

Global TV & video market trends

How IP based content consumption
is changing our industry's landscape

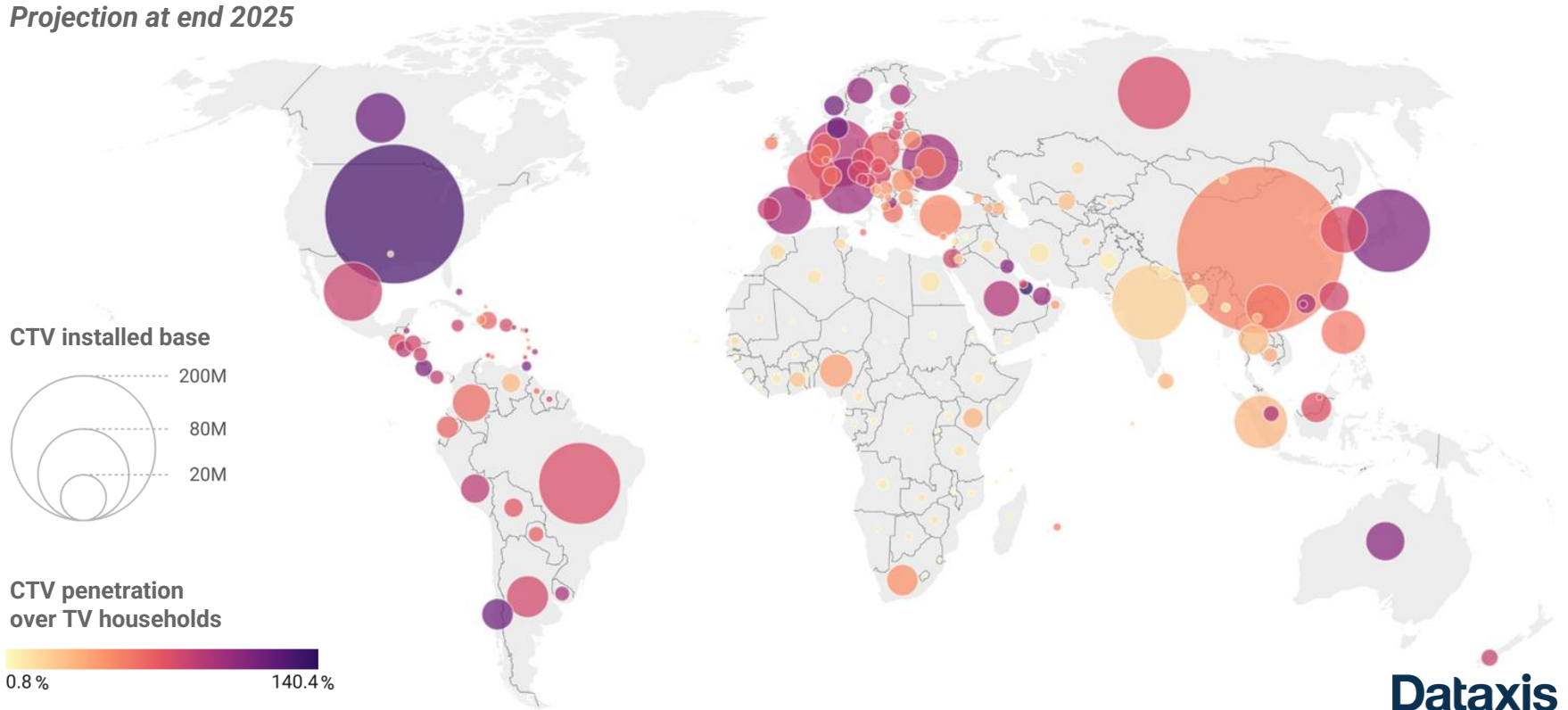


Presented by

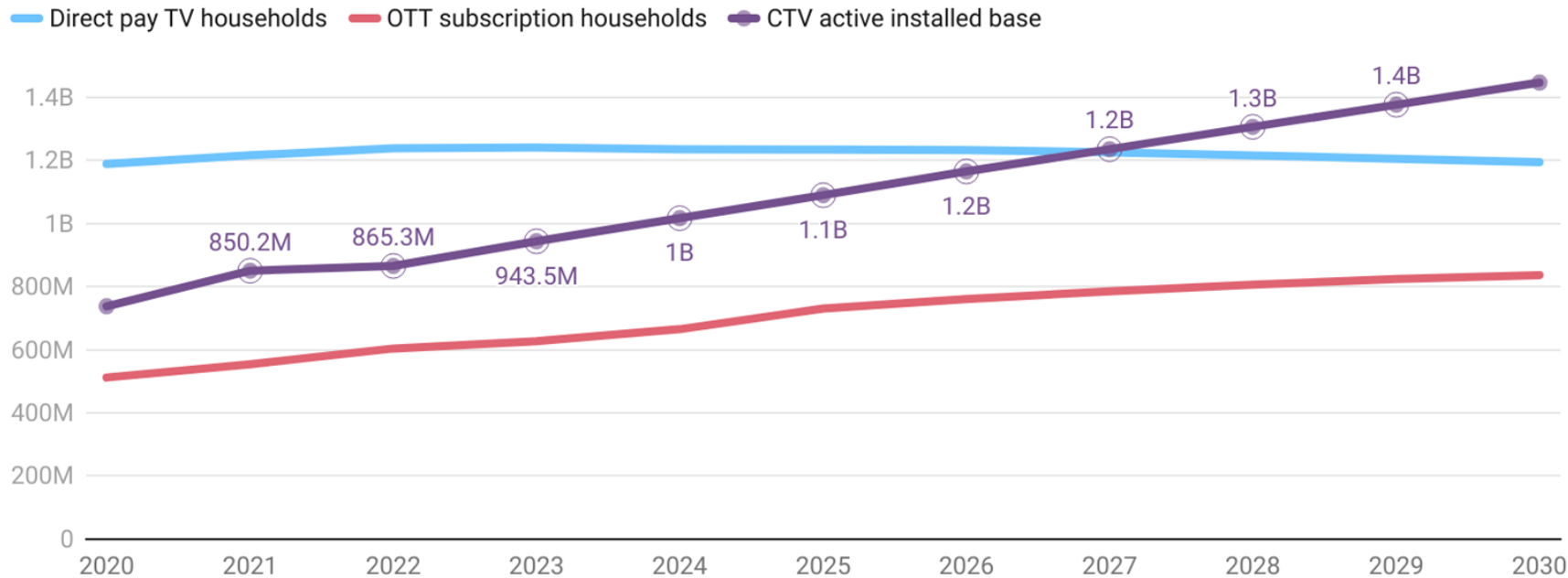
Ophélie Boucaud
Principal Analyst

The global active CTV installed base will reach 1.1 billion devices by the end of the year

Projection at end 2025

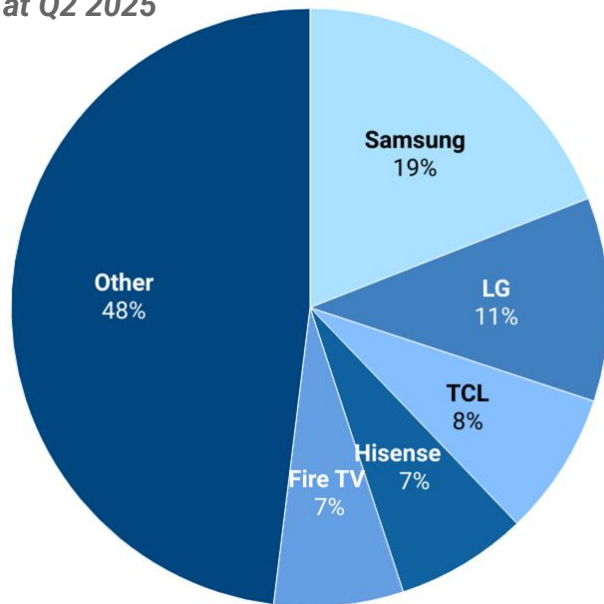


More households will access content on CTV interfaces than on pay TV platforms by 2027

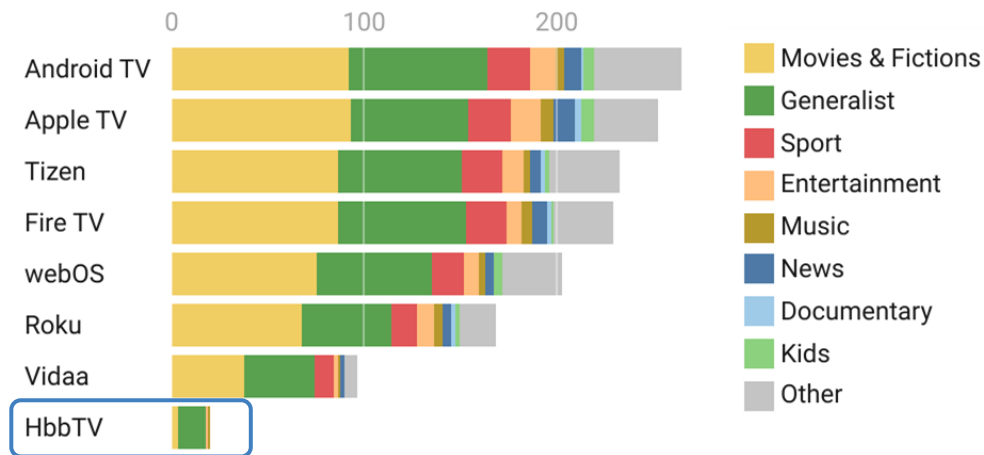


CTV interfaces have become the gateway to an extremely fragmented video app landscape

Manufacturers' global market shares across CTV and streaming devices at Q2 2025



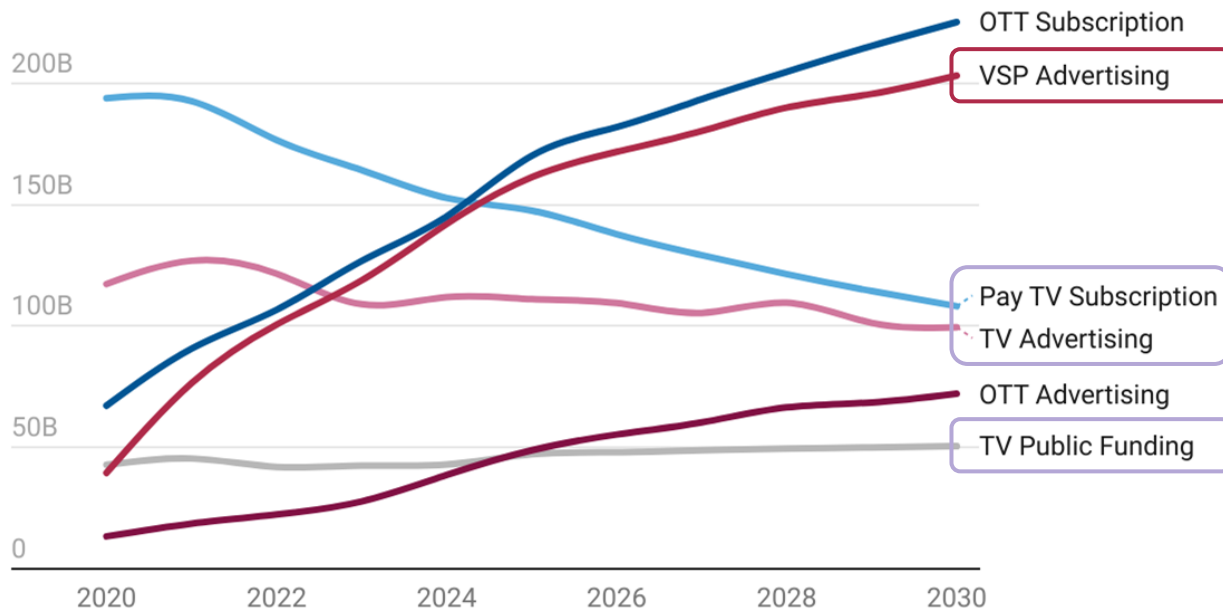
Number of TV and streaming apps by category available on CTV OS at Q2 2025



The vast majority of CTV apps natively on **HbbTV** are **BVOD** services edited by European media companies

Digital commercial revenues will account for 55% of the total TV and video landscape this year

Total TV and video revenues evolution in USD

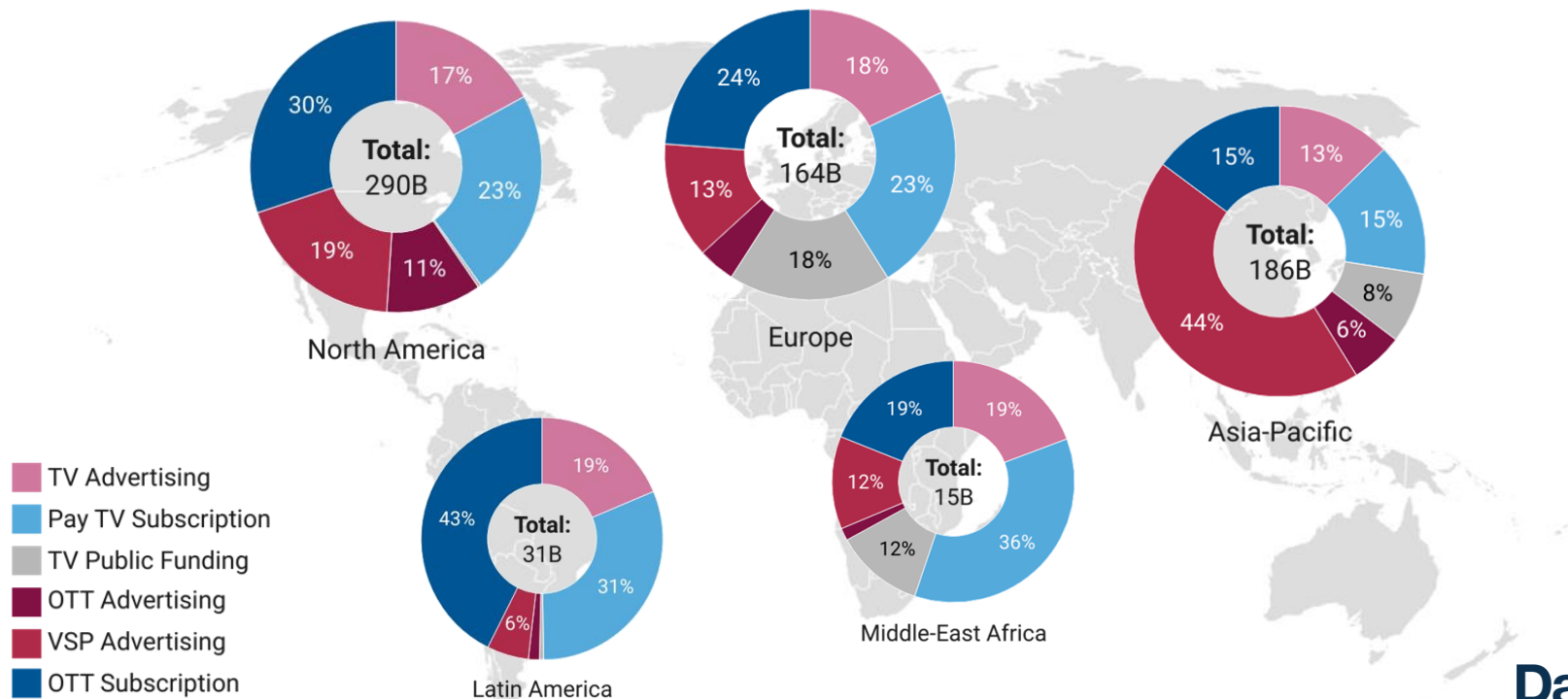


Video sharing platforms will pass the **\$150B mark** in global ad revenues this year, driven by high consumption in APAC and NAM, and record breaking results of YouTube, Meta and TikTok

Linear TV across FTA and pay TV account for **less than half** of total video revenues since last year

Global trends favor hyper scalers as they consolidate growing market shares across all regions

Total TV and video revenues projection for 2025 in USD



Collaboration is the new motto to reach mass audiences in a fragmented and transitioning distribution landscape

Content partnerships



Content distribution



Advertising partnerships

