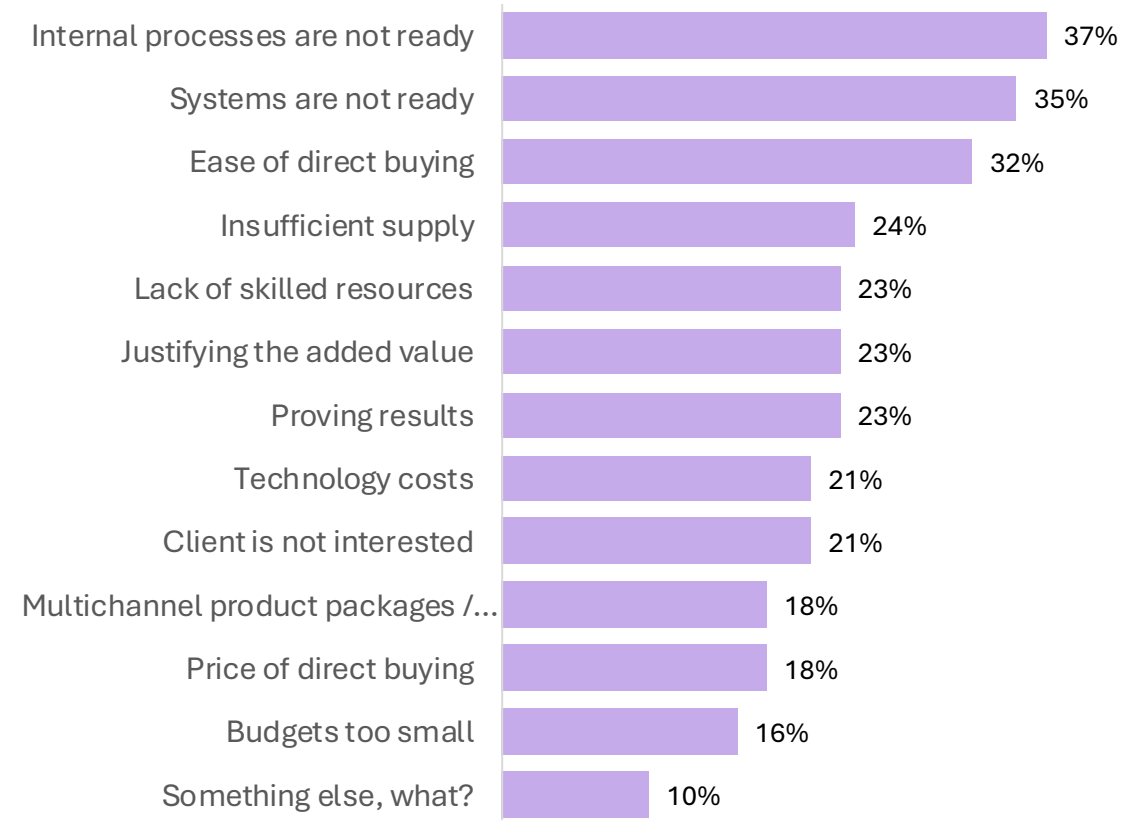
Media buying will become even more automated. Optimisation will be done more often and in faster cycles. Planning, reporting and analysis will speed up.

Growth in new channels is held back by internal processes and systems

- Internal processes are seen as the biggest barrier (37%) to programmatic expanding into new channels, followed by system capabilities (35%). Ease of direct buying ranks third (32%).
- Other significant reasons: insufficient supply (24%), plus lack of skilled resources, justifying added value and proving results, which share 5th–7th place (23%). Technology costs (21%) follow closely.
- **Compared with 2025:** internal processes have clearly become the top barrier, while justifying added value and proving results have dropped to mid-table (23%).

Note: unlike previously, results are presented without a breakdown by respondent group, so the comparison with 2025 is indicative.

Question: What do you see as the biggest challenge to buying in new channels (DOOH, audio, retail, CTV) shifting to programmatic? Select the three most important.

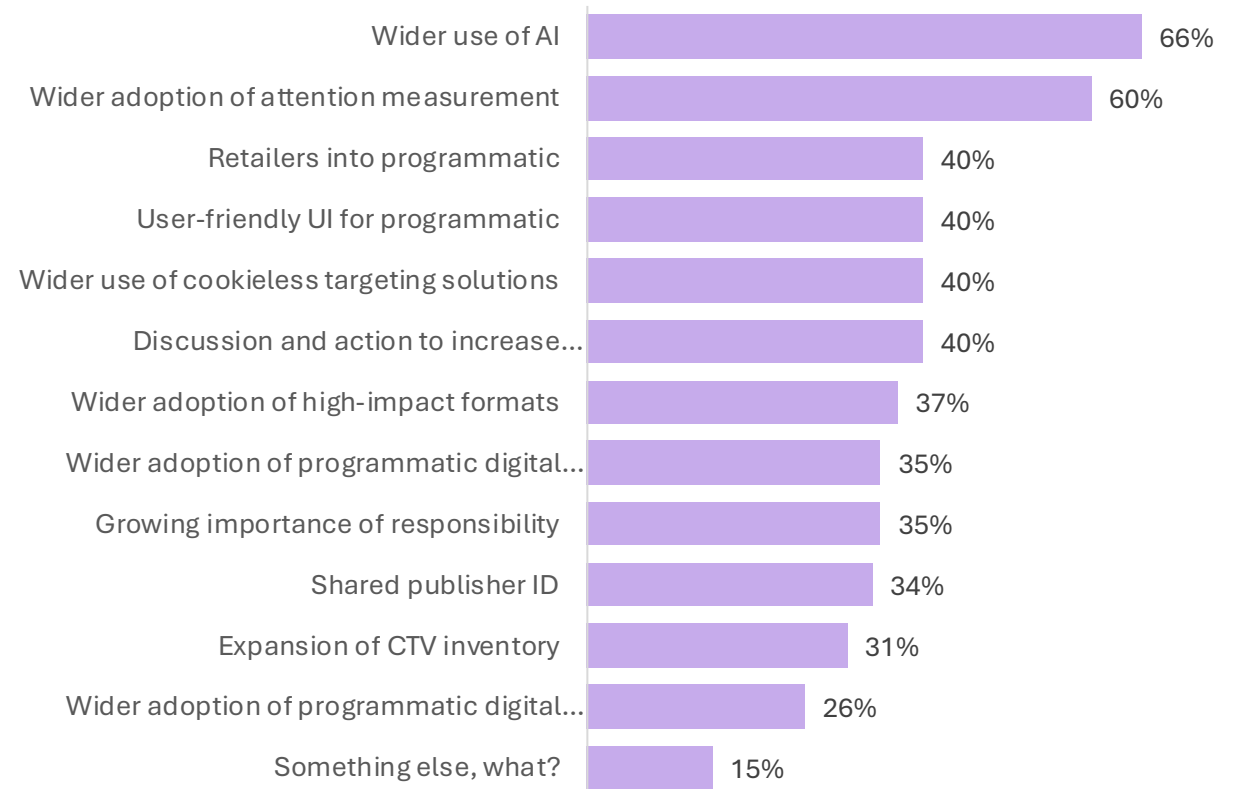


Next, the market expects more AI and better measurement

- Wider use of AI (66%) and wider adoption of attention measurement (60%) clearly top the list.
- The next group includes bringing retailers into programmatic, a more user-friendly interface, cookieless targeting solutions and greater appreciation of domestic journalistic content.
- High-impact formats have become less important as a development wish since last year.
- The importance of a shared publisher ID continues to decline.

Note: unlike previously, results are presented without a breakdown by respondent group, so the comparison with 2025 is indicative.

Question: What developments in programmatic buying would you like to see in the Finnish market over the coming year?



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Gambling advertising is likely to create growth in programmatic advertising.

Impact of the opening of the gambling market

*Open question: How do you think the liberalisation of gambling advertising, taking effect on 1 July 2027, will affect the programmatic advertising market in Finland?
Summary of open-ended responses.*

- 1. The liberalisation of gambling advertising will grow the programmatic market:** Respondents believe the programmatic market will grow as new gambling operators enter. Growth is expected especially in programmatic buying, which international operators use extensively.
- 2. Rising CPM prices and tougher competition:** Responses noted that competition for ad inventory will increase and programmatic prices will rise. Respondents raised the sufficiency of inventory, upward price pressure and the opportunity to monetise inventory that has previously been harder to sell.
- 3. The impact will likely be strongest right as the market opens:** Many respondents expect the market opening to create an initial spike in demand, raising ad volumes and prices. After that, the market is expected to level off at a new, higher level than today.
- 4. Publishers' position will strengthen:** Responses emphasise the view that publishers will benefit the most. Demand for PMP deals, direct buying and premium inventory is expected to grow. However, some respondents see a risk of investment flowing to international platforms.
- 5. Regulation, responsibility and implementation raise questions:** Responses highlighted uncertainty about future legislation: what may be advertised, in which environments advertising is permitted and how licensed operators are identified. Discussion is also expected on responsibility, brand safety solutions, ad fraud and possible circumvention of regulation.

2025 vs. 2026: programmatic enters its next phase of growth

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|---|--|--|
|  | Growth expectations are strengthening | In most respondent organisations, the importance of programmatic has remained stable or grown, and publishers and agencies also expect growth in the coming year. |
|  | New channels are moving from talk to practice | Alongside display and video, audio, pDOOH and CTV are already part of programmatic buying. The next wave of growth is expected especially from retail media and pDOOH. |
|  | Speed is now the standout benefit | Alongside data and targeting, speed, responsiveness and automated optimisation are rising. |
|  | Challenges are shifting towards business impact | The talent shortage has become less significant on the buy side, while proving impact, competition from international media and value chain transparency are gaining prominence. |
|  | AI has become an everyday tool | AI is already used for reporting, analysis, planning and optimisation. The next phase is even deeper process automation. |

Study team

Ville Ahola – Adnami

Maarit Toivonen – Alma Media

Pasi Raassina – Bauer Media Outdoor

Anni Lintula – IAB Finland

Tiina Sihvonen – Otavamedia

Miia Salmi – Sanoma

Comments on the results from the study team



Miia Salmi
Sanoma

"The opening of gambling advertising is expected to give programmatic advertising a significant boost. New players entering the market are expected to increase demand for premium inventory, for example, and affect CPM prices. The impact is expected to be strongest in the early stages right after the market opens, after which the market will likely find a new balance.

The topic also rightly raises some concern. Regulation, licensing practices and responsible advertising requirements will determine the long-term effects of the reform."



Ville Ahola
Adnami

"It will be interesting to see how AI and growing automation affect programmatic buying.

Time will tell whether the complex becomes simpler. If it does, the focus will shift from technical challenges to commercial choices. Then the benefits of programmatic in algorithmic optimisation, data, control and speed will play an even bigger role."

Comments on the results from the study team



Maarit Toivonen
Alma Media

"Programmatic advertising in Finland has finally turned to growth. The industry's biggest trends lay the groundwork for sensible development: a focus on advertising attention and the improvements brought by AI will continue to grow the market. An intriguing detail in the responses is that both the buy side and the sell side see the popularity of international media as one of the industry's biggest challenges. This shift in thinking may ultimately bring positive momentum to the Finnish market."



Pasi Raassina
Bauer Media Outdoor

"I have been involved in IAB's programmatic study for years. From the start, the study has given us faith in the growth of the programmatic market in Finland too, and this year that faith has materialised as actual market growth. This is a good basis for the years ahead, and I believe programmatic growth will rely increasingly on an omnichannel approach and the opportunities created by AI capabilities."

Comments on the results from the study team



Tiina Sihvonen
Otavamedia

"AI no longer appears as just one trend among others. It is already visible in how programmatic is done in practice.

Optimisation, reporting, analytics and planning stood out strongly, but at the same time the responses emphasised the idea that an ever-larger share of the work is becoming automated and happening in real time."



Anni Lintula
IAB Finland

"Programmatic advertising in Finland is on the threshold of a new phase of growth. Based on the survey, confidence in its potential is strong, but growth will not happen by itself.

Programmatic is developing rapidly in Europe, and Finland must keep pace with the change. There are many growth opportunities, but realising them requires technology, supply, skills and operating models to develop in the same direction."

Thank you!

IAB Finland is an expert community for digital advertising and marketing that brings people and companies together to develop the Finnish digital market.

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