

Navigating the Netflix Video Podcast Migration





Ad Results Media (ARM) invests big bets in audio for two core reasons: it reaches the brain differently, and it performs. It creates a "theatre of the mind" that builds unmatched brand intimacy.

Despite the fact podcasters were born from audio, the podcast listener market has reached a tipping point where a video of the show recording is no longer a "nice-to-have" extension. Clips and snippets with visual components distributed in platforms outside of Apple Podcasts and Spotify have become a core discovery engine that drives listeners to tune in audibly, visually, or both.

Netflix's launch of their own two bespoke hosted podcasts, and aggressive 2025/2026 acquisition of video podcast rights from Barstool Sports, iHeartMedia, Spotify (The Ringer) and more, represents a tectonic shift in customer attention and ability to discover and tune-in to podcasts. The industry is showing clear shifts from open-source YouTube uploading & distribution by creators, to a "walled garden" of premium SVOD (Subscription Video on Demand).

For brands advertising in the audio-creator space, this is a double-edged sword: brands lose the "free-to-air" virality of YouTube, but brands can gain premium, producer-vetted, less-skippable, environments in influencer & digital audio-video history.

ARM predicts Netflix's expansion into video podcasting is further evidence that podcasts are a mainstream channel, the walled garden nature of the launch may trigger fragmentation in podcast measurement across multiple devices, publisher-led price hikes, and logistical "category wars" despite a lack of unified measurement. Brands should take advantage of it in broad strokes by working with an expert to monitor changes in show reach and performance until viewership is third-party verified, piloting future interactive units only at discounted "test-and-learn" rates, and enforcing rigid episodic exclusivity to prevent competitor ad-clashes against host-read endorsements.



The 2026 Host Lineup

As of early 2026, the video versions of the world's most influential podcasts are migrating exclusively to Netflix.

"What do Bill Simmons, Chelsea Handler, Bobby Bones, and Adam Devine have in common? They all have video podcasts, and better yet, those pods are going to be available to stream on Netflix. Starting in January, you'll be able to watch some of the biggest shows from Spotify (The Bill Simmons Podcast), Barstool (Pardon My Take), and iHeart (My Favorite Murder) in the same place you can catch Stranger Things and KPop Demon Hunters. In addition to these fan favorites, look out for Netflix's own offerings, including a Bridgerton companion pod and Skip Intro, where host Krista Smith interviews the talent behind your favorite Netflix series and films. Check out the release dates below, and clear your schedule - these podcasts aren't going to watch themselves (but you definitely can!)." - Netflix.com.

Partner	Key Shows Moving to Netflix (Video Exclusive)
	<ul style="list-style-type: none"> Pardon My Take Spittin' Chiclets The Ryen Russillo Podcast
	<ul style="list-style-type: none"> The Big Picture The Bill Simmons Podcast Conspiracy Theories Dissect Game Over The Recipe Club The Dave Chang Show The Mismatch The Ringer Fantasy Football Show The Ringer NBA Show The Ringer NFL Show The Rewatchables The Zach Lowe Show
	<ul style="list-style-type: none"> 3 and Out with John Middlekauff Behind the Bastards Bobby Bones Presents: The BobbyCast The Breakfast Club Buried Bones Dear Chelsea New Rory & MAL My Favorite Murder Joe and Jada This is important The Psychology of your 20s Stuff They Don't Want to You to Know Stuff to Blow Your Mind Stuff You Missed in History Class
	<ul style="list-style-type: none"> 2 new exclusive shows: The Pete Davidson Show The White House with Michael Irvin

Source: Podnews (Oct 2025), Front Office Sports (Dec 2025), iHeartMedia Press Room (Dec 2025), Netflix (Jan 2026), The Verge (Jan 2026). Other partners continue to migrate on an ongoing basis.

For Spotify, Barstool Sports, and iHeart, While audio versions will remain on RSS feeds (Spotify, Apple), the visual experience, where the brand's visual branding, desk signage, and integrated segments live, will move and be accessible only behind Netflix's paid walled garden.



Projected Winners from the Shift in Platform

For the Platforms (Netflix):

Netflix is chasing "casual viewing" hours.

They've realized that YouTube owns the "second screen" experience across creators. By bringing in Bill Simmons or Big Cat, Netflix fills the gap between \$100M scripted dramas with "modern talk shows" that cost a fraction to produce but generate massive engagement hours and recurring habits.

Netflix is hungry for live-adjacent content. They streamed NFL Christmas Day games exclusively, Jake Paul vs Anthony Joshua's fight, and The 31st Annual SAG Awards in the past year to garner more customers tuning in. Collecting an initial anthology of premium podcasts in addition to creating and hosting their own celebrity-hosted content is proof they plan to double-down expansion in live-adjacent content.

For the Creators & Their Representation:

YouTube's algorithm is fickle. Netflix offers guaranteed licensing revenue and removes the dependency on the "Skip Ad" button. It also elevates their talent to "Netflix Star" status, which opens doors for documentaries and live specials.





How Networks Are Monetizing

Podcast networks are taking distinct approaches to monetization as content expands onto Netflix, creating a fragmented but opportunity-rich landscape for brands.

A few examples of this include:

- Spotify is embracing a hybrid model, where baked-in ads carry over while Netflix layers in dynamic advertising – introducing incremental monetization, but also potential brand adjacency challenges.
- iHeartMedia is prioritizing reach and discovery through a licensing-first approach, keeping content free of Netflix dynamic ads and preserving a clean, uninterrupted brand environment.
- Barstool Sports is taking a phased approach – launching without dynamic ads before transitioning to them, with added safeguards like category exclusivity to protect existing sponsors.

In practice, this means brands may see anything from “premium placement” within uncluttered content to more traditional ad-supported experiences, depending on the network – underscoring that distribution and monetization strategies are no longer one-size-fits-all.





Impact for Brands Buying Ads

The shift from YouTube to Netflix fundamentally changes how brands and agencies may deploy budgets where measurement is a fundamental part of it.

Ad Planning

The buying structure is likely to be bifurcating between Host-Integrated (Sold by the companies that represent the show) and platform-inserted (sold by Netflix, most like a DAI audio ad, but video).

For host-integrated, Netflix generally does not strip baked-in, endorsed ads out. They remain "embedded" in the video file provided to Netflix, along with any QR codes, promo codes, or collateral a brand has the host permanently stitch into the episode. This remains the "Gold Standard" for brand affinity. However, because the video is now on Netflix, the production value of these "host-read" segments needs to increase to match the "Living Room/Big Screen" experience.

For produced video (similar to an audio DAI ad), it appears based on early conversations some podcasts will be eligible to be served Netflix-served dynamic produced ads via Netflix Ads Manager (Direct or Programmatic). These come at standard :15, :30 lengths and may unlock a possibility for Netflix to treat Podcasts as a Genre/Category (e.g., "Sports Podcasts" or "True Crime Podcasts"). This is not confirmed.



Ad Buying

This isn't just a podcast buy anymore; the walls of audio and connected TV are blurring further.

Audio and influencer investors will certainly continue to purchase baked-in endorsement ad reads through iHeart, Spotify, and Barstool to unlock talent, because it ensures a brand's message is in the audio (Spotify/Apple) AND the video (Netflix).

Video investors may be able to reach podcast watchers dynamically with produced, non-endorsement ads across any show that Netflix migrates to their platform assuming they are allowing it to monetize and the audience they are targeting naturally lands on that content. Since Netflix is selling "audience-based" video and not "show-based," if we buy through Netflix directly, we might end up on *The Psychology of Your 20s* when we wanted John Middlekauff.



Ad Tracking

Video podcasts on Netflix are not unmeasurable, but would operate very differently from podcast attribution.

Brands buying through Netflix Ads Manager receive standard connected TV reporting such as impressions, reach and frequency, ad completion rates, and third-party verification through partners like Nielsen (for the ad-supported tier), IAS, and DoubleVerify (source). Netflix also supports brand lift and outcome studies via partners like Kantar, iSpot, and EDO.

What Netflix does not provide by default is pixel-level exposure data that can be directly matched to individual conversions or cleanly passed back to podcast publishers, which is why Netflix performance does not surface in traditional podcast attribution platforms. Podcast measurement platforms, including but not limited to Claritas, Magellan, and Podscribe, do not directly measure Netflix impressions. They are not integrated into Netflix's ad stack and cannot ingest Netflix exposure logs.



Podscribe, specifically, can include CTV as part of cross-channel attribution when there is pixel-based or modeled exposure data to work from, but it is not a native CTV measurement provider like Nielsen or IAS. Any Netflix-related attribution from podcast measurement vendors would be inferred rather than directly observed, using modeled household or geo matchbacks to downstream behavior rather than confirmed Netflix impression data.

In the event Netflix does not share viewership data back with publishers or advertisers, brands risk “flying blind” on a portion of impressions—similar to the challenges seen with simulcast distribution on YouTube. Put simply, if data is not passed back to platforms like Spotify, there is no clear way to determine how many baked-in ad impressions are driven by Netflix versus other endpoints. In these cases, promo codes and vanity URLs may become the only directly observable signals for tracking conversion tied to that exposure.

Netflix has established measurement capabilities; the gap today is in how, or whether, that data is shared back with advertisers and agencies for baked-in podcast ads. Netflix’s partnerships with Kantar, iSpot, and EDO may unlock match-back attribution. At this time (January 2026) this method of measuring video podcasts has not been implemented or explored in any press releases. Netflix has also opened up to Nielsen for “Standard with Ads” measurement, which provides the “apples-to-apples” comparison to Linear TV that advertisers have wanted. However, ARM’s POV is that a podcast/influencer buy lands differently than a truly linear produced buy, and this will not be a business solve.



Predictions & Point of View: Navigating Podcasts on Netflix

1. CPM Inflation Driven by Expanded Distribution

As legacy baked-in podcast ads gain incremental exposure through Netflix – including within ad-free environments – publishers are likely to position this as added value. This could translate into upward pressure on CPMs, particularly as shows extend into premium, large-screen environments.

ARM's POV:

Incremental reach alone doesn't justify higher pricing without transparent, third-party validation. While Netflix has made strides in measurement, the industry still lacks consistent visibility into how that data is shared and verified for baked-in podcast ads. Until viewership can be independently validated and clearly reported, pricing should remain grounded in the core audio investment. For now, any additional reach via Netflix should be viewed as upside – not a premium line item.

2. The Emergence of Interactive Ad Formats

Given Netflix's history of experimentation with interactivity – and precedents set by platforms like YouTube and Pinterest – interactive ad units within podcast content feel like a natural next step.

ARM's POV:

These formats should be approached as test-and-learn opportunities rather than standard buys. Early adoption will require clear attribution frameworks and success metrics tied to performance, not just engagement.

Interactivity is most effective when it reduces friction between exposure and action – think seamless pathways to conversion rather than repurposed tactics like QR codes. Execution will also matter: creative should feel native to the platform experience, not bolted on.

As podcasts extend into a living room environment, creative standards will need to evolve alongside distribution. Brands should anticipate the need for high-resolution, TV-ready assets (e.g., 4K) to ensure visual quality holds up on larger screens. What works in a mobile or audio-first context may not translate effectively to a premium, lean-back viewing experience, raising the bar for both production value and brand presentation.



3. Category Exclusivity Will Become a Battleground

The intersection of baked-in (show-level) and dynamic (audience-level) ad delivery introduces potential conflicts. For example, a host-read endorsement for one brand could coexist with dynamically inserted ads for a competitor within the same episode.

ARM's POV:

This tension will accelerate the need for clearer category exclusivity – at minimum on an episodic basis. As high-value podcast IP expands onto Netflix, expect more structured sponsorship models, including presenting partnerships and tighter control over brand adjacency. Longer term, this may also influence how shows are packaged and sold, with some opting for fewer, more integrated brand relationships to preserve consistency across platforms.

4. Blurring Lines Between Media Budget Categories

The shift of podcasts onto Netflix complicates an already ambiguous question: where do podcasts live within the media mix? Audio, video, influencer, or something else entirely?

ARM's POV:

Despite the visual layer, host-read podcast advertising remains fundamentally rooted in creator endorsement. That makes it more akin to influencer marketing than traditional video or CTV.

Standard video metrics – like viewability or completion rates – often fail to capture the core value driver: the credibility and influence of the host. As a Video Podcast result, rigid channel-based budget classifications may become less relevant, giving way to more outcome-oriented frameworks.





5. Format Shifts Will Reshape Audience Behavior

The migration of podcasts to Netflix introduces a two-sided audience dynamic. On one hand, existing fans may continue consuming content via audio platforms like Spotify or Apple Podcasts. On the other, Netflix-native viewers may discover and engage with podcast content for the first time.

ARM's POV:

Rather than a full migration, the more likely outcome is fragmentation – and expansion. Audience behavior will diversify across platforms, creating both measurement challenges and growth opportunities.

Success in this environment will depend on two things:

- **Holistic measurement:** Aggregating reach and frequency across RSS and streaming ecosystems
- **Creative adaptability:** Ensuring messaging works seamlessly in both audio-first and video-first contexts

Even as formats evolve, the most effective creative will remain grounded in strong, descriptive storytelling, ensuring the message translates regardless of how or where the audience engages.





Reach out to your **ARM account lead** or **contact us** to learn more about navigating these changing landscapes effectively today.

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