

omd



2025 IAB NewFronts

Global innovation opportunities as post-linear TV scales

Updated: May 16th 2025

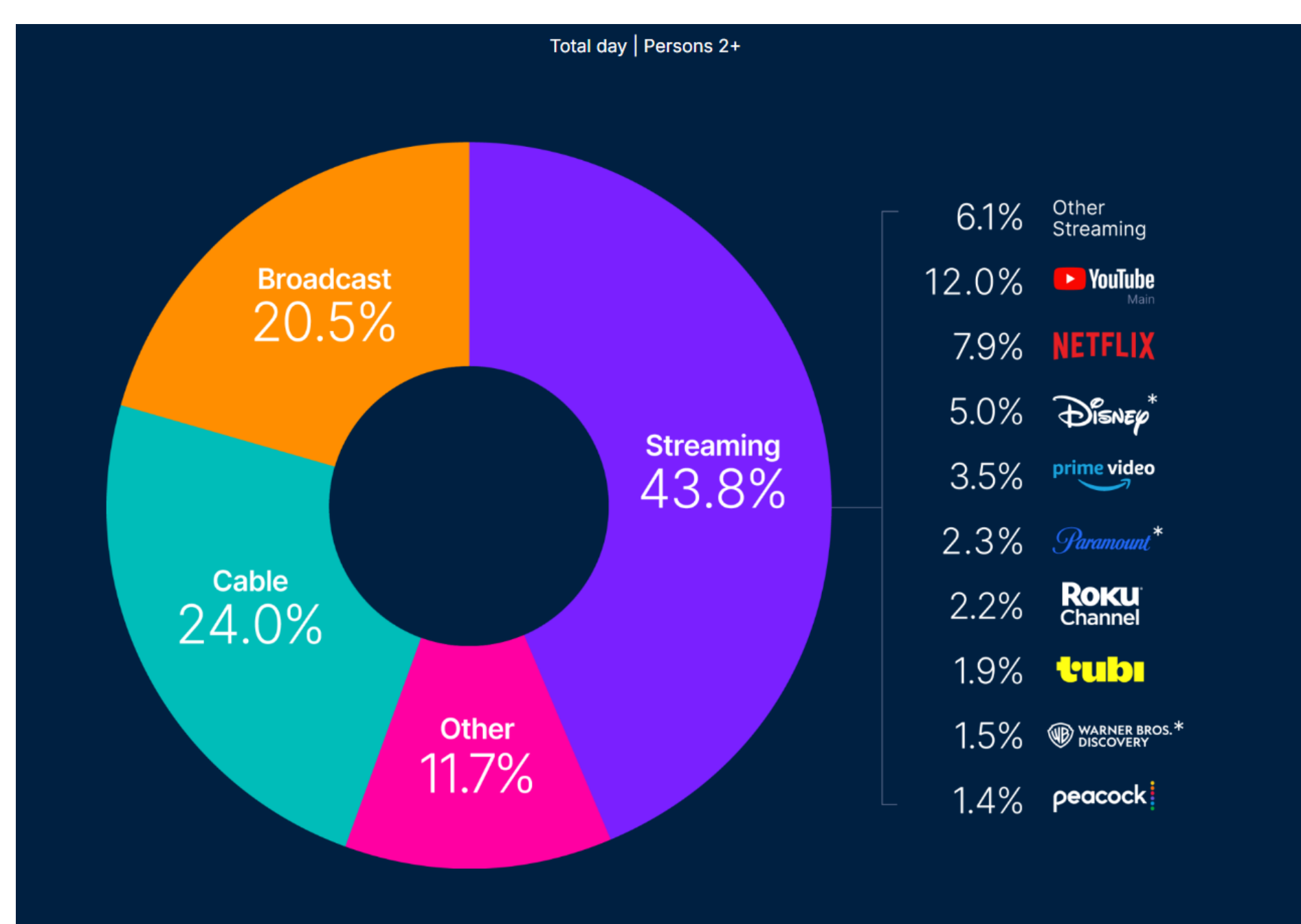
WE *Create* WHAT'S NEXT

NewFronts rise in prominence

Global ad investment crossed \$1 trillion in 2024 and is expected to [grow another 7.6% in 2025](#), driven largely by digital expansion.

That growth is increasingly performance-centered. For example, retail media spend will be [over \\$150 billion](#) worldwide this year, absorbing budgets that once went to prime-time GRPs.

Streaming's share of total US TV now almost matches that of [broadcast and cable combined](#). Streaming accounts for [42.4% of ad-supported](#) viewing in the US, as the days of streaming being dominated by ad-free subscriptions are behind us.



Similar trends are playing out around the world. The latest WARC predictions state that global linear TV ad investment is set to decline by [6% this year](#), and over 4% in 2026, whilst CTV and streaming ad investment is set to grow by 15% this year and 13% next year, matched only in growth by Retail Media.

[Broadcasters](#) in many key advertising markets are trying to form data and commercial alliances to counteract the increasing dominance of the global streaming brands.

As the video landscape has inexorably shifted from broadcast to streaming, the upfronts have [changed their focus](#) to be more flexible, with [searches down 75%](#) since the peak more than 10 years ago.

Instead, the digital-centric [IAB NewFronts](#) has taken greater prominence to assert itself as defining the [cross-screen operating system](#) for media, commerce, and culture.

Over 30 platforms pitched shoppable video, creator marketplaces, and AI-native buying tools. OMG NA has created a [full round-up of everything announced](#). Significant announcements illustrate the strategies of the major platforms, and new opportunities for advertisers as streaming video media prepares to take a leadership position.

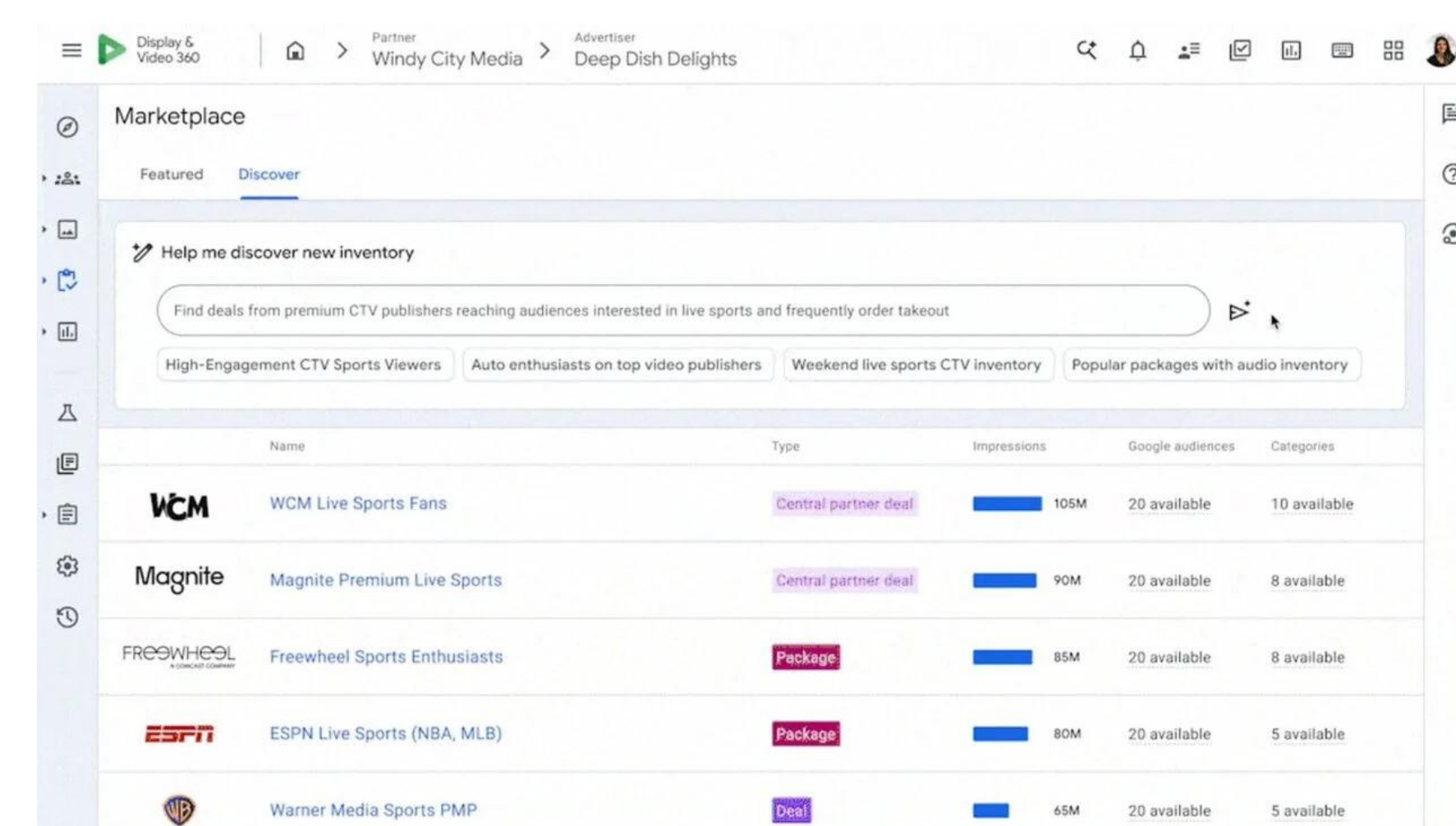
AI-powered experience and performance

Naturally, the increasing utilization of AI was a pervasive theme.

Google made several announcements relating to [generative AI in DV360](#), that build on existing capabilities such as the [Commitment Optimizer and Audience Persona](#) tools.

These include:

- Smarter inventory selection: AI helps find personalized inventory suggestions.
- Easy campaign setup: AI optimizes settings for audiences, categories, and brand safety.
- Quick help & improvements: Users can ask questions within the platform to get immediate answers and improve campaigns.
- Instant reports: AI quickly generates ready-to-use reports based on user queries.



Google claims that DV360 can reach [98% of US CTV households](#). Driven by an expanding set of [inventory partnerships](#), including live shows and sports events, and Retail Media through brands such as Costco, Intuit, and United Airlines. Also, its expanding a [Netflix deal to the EMEA region](#).

Streaming media has long been seen as a growth driver for TV hardware brands. They are now able to deliver mass-scale reach and technology-driven innovation.

- [VIZIO Ads](#), now owned by Walmart, claims to [reach 79 million people](#). It unveiled one-click [checkout overlays and closed-loop attribution](#) for every smart-TV impression.
- [LG](#) showed QR-triggered [shopping ads and 3-D storefronts](#) on their FAST home screens, [initially in North America](#) but expanding globally this year. As well as [AI CTV ad optimization](#).
- [Samsung](#) Television Network launched at the NewFronts and dubbed their "Broad-Fast" network to reach 88 million people with new [ShoppingBreaks](#) and [GameBreaks](#) interactive experiences launching later this year.

Social platforms at NewFronts

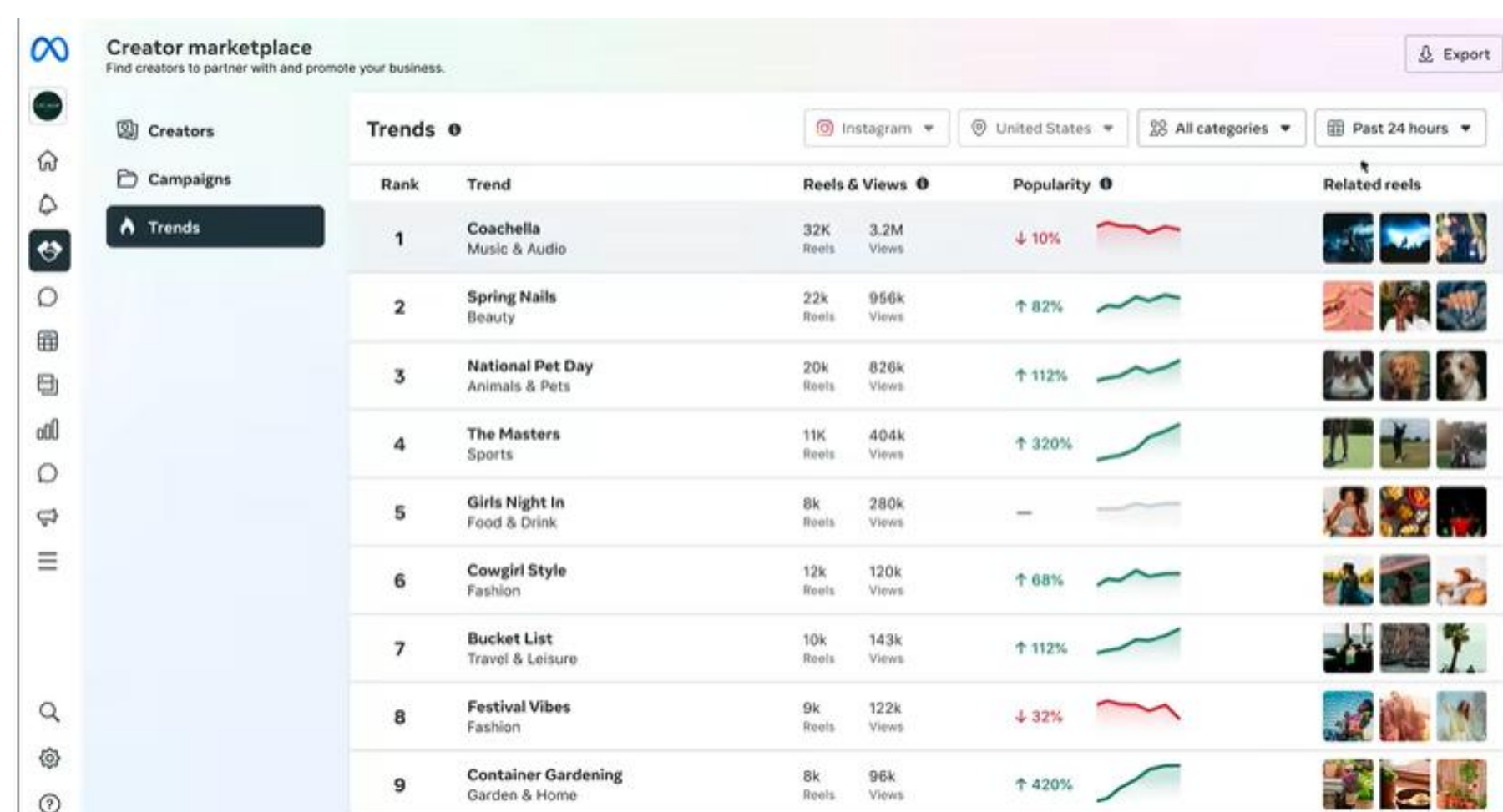
The social platforms see the IAB NewFronts as [significant in driving](#) their ad innovations.

[TikTok](#) Pulse has been enabling brands to get close to culture for several years now. This year, [expanding Pulse Premiere reach](#) by packaging Formula 1, Red Bull, and live cultural tent-poles, letting brands buy adjacency at “cultural speed”. TikTok claims that on average, [45% of those reached](#) will not have seen the ad on TV.

Also launching [Pulse Core](#), which allows ads to be served with content organized by trends and events to utilize brand-safe inventory from the top 4% of UGC creators in many global markets.

In response, Meta launched [Reels Trending Ads](#) and the global roll-out of [video ads on Threads](#), providing another route for brands to quickly advertise around the content and culture trends that are blowing up on these platforms.

Meta also announced testing of creator marketplace trends and an API that matches brands to rising memes in near real-time.



[Snapchat](#) this year claimed to have surpassed [900 million monthly active users](#). Supported by new [reach mechanisms and formats](#);

- First Snap is a first impression, single-day takeover that leads to a full-screen video asset and CTA from the brand.
- Web and App Auction Ads from goal-based bids.
- Sponsored Snaps sent directly from creators' handles.
- Promoted Places enables location discovery for 400m monthly Snap Map users.

Whilst [AI-powered Smart Campaign Solutions](#) shifted 75% of Snap ad revenue to direct-response formats.

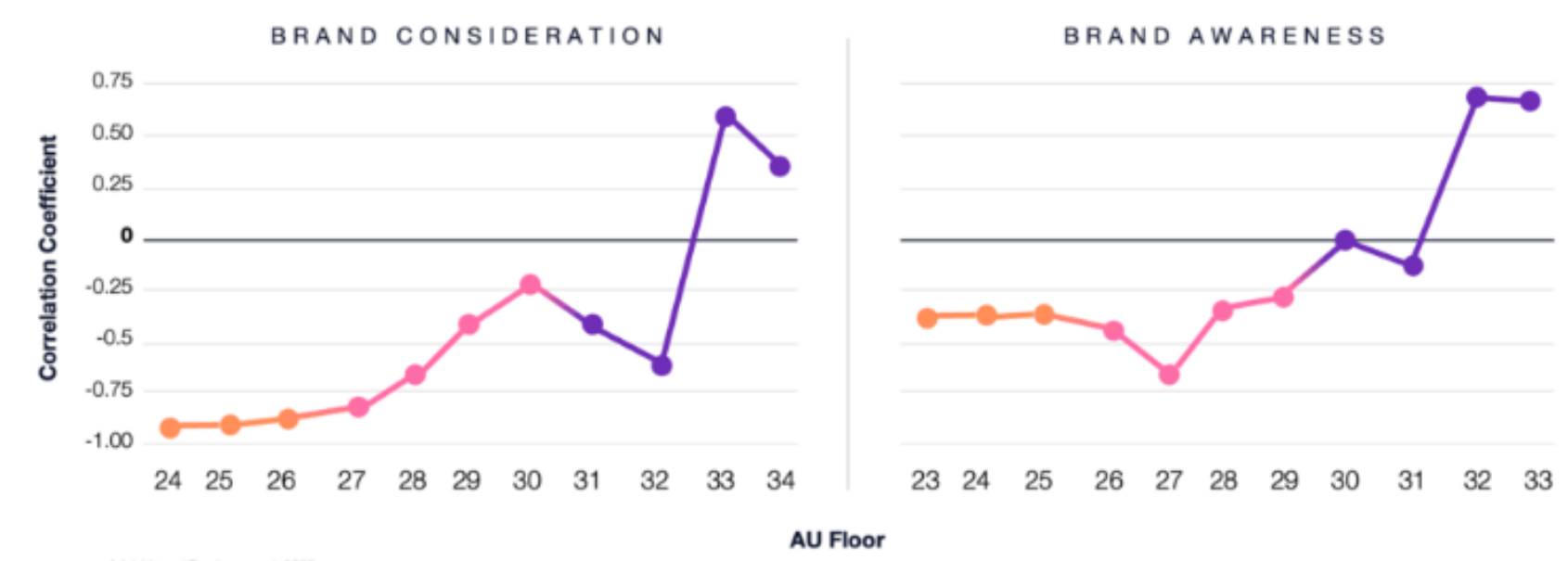
LinkedIn is quietly becoming a [B2B CTV](#) outlet, appearing at [its first NewFronts](#). They are extending professional identity targeting to the biggest screen in the house.

Streaming surges into brand building

Attention metrics are increasingly being applied across screens as different types of content are optimized to achieve business outcomes.

[Teads](#) introduced [outcome guarantees tied to its cross-screen Attention Unit](#) (AU) score, effectively underwriting business results if ads clear pre-set attention thresholds.

Guaranteed attention, custom-tailored to your brand's KPIs



As algorithms fragment audiences, adjacency to trusted creators, live moments, and premium journalism delivers attention premiums that are hard to achieve through broad-based buying.

OMG has a [long history of working with attention](#) data to optimize channel, placement, and creative selection. A recently announced [OMG video attention panel](#) in the UK has provided our clients with [numerous insights](#) into the way attention is delivered and optimized in different TV contexts.

CTV's addressable scale only magnifies the shift. As different models from AVOD and BVOD to FAST achieve scale, and shoppable, immersive, and playable experiences area is launched. Each is to grab an ever-larger share of consumer attention and hence the opportunity to influence purchase decisions.

Netflix's ad-supported tier [surging to 70 million MAUs](#) months after launch, demonstrates consumer tolerance for value-exchange models and gives advertisers Hollywood-grade reach with sophisticated audience, context, and frequency management.

Brands need to harmonize AI, commerce, and culture with the changing reach profiles of a wide variety of video channels from broadcast to ultra-niche social creator networks. To deliver experiences that live beyond the moment and achieve the necessary differentiation to rise above increasingly commoditized, bid-based media marketplaces.



Jean-Paul Edwards

Managing Director, Product
OMD Worldwide