



Source: abc Entertainment

MEDIA IMPACT REPORT

Upfronts and NewFronts Recap

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Recapping the 2025 Upfronts and Newfronts

By [Rachel Baker](#), SVP, Head of Media Investment and Partnerships, [Ryan Gilbert](#), VP, Digital Media, and [Jacob Simonich](#), Associate Director, Paid Search & YouTube

2025 Upfronts

This year's overarching theme: live content is still paramount but the focus on interactivity, personalization and commerce, all powered by AI, took center stage.

NBCUniversal

- NBCUniversal discussed the recently named cable spinoff, Versant, which will have no near-term change for advertisers.
- NBCU will be the home to some of the biggest live events in 2025 and 2026 including the return of the NBA and Super Bowl 2026.
- "Legendary February"—NBCU will deliver an unprecedented 17-day stretch of live sports featuring the Super Bowl, Winter Olympics and the NBA All Star Weekend.
- In the summer, Telemundo and Peacock will be the Spanish language home to the FIFA World Cup.
- 70% of NBC's lineup is live, spanning sports, news and entertainment.
- Telemundo also continues to strengthen its live programming, with 70% of its content airing live.
- Peacock continues to expand its live programming, with more than 7,500 hours of live sports content slated for 2026.
- Live content matters because it delivers 21% more engagement compared to non-live content.
- Showcased how innovative ad unit campaigns drove 3x higher unaided brand awareness and 1.3x higher search lift.

FOX

- Fox is fully leaning into its major moments such as the 2026 FIFA World Cup, with NFL, MLB, NASCAR and College Football rounding out their sports content.
- More than 200 new brands have advertised on Fox News since last year's elections, driven by continued ratings growth.
- A medical comedy adapted from a PBS staple and a drama series starring Patrick Dempsey as a hitman with Alzheimer's were two of the new shows announced.
- The company also announced a Judeo-Christian miniseries that is a rarity for network television.
- Fox's total audience across all verticals increased 26% last year.
- Fox's latest adtech innovation will allow buyers to use AI for planning across the company's linear and streaming channels, as well as the content verticals Fox Sports, Fox News, Fox Entertainment and Tubi, and will power automated campaign activation. OneFox will provide real-time measurement insights based on business outcomes including sales lift, engagement and brand resonance.
- Fox announced a new streaming service called Fox One, which will launch in time for the start of the 2025 college football and NFL seasons.
- Fox One consumers will have access to live streaming and on-demand access to their full portfolio of brands including FOX News, FOX Business, FOX Weather, FOX Sports, FS1, FS2, BTN,

FOX Deportes, FOX Local Stations and the FOX network as well as the option to bundle FOX Nation within one platform.

Amazon/Prime Video



Source: Amazon

- Amazon's Upfront spotlighted a vast entertainment universe and a one-stop shop for customers and advertisers.
- Amazon's ad-supported monthly reach in the U.S. has expanded to an audience of over 300 million.
- Prime Video's ad-supported monthly audience has reached more than 130 million in the U.S., with engagement increasing to 37% in monthly viewing hours. 88% of these customers shop on Amazon.com, which means a product they see during a show like "Cross" could be in their cart before the ad ends and on their doorstep the next day.

Original content

- Amazon previewed their upcoming lineup of original shows and movies, including season two of "Fallout" and "Beast Games".
- Amazon provided a first look at "Spider-Noir" starring Nicolas Cage.
- Prime Video will expand their young adult programming, including the new series "Elle."
- The Kelce brothers made an appearance to highlight their popular podcast "New Heights" on Wondery and Travis's game show "Are You Smarter than a Celebrity" on Prime Video.

- EDM DJ Steve Aoki opened the upfront with a DJ set, which livestreamed on Twitch. Lizzo also made an appearance during the show to explain how she connects with her fans on both Twitch and Amazon Music.

Live Sports

- Amazon showcased the scope of their year-round sports offerings, which include the NFL, NBA, WNBA, NASCAR, and NWSL.
- Amazon is becoming the new home for the NBA starting October 24, with an 11-year deal that includes more than 65 regular-season games, exclusive Emirates NBA Cup knock-out rounds, and playoffs.
- WNBA coverage starts May 22, featuring six Indiana Fever games.
- NASCAR makes their Prime Video debut at the Coca-Cola 600.
- Amazon can turn commercials into instant shopping opportunities, allowing viewers to purchase products directly with their remote control during live broadcasts. For advertisers, this convergence of premium sports (i.e. NFL's Black Friday game) and advanced technology opens up a whole new playing field.

Ad solutions across the full funnel

- Amazon announced AI-powered technology that allows advertisers to reach audiences with contextually relevant pause ads that seamlessly connect brands to the scenes viewers are watching in that moment.
- Amazon introduced an expanded suite of interactive ad formats, including enhanced shoppable ads with real-time Amazon shopping signals, which include pricing, deals, reviews, Prime shipping information, and more.



Photo by Slaven Vlasic/Getty Images for Amazon

TelevisaUnivision

- TelevisaUnivision focused on live and young audiences.
- Introduced new unscripted, live, 24/7 “always on” formats—lifestyle, competition and music—that will air on the company’s streaming platform, ViX, and will be available on social media.
- They highlighted a new festival called YA fest and a streaming platform for music. YA Fest will take place in three major cities starting in September 2026 and feature live performances and immersive fan experiences that will air across TelevisaUnivision’s platforms.
- TelevisaUnivision is launching ViX Música, a streaming platform for all the music in the ViX universe. Vix Música has a partnership with iHeartMedia to exclusively stream iHeartRadio Fiesta Latina live on Vix in October.
- TelevisaUnivision is also continuing to build its sports programming with the extension of its soccer rights deal with Concacaf. Their portfolio now includes the Women’s Championship, Women’s Gold Cup, Nations League, and Champions Cup. This will continue to build on the company’s year-round coverage of Liga MX and Liga MX Femenil, UEFA Champions League Final, Concacaf Gold Cup, and FIFA Club World Cup.
- The company also introduced new immersive in-show ads for ViX, which are built in partnership with TripleLift for seamless brand integration within content.

Disney

- Disney’s presentation played up franchise and IP, stating they will provide “flexibility and value” among their various ad-friendly tools.
- Former NFL stars Peyton and Eli Manning showcased many of the returning series like “High Potential” and “Paradise,” while the cast of “Only Murders in the Building” and “The Bear” came out to speak about their own shows. Two new series from Ryan Murphy were showcased by their cast.
- The Marvel Cinematic Universe was the subject of the presentation’s biggest news—that Krysten Ritter will reprise the role of Jessica Jones in season two of “Daredevil: Born Again.”

- ESPN’s new streaming offering was highlighted—the reimagined service brings fans closer to the game with a focus on personalization—users can curate their own SportsCenter, access embedded sports betting, commerce and control their TV viewing experience from their phone.
- The 2027 Super Bowl will air on ABC and ESPN, the Oscars will return to Hulu in 2027, and the Grammys will start airing on ABC in 2027.
- ABC News’ World News Tonight remains the most-watched nightly news program.
- Disney announced a new women-led sports commentary show called “Vibe Check,” which features an all-female roster highlighting the biggest stories in sports.
- Disney showcased two ad tech offerings:
 - Experience Composer—allows advertisers to “test and refine their creative using real-time insights, maximizing the value of every impression for the right audience at the right time and now with the right format.”
 - Disney Compass—gives agencies direct access to first-party data for smart planning, deeper insights and more precise measurement
- Disney referenced that a need for standardized measurement will be key in the future when comparing performance against all premium streamer players—especially for brand advertisers and partnerships.



Source: abc Entertainment

Warner Bros. Discovery (WBD)



Source: Warner Bros. Discovery

- They announced that the company would rebrand its streaming service back to “HBO Max,” two years after losing the HBO part of the name.
- WBD also touted their live sports programming as more dynamic and diverse with additions of sports rights such as Unrivaled, Roland Garros, Big 12 football, BIG EAST conference, NASCAR, FIFA Club World Cup, and others, though some are sublicensed.
- They also highlighted Bleacher Report’s digital partnership with the NFL, which had a strong presence at the draft this year.
- They also promoted women’s sports platform B/R W, rebranded this year from HighlightHER.
- WBD continues to be the home for NHL regular season and playoff games, the Stanley Cup Finals and NCAA March Madness.
- CNN also announced their new streaming product launching this fall, CNN all access. CNN will also be launching a standalone weather app.
- WBD unveiled two new advertising solutions:
 - NEO, a new ad platform developed in partnership with FreeWheel and Magnite, will provide buyers direct access to WBD’s entire premium video inventory across streaming, linear, FAST, and syndication, through one simplified and user-friendly interface. Designed to enhance transparency and impact, NEO will empower advertisers to match their messages with WBD’s content. Buyers will have greater control and direct access to WBD’s entire supply across

all owned and operated properties, as well as distributed endpoints in the portfolio, streamlining their transaction process and capitalization on deeper reporting and advanced insights.

- DemoDirect, is an innovative linear TV advertising solution designed to simplify and streamline demographic-based buying across WBD’s premium network portfolio. Created to reduce the complexity of traditional demo-based buying, DemoDirect offers advertisers a single, optimized path to reach key audiences with one plan, one CPM, and one invoice.
- WBD Storyverse is a new initiative to strategically unlock the WBD vault for advertisers and meet the rise in demand for nostalgia while satiating new and established fanbases. WBD Storyverse leverages WBD’s films and series to help brands emotionally connect with audiences using beloved characters and IP with new twists.

Netflix



Source: Netflix

- Netflix highlighted the growth of their ad-supported plan, which now reaches more than 94 million global monthly active users and more 18-34 year olds than any other U.S. broadcast or cable network.
- Ad-supported members in the U.S. are highly engaged, spending an average of 41 hours per month on Netflix. The time spent is roughly the same with or without ads.
- Advertisers can now target more than 100 interests in over 17 categories—including life stages.

- Advertisers can incorporate their first-party data, either through LiveRamp or directly with Netflix, so clients can match data sets for behavioral insights and targeting capabilities against Netflix's ads audience.
- Netflix also opened third-party data access to trusted partners like Experian and Acxiom and announced their own clean room strategy.
- Netflix announced the development of new first-party measurement solutions, starting with a brand lift capability tying viewing behaviors to consumer brand perceptions.
- Netflix debuted a new modular framework for ad formats which will be available by 2026 and leverages generative AI to instantly marry advertisers' ads with the content. This includes interactive midroll and pause formats that build custom advertising creative with added overlays, calls to action, second screen buttons, and more to serve the right ad to the right member at the right time.
- For live events, in addition to WWE every week, the Katie Taylor vs. Amanda Serrano professional boxing fight was announced, as well as two NFL Christmas day matchups (Dallas Cowboys vs. Washington Commanders and Detroit Lions vs. Minnesota Vikings).
- Netflix previewed many new series as well as returning shows such as "Nobody Wants This," "Bridgerton," "Wednesday" and the fifth and final season of "Stranger Things."



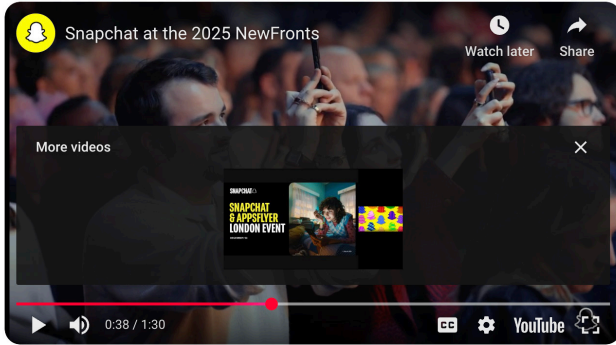
Source: Netflix

Google NewFront



- 2025 was the first time that living room TV YouTube viewership has exceeded YouTube's mobile viewership. YouTube currently leads the marketplace with more than 20% of all streaming viewership minutes.
- YouTube TV live sports inventory will be available at auction in the future. Previously, this inventory was only available on reservation. There are still questions on whether advertisers can bid on specific sports/programs, rates, etc. This should begin mitigating empty ad space (i.e., "your program will resume momentarily" breaks) for YouTube TV sports viewers in the future.
- YouTube is launching a full commerce and retail media offering available via DV360 starting this summer. Retail launch partners include Costco, United Airlines and Regal Cinemas.
- Retail data, brand first-party data and Google audience data can now all be leveraged and co-mingled to reach audiences on the YouTube platform.
- DV360 expanding inventory by adding partnerships with Netflix and Disney. They are also increasing avenues to reach Gen Z through Warner, Spotify, Tubi and gaming partnerships like Roblox.
- DV360 also introduced new AI capabilities including AI campaign building and audience matching.

YouTube



Source: YouTube

- Shorts now has more than 2 billion monthly users.
- YouTube ranks #1 for content creator trustworthiness.
- 45% of Shorts users are not on TikTok; 60% are not on Instagram Reels.
 - Delivers 23% higher ROI than other channels. Users discover on Shorts, then move to other YouTube formats.
- YouTube has shown to cut shopping journey by an average of six days due to influencer trust.
- Insights Finder will now include Creator Finder feature, allowing you to find creators that index against your vertical (ex. ice cream users are six times more likely to be fans of gymnastics, platform will suggest gymnastics creators.)
 - This functionality will make it easier to partner with creators through BrandConnect and partnership ads. This will also be available via DV360 soon.
 - Creator Partnership Hub now available in Google ads and will include costs to run campaigns.
- Organic and paid metrics—and more are coming—to Google ads, so brands will not have to request metrics from creators.
- Google is piloting creator lead-ins where creators can authentically discuss brand partnerships before ad videos to strengthen connection.
- When compared to social channels, YouTube ranked #1 with Gen Z for product reviews.

Brandcast

- NFL to stream on YouTube for free for first Friday night game in Sao Paulo, Brazil.
- Teaming up with NFL for Super Bowl Flag Football featuring creators and artists with international flag football also in the works.
- New package coming to access major cultural moments, i.e. awards shows, Black Friday, PGA Championship and more. Youtube will also include tech built with Gemini to match ads with peak moments where audiences are most engaged.
- Expanding shoppable CTV with new QR code function to send to phone and Interactive product feed now available.



/UPDATES

Google Antitrust Case: What It Means for Advertisers

By **Jacob Simonich**, Associate Director, Paid Search & YouTube

In January 2023, the U.S. Department of Justice (DOJ) brought a federal antitrust case against Google accusing the tech giant of monopolizing the ad tech market in violation of the Sherman Antitrust Act of 1890. Google has been entangled in antitrust lawsuits since 2020 based on the company's alleged monopoly of the search engine market.

The Ruling

On Thursday April 17, 2025, a federal judge ruled against Google stating that the company is in fact operating an illegal monopoly in the ad tech industry. The court determined that Google used anticompetitive practices that helped them control the digital ad market. These practices include tying its publisher ad server and ad exchange together through contractual and technical integration.

The federal court failed to prove that Google has a monopoly in the ad networks themselves which was raised as a separate complaint in the case. This marks the second antitrust suit Google has lost after the initial 2020 search engine case. Google has publicly disagreed with the ruling arguing that their platform and practices do not harm users or competition.

What's Next?

Currently, it is unclear what next steps the DOJ will take based on this ruling. Action is still needed on a

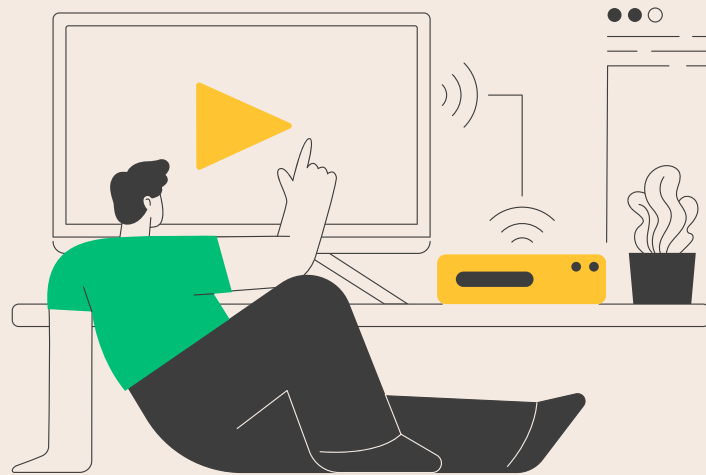
separate search engine suit from 2020 to decide how Google will break its monopoly and how the new administration will affect that. Google will also inevitably appeal the federal court's decision, pushing a final resolution out further.

How Will This Affect Google Advertising?

While there is no immediate resolution, this decision could have massive ramifications to how advertisers purchase inventory on current advertiser networks in the long run. The Google Ads platform can potentially be broken off or sold to another company enabling other platforms to access the ad networks for Google display, video, and even search more easily.

This could also give more transparency to the ad buying process on ad networks to create more opportunity for advertisers to choose where and how to buy ad inventory. Regardless of the legal outcome, Google will likely remain the world's most used search engine even as the rise in popularity of search on platforms like Tik Tok, Perplexity, and others is shifting the global search engine landscape.

The Rain the Growth Agency team is working diligently to stay ahead of the curve and ensure we are exploring, vetting and testing all new opportunities.



/NOTEPAD

Navigating a Tight Linear TV Marketplace

By **Susan Rupert**, VP, Media, Rainstorm Direct

The linear TV marketplace has remained steadily competitive in 2025 making it challenging for advertisers to achieve and retain growth. While there have been concerns around consumer spending potentially decreasing, the uncertainty around impacts from tariffs have had minimal impact on advertising spending thus far.

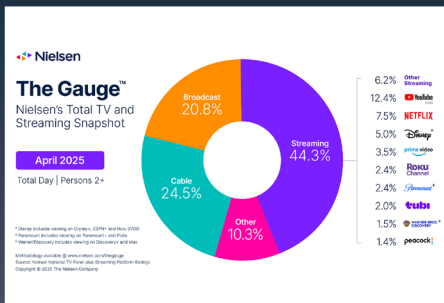
Despite a competitive environment there are still several things that can be done to help improve a campaign's performance and continue momentum:

- **Maximize Best Performers**
 - Maximize frequency on strongest performing dayparts
 - Make sure all available rotations/dayparts are on the schedule
 - Use a combination of National and Local breaks to maximize presence on the network
 - Leverage all available creative lengths
- **Test/Retest Opportunities**
 - Identify networks and rotations to test and retest
 - Consider testing in new programs or programs that have shifted to a different daypart

- **Be Flexible with Your Budget**—Even in a competitive marketplace there are weekly firesale opportunities across all network types—cable, broadcast network and syndication. Being flexible with your budget will allow you to take advantage of last-minute deals.
- **Leverage Guaranteed Deals**—Consider guaranteed media deals to layer onto core media to maximize campaign results. These guaranteed deals can be based on CPMs, KPIs, etc.

Advertisers are watching the global economy waiting to see where tariffs, trade agreements and the stock market net out. With so much in flux, it is difficult to project how the upcoming broadcast upfront year will play out, ultimately impacting how open or competitive the linear TV scatter marketplace will be. Staying informed and remaining flexible are key to navigating the ever-changing marketplace.

/QUICK HITS



The Gauge™: Streaming Peaks Again, Drawing from Successful Multiplatform Strategies

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Budget and bidding

Budget: \$50.00/day
Bidding: Target ROAS

Smart Bidding Exploration 100%

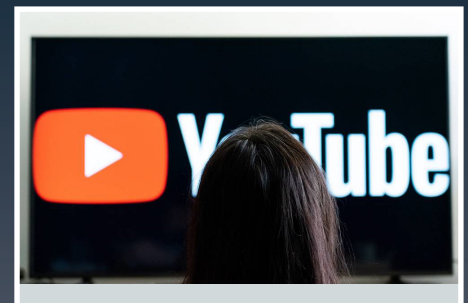
☒ Allow Smart Bidding to explore new traffic on this campaign

ROAS target tolerance: 10% 15% 30%

With Smart Bidding Exploration, your effective target ROAS is 170%. This estimate does not include the effect of ad group-level ROAS targets.

Google Makes 'Biggest' Update To Smart Bidding

[\[Mediapost\]](#)



YouTube's Cross-Platform Takeover Is Putting Pressure On Creators

[\[MarketingBrew\]](#)

Need More Guidance?



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