A woman with dark hair and glasses is looking directly at the camera. Her eyes are framed by the reflection of a digital interface with blue and green colors. The background is dark, suggesting a low-light environment or a night scene.

Olyzon

# CTV spend unlocks in 2026: Key innovations marketers say they need to scale



WHITE PAPER - 2026  
ENGLISH VERSION

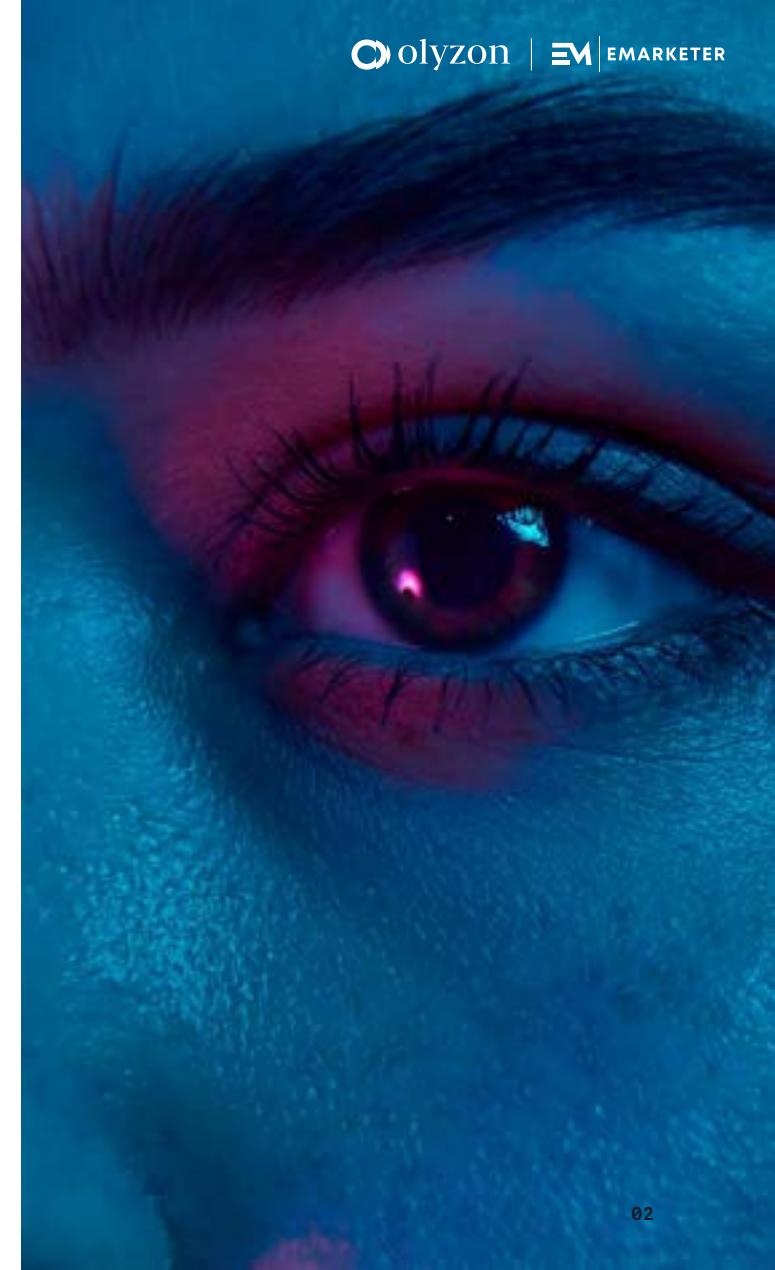
IN PARTNERSHIP WITH



# As connected TV (CTV) enters a new phase of maturity, marketers are shifting from experimentation to acceleration.

New data from EMARKETER and Olyzon reveals where confidence is rising, what's holding budgets back, and how program-level transparency, cross-platform frequency control, and agentic orchestration could unlock billions more in CTV investment.

Based on a survey of 124 CTV ad buyers, this report looks at how the channel is evolving and why many marketers feel excited and frustrated at the same time. The insights reveal where confidence is growing, where uncertainty still lingers, and how these dynamics are shaping the pace of CTV investment.



# Key survey findings:

01

## CTV's growth potential is underrealized.

Only 14.5% of marketers have fully shifted their linear TV budgets to CTV, with nearly half planning to redirect 5% to 30% of their linear spend to the channel in 2026. But if key challenges were solved, nearly 80% of marketers say they would increase their CTV budget by at least 11%.

02

## Marketers struggle to trust CTV performance.

Over a third (37.9%) cite the inability to prove incremental return on ad spend (ROAS) as a top barrier to greater investment and nearly half (48.4%) lack confidence that their impressions reach unique audiences, highlighting persistent transparency and deduplication gaps.

03

## Attention is uncertain and hard to measure.

Nearly a third (31.5%) of marketers aren't confident their CTV ads capture viewer attention during ad breaks. While standard 15- and 30-second spots remain the preferred format, marketers are **exploring home screen placements and pause ads for more reliable attention signals**.

04

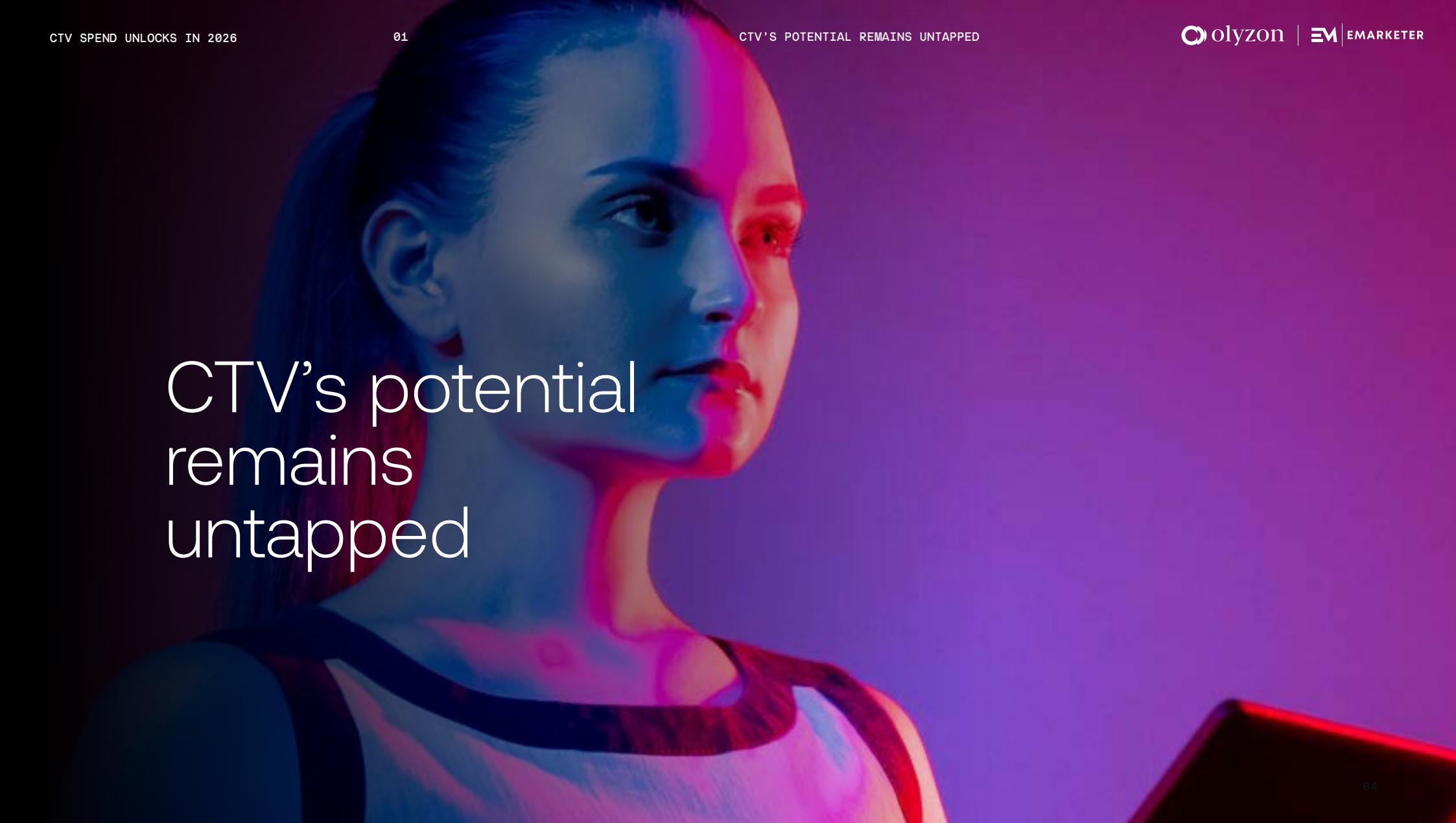
## CTV complexity is slowing scale.

Some 39.5% say managing TV campaigns has become more complicated as CTV has grown, with fragmentation across demand-side platforms (DSPs), walled gardens, and direct deals driving operational friction. Cross-platform deduplication and frequency control are 2026 priorities for a large share of buyers as confidence in unique reach remains low.

05

## Agentic AI shifts from analysis to action.

Over half (56.5%) expect CTV to deliver higher ROI than other channels in 2026. Around 40% are already testing predictive reach modeling or AI-driven audience planning, while more than a third plan to use AI for creative optimization.



CTV's potential  
remains  
untapped

# CTV is nearing a major inflection point.

After years of experimenting, shifting linear budgets into CTV, and getting comfortable with the channel, marketers are now positioned to invest more aggressively.

- ▶ Yet only 14.5% of marketers have fully shifted their linear TV budgets to CTV, indicating room for growth, according to the EMARKETER/Olyzon survey.
- ▶ But momentum is building: 46.0% plan to redirect 5% to 30% of their linear spend to CTV in 2026, while another 12.9% expect to shift 31% or more.

In other words, experimentation is moving from concept to reality. US CTV ad spend will grow 14.0% in 2026, reaching \$37.26 billion, nearly one-tenth (9.8%) of total digital ad spend, according to EMARKETER's September 2025 forecast.



But the channel's potential is even bigger than that: Nearly 80% of marketers would allocate 11% or more to CTV if their biggest challenges were addressed, according to the EMARKETER/Olyzon survey.

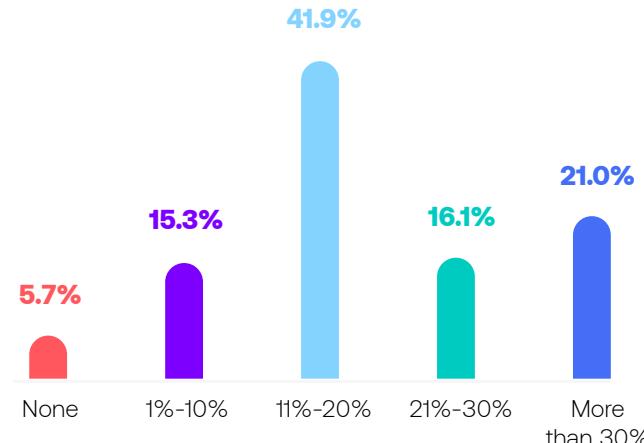


Marketers still  
struggle to trust  
CTV performance

# Despite the excitement around CTV, one issue continues to hold the channel back: Marketers can't clearly prove its value.

- Over a third (37.9%) of marketers cite the inability to demonstrate incremental ROAS as one of the main reasons they're not investing more.
- In addition, 30.7% cite high costs of CPMs and 27.4% cite a lack of supply path/inventory transparency.

If these primary blocking issues were substantially resolved (e.g., full transparency, robust incremental measurement) within the next 12 months, by what percentage would your organization increase its CTV spend?



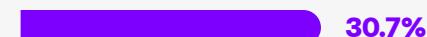
Source: EMARKETER and Olyzon "2026 CTV Optimization Survey," November 2025. n=124

## What are the top two reasons preventing you from investing significantly more in CTV today?

Difficulty proving incremental return on ad spend (ROAS)



High cost (CPM)



Lack of supply path/inventory transparency



Limited frequency/unique reach control



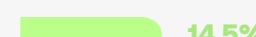
Concerns about fraudulent inventory



Complex execution/setup



Other



None of the above



Source: EMARKETER and Olyzon "2026 CTV Optimization Survey," November 2025. n=124

# Agency aggravations:

- Agencies are significantly more likely than B2B or B2C brands to report that a lack of supply path/inventory transparency is one of the top reasons preventing them from investing more in CTV. They're also more likely to say they are very dissatisfied with the visibility into the exact programs their CTV ads ran in.



• **4 in 10** are unhappy with their visibility into which programs their ads appeared in.

On top of that, there's still uncertainty about who CTV ads are actually reaching.

- Nearly half of marketers (48.4%) lack confidence that their impressions reach unique audiences, raising concerns about wasted spend and frequency overload.

Because of this, marketers are calling for deeper, more transparent data. At the top of their list is program-level insights into audience and content, followed by placement-level KPIs, and device-level attention or viewthrough rates.

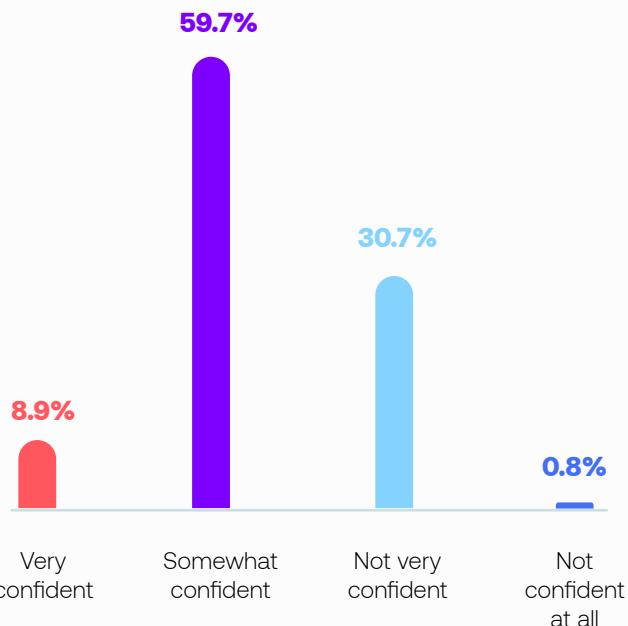
"Show-level data is the most common ask from CTV buyers," said EMARKETER senior analyst Ross Benes. "Marketers receive this information inconsistently, but they are more likely to get it when working directly with publishers. Offering this level of transparency is a huge opportunity for CTV platforms."

# What marketers really think about viewer attention

When it comes to formats that best sustain attention, marketers rely on familiar territory.

- ▶ The standard 15- and 30-second spot remains the clear favorite, with 43.6% saying these traditional units perform best on the big screen.
- ▶ These types of formats are long enough to deliver a message but short enough to hold a viewer's focus, especially in environments where consumers aren't actively shopping.

## How confident are you that you're capturing viewer attention during CTV ad breaks?

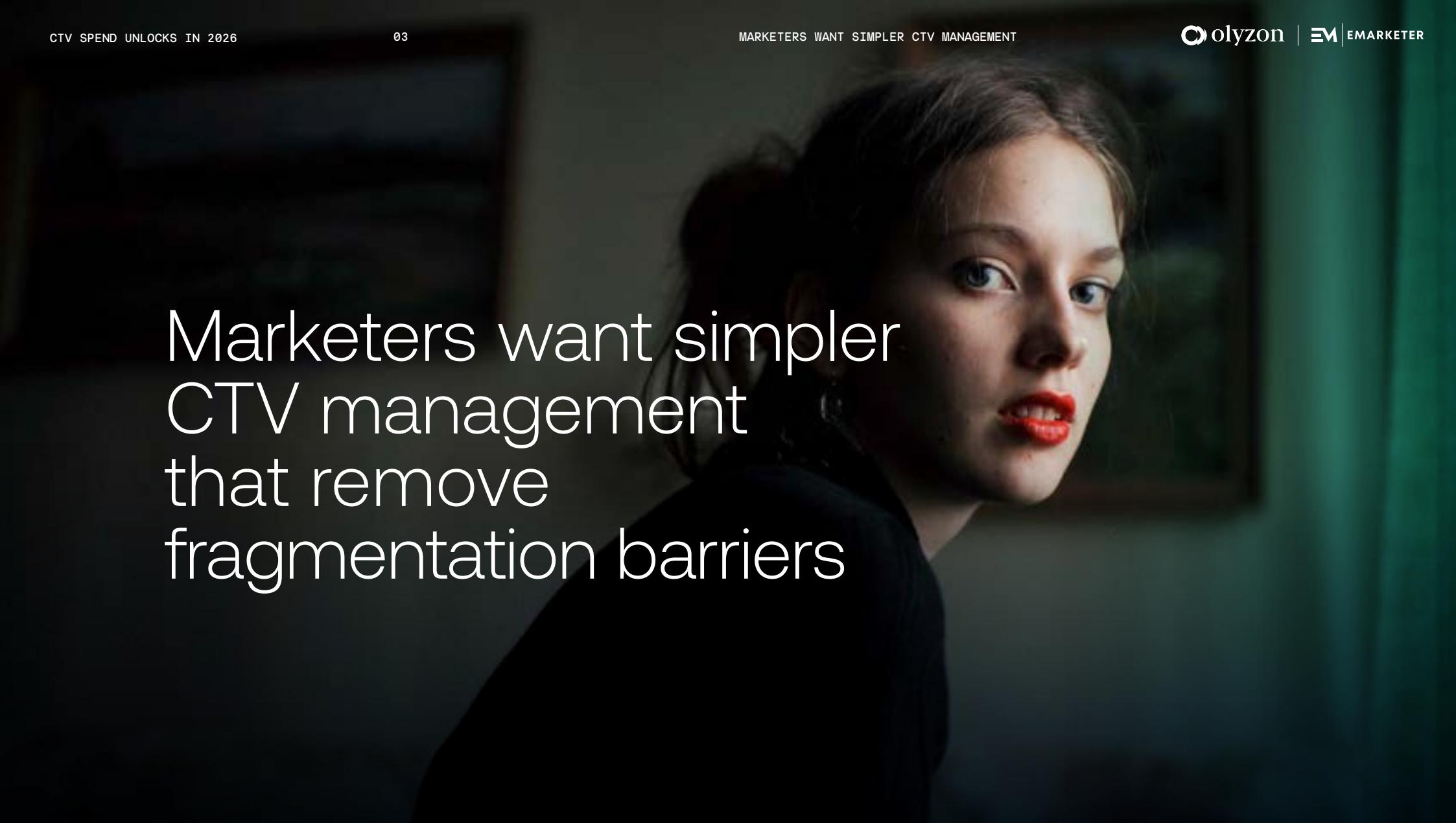


But attention isn't limited to mid-roll ads.

- ▶ Marketers also see promise in home screen placements and pause ads, both selected by 37.1% of respondents.
- ▶ These formats benefit from low clutter, strong visibility, and moments when viewers are more receptive or stationary, whether browsing for something to watch or pausing content mid-stream.
- ▶ In addition to testing enhanced breaks and L-bar placements, marketers expect sequencing across formats to secure more durable attention and lower clutter.

This shows marketers are still experimenting with attention in a CTV world, balancing trusted formats with emerging surfaces for more intentional engagement.

**However, attention isn't generated in a vacuum.** Beyond ad formats, marketers are realizing that attention is heavily influenced by **contextual resonance**. An ad placed in a high-quality, emotionally aligned program benefits from a halo effect that technical metrics like viewability cannot capture. While attention confirms a viewer is present, resonance ensures the environment aligns with the brand's DNA. For marketers, the goal is shifting from simply capturing eyes to ensuring the message fits the context, as this alignment is a primary driver of long-term ROAS. The next frontier of measurement isn't just confirming the ad was on screen but scoring the quality of the environment it appeared in.

A close-up photograph of a woman with dark hair and red lipstick. She is looking directly at the camera with a serious, intense expression. The lighting is dramatic, with strong highlights on her face and dark shadows. The background is dark and out of focus.

Marketers want simpler  
CTV management  
that remove  
fragmentation barriers

# As CTV has grown, so has the complexity of managing it.

In fact, 39.5% of marketers say TV campaign management has become more complicated because of CTV's rise, adding new layers to planning, buying, and measurement. That complexity is fueling higher expectations.

"The experimental days of CTV are gone. Now that it is clearly mainstream, marketers have higher expectations on the results it should deliver," said Benes.

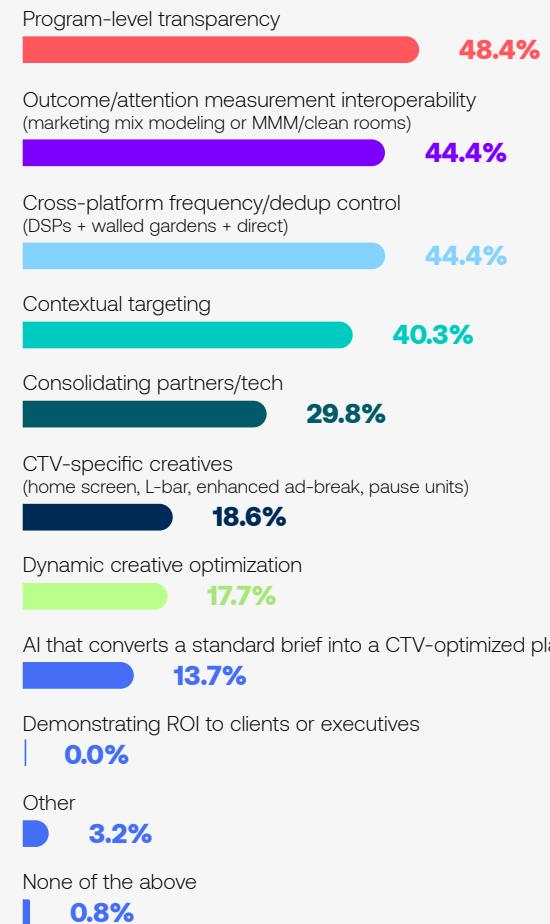
Going into 2026, marketers' most consistent request is for clearer program-level transparency, something nearly half say they need in order to feel confident about their campaigns. They want to know where their ads ran, who they reached, and why those placements matter. That fragmentation creates a decision crisis.

But transparency is only part of the story. Marketers seek tools to regain control and reduce fragmentation.

- ▶ Some 44.4% want to manage frequency and deduplication across DSPs, walled gardens, and direct deals to avoid waste and improve audience experience.
- ▶ The same percentage want interoperable outcome or attention measurement, whether through marketing mix modeling (MMM), clean rooms, or other solutions that can tie everything together.
- ▶ Agentic AI is emerging as a solution to fragmentation, automating the work between disparate platforms, reducing friction across the full funnel, and unlocking the scale marketers need to compete.

In short, marketers want CTV to function as a unified system. The easier it is to plan, monitor, and optimize, the more CTV can grow.

## What are your top 3 CTV priorities for 2026?



Source: EMARKETER and Olyzon "2026 CTV Optimization Survey," November 2025, n=124. Note: Respondents could select up to three answers.

# The hidden cost of CTV ad waste

For all its promise, CTV still carries a meaningful amount of inefficiency.

- ▶ Over half estimate that 5% to 20% of their CTV spend is wasted, while nearly a third believe 21% or more of their budgets is lost.
- ▶ That's a sizable hit in a channel where every impression is supposed to be precise.

**Roughly what percentage of your CTV ad spend do you believe is wasted due to inefficiencies (duplication, irrelevant placements, manual operations)?**

&lt;5%

10.5%

5%–10%

29.0%

11%–20%

23.4%

21%–30%

22.6%

31% or more

7.3%

Not sure

7.3%

When asked about the largest contributors to campaign cost or team effort, marketers cite a mix of operational friction and technical limitations.

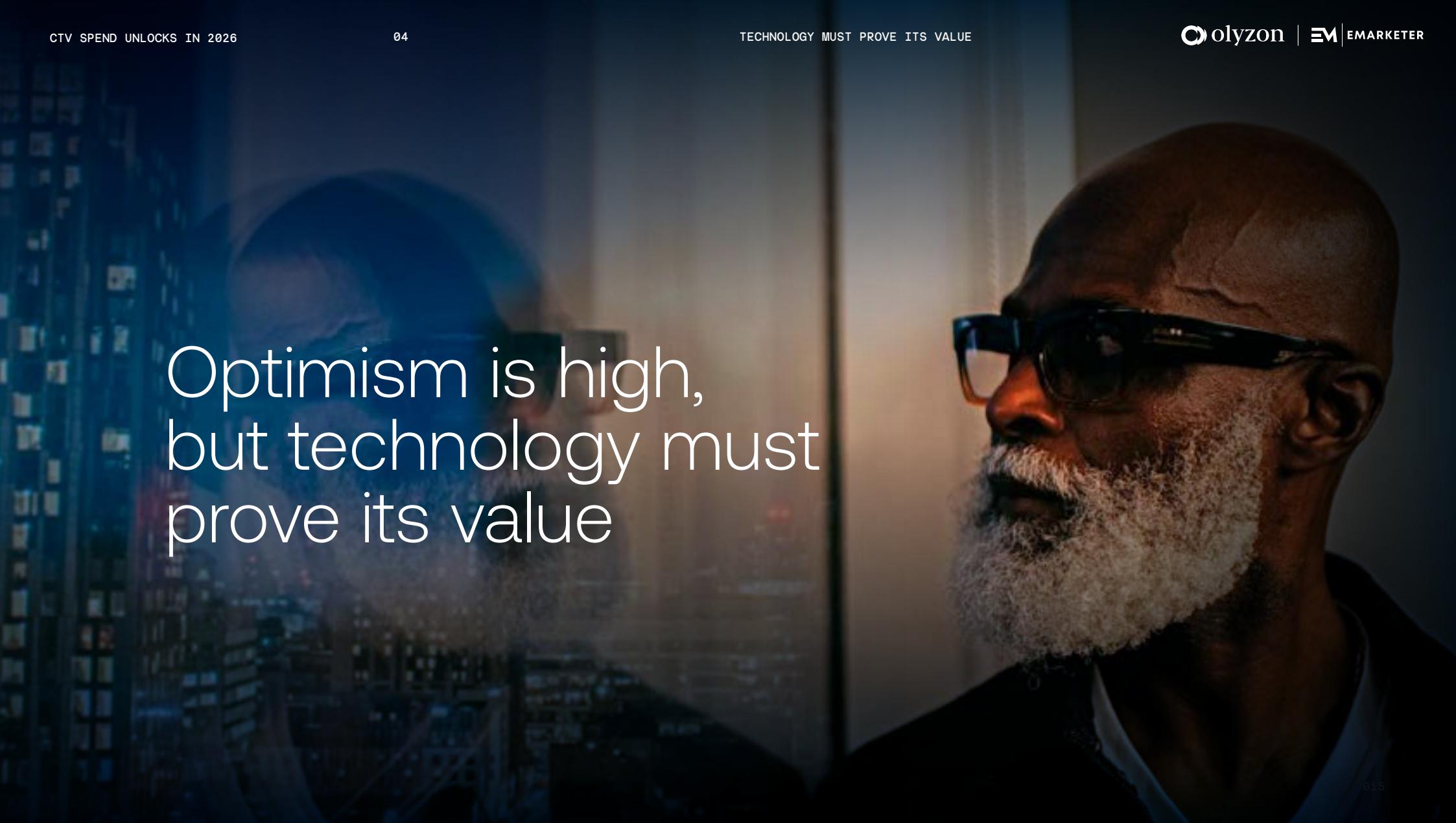
- ▶ Manual reporting tops the list as the biggest drain on time and budget.
- ▶ Tech taxes from DSP, supply-side platform (SSP), and data fees follow closely, highlighting the cumulative cost of the CTV supply chain.
- ▶ Deduplicated reach waste remains a persistent issue as marketers juggle multiple platforms and buying paths.

Measuring the impact of this waste is its own challenge. The most common approaches include tracking viewability and completion rates and analyzing frequency capping and overexposure to pinpoint inefficiencies.

Yet just as many marketers say they don't have a consistent method for measuring ad waste at all.

The result is a rapidly growing channel with blind spots that undermine efficiency and confidence. Until marketers can quantify and address waste, even the most sophisticated CTV strategies risk leaving value on the table.

Program-level transparency, agentic planning, and cross-platform frequency control are among the ways to reduce these costs.



Optimism is high,  
but technology must  
prove its value

# Despite today's frustrations, marketers are entering 2026 with optimism.

Over half (56.5%) believe CTV will deliver higher ROI than other channels, and many see AI as the catalyst for smarter planning and faster execution.

The shift is underway, with 42.7% of marketers exploring or testing predictive cross-screen reach modeling, and 37.1% exploring or testing AI-driven audience planning or lookalike modeling to find viewers more efficiently.

Marketers are increasingly willing to let AI handle operational tasks.

- ▶ A quarter are exploring agentic media buying or autonomous optimization, and 13.7% say AI that converts a standard brief into a CTV-optimized plan is a top priority for 2026.

- ▶ More than a third plan to test AI-powered creative optimization, a timely move given over a quarter say none of their ads are CTV specific and over a third say less than half are.

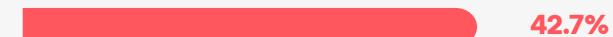
While these shifts signal a growing belief that AI can help close CTV's biggest gaps, marketers remain cautious about AI.

The biggest concerns center on transparency, with 41.1% worried about not knowing how AI makes decisions. A third of marketers question whether AI will actually deliver meaningful performance improvements, and 28.2% cite data privacy and compliance as reasons for holding back.

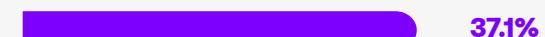
So while marketers believe AI can unlock CTV's next phase, they're waiting for the technology to prove its capabilities responsibly, reliably, and transparently.

**Which of the following technologies or capabilities are you exploring or adopting in 2026 for your CTV advertising?**

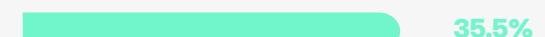
Predictive cross-screen reach modeling (e.g., "AI tools that predict how many unique people your ads will reach across different screens")



AI-driven audience planning or lookalike modeling



Creative optimization powered by AI



Automated contextual analysis (content-level data)



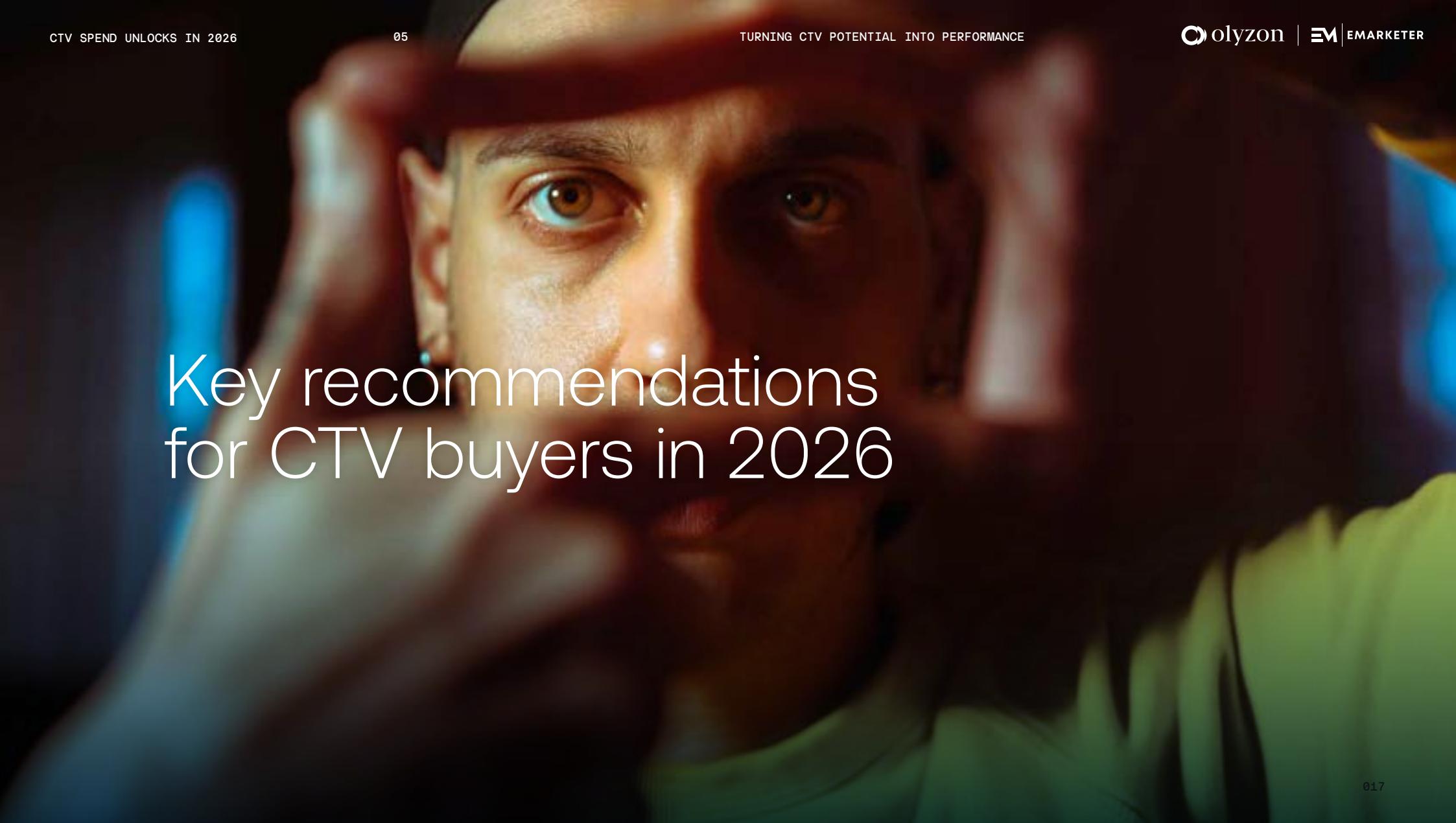
Agentic media buying/autonomous campaign optimization



None of these yet



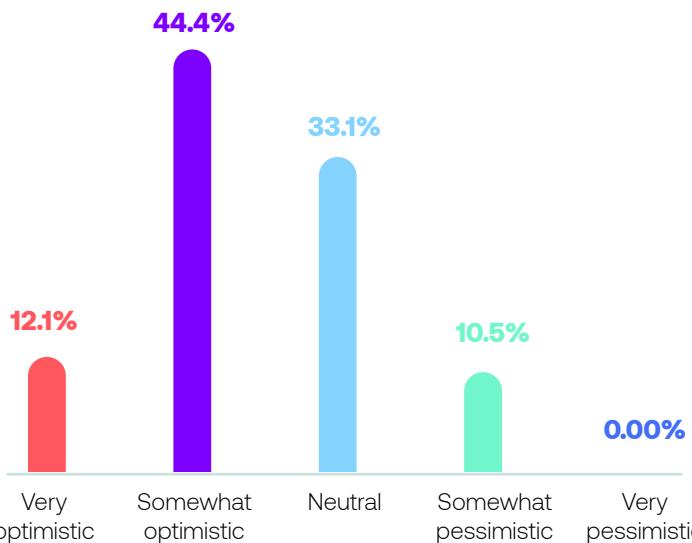
Source: EMARKETER and Olyzon "2026 CTV Optimization Survey," November 2025, n=124



# Key recommendations for CTV buyers in 2026

CTV is on the verge of a breakthrough, but realizing its full potential requires decisive action from marketers, platforms, and partners.

How optimistic are you that CTV will deliver higher ROI than other digital video channels in 2026?



Source: EMARKESTER and Olyzon "2026 CTV Optimization Survey," November 2025. n=124

As budgets accelerate heading into 2026, what should marketers do now to make the most of this moment?

01

## Demand deeper transparency to drive smarter planning

Require show-level metadata to assess contextual quality, placement-level KPIs, device-level attention/viewthrough rate, and clean-room/MMM-ready exports in a standardized format. Make delivery of these fields a condition of spend.

Transparency shouldn't just be a fraud check; it should be a quality check. Marketers need to move from asking, "Did my ad run?" to, "Did it run in content that aligns with my brand's DNA?" This shift from technical verification to contextual scoring can help prove ROAS in a premium environment.

02

## Enforce cross-platform frequency and deduplication

Set hard caps and frequency budgets that apply across DSPs, walled gardens, and direct buys. Audit unique reach; don't buy properties that can't or won't participate in reasonable deduplication efforts. Achieving this requires a unified platform strategy that orchestrates frequency rules across DSPs, walled gardens, and direct buys, closing the gaps that fuel inefficiency and protecting both budgets and audience experience.

# 03

## Adopt an agentic operating system to orchestrate the full lifecycle

Lean into AI not just for efficiency but for decisioning. Marketers can use agentic AI to bridge the gap between strategy and execution, automating the flow from brief to plan to buying instructions. Focus on platforms like Olyzon that can ingest granular signals like context and attention and turn them into immediate media decisions.

AI holds enormous promise across planning, audience modeling, and creative optimization, but marketers should focus on use cases that deliver tangible value.

Successful teams will use AI planning tools to generate CTV-optimized plans (including audience, program list, KPIs), source program data, and output activation-ready specs and reporting templates.

# 04

## Modernize CTV creative for CTV native surfaces and sequenced delivery

The creative gap is one of the most fixable issues in CTV. With many marketers still repurposing linear assets, investing in CTV-specific storytelling, including formats tailored to viewing context, attention patterns, and screen behavior can unlock immediate gains. Sequence formats and time delivery to contextual/moment-aware cues. In addition, AI is moving from post-campaign analysis to predictive optimization, helping brands identify which creative elements will trigger the highest response before the media spend is fully deployed.

# 05

## Treat ad waste as a strategic problem, not an operational one

Inefficiencies are cutting into budgets and delaying scale. Marketers should adopt consistent frameworks for identifying waste, from viewability and completion rate diagnostics to frequency exposure analyses. Partnering with platforms that provide clear deduplication, transparent fees, and strong measurement interoperability will accelerate progress.

# About the survey

This survey was developed and fielded by EMARKETER in collaboration with Olyzon in November 2025. It surveyed 124 CTV ad buyers to understand their strategies, tools, challenges, and future plans for optimizing CTV advertising.

# About this report

Research for this report was compiled by members of the EMARKETER Studio team in partnership with Olyzon, using reports, forecasts, and research by EMARKETER on CTV ad spend and strategies conducted in September to November 2025.

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Olyzon is a CTV-native decisioning platform that helps advertisers and agencies bring clarity, relevance, and measurable business outcomes to connected TV. Powered by agentic AI, the platform maps CTV programming at scale, predicts creative resonance, and enables context-aligned ad experiences with program-level transparency and outcome measurement. Olyzon is headquartered in New York with offices in Paris.