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Rapid Response

CTV Advertising in 2026

Delivering advantage when streaming takes the lead

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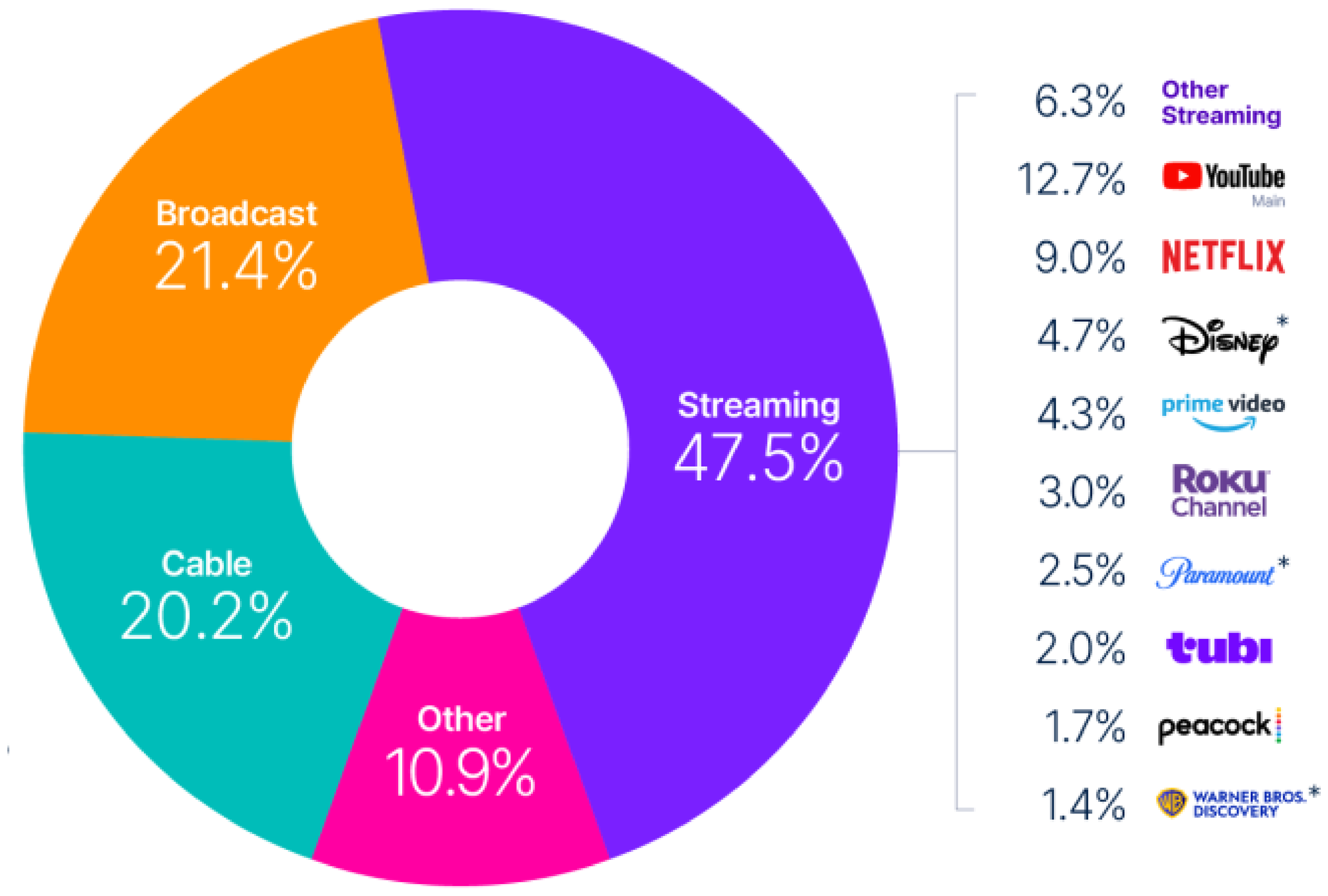
Streaming Takes the Lead

Streaming is no longer an alternative to TV; it is TV. For brands still planning video investment around linear reach with streaming as incremental, the data demands a fundamental rethink.



Nielsen's December 2025 Gauge puts streaming at 47.5% of US viewing, a new category record. Christmas Day pushed that to 54%, with 55B streaming minutes driven by NFL and tentpole drops like Stranger Things. A seasonal spike has become a permanent plateau.

The pattern holds globally. German linear viewing dropped to 158 minutes per day in 2025, down 8%, while streaming grew 21%. In Spain, 75% of viewers consume FAST and AVoD content weekly, with 60% reporting they no longer watch traditional linear. In the UK, YouTube overtook the BBC as the highest-reach video platform in December, capturing 17% of all viewing. Brazil shows even sharper concentration: YouTube alone commands 21.6% share.

Legacy broadcasters are responding by capitulating. The BBC struck a deal to create custom content for YouTube, treating the platform as its most effective global distribution partner. Telcos worldwide are bundling streaming services, driving adoption in the late majority.

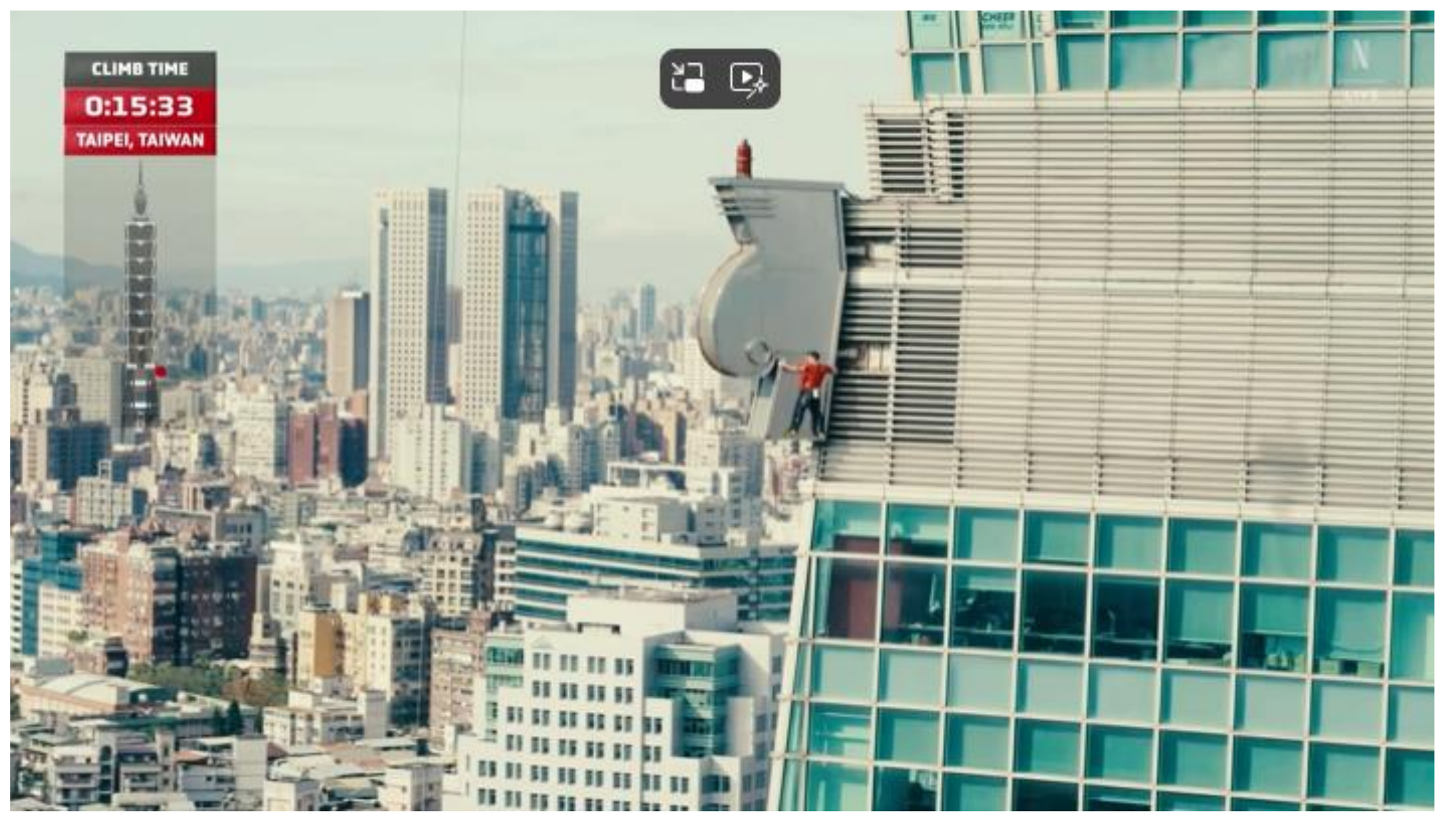
The economics reinforce this trajectory. Ampere forecasts global content investment reaching USD 255B in 2026, with streamers taking share from broadcasters even as production costs outpace subscription revenue. Ad-funded models are becoming essential to the ecosystem's economics, not an optional upside.

The implication is clear: video planning built around linear reach is now structurally disadvantaged. The question isn't whether to shift the budget, that decision has been made by audiences. The question is how to maintain reach and frequency discipline across a fragmented streaming landscape.

Netflix Builds the New Mass Reach Platform

The scale now exists for streaming to function as a true reach vehicle. Netflix's Q4 2025 earnings reported 325M paid memberships worldwide, translating to roughly one billion global viewers when household co-viewing is counted.

Innovation in 'Live' is an increasing part of the Netflix proposition.



- Expanding live sports events, Netflix last week streamed the free climbing (i.e. without safety equipment) of Taipei 101
- Live voting is being rolled out for the talent show Star Search
- Starting this summer Netflix subscribers in France will be able to access TF1 live channels + on-demand content directly inside Netflix
- A different dimension to the live experience is Family game nights brought to the TV screen
- Netflix's earlier-than-expected access to Universal live-action movies shows the studio is thinking in terms of a streaming-first world

This appointment viewing creates real-time cultural moments that aren't just distribution mechanics. They can recast weekly viewing plans, reshape inventory and competitive pacing for ad-supported discovery

Netflix's ad revenue grew more than 2.5× in 2025 to USD 1.5B, with a stated expectation to roughly double again to USD 3B in 2026.

In Q4 2025, Netflix introduced Monthly Active Viewers (MAV) as a new reach currency capturing the number of viewers who watch at least one minute of ads per month. On this basis, Netflix already reaches 190M+ global MAVs, giving advertisers the kind of scaled, premium footprint that previously existed only in linear.

The investment required to hit that mark is already visible: rapid development of its proprietary ad tech stack, expansion of ad formats, innovation in blending with context improvements to fill rates, and the introduction of interactive units.

Shoppable TV

CTV can now sell, not just communicate. YouTube's rollout of shoppable CTV ads within Performance Max and Demand Gen marks the shift: product feeds render directly on TV as QR code carousels, moving viewers from watching to purchasing in a single scan. The big screen is becoming a storefront.

Audiences can see a variety of products...

...and browse and scan directly from their TV screen!

The early economics are compelling. TV's share of Demand Gen impressions tripled from roughly 0.5% to 1.5% following the rollout, with CPAs running 30-40% lower than other surfaces. Campaigns including TV screens deliver 7% incremental conversions.

Pinterest and Roku's "Bring My Pinterest to Life" extends the model into long-form video, where discovery, inspiration, and shopping happen inside the same viewing moment.

The operating model shifts with this capability. CTV becomes a shoppable storefront, not just a brand vehicle. Mobile becomes the conversion engine, bridging the scan to the product page to checkout. Measurement becomes a cross-device requirement, tracking exposure to scan to sale across screens.

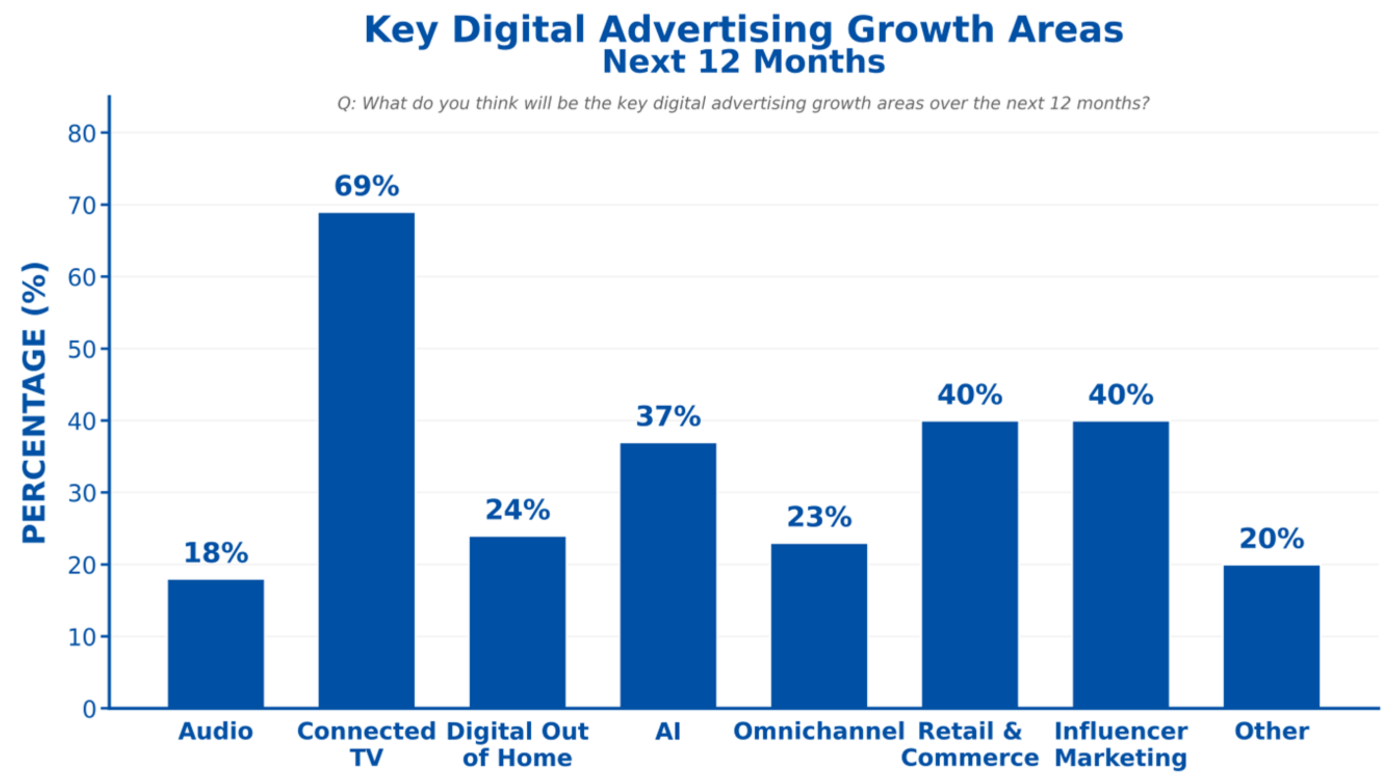
For advertisers, the strategic advantage lies in orchestration. "CTV as performance" budget will flow, but only to brands that can unify creative, product feeds, retail signals, and closed-loop outcomes into one system. This is where Omni's connected identity, retail partnerships, and commerce activation capabilities become pivotal.

The barrier to capturing this value is operational, not strategic. Most advertisers understand the opportunity; fewer can execute it. Product feeds must be synchronized, creative must be commerce-enabled, and measurement must span the journey from living room to checkout.

The test for CMOs: can your organization execute a shoppable CTV campaign by Q2? If the answer is no, the capability gap is now a competitive gap. Brands solving this first will set the benchmark for CTV performance. Those waiting for perfect measurement will watch competitors capture share.

CTV value

IAB Europe's new Attitudes to Digital Advertising 2026 study across 25+ European markets puts CTV at the top of investment and innovation priorities.



The report highlights programmatic maturity gaps alongside ongoing visibility issues. Advertisers lack clarity on where ads ran, face privacy-safe identity fragmentation, navigate inconsistent supply paths, and rely on private marketplaces to regain control. These frictions hold back budget reallocation from linear, even as audiences shift decisively to streaming.

Omnicom Media's CASA CTV standards Initiative addresses the core barriers: inventory transparency, identity resolution, and fraud prevention practices that bring CTV closer to the accountability standards advertisers expect from linear.

The strategic requirement for advertisers is orchestration across screens and signals. Planning, activation, and measurement must operate as one connected system. That's the logic behind Omni's evolution: unified data, identity, and AI layers that let brands act on CTV signals in-flight, not quarters later.

The operational unlock extends beyond targeting. Faster learning i.e. using connected signals to optimize creative, exposure, and investment across screens becomes the competitive advantage. In a fragmented landscape, the brands that learn fastest win.

Where Omni's innovation lens matters: the next generation positions Omnicom teams to connect data, identity, and AI-driven decisioning across channels, exactly what's required as CTV signals become more granular and more privacy-constrained.

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