



**alliance des
medias tv vidéo**

Analysis of Media CPTs in France and by Country

Updated version - revised 2024 data and 2025 data 19 August 2026

2025 Scope

7 countries: France, UK, Germany, Italy, Netherlands, Spain, USA

- Media analysed: TV (all day / prime time / non-prime time), radio, digital audio, And for ONLINE VIDEO:
- BVOD (20”), SVOD (20”), AVOD (20”), non-skippable YouTube (YT) on CTV(20”), non-skippable YT videos on other devices (20”), skippable YT video (ALL FORMATS), OUTSTREAM (Teads, Webedia, Xandr... 20 seconds), Digital Social Video (ALL FORMATS)
- Targets audiences: 15+ et 25-49 years old

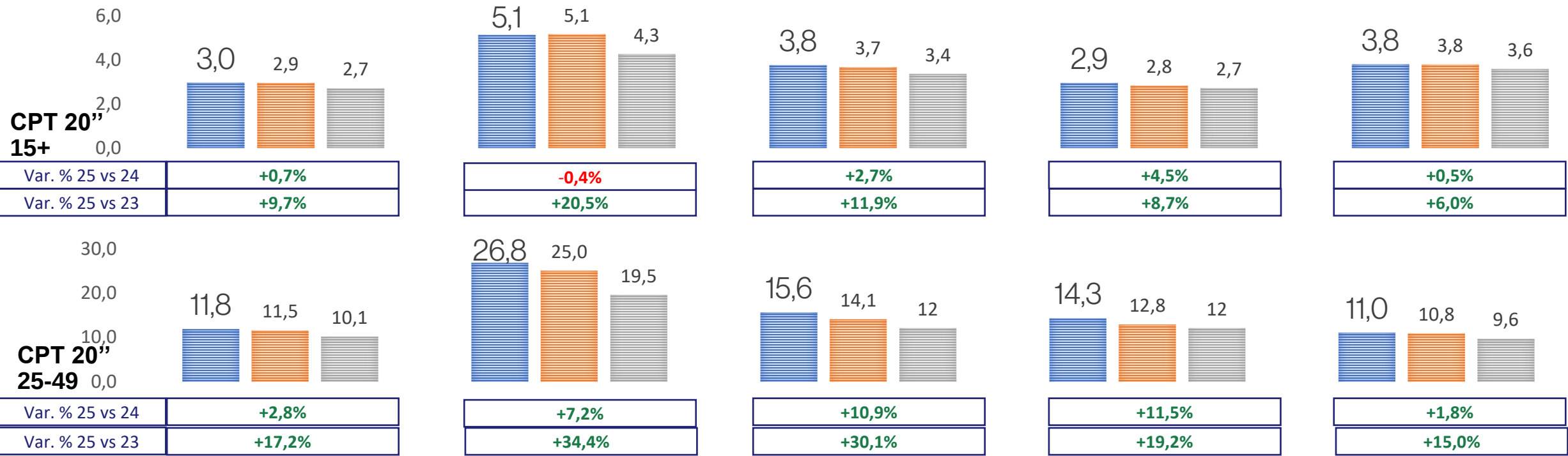
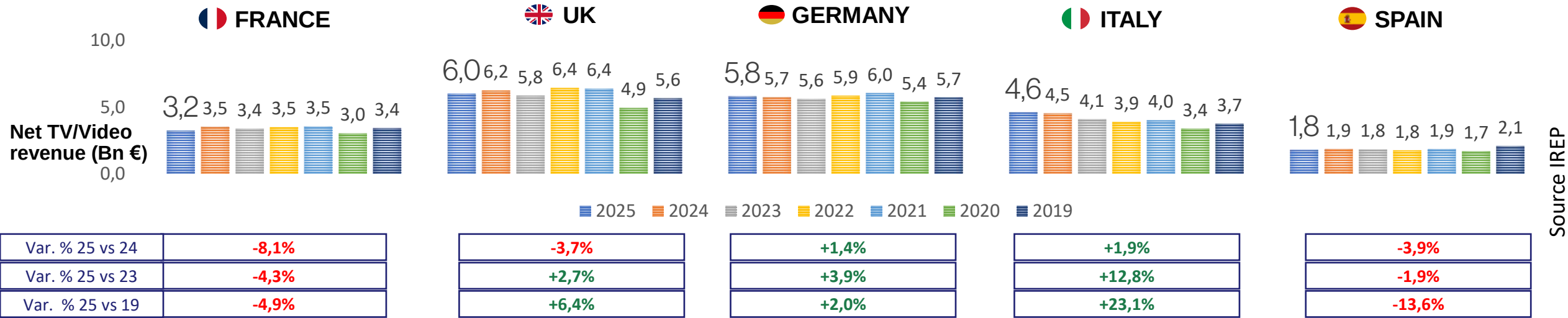
2024	Target populations			
COUNTRIES	15+	25-49	15-34	25-59
France	54 433 000	19 504 000	15 098 000	28 059 000
UK	52 607 000	20 799 000	15 367 000	23 463 000
GERMANY	69 082 000	26 235 000	18 400 000	39 043 000
ITALY	51 587 000	17 650 000	12 027 000	27 165 000
NETHERLANDS	14 838 000	5 502 000	4 464 000	8 062 000
SPAIN	39 652 000	14 881 000	10 092 000	22 007 000
USA	263 509 00	103 067 000		

2025	Target populations	
COUNTRIES	15+	25-49
France	54 872 000	19 820 000
UK	52 607 000	21 069 000
GERMANY	69 082 000	26 395 000
ITALY	51 587 000	17 610 000
NETHERLANDS	14 838 000	5 602 000
SPAIN	39 652 000	15 060 000
USA	266 750 000	103 850 000

DEFINITIONS:

AVOD : Rakuten, PlutoTV
SVOD : Netflix, Amazon, Disney+
SOCIAL VIDEO : TikTok, Snapchat, Meta
YT non-skippable CTV, other non-skippable devices, YT skippable
BVOD : Catch-up TV

Variations in TV/Video Net Revenue and CPTs, 15+ y/o and 25-49 y/o, 2025



KEY TAKEAWAYS:

VARIATIONS IN TV INVESTMENT AND CPTS (2025 VS. 2024/2023)

❖ Contrasting inventory pressures and advertising revenue:

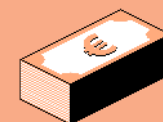
The decline in listening time is creating inventory constraints in Europe. TV/Video revenues are growing strongly in Italy vs. 2023 (+12.8%), more moderately in Germany (+3.9%) and the UK (+2.7%), while France (-4.3%) and Spain (-1.9%) are seeing a decline in net advertising revenues (2025 vs. 2023).

1

EVOLUTIONS IN TV 20'' CPTS

FOR 15+ Y/O / 25-49 Y/O 2025 / 2024 / 2023

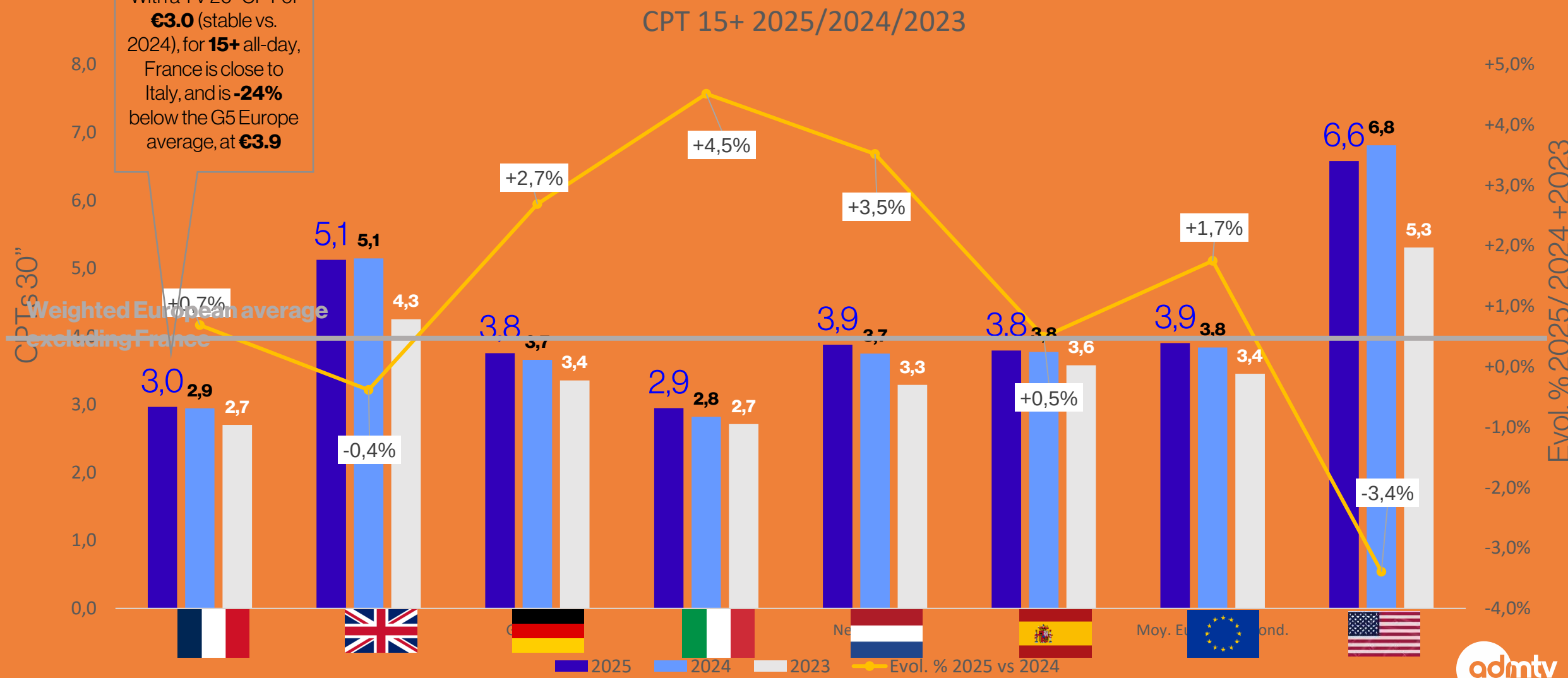
5 countries / European average excluding France = UK, Spain, Italy, Germany, Netherlands



Evolutions in TV 20" CPT, 15+ y/o, All Day

HOW TO READ THIS:

With a TV 20" CPT of **€3.0** (stable vs. 2024), for **15+** all-day, France is close to Italy, and is **-24%** below the G5 Europe average, at **€3.9**



*G5 = UK, Germany, Italy, Netherlands, Spain / CPTs weighted by population size

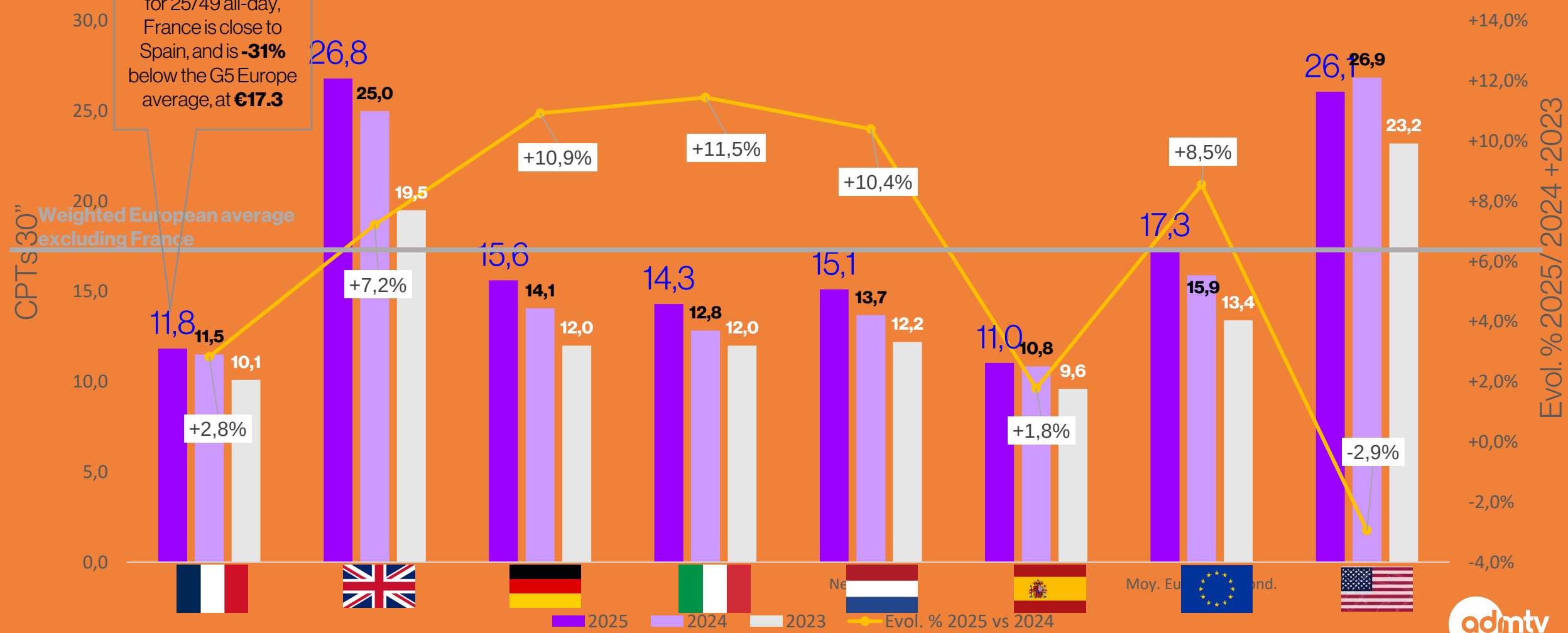


Evolutions in TV 20" CPT, 25-49 y/o, All Day

HOW TO READ THIS:

With a TV 20" CPT of **€11.8** (+3% vs. 2024), for 25/49 all-day, France is close to Spain, and is **-31%** below the G5 Europe average, at **€17.3**

CPT 25-49 2025/2024/2023



*G5 = UK, Germany, Italy, Netherlands, Spain / CPTs weighted by population size

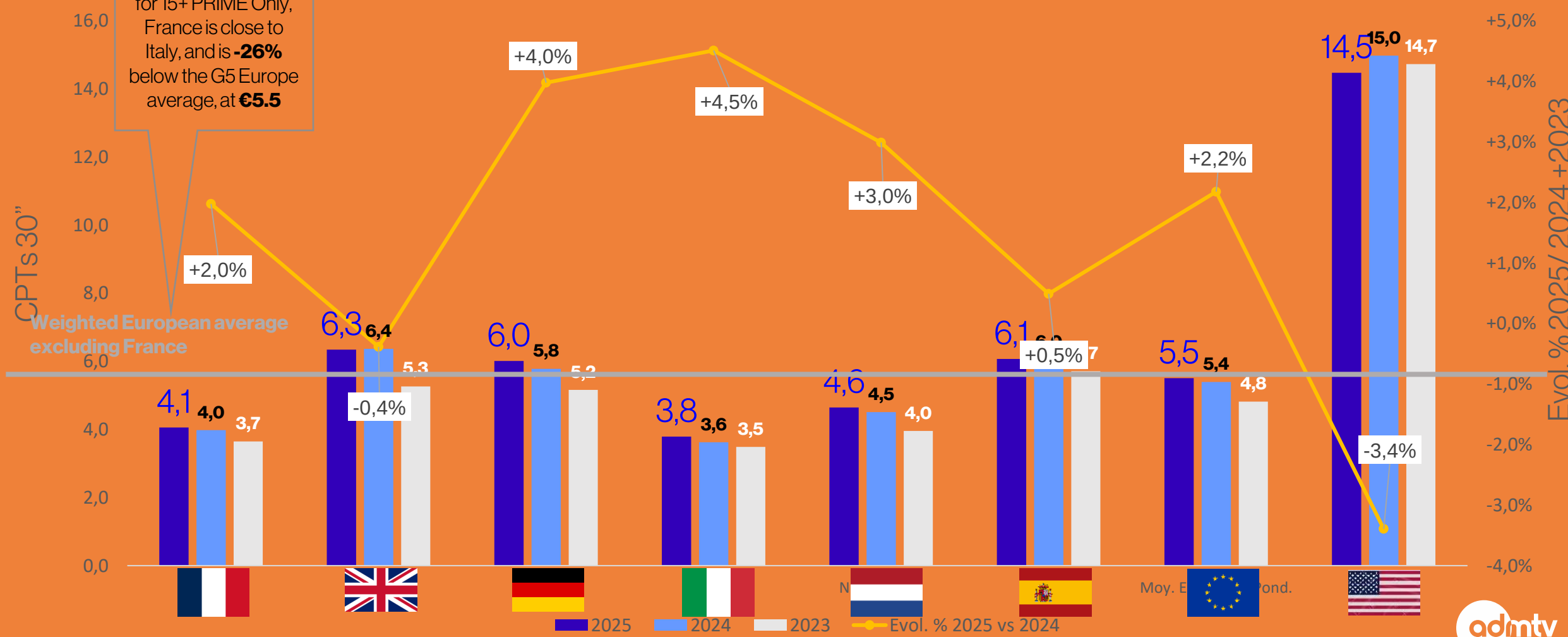


Evolutions in TV 20" CPT, 15+ y/o, Prime

HOW TO READ THIS:

With a TV 20" CPM of **€4.1** (+2% vs. 2024), for 15+ PRIME Only, France is close to Italy, and is **-26%** below the G5 Europe average, at **€5.5**

CPT 15+ PRIME 2025/2024/2023



*G5 = UK, Germany, Italy, Netherlands, Spain / CPTs weighted by population size

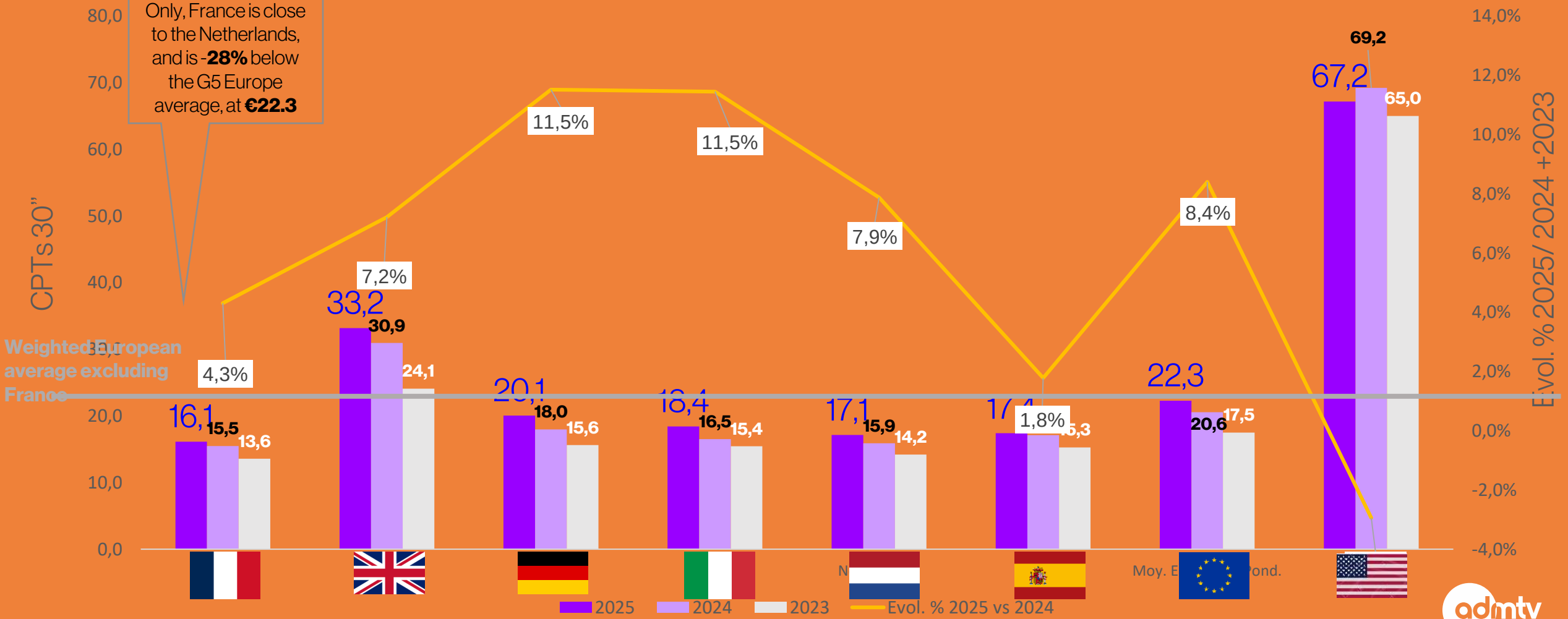


Evolutions in TV 20" CPT, 25-49 y/o, Prime

HOW TO READ THIS:

With a TV 20" CPT of **€16.1** (+4% vs. 2024), for **25/49 PRIME** Only, France is close to the Netherlands, and is **-28%** below the G5 Europe average, at **€22.3**

CPT 25-49 PRIME 2025/2024/2023



*G5 = UK, Germany, Italy, Netherlands, Spain / CPTs weighted by population size



KEY TAKEAWAYS:

EVOLUTIONS IN TV 20" CPTS (ALL DAY & PRIME, 2025)

❖ All day:

- **15+ :** At €3.0, the French 15+ CPT is almost unchanged. France is close behind Italy (€2.9, +4.5%) and remains 23% cheaper than the Europe average (€3.9, +1.7%). German and British CPTs are markedly higher, at €3.8 and €5.1 respectively.
- **25-49 :** +3% increase in the French CPT vs. +9% in Europe. With a CPT of €11.8, France is very close to Spain (€11, +2%). Conversely, Germany and Italy are seeing sharp inflation at +11%, and the UK peaks at a €26.8 CPT, pushing up the Europe average to €17.3

❖ Prime Time :

- **15+ :** The 20" Prime CPT in France stands at €4.1 (+2.0% vs. 2024), 26% below the European average (€5.5, +2.2%). Only Italy offers a lower Prime rate (€3.8, +4.5%)
- **25-49 :** at €16.1 for France, the CPT remains particularly competitive vs. the Europe average, which reaches €22.3 (+8%), and vs. the UK, which soars to €33.2 (+7%), or the USA at €67.2.

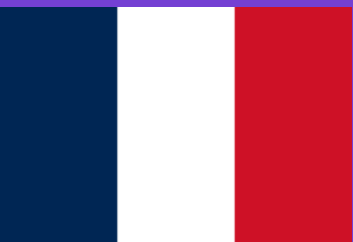
2

COMPARISON OF TV AND VIDEO CPTS

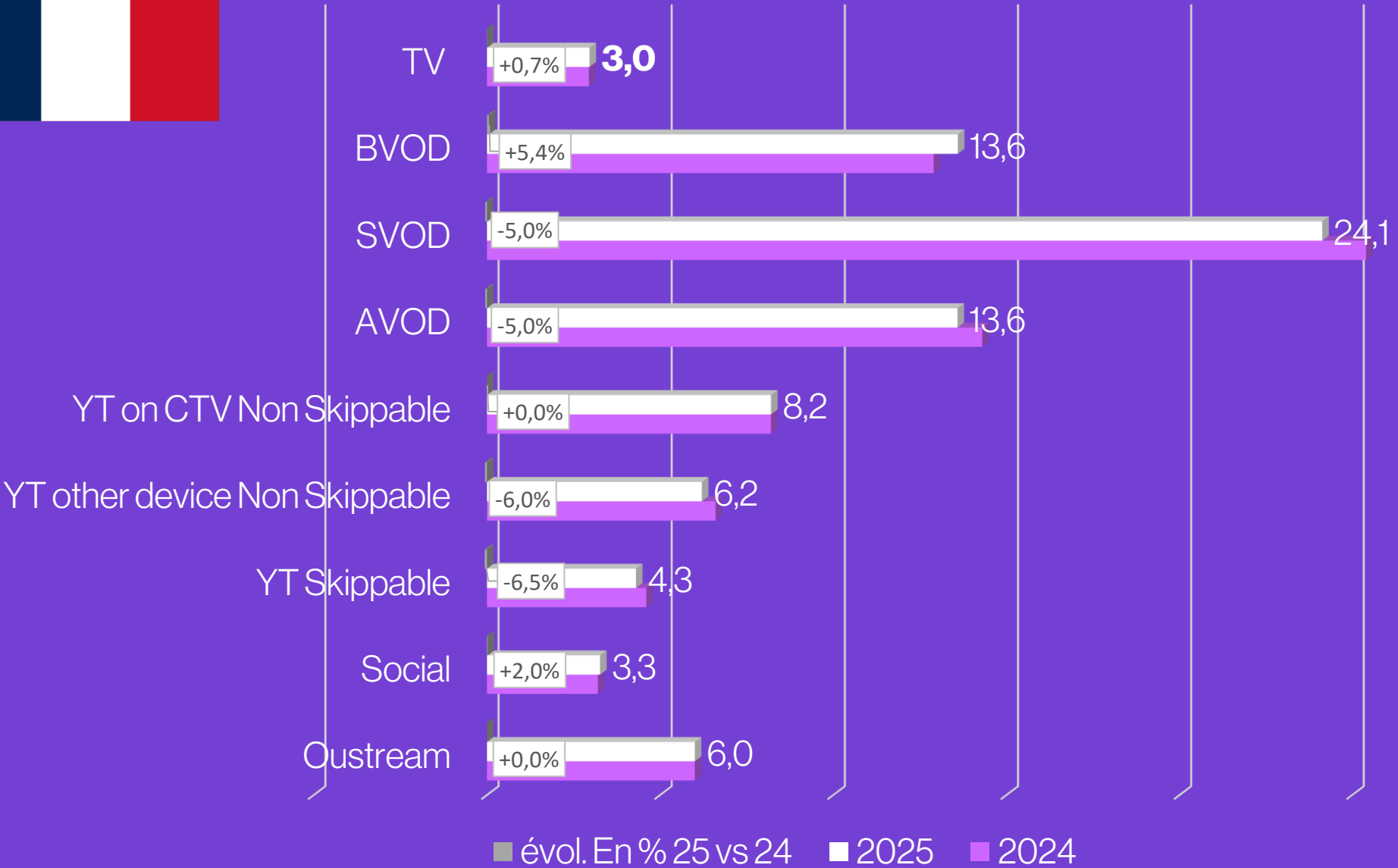
**TV / BVOD / SVOD / AVOD / YT on
CTV skippable / Non-skippable YT
on other devices / YT skippable /
Social Video / Outstream**



Comparison of TV vs. Video 20" CPT, 15+, 2025 vs. 2024



CPT 20" 15+ / France / 2025 vs. 2024

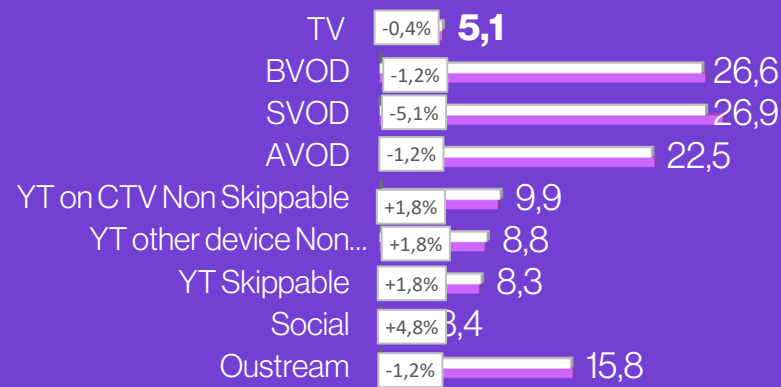


The TV 20" CPT for 15+ is very close to social, at €3.0 and €3.3 respectively. While the BVOD CPT rises by +5%, it falls by -5% for SVOD and AVOD.

Comparison of TV vs. Video 20" CPT for 15+ 2025 vs. 2024



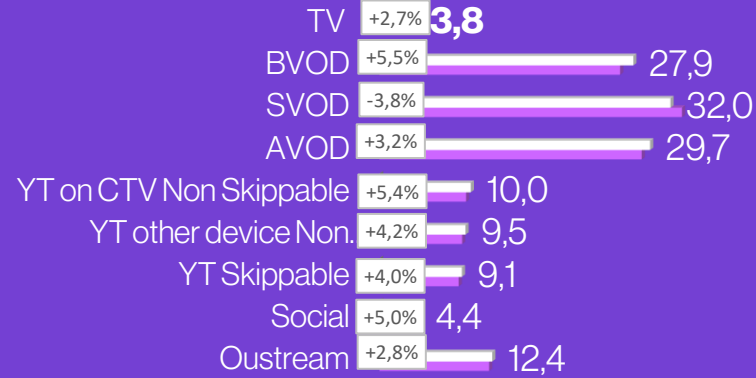
CPMT 20" 15+ / UK / 2025 vs. 2024



■ évol. En % 25 vs 24 ■ 2025 ■ 2024



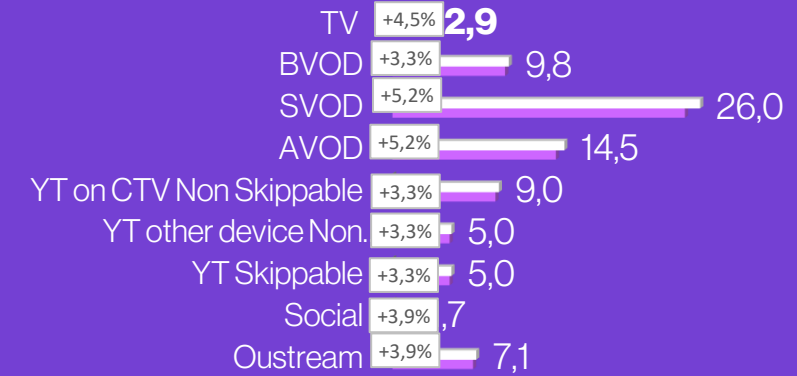
CPT 20" 15+ / Germany / 2025 vs. 2024



■ évol. En % 25 vs 24 ■ 2025 ■ 2024



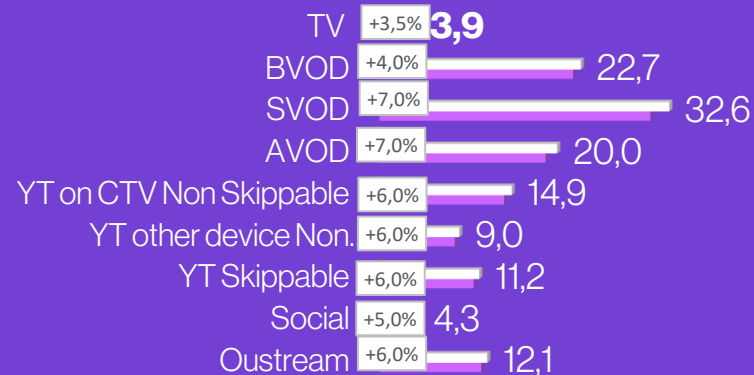
CPT 20" 15+ / Italy / 2025 vs. 2024



■ évol. En % 25 vs 24 ■ 2025 ■ 2024



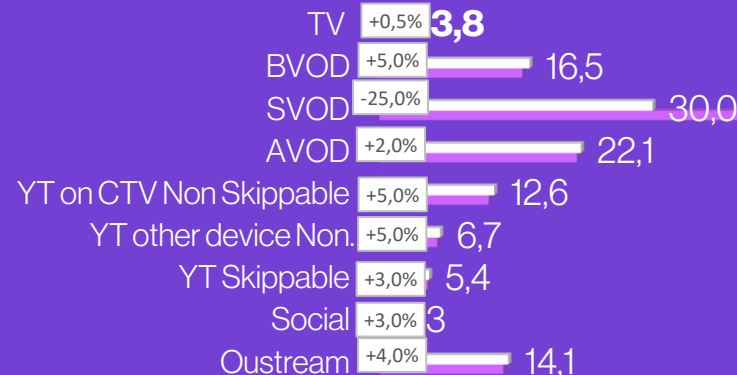
CPT 20" 15+ / Netherlands / 2025 vs. 2024



■ évol. En % 25 vs 24 ■ 2025 ■ 2024



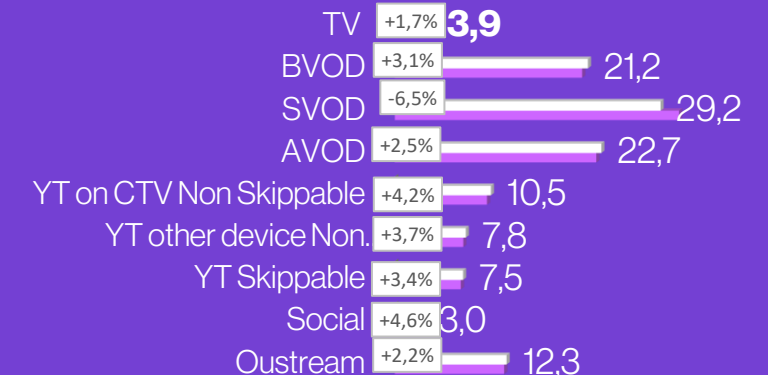
CPT 20" 15+ / Spain / 2025 vs. 2024



■ évol. En % 25 vs 24 ■ 2025 ■ 2024

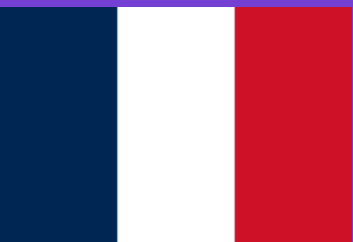


CPT 20" 15+ / Moy. Eur. 2025 vs. 2024

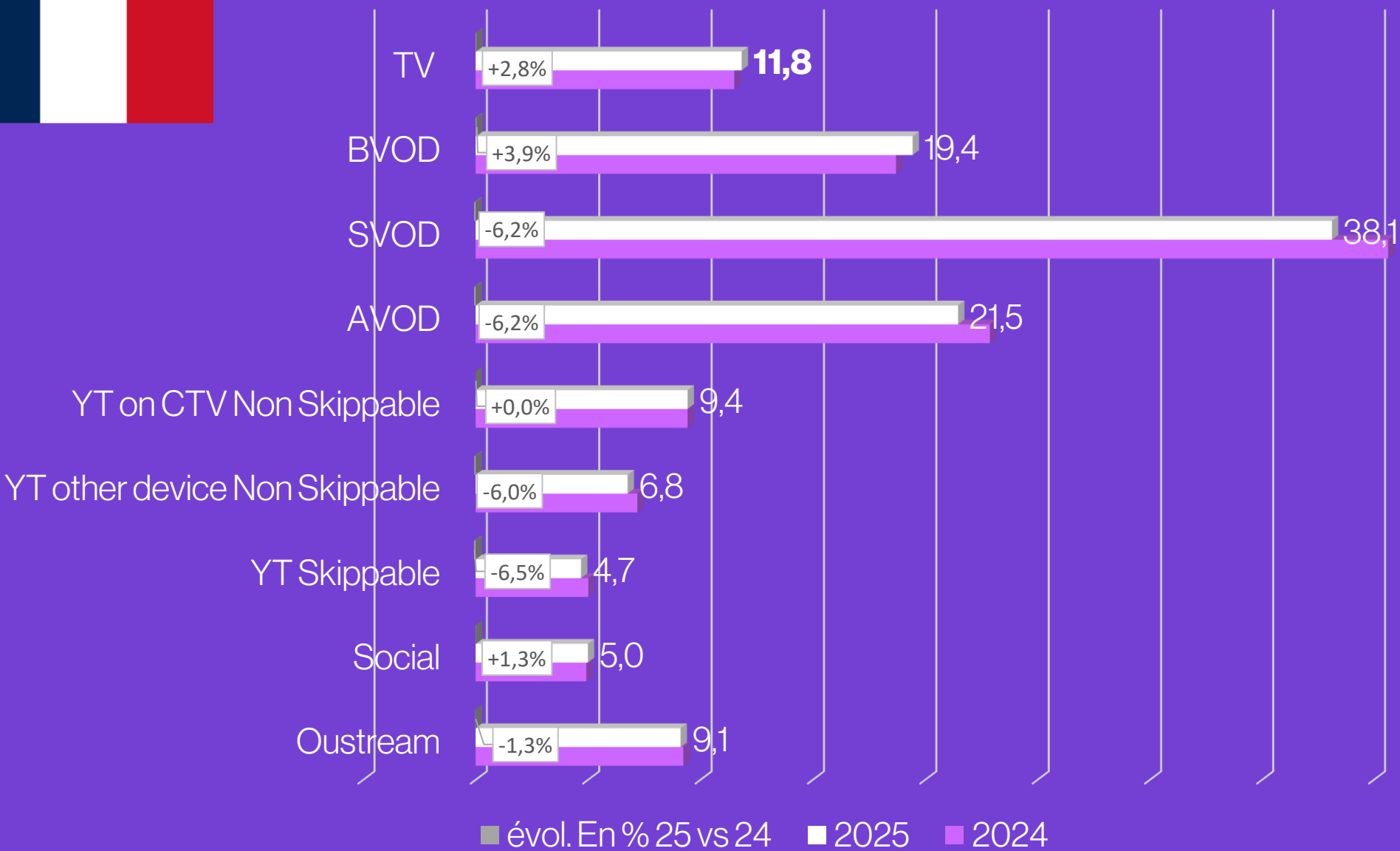


■ évol. En % 25 vs 24 ■ 2025 ■ 2024

Comparison of TV vs. Video 20" CPT for 25-49, 2025 vs. 2024



CPT 20" **25-49** / France / 2025 vs. 2024

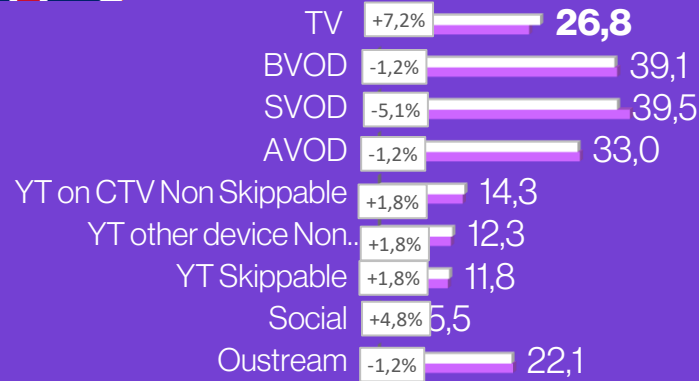


The **BVOD** and **SVOD** 20" CPTs for 25-49, at **€19.4** and **€38.1** respectively, are down -6% but remain well above all other digital levers.

Comparison of TV vs. Video 20" CPT for 25-49, 2025 vs. 2024



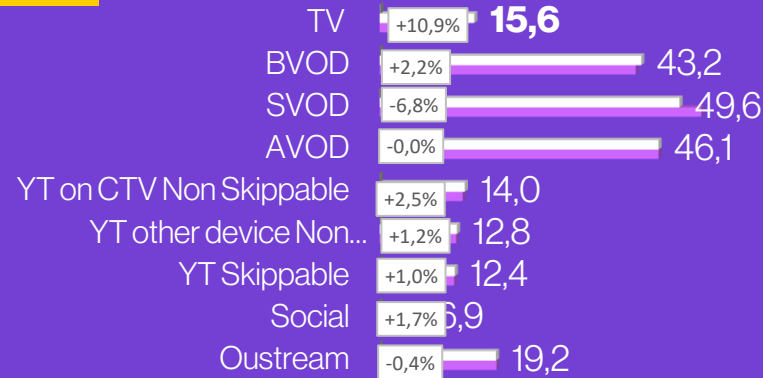
CPMT 20" **25-49** / UK / 2025 vs. 2024



■ évol. En % 25 vs 24 ■ 2025 ■ 2024



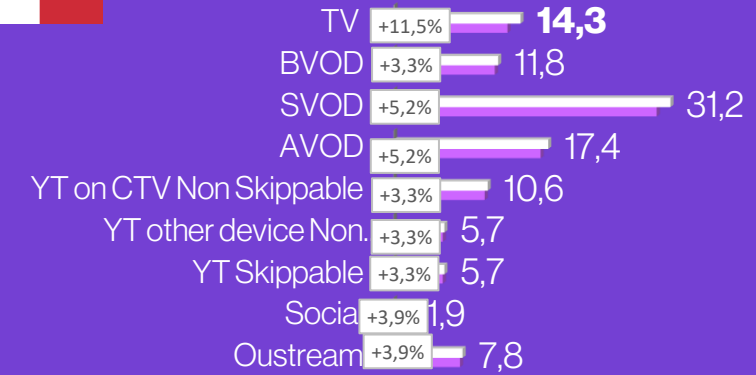
CPT 20" **25-49** / Germany / 2025 vs. 2024



■ évol. En % 25 vs 24 ■ 2025 ■ 2024



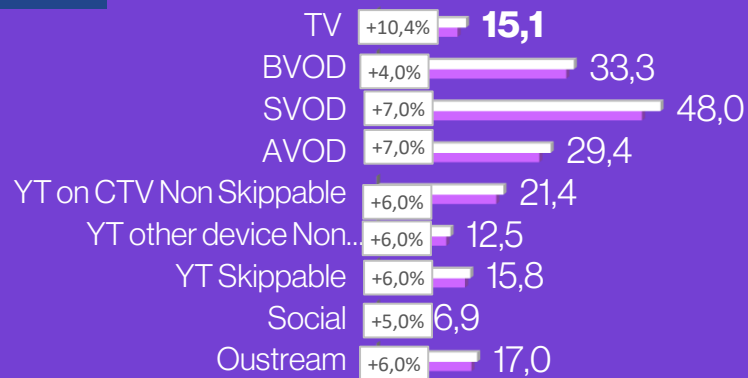
CPT 20" **25-49** / Italy / 2025 vs. 2024



■ évol. En % 25 vs 24 ■ 2025 ■ 2024



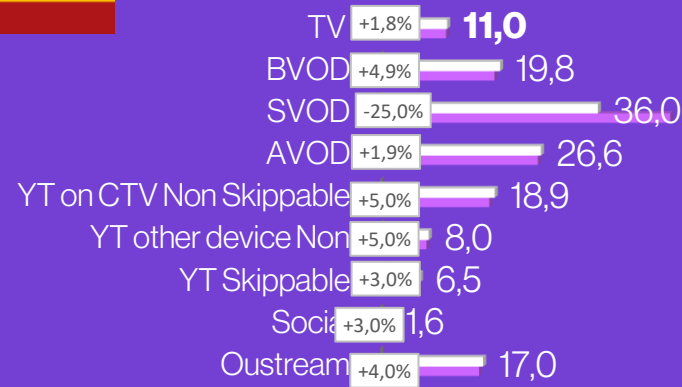
CPT 20" **25-49** / Netherlands / 2025 vs. 2024



■ évol. En % 25 vs 24 ■ 2025 ■ 2024



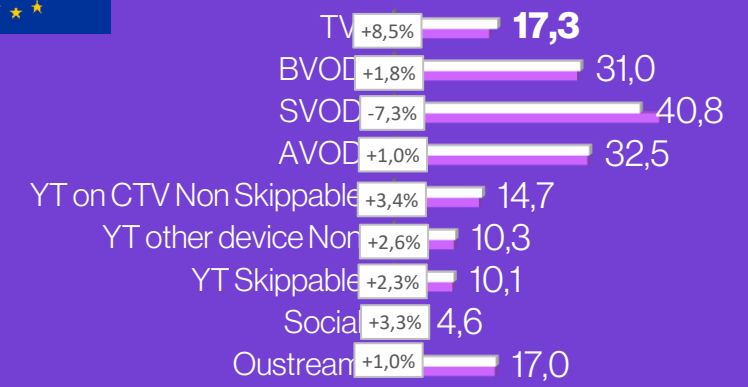
CPT 20" **25-49** / Spain / 2025 vs. 2024



■ évol. En % 25 vs 24 ■ 2025 ■ 2024



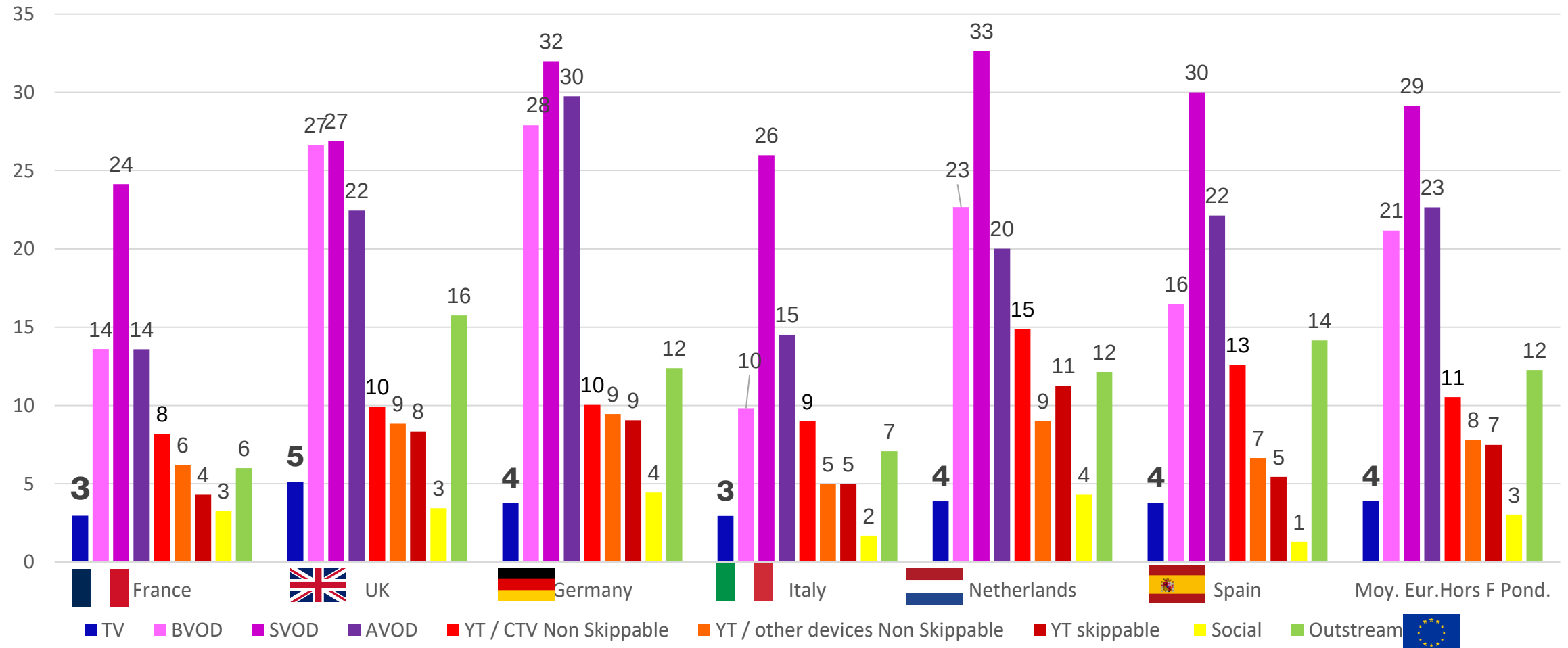
CPT 20" **25-49** / Moy .Eur./ 2025 vs. 2024



■ évol. En % 25 vs 24 ■ 2025 ■ 2024

Comparison of TV vs. Video 20" CPT, 15+ / by Country, 2025

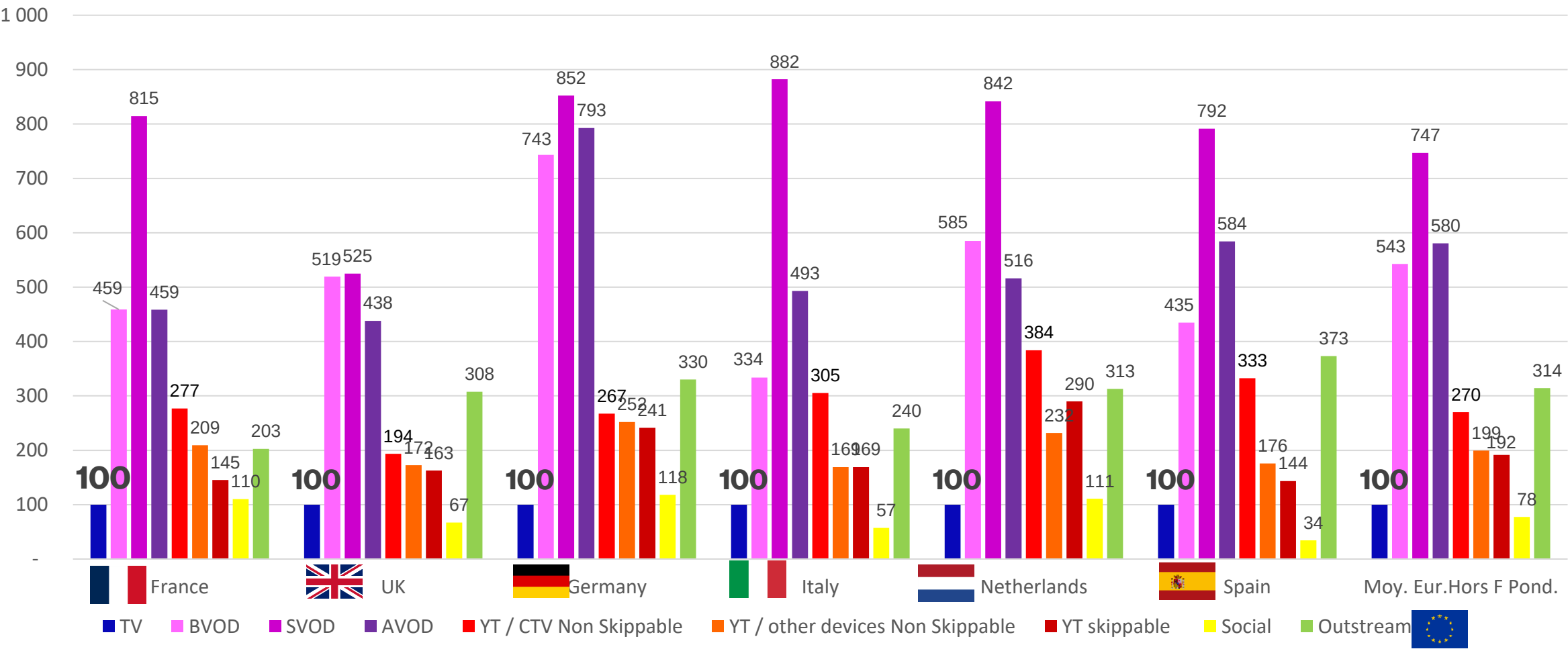
TV and VIDEO CPT 2025 / France, UK, Germany, Italy, Spain, Netherlands



G5 = UK, Germany, Italy, Netherlands, Spain / CPTs weighted by population size

Comparison of TV CPT idx. 100 vs. Video 20" CPT, 15+ / by Country, 2025

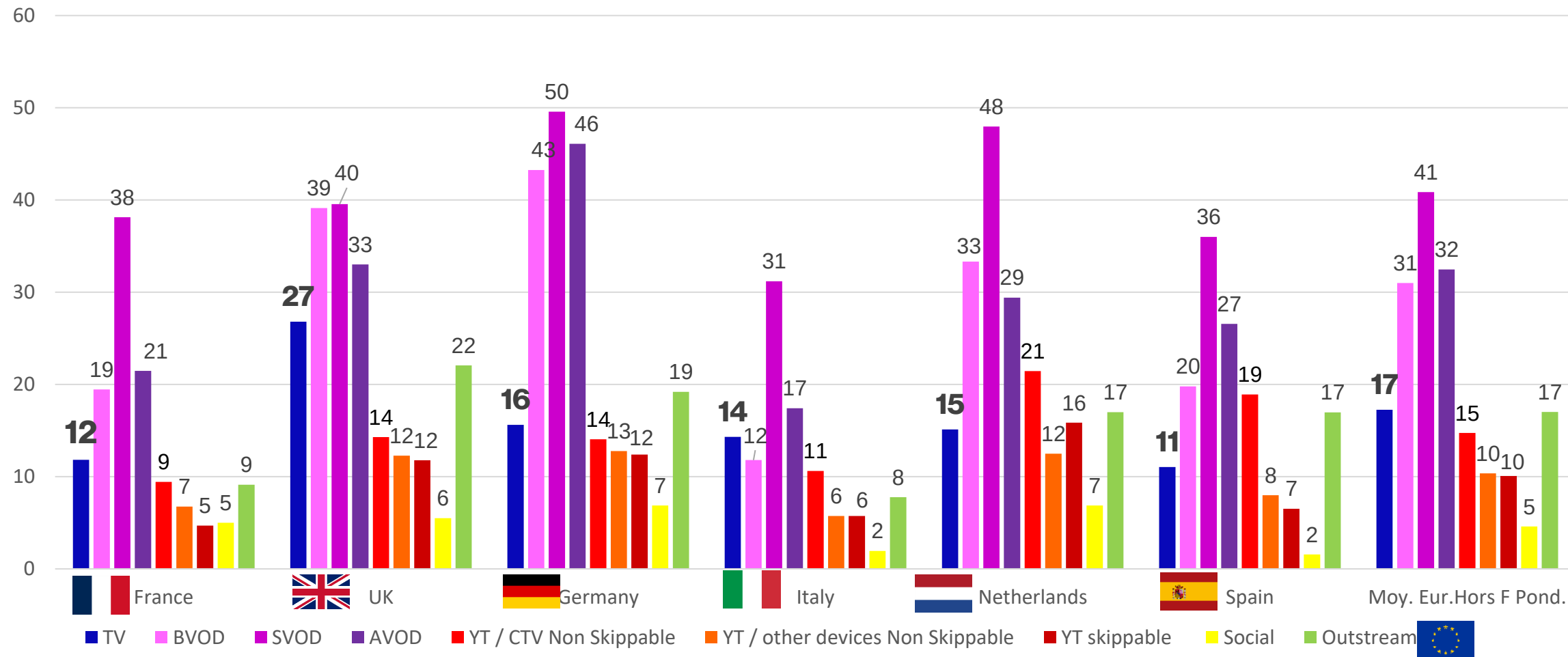
VIDEO Index 2025 vs. TV CPM base 100, 15+ / France, UK, Germany, Italy, Spain, Netherlands



G5 = UK, Germany, Italy, Netherlands, Spain / CPTs weighted by population size

Comparison of TV vs. Video 20" CPT, 25-49 / by Country, 2025

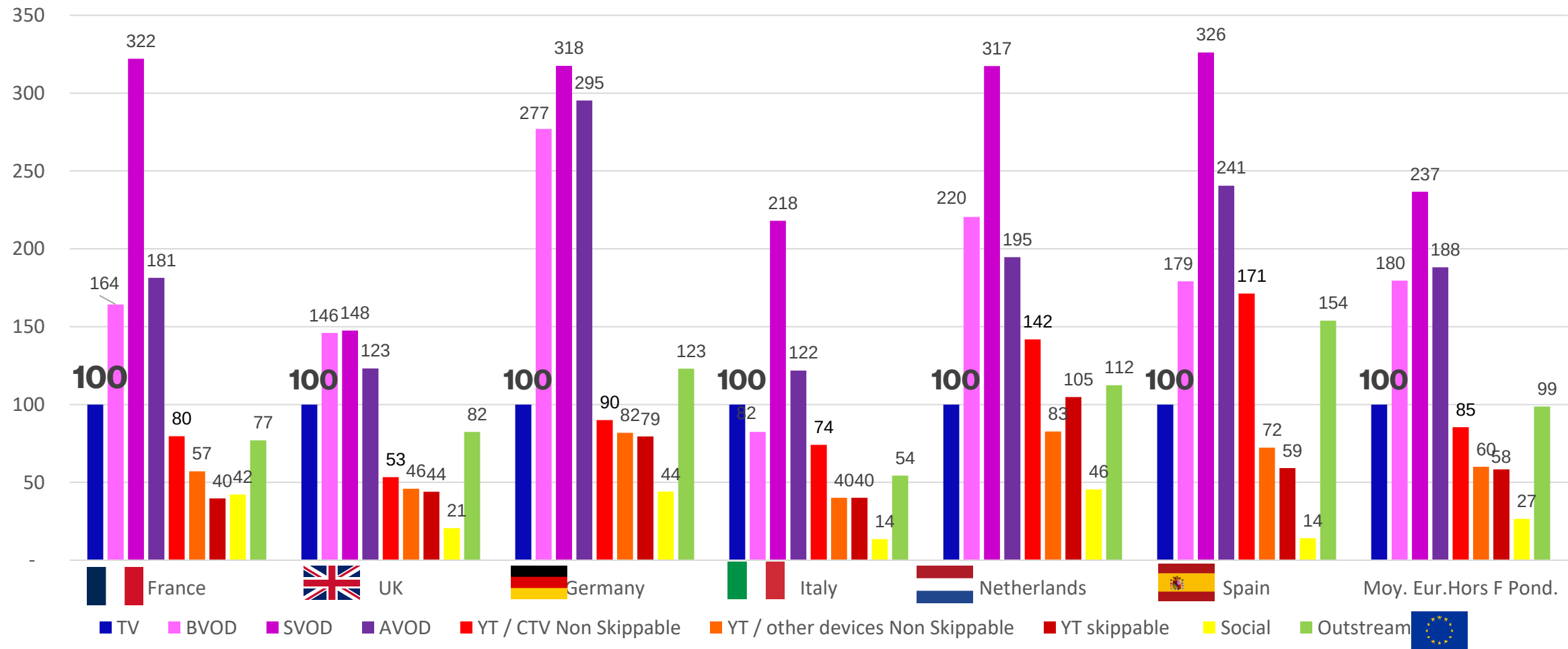
TV and VIDEO CPT 2025 / France, UK, Germany, Italy, Spain, Netherlands



G5 = UK, Germany, Italy, Netherlands, Spain / CPTs weighted by population size

Comparison of TV CPT idx. 100 vs. Video 20" CPT, 25-49 / by Country, 2025

VIDEO Index 2025 vs. TV CPT base 100, 25-49 / France, UK, Germany, Italy, Spain, Netherlands



G5 = UK, Germany, Italy, Netherlands, Spain / CPTs weighted by population size

KEY TAKEAWAYS:

COMPARISON OF TV VS. VIDEO 20" CPT FOR 15+ IN FRANCE

- ❖ **Linear TV / unmatched affordability:** at €3.0 per CPT, a 20" TV spot outperforms digital video formats in terms of cost. Only radio is cheaper.
- ❖ **TV and Social Video are neck and neck:** the €3.0 CTV for TV is closely followed by that of Social Video at €3.3 (a cost-effective short-term reach lever).
- ❖ **Premium formats command a premium price:** the high CPTs for **BVOD (€13.6, +5.4%)** and **SVOD (€24.1, -5%)** illustrate the premium placed on the distribution environment.
- ❖ **Different pricing for YT depending on screen type:** €8.20 for YT on CTV (non-skippable, stable at +0%), **€6.20** on other devices (non-skippable, -6%) and **€4.30** for skippable formats across all devices (-6.5%). Outstream, meanwhile, stands at €6.0 (stable).

KEY TAKEAWAYS:

INDEX VIDEO 2025 VS. CPT TV BASE 100 / 15+ IN FRANCE

- ❖ **A uniquely wide gap in France** : given the low CPT for TV, the metrics for video are the most spectacular
- ❖ **SVOD** : Index 815; at €24.1, it is 8 times more expensive than TV CPT
- ❖ **BVOD and AVOD** : Index 459 (CPT of €13.6, or 4.5 times that of TV)
- ❖ **Non-skippable YT CTV** : Index 277 (CPT of €8.2)

KEY TAKEAWAYS:

COMPARISON OF TV VS. VIDEO 20" CPT FOR 25-49 IN FRANCE

- ❖ **Gap narrowing :** In France, the rise in TV CPT to **€11.8** for 25/49 is reshaping digital alternatives
- ❖ **Linear TV is now more expensive than non-skippable YT CTV :** At €11.8, TV CPM is 25% higher than **YT's rate of €9.4**, which remains stable compared to 2024.
- ❖ **SVOD :** At €38.1 (despite a 6.2% decline), **SVOD** stands out as the most expensive video channel, ahead of **AVOD (€21.5, -6.2%)** and **BVOD (€19.4, +3.9%)**
- ❖ **Social Media and Skippable YT :** highly accessible with CPTS of €5.0 (+1.3%) and €4.7 (-6.5%), respectively, these channels are becoming increasingly prominent.

KEY TAKEAWAYS:



INDEX VIDEO 2025 VS. CPT TV BASE 100 / 25-49 IN FRANCE

- ❖ **Balance of power reversed** (TV CPT Base 100 = €11.8) vs. YT, social media and outstream
- ❖ **SVOD**: Index 322, CPT of €38.1 or 3.2x that of TV
- ❖ **BVOD**: Index 164, CPT of €19.4. Italy and Spain, unlike all other countries, have indices of 44 and 74, respectively
- ❖ **Non-skippable YT CTV**: Index 80 (20% below TV CPM of €9.4)
- ❖ **SOCIAL VIDEO**: Index 42 (CPM of €5.0)

SUMMARY TABLE

Country / Region	TV CPT 15+ / 20"/2025	Var. % 25 vs. 24	TV CPT 25-49 / 20"/2025	Var. % 25 vs. 24	Net Ad Revenue Var. % 25 vs. 24
France	3.0	+0.7%	11.8	+2.8%	-8.1%
UK	5.1	-0.4%	26.8	+7.2%	-3.7%
Germany	3.8	+2.7%	15.6	+10.9%	+1.4%
Italy	2.9	+4.5%	14.3	+11.5%	+1.9%
Spain	3.8	+0.5%	11.0	+1.8%	-3.9%
USA	6.6	-3.4%	26.1	-2.9%	-11.2%

The logo features a solid blue background with four concentric white circles. The text "alliance des médias tv video" is centered horizontally and partially overlaps the innermost white circle. The text is in a bold, sans-serif font, with "alliance des" on the top line and "médias tv video" on the bottom line. The word "médias" includes a diacritical accent on the 'e'.

**alliance des
médias tv video**