omd

Rapid Response

Video Landscape Update

Exploring the Post-Linear TV Environment

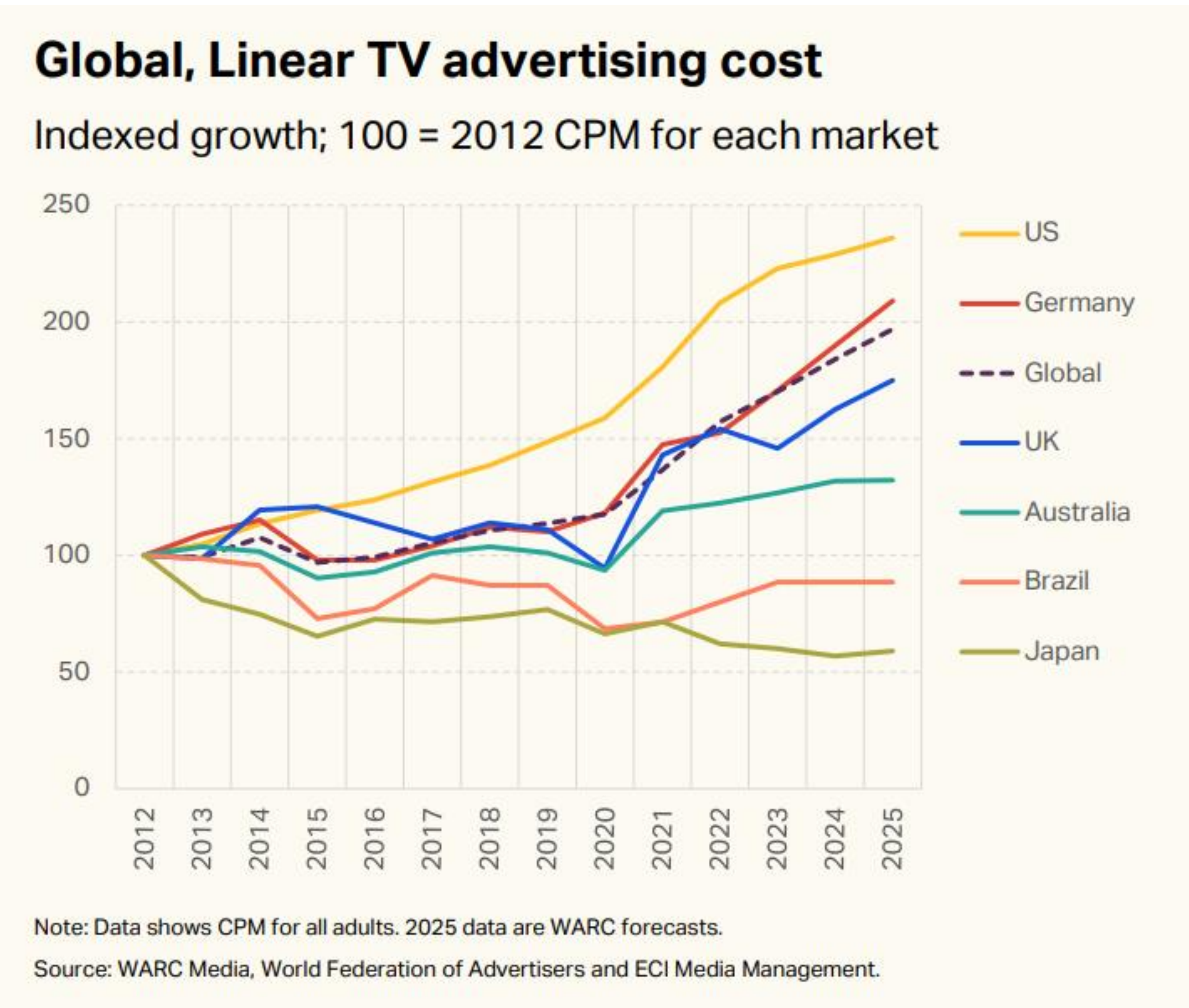
Updated: 19th September 2025

WE Create WHAT'S NEXT

Video's Center of Gravity has Moved Again

The reach of and investment in linear TV have been in mutually reinforcing decline for more than a decade. WARC's Global Ad Trends Report tracks a 27.5% drop in linear spending from 2014 to 2024 (over 50% in real terms).

Linear TV accounts for just 12.4% of global ad spend in 2025, down from 41.3% in 2013, illustrating a profound shift in the dynamics of global media investment.



We have also seen global linear CPMs almost double (up around 27% inflation-adjusted). Rising US CPMs are driven by the dominance of live sports in viewing share, taking 182 of the top 200 broadcasts. Live Sports are more impervious to a shift to streaming than other content.

In Japan, an aging population is slowly shifting viewing, but investment is moving more quickly to digital channels, whilst the market is sticking to legacy measurement and buying models.

YouTube's share of US TV viewing hit a record 13.4% in July 2025, its sixth consecutive month at #1. The shape of consumption in online video is very different, as illustrated by a recent BARB report in the UK. The first in the world to analyse individual YouTube channel reach on TVs. The top 20 is dominated by young children's channels (likely only proving the narrow range of interests of under-8s). The most popular non-kids channel, Mr Beast, reaches only around 0.5% of the UK population per week.

To benefit from the huge reach of YouTube, large channels should be thought of as shows, curated as lists to be managed, using Omni's cross-publisher controls and publisher APIs within a unified video approach.

The Forces are Redrawing TV

The gateways to inventory are shifting. Smart-TV operating systems command ever more attention. LG claims 11 minutes of OS use on average before settling on a programme or channel to watch.

At the same time, ad-tier momentum is re-configuring premium streaming. The SVOD ad-tier is seeing sustained uptake with the growth of Netflix and Disney ad-tiers in both the US and UK, expanding addressable reach while keeping price-sensitive audiences in the ecosystem.

Netflix now claims 94m ad-supported subscriptions worldwide. The streaming platforms are starting to monetize meaningfully. Netflix is set to make USD 4.5bn from ads this year, or about a dollar a week per subscriber.

Retail media's collision with video has Amazon Ads at the forefront. This week, Netflix and Amazon announced a deal whereby Netflix inventory will be made available through Amazon's DSP, starting later this year in 12 markets.

Amazon is positioning itself not only as a low-cost way to access a significant proportion of video inventory to deliver the scale needed to shift brand perceptions, but also as precision and connected measurement to sell from those ads directly.

Buying mechanics are changing as more video inventory becomes programmatic. New buying models and mechanisms to create low-cost TV quality creative are opening the doors to a far greater range of advertisers.

4m businesses already use Meta's generative AI creative tools, and broadcasters will seek access to a vast untapped source of demand for inventory.

Channel 4 in the UK recently launched an initiative to bring SMEs to its streaming service to buy highly targeted inventory and use gen AI creative tools. Netflix also plans to roll out gen AI creative in mid-roll and pause ads in 2026; the long-term brand impact of these techniques is an open question.

Advertiser Implications

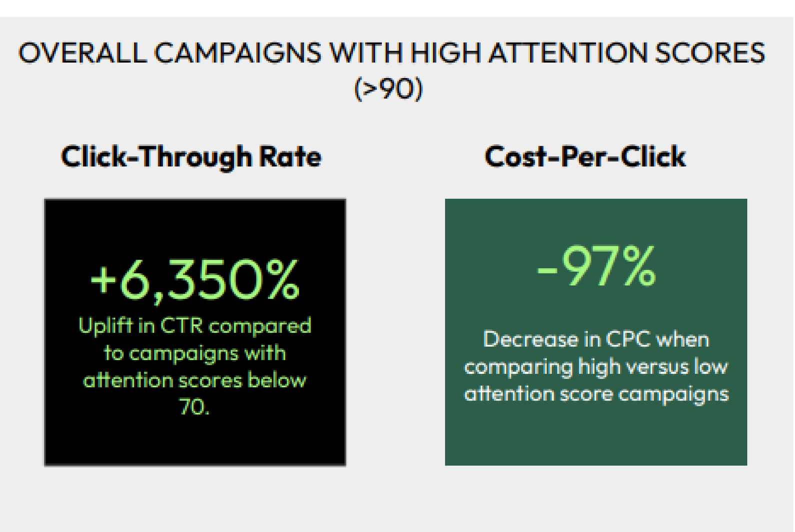
Shifting consumer behaviors and tastes have already altered the broadcast sector. When we also consider the convergence of commerce and media, as well as the rapid impact of AI, there are numerous implications for advertisers.

Rising linear CPMs and streaming time share will lead to a heavier CTV weighting to restore cost-effective reach, especially for small and mid-sized campaigns, which may see allocations increase by up to 60% on CTV.

Device-level intent is a valuable signal. Roku viewer-search data helps identify what people are looking for on the biggest screen. This is highly impactful for creative versioning and contextual adjacencies. Brand-specific audiences created within Omni get sent to Roku's clean room, where they are layered with Roku's anonymized and aggregated search data. This data then informs spend and content decisions from sponsorships, tailored creative messaging, or even contextual optimization.

AVOD, FAST, and BVOD are forming roles in the upper/mid-funnel of a commerce-aware chain. Video impressions should be connected to browse and basket behaviors (via Amazon Ads and Publisher Cloud) and calibrated to marginal ROAS lift, not last-click bias. Early OMG/Amazon work has validated closed-loop planning and measurement patterns.

Interactivity and attention, not just 30" OTS, should be considered as CTV becomes an interactive canvas. Programmatic pause ads, QR-enabled overlays, AI lens, and shoppable units can outperform standard pre-roll when used judiciously around relevant content (sports, reality, live, etc).



Also, design creative for quality attention, an OMD case study with IAS in Hong Kong shows stronger performance when optimizing to attention signals versus just delivery KPIs.

Forward Outlook for the Next 12 Months

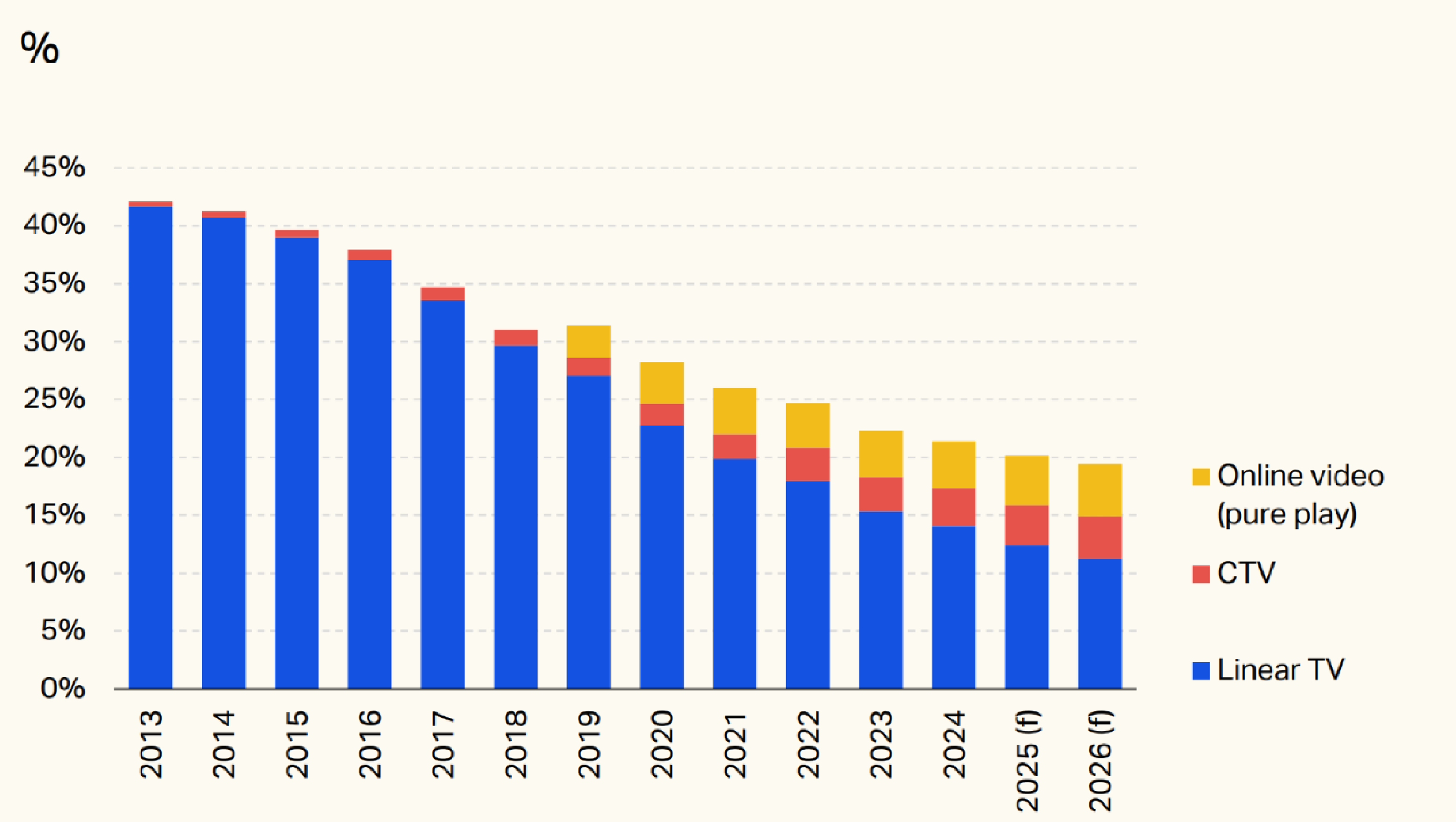
After losing MRC accreditation in 2021, Nielsen has regained US accreditation with a new Big Data + Panel product for 25/26 Upfront negotiations. It is a larger panel, and data from 75m connected devices are calibrated and validated in the new landscape.

Numerous syndicates and partnerships between broadcasters have been formed around the world. They will drive growth as previously highly competitive local suppliers come together in marketplaces, insight, and measurement protocols to simplify buyer workflow and deliver frequency control.

There will be new video governance requirements and challenges as viewing spreads beyond legacy regulatory oversight. OMG's CASA framework (Accountability, Standards & Safety) remains central to enforcing rights to transparency, suitability, and consistent delivery across emerging video channels, including smart-TV environments and creator-led CTV. As well as the platform AI buying agents across formats, including video.

We can expect more techniques perfected in digital environments on big screens, such as A/B testing CTAs, QR timing, and layout for co-viewing contexts.

Global, TV and online video share of total ad spend



Note: Online video includes ad spend with YouTube but excludes social video. 2025 and 2026 data are WARC forecasts.

Source: WARC Media

Video formats uniquely capture attention, shift perceptions, and drive action across the consumer journey. Recent declines in overall share for TV, CTV, and online video combined can be reversed if the core strengths of video can continue to be effectively combined with now mature and scaling digital techniques, aligned with new emerging AI capabilities.

Jean-Paul Edwards

Managing Director, Product | OMD Worldwide