

omd



IAB NewFronts 2026

When the screen becomes the store

Updated: March 27th 2026

WE *Create* WHAT'S NEXT

The Screen Becomes the Store

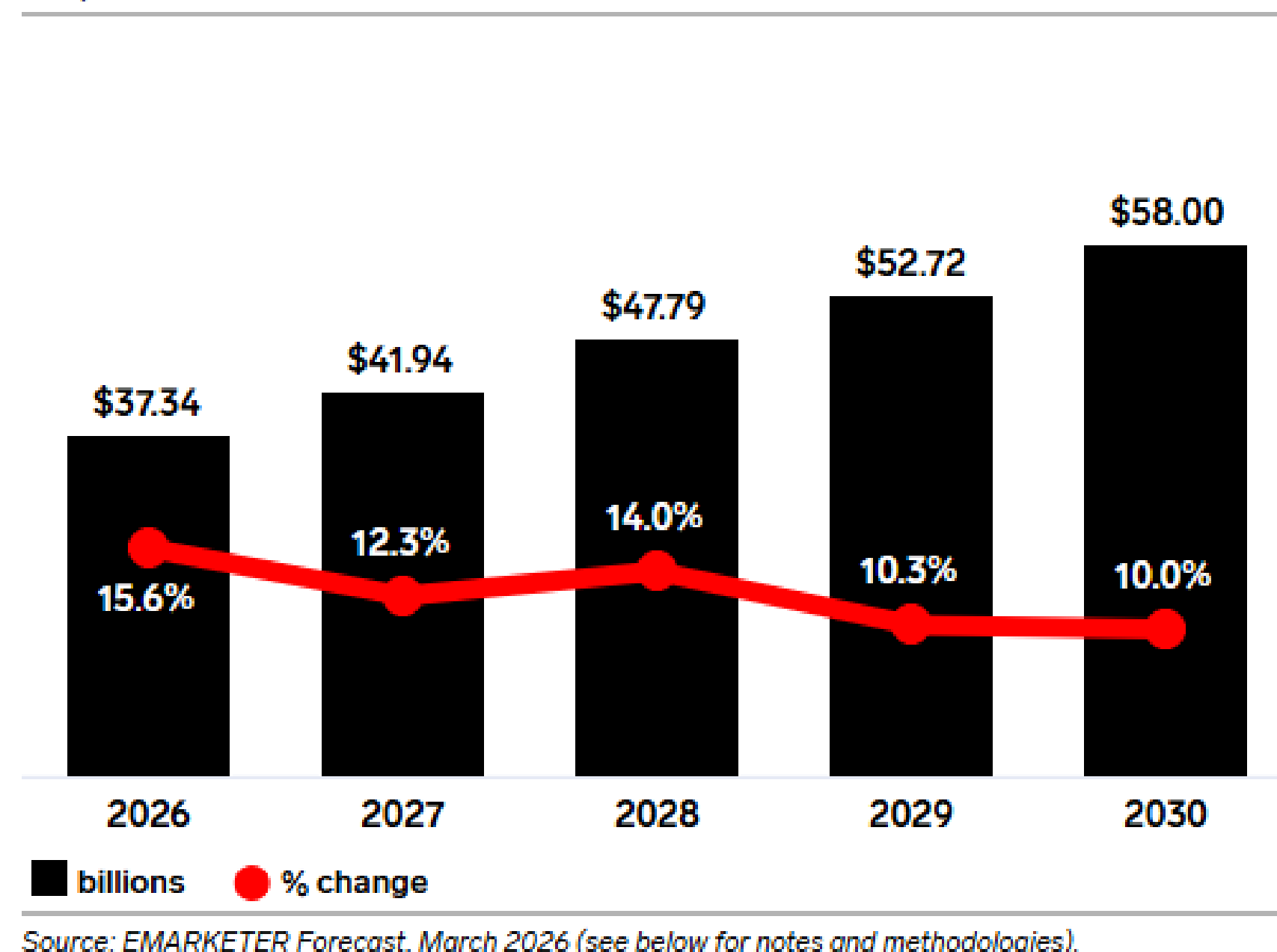
The [2026 IAB NewFronts](#), shifted to [March](#) to align with real buying cycles rather than legacy broadcast calendars, delivered the clearest signal yet that the video marketplace has changed significantly over the past two years.

The meta-narrative is less about streaming's growth and more about its transformation into a different category of media entirely.

U.S. CTV ad spend is projected to hit [\\$37 billion in 2026](#), according to eMarketer, up 15% year-on-year, and is [on track to surpass traditional TV by 2028](#).

Connected TV Ad Spending

US, 2026-2030



Money isn't simply moving from linear to digital. It's moving from impression-based buying to an outcome-based infrastructure.

[IAB's 2026 Outlook Study](#), based on insights from over 200 brands and agency buyers, forecasts [9.5% total U.S. ad spend growth](#) this year, with digital channels leading: social up 14.6%, CTV up 13.8%, commerce media up 12.1%.

Cross-platform measurement has risen to 72% of advertiser priorities, up from 64% year-over-year, and two-thirds of buyers are now focused on [agentic AI for campaign execution](#).

The pitch is no longer "watch this content, then go buy." It is "watch this content *inside* a transaction engine."

Across four days of presentations from Google, Walmart/VIZIO, Tubi, Samsung, TikTok, [LG](#), and LinkedIn, one structural theme dominated: the collapse of distance between media exposure and commerce outcome.

Every major presenter brought some version of an [AI-powered measurement](#) proposition with closed-loop attribution and retail data integration, representing a fundamental rewiring of what a video advertising impression is for.

The Vertical Commerce Stack

The clearest illustration came from [Walmart and VIZIO's opening-day presentation](#), their first fully integrated pitch since [Walmart's \\$2.3 billion acquisition of VIZIO closed in December 2024](#).

The proposition is deeply vertically integrated. Walmart now controls the TV hardware (VIZIO and Onn devices), the operating system (VIZIO OS), the retail data ([150 million weekly U.S. customers](#)), and the measurement loop.

A [unified Walmart account login](#) across all new VIZIO OS and Onn TVs was announced this week. It effectively fuses a viewer's streaming identity with their shopping identity at the operating-system level.



The first product placement integration tells the story. [L'Oréal products will appear within premium content across VIZIO OS](#), powered by Walmart's first-party customer data, with creative extensions spanning Walmart product pages and omnichannel retail touchpoints.

"This collaboration demonstrates the power of integrating premium storytelling with retail to inspire customers and drive measurable business impact within a closed-loop ecosystem," said Nora Wolfe, SVP, U.S. Head of Media, L'Oréal.

It creates a seamless path from inspiration to purchase, all within a single closed-loop ecosystem.

- [65% of Walmart customers say CTV ads helped them discover new products.](#)
- Successful campaigns via Walmart Connect delivered a [median 44% view rate](#).

This isn't retail media bolted onto CTV. It is a commerce infrastructure that happens to include a screen.

Google's Counter-Move

Google reinforced the pattern through a different lens. [Gemini is now the true operating layer of DV360](#). Not a bolted-on assistant, but the core planning and buying intelligence. DV360 now [reaches 96% of ad-supported CTV](#) homes through five billion hours of monthly supported viewing.

Gemini now [proactively curates](#) media packages, predicting consumer behavior across search, scroll, and stream touchpoints to deliver value before a campaign even goes live. Gemini is also bringing [many new consumer experiences](#) to Google TV.

Marketers can upload media plans and have [Gemini auto-translate](#) them into comprehensive campaign setups. The YouTube [Creators Partnerships Hub](#) is also getting Gemini powered search, to find more relevant creators. An embedded agent [Ads Advisor](#), will build custom reporting dashboards inside the Google Ads Console.

Google also debuted [Confidential Publisher Match](#), a privacy-safe identity model linking first-party advertiser data with signals from [streamers like Roku](#) in a trusted execution environment.

Google has been building out its Commerce Media suite, this week expanding via a new [Kroger integration](#), which takes connecting CTV impressions directly to conversions across devices further.

SKU-level reporting in DV360 will let brands see the precise sales impact of YouTube and display ads on Kroger purchases.

× New instant report Guided tour

Commerce measurement conversion report

Time zone: Advertiser Date range: Jan 1 - Jan 31, 2026

Table

Enter a search term or select filters

Advertiser Currency	Merchant Name	Offer Name	Item Id Sold	Units Sold	Cart Revenue
USD	My Retailer	Chocolate ice cream	123456789	1,800	\$5,000
USD	My Retailer	Strawberry ice cream	123456781	1,550	\$4,500
USD	My Retailer	Vanilla ice cream	123456783	1,500	\$4,400
USD	My Retailer	Mint chip ice cream	123456782	1,250	\$4,000
USD	My Retailer	Matcha ice cream	123456788	1,200	\$3,900
USD	My Retailer	Mango frozen fruit bars	123456787	1,000	\$4,000
USD	My Retailer	Cherry frozen fruit bars	123456784	800	\$3,800
USD	My Retailer	Lime frozen fruit bars	123456785	650	\$3,200

DIMENSIONS

- Advertiser Currency
- Merchant Name
- Offer Name
- Item Id Sold

Search metrics and dimensions

- Active view
- Audience
- CM360
- Commerce media
- Computer system
- Conversions
- Cost
- Custom bidding
- Custom impression value
- Date
- Digital out of home
- Fees

METRICS

- Units Sold
- Cart Revenue

General

- Ad position
- Ad server source
- Ad type
- Advertiser currency
- Advertiser ID
- Advertiser integration code
- Advertiser status

YouTube, which [eMarketer projects will capture nearly 12% of all CTV ad revenues in 2026](#), now has pause ads and creator takeovers purchasable through DV360, tightening the loop between Google's buy-side tool and its owned inventory.

Google claims that on average [90m hours of shopping videos](#) are watched each day globally on YouTube. The DSP is becoming a buying environment that reinforces Google's walled garden, and it's doing so with AI as the connective tissue.

Implications for Innovation

CTV should be considered less as a media channel and more as a commerce operating system.

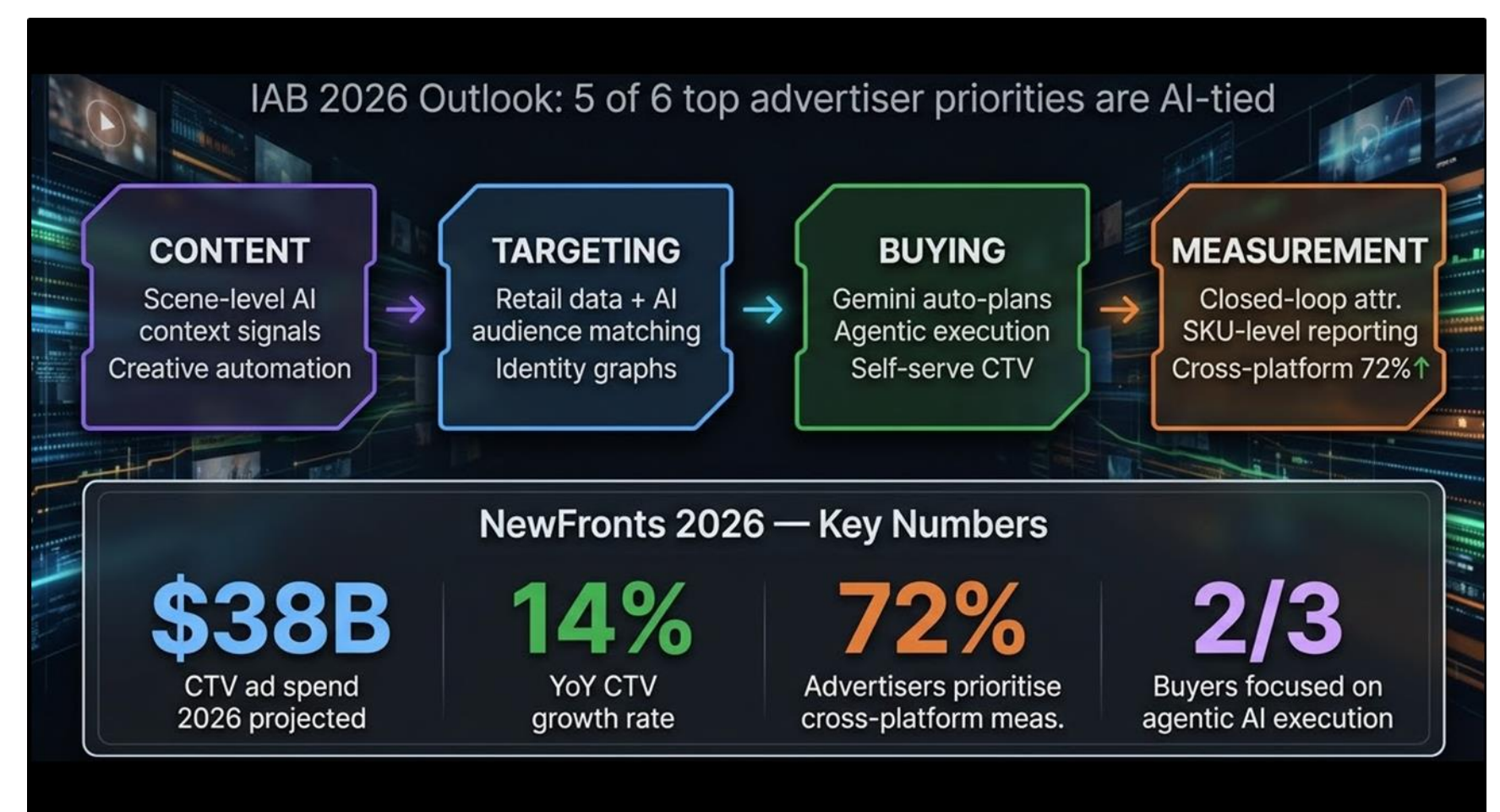
The Walmart/VIZIO model and Google's Kroger integration show that [closed-loop attribution](#) from impression to transaction is now table stakes for the platforms competing for spend. Demand the same from every video partner.

Google and Walmart are building systems where algorithms do the planning, buying, and attributing, so the AI layer is no longer optional.

The brands that shape those automated environments, through [structured data](#), [clean identity graphs](#), and clear decision policies, will outperform those that simply hand budgets to the algorithm and hope.

This is the moment where video buying transitions from a negotiation to a machine-to-machine specification exchange. The brands that have invested in eligibility and justification signals, the structured inputs that automated systems use to include or exclude, are the ones these new systems will favor.

These are the principles and architectures driving search towards GEO, an integrated approach across all SKUs, audiences, intents and touch points is optimal.



When the screen is the store, the media plan is the sales strategy, and AI is both the planner and the auditor, the traditional division between media buying, creative, and commerce becomes far less pertinent.

[Ad Age called this year's NewFronts a search for a data partner or an agentic AI development](#) as much as a content marketplace. That reframing is the signal. The brands that recognize this shift will spend the next six months redesigning their operating models around commerce-integrated video and AI-native planning.

The rest will spend it renegotiating CPMs for impressions that no longer measure what matters.



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