



The
Global
TV Group

egta

The Global TV Deck 2025

Total TV's consumption across the world

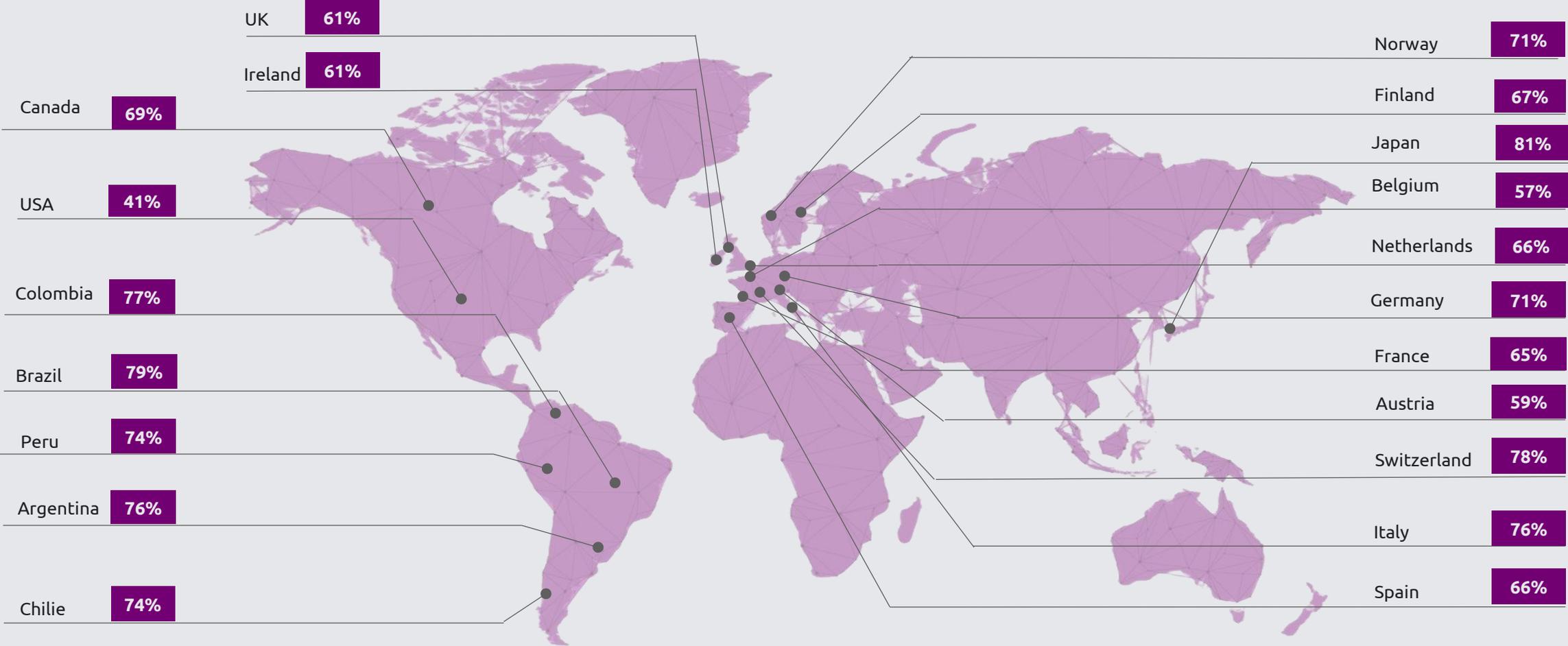
The Global TV Deck 2025



1. Austria
2. Argentina
3. Belgium
4. Brazil
5. Canada
6. Chile
7. Colombia
8. Finland
9. France
10. Germany
11. Italy
12. Ireland
13. Japan
14. Netherlands
15. Norway
16. Peru
17. Spain
18. Switzerland
19. United Kingdom
20. United States

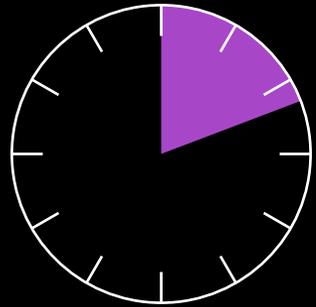
- This presentation provides an overview of video consumption trends across 19 countries worldwide. The data, collected by egta and the Global TV Group, highlights how the video market is evolving as audiences adopt new viewing habits.
- Across all markets, linear TV consumption is slightly declining, driven by the rapid expansion of streaming and on-demand platforms. Younger audiences in particular are gravitating toward streaming services that offer flexibility, personalized experiences, and extensive content libraries. But the streaming platforms are part of broadcasters' ecosystem too. World-wide, their BVOD offers are rapidly growing and meeting an increasing success.
- Linear TV continues to hold significant strategic value for both broadcasters and advertisers. When the strengths of linear and digital environments are combined, they create a powerful "total video" ecosystem - one capable of engaging diverse audiences while delivering meaningful opportunities for advertisers. All that in a brand-safe and highly professional environment, quite different from the reality of video-sharing platforms.

The Share of TV in the “total video landscape”



“TV”= linear TV + time shifted + BVOD – Figures for the first half of 2025
Source: the Global TV Deck 2025, see individual slides for details

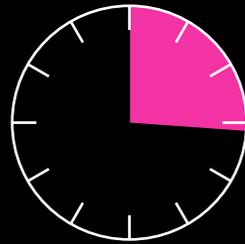
High TV viewing times. Facilitated trust.



2h19

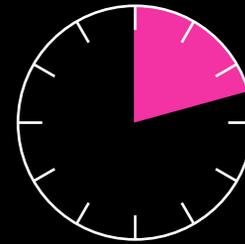
Global

Above



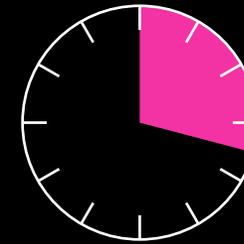
3h06

Europe
+47 min. above average



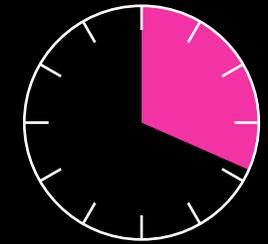
2h31

North America



3h30

South America



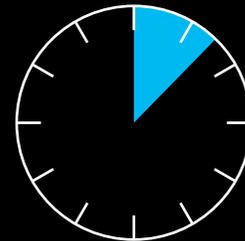
3h48

Africa

Below

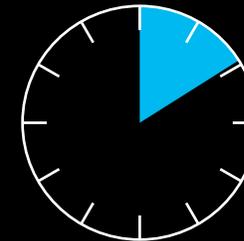
1h28

Oceania



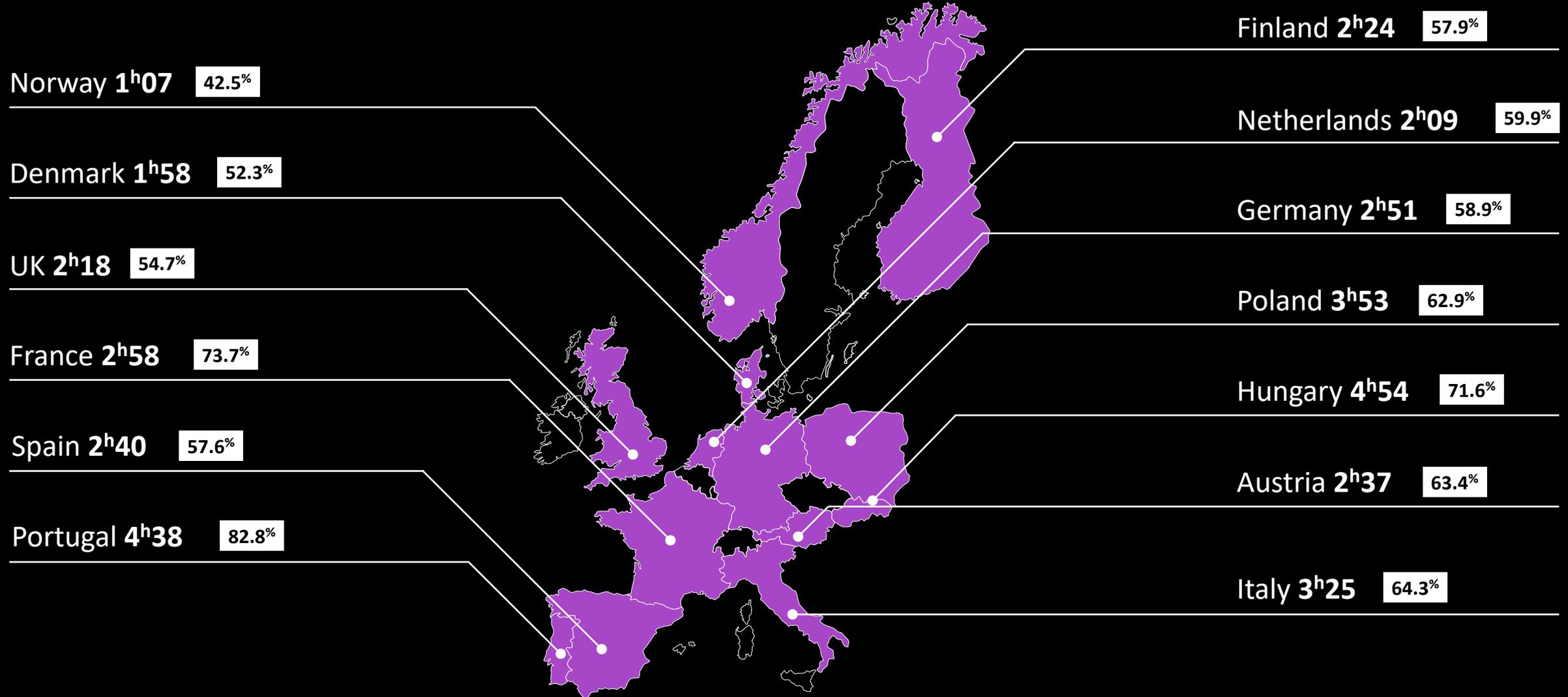
1h58

Asia



Understanding local. Knowing cultural differences.

Daily linear TV viewing time and reach across Europe



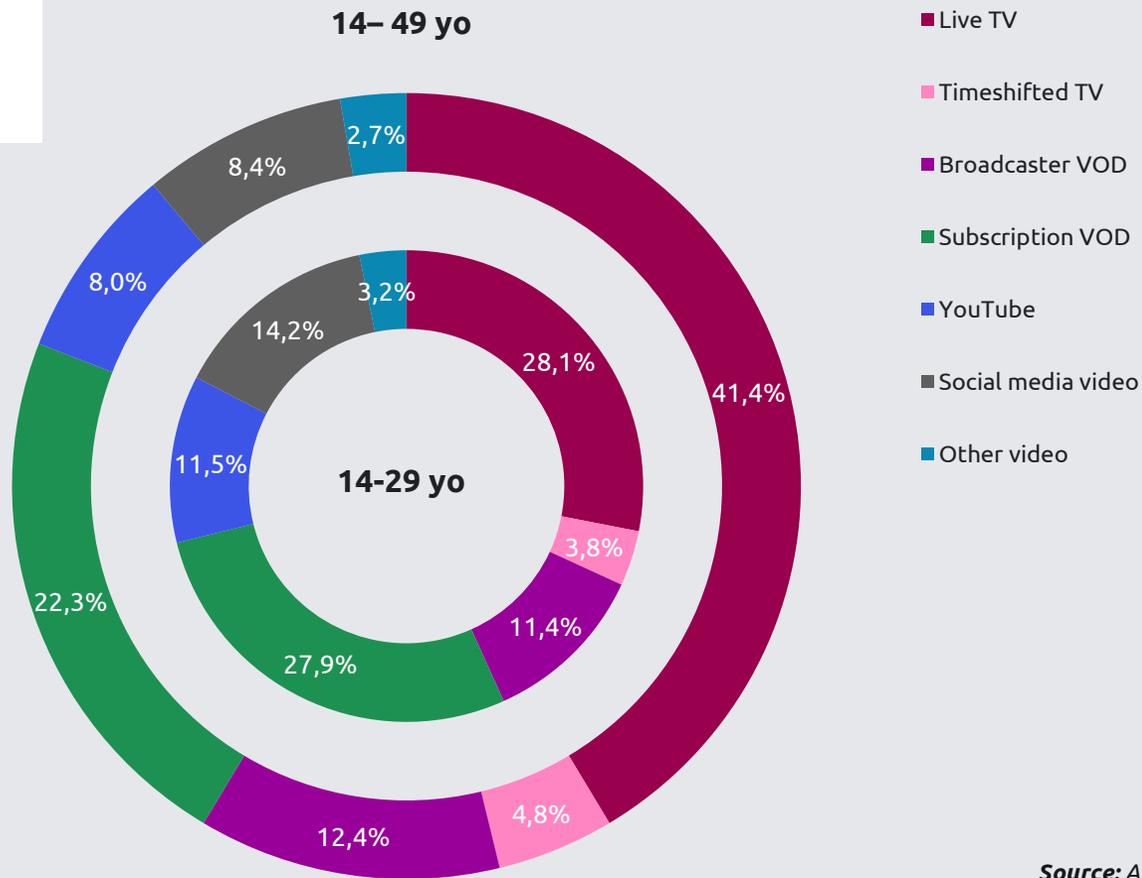
Source: Glance 2024. All individuals.

©RTL AdAlliance



Austria: Multiplatform TV accounts for 59% of video consumption

Viewing on
all devices
2024



Average video time per day:

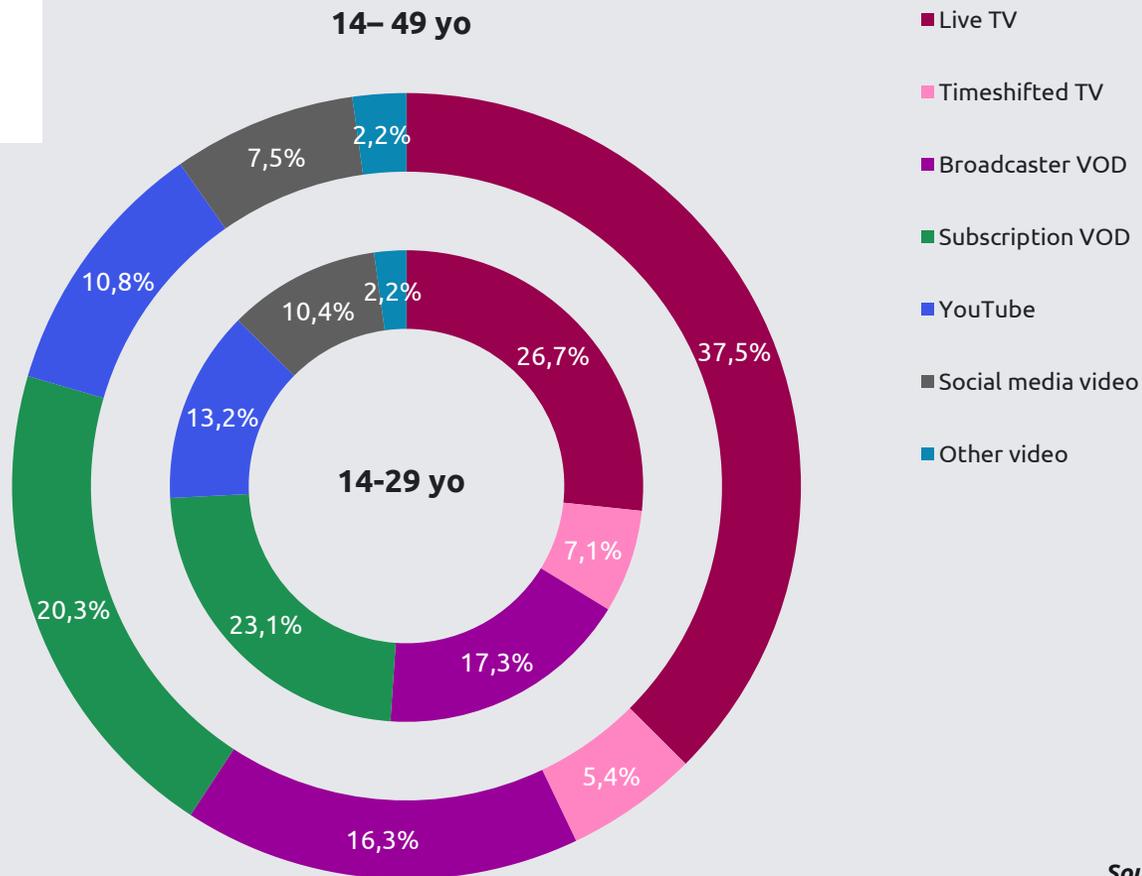
- 14-49 yo: 186 minutes
- 14-29 yo: 185 minutes

Source: AGTT Total Video Study Full year 2024



Austria: Multiplatform TV accounts for 59% of video consumption

Viewing on all devices
H1 2025



Average video time per day:

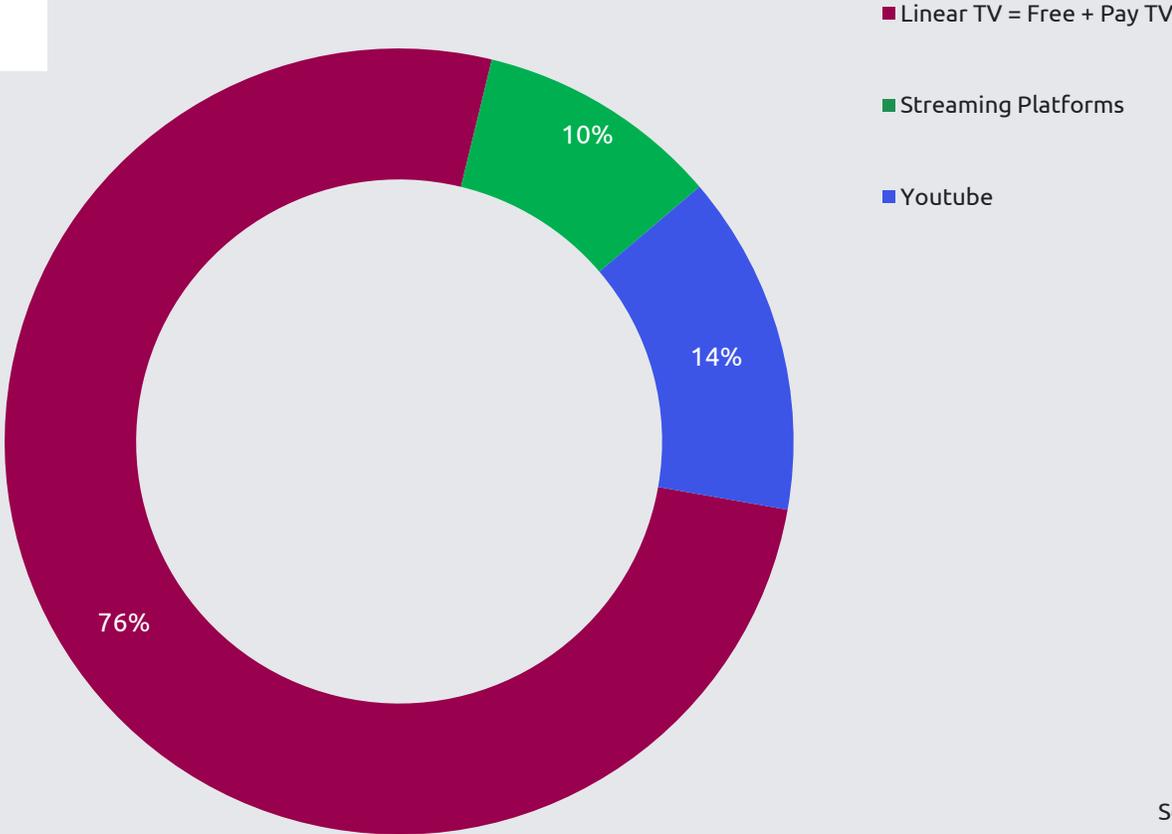
- 14-49 yo: 184 minutes
- 14-29 yo: 184 minutes

Source: AGTT Total Video Study H1 2025

Argentina: linear TV accounts for 76% of video consumption

Viewing on all devices
H1 2025

Total individuals

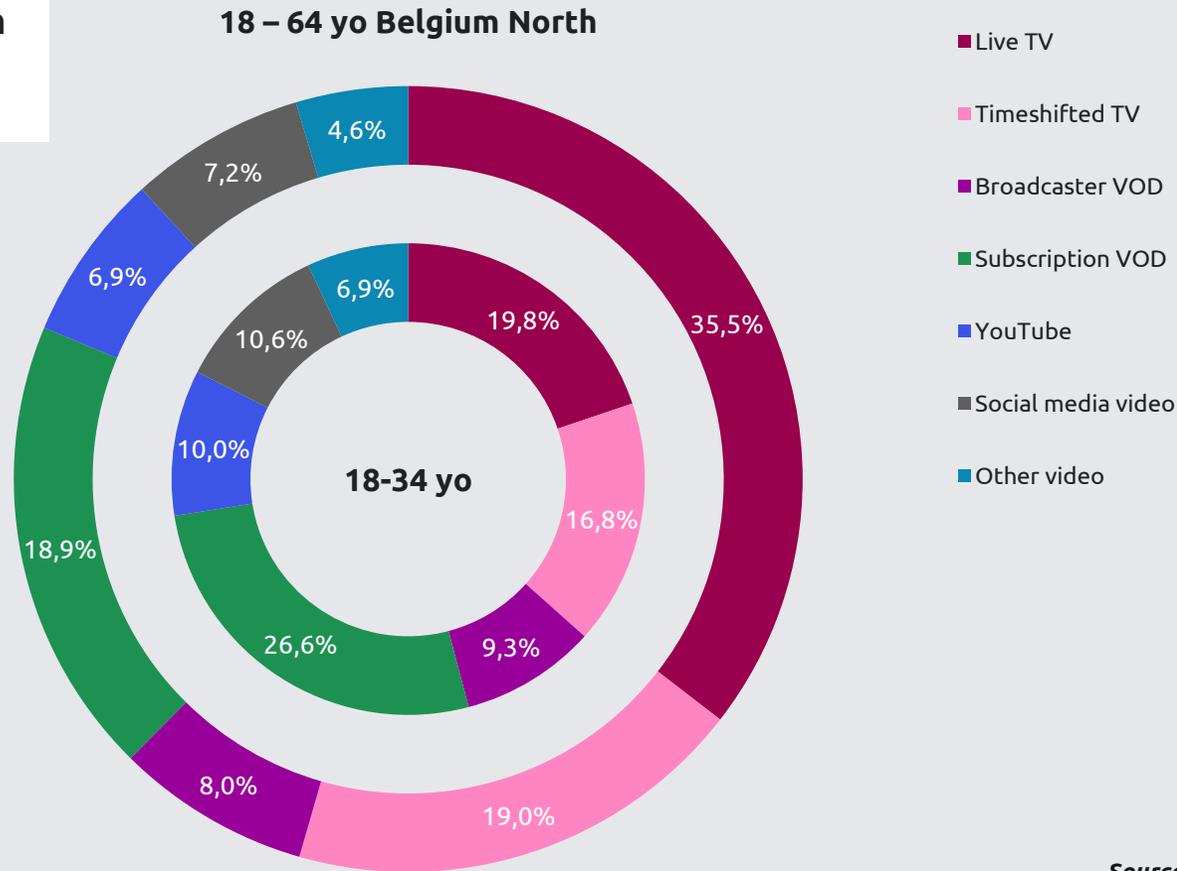


Source: Kantar IBOPE Media H1 2025

Shr% [Total Video] | Aggregate Viewing | Video Platforms, Pay TV, Broadcast TV | TV/CTVs | All Day | Excluding Non-Identified Video Consumption and Other uses of the TV set (Consoles / Games / etc).

Belgium: Multiplatform for Belgium North TV accounts for 62% of video consumption

Viewing on all devices 2024



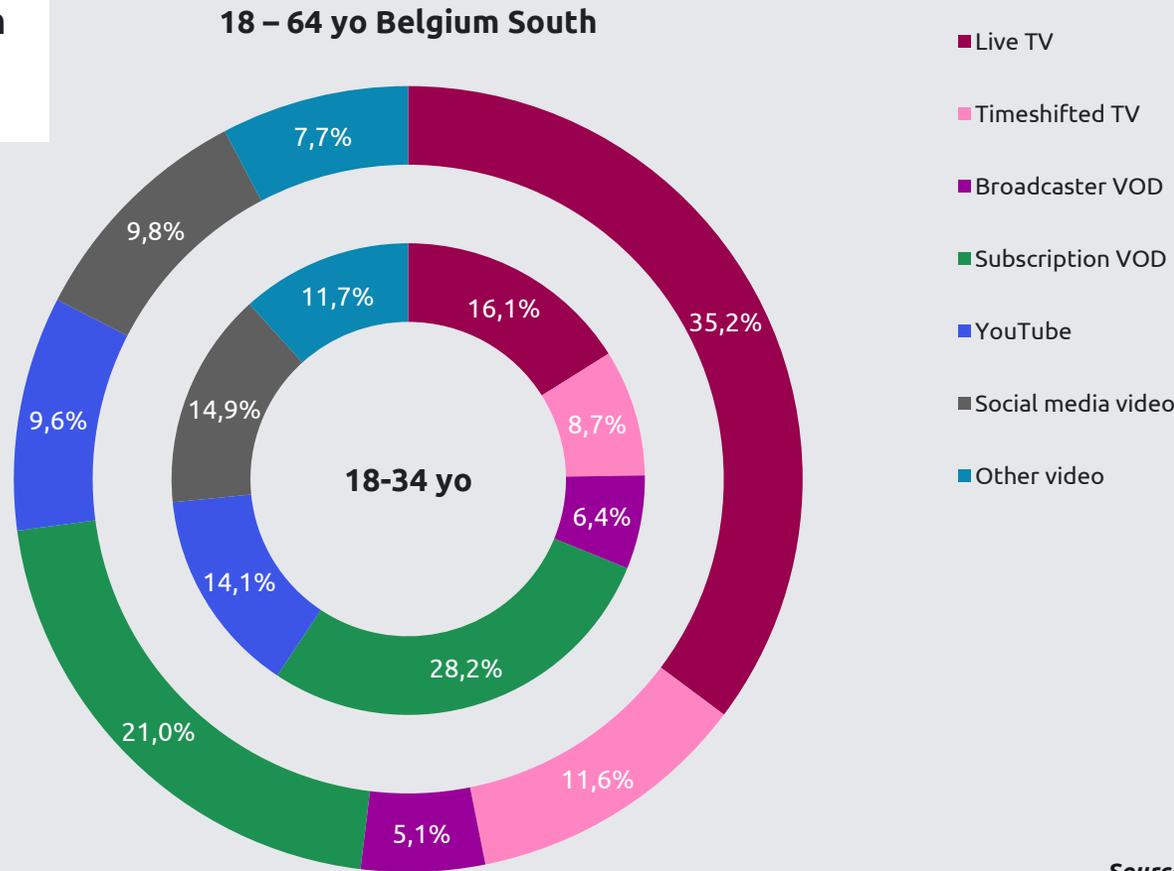
Average video time per day:

- **18-64 yo:** 272 minutes
- **18-34 yo:** 290 minutes

Source: IP Video Observer Full year 2024

Belgium: Multiplatform for Belgium South TV accounts for 52% of video consumption

Viewing on all devices 2024



Average video time per day:

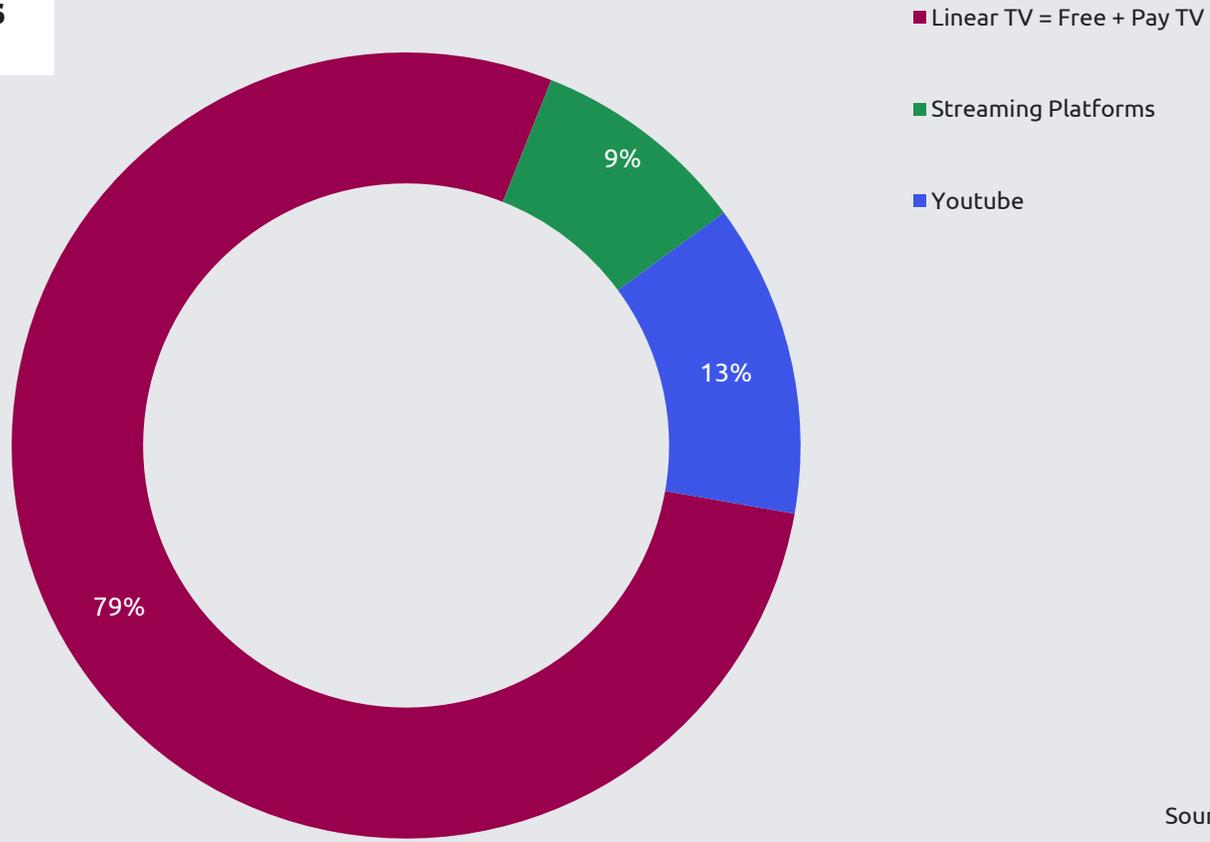
- **18-64 yo:** 335 minutes
- **18-34 yo:** 350 minutes

Source: IP Video Observer Full year 2024

Brazil: linear TV accounts for 79% of video consumption

Viewing on all devices
H1 2025

Total individuals

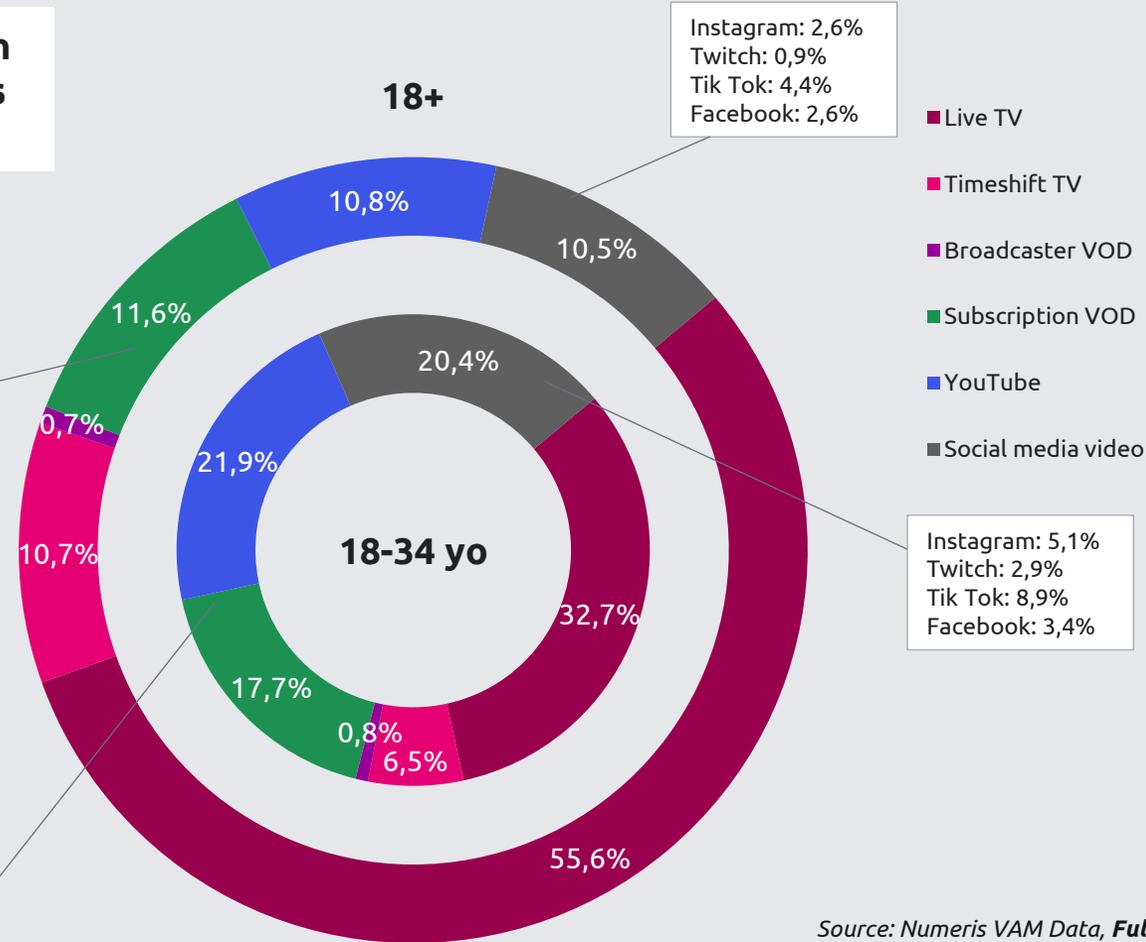


Source: Kantar IBOPE Media H1 2025

Shr% [Total Video] | Aggregate Viewing | Video Platforms, Pay TV, Broadcast TV | TV/CTVs | All Day | Excluding Non-Identified Video Consumption and Other uses of the TV set (Consoles / Games)

Canada: Multiplatform TV accounts for 67,1% of video consumption

Viewing on all devices 2024



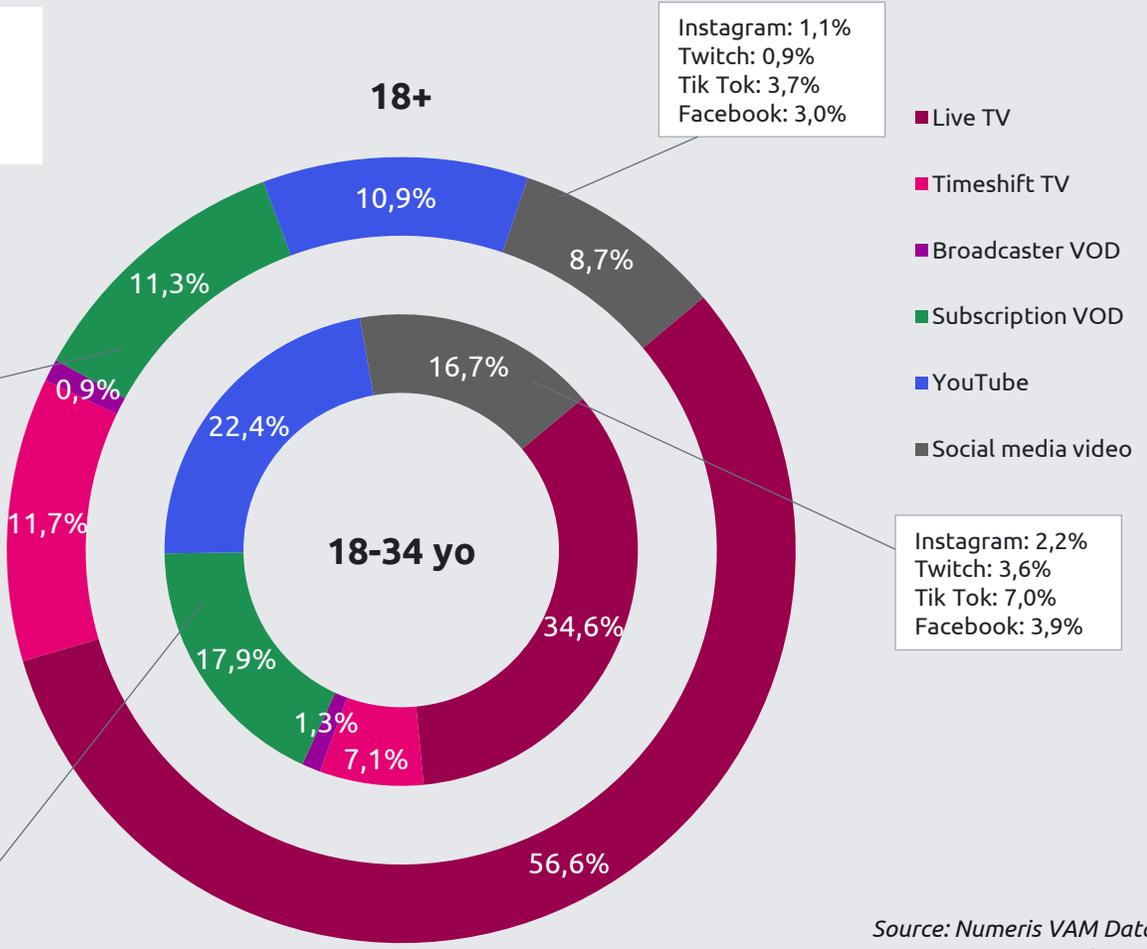
Average video time per day:

- **18+:** 232minutes
- **18-34 yo:** 172 minutes

Source: Numeris VAM Data, **Full year 2024**, Ontario + Quebec Franco; streaming services are in-home viewing only

Canada: Multiplatform TV accounts for 69% of video consumption

Viewing on all devices
H1 2025



Average video time per day:

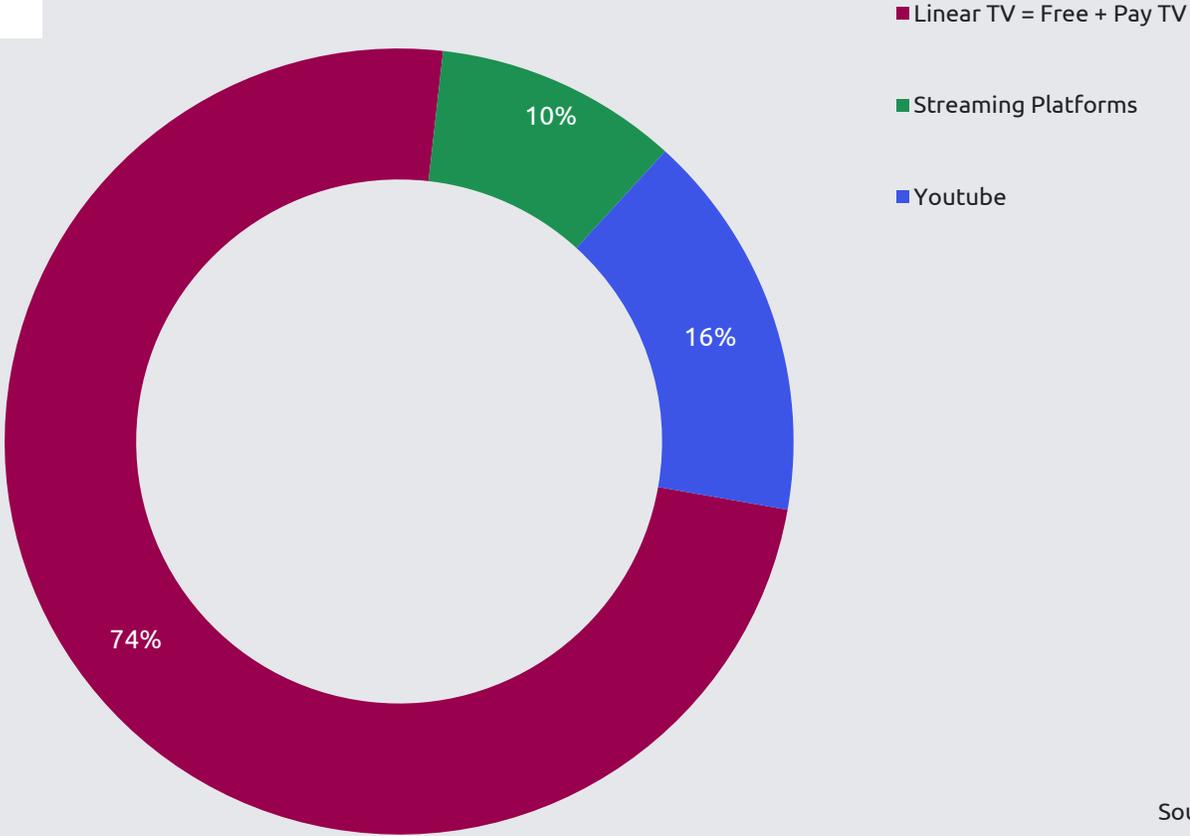
- **18+:**
217 minutes
- **18-34 yo:**
140 minutes

Source: Numeris VAM Data, H1 2025, Ontario + Quebec Franco; streaming services are in-home viewing only

Chile: linear TV accounts for 74% of video consumption

Viewing on all devices
H1 2025

Total individuals



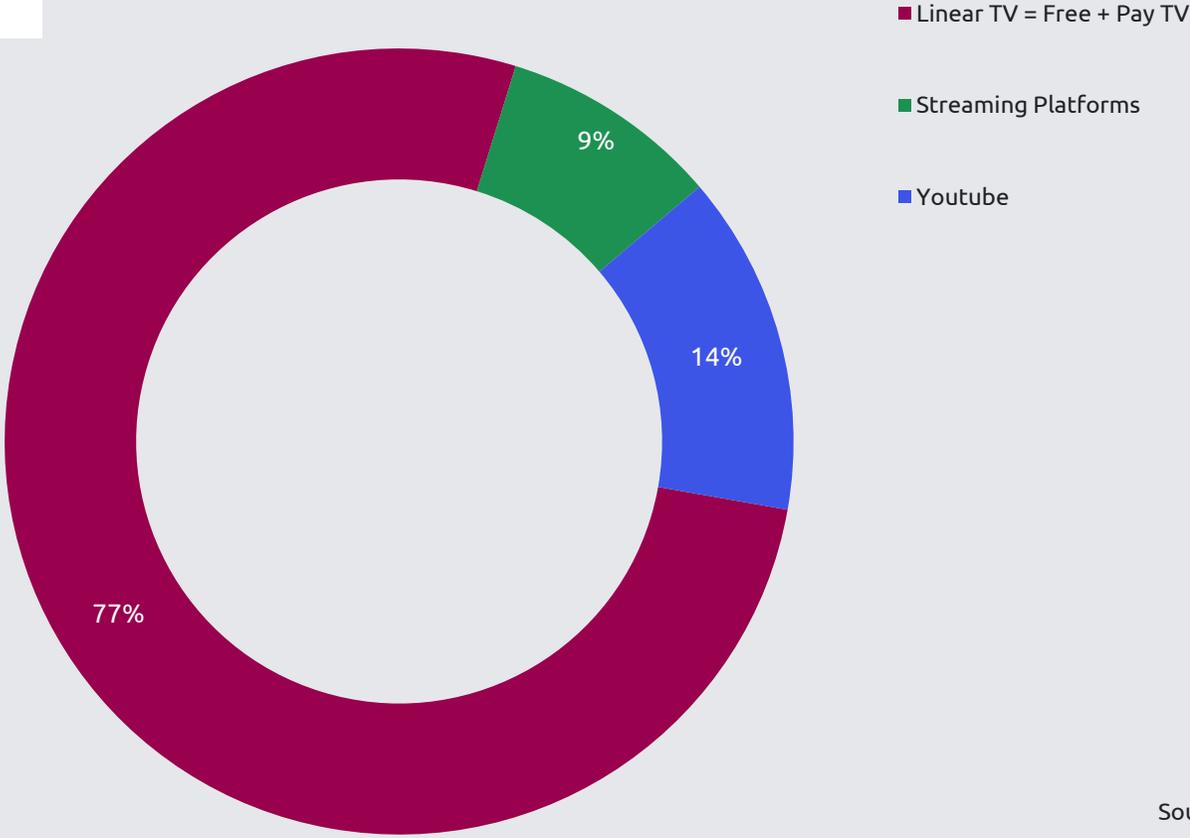
Source: Kantar IBOPE Media H1 2025

Shr% [Total Video] | Aggregate Viewing | Video Platforms, Pay TV, Broadcast TV | TV/CTVs | All Day | Excluding Non-Identified Video Consumption and Other uses of the TV set (Consoles / Games / etc).

Colombia: linear TV accounts for 77% of video consumption

Viewing on all devices
H1 2025

Total individuals

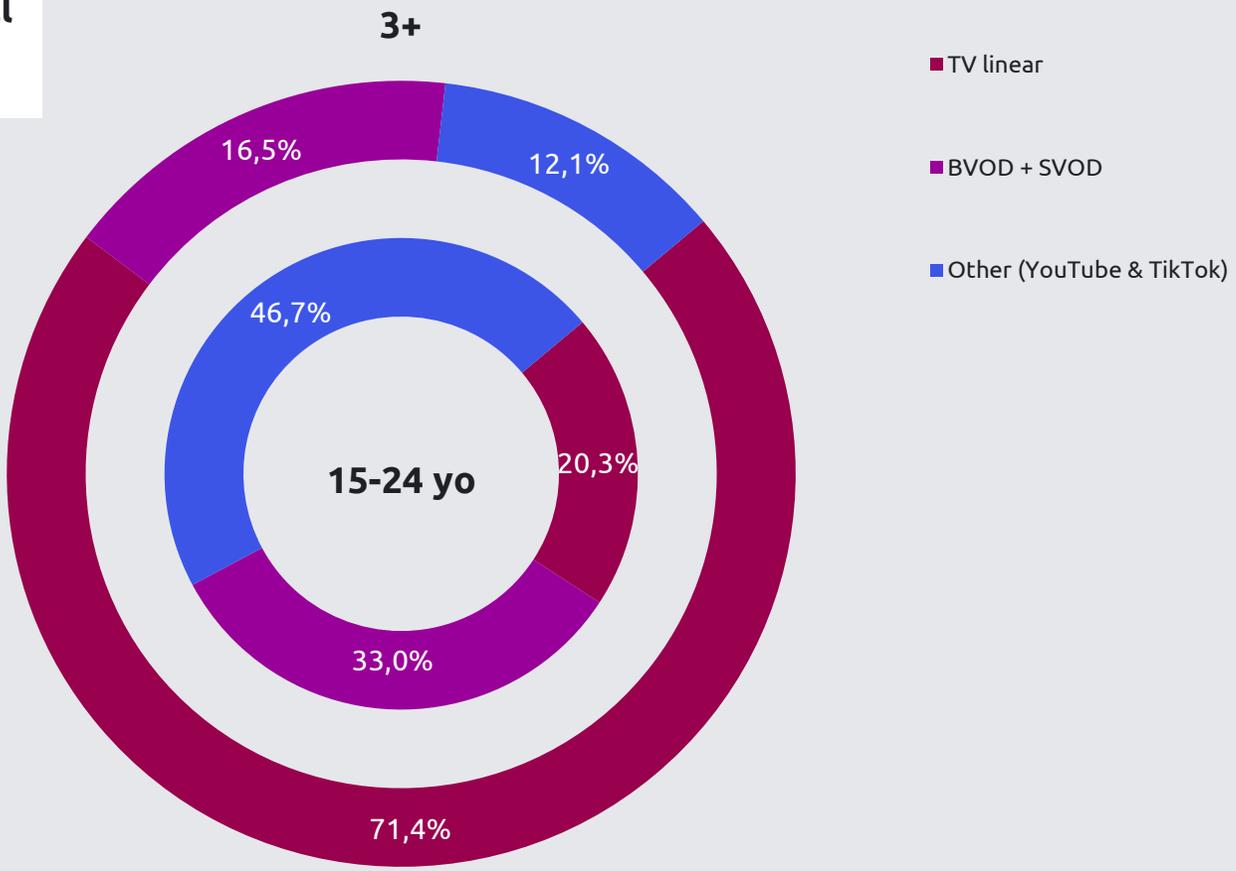


Source: Kantar IBOPE Media H1 2025

Shr% [Total Video] | Aggregate Viewing | Video Platforms, Pay TV, Broadcast TV | TV/CTVs | All Day | Excluding Non-Identified Video Consumption and Other uses of the TV set (Consoles / Games / etc).

Finland: Multiplatform TV accounts for 88 % of household video consumption

Viewing on all devices
2024



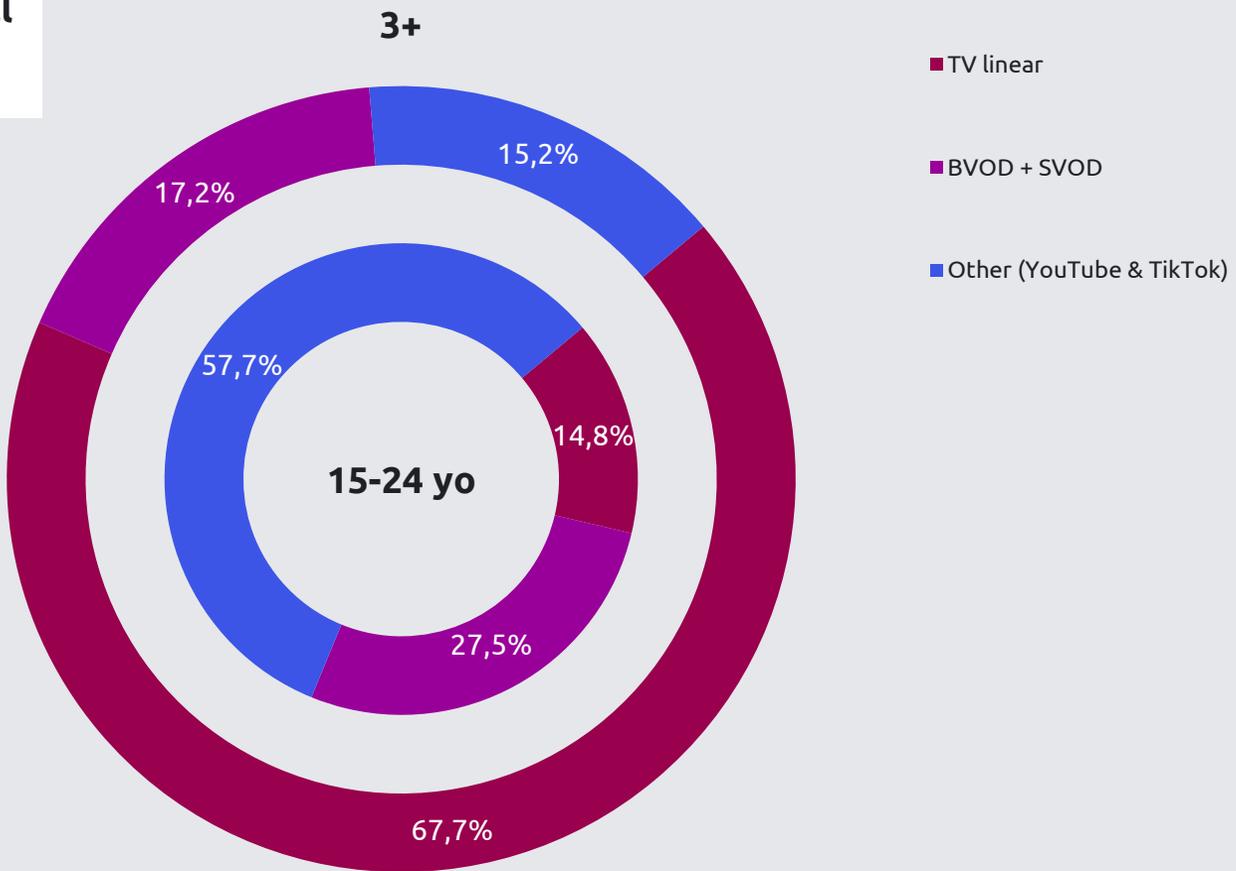
Average video time per day:

- **3+:** 197 minutes
- **15-24 yo:** 102 minutes

Source: Finnpanel; TV Audience Measurement full year 2024, household viewing

Finland: Multiplatform TV accounts for 85 % of household video consumption

Viewing on all devices
H1 2025



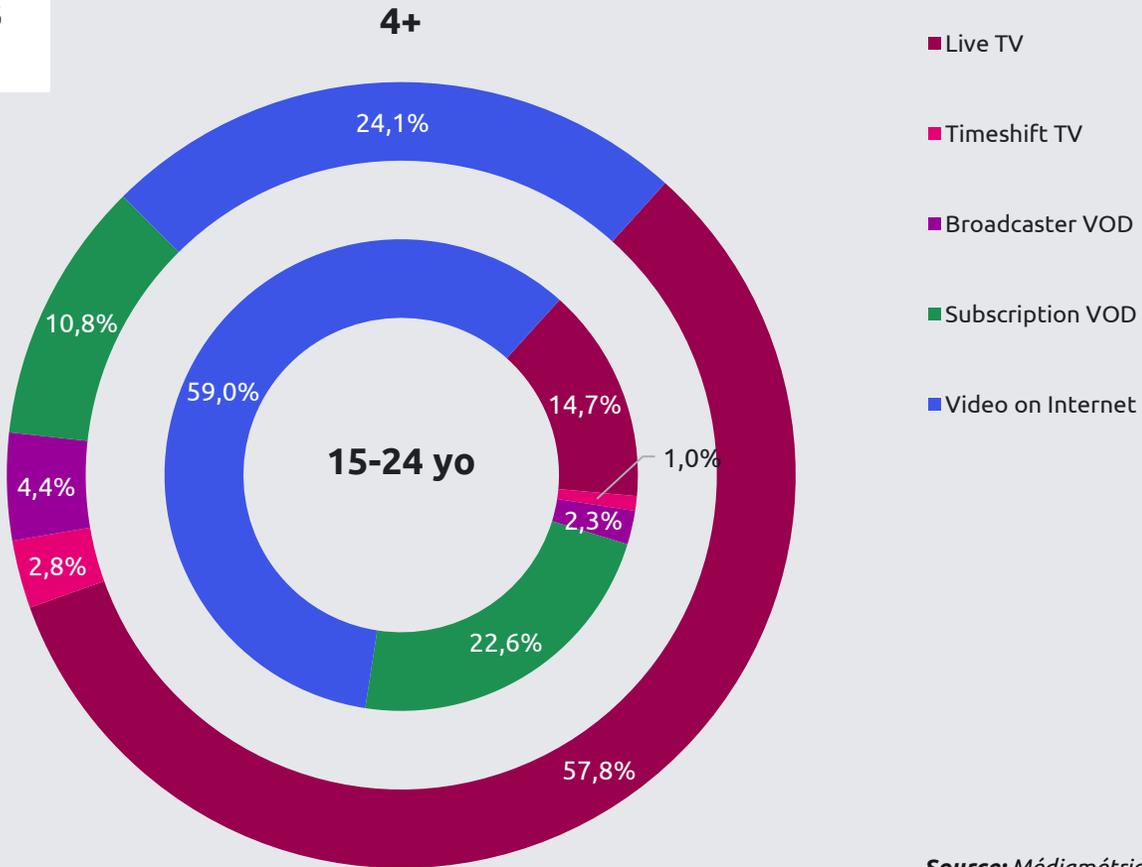
Source: Finnpanel; TV Audience Measurement H1 2025, household viewing

Average video time per day:

- **3+:** 206 minutes
- **15-24 yo:** 119 minutes

France: Multiplatform TV accounts for 65% of video consumption

Viewing on all devices
H1 2025

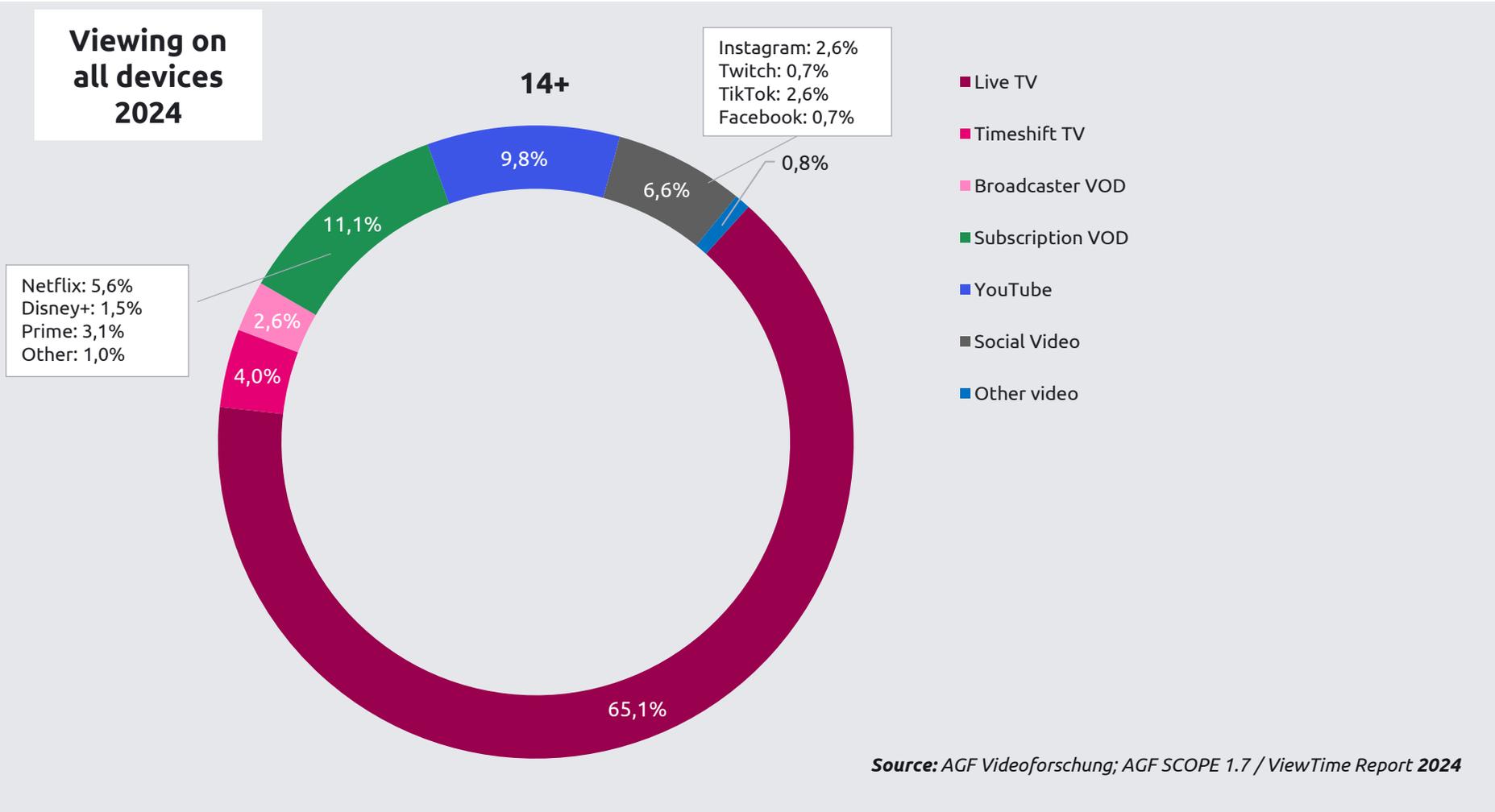


Average video time per day :

- **4+:**
249minutes
- **15-24 yo:**
217 minutes

Source: Médiamétrie; Global vidéo and Médiamat H1 2025

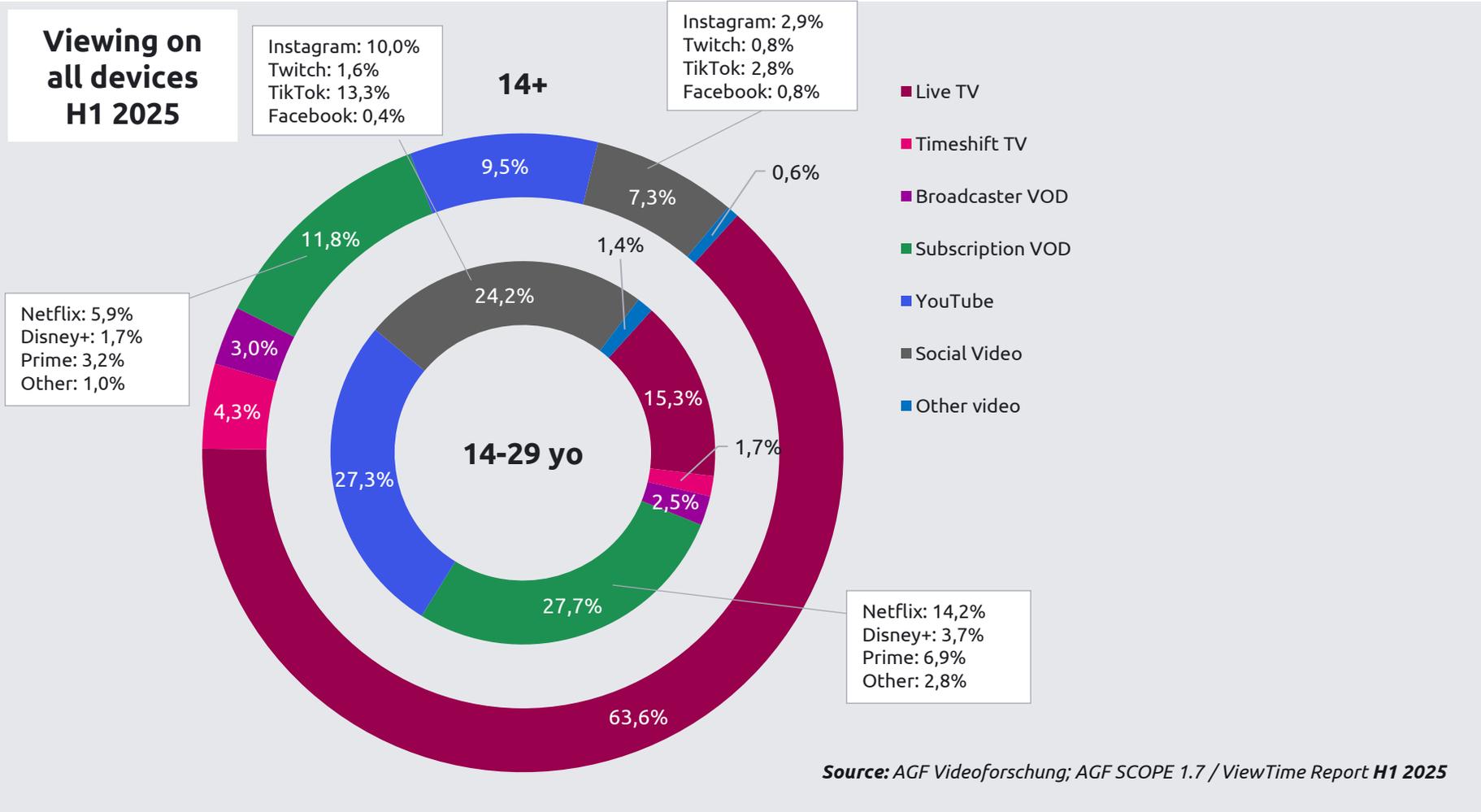
Germany: Total TV accounts for 72% of video consumption



Average video time per day:

- **14+:**
272 minutes

Germany: Total TV accounts for 71% of video consumption

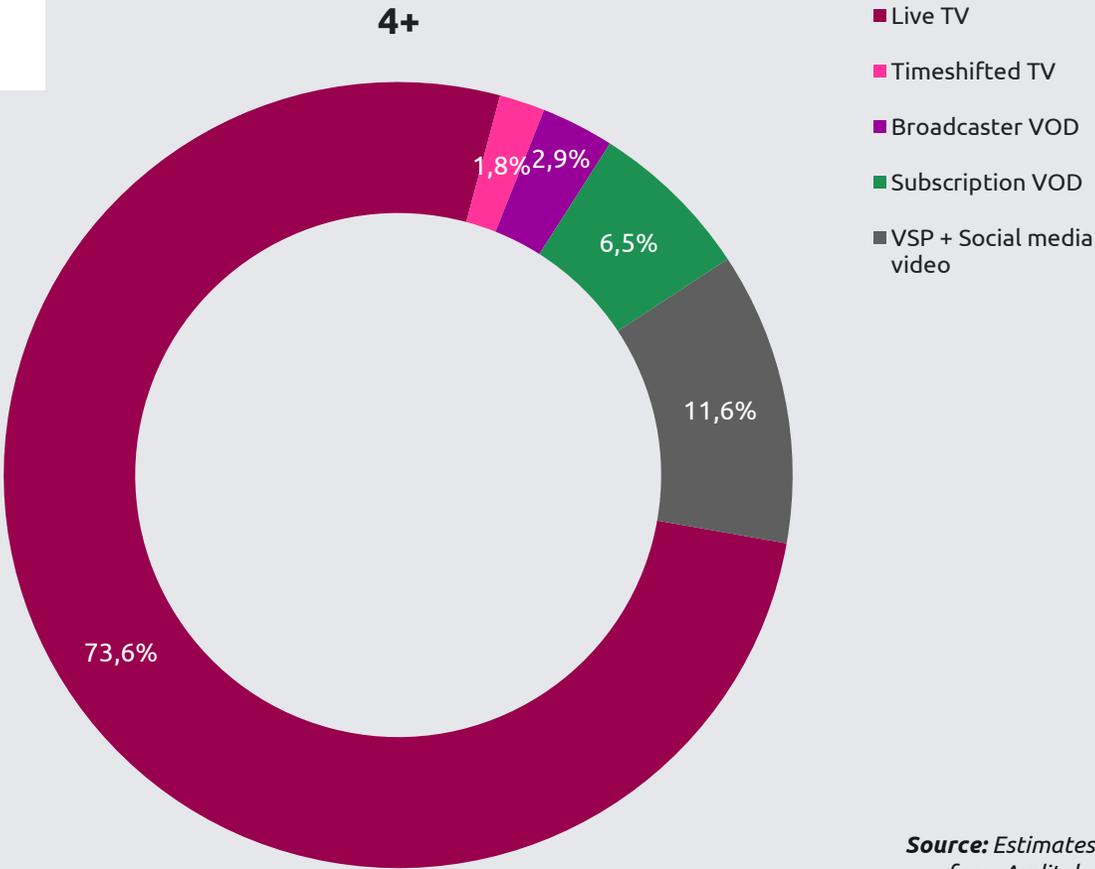


Average video time per day:

- **14+:**
264 minutes
- **14 – 29 yo:**
195 minutes

Italy: Multiplatform TV accounts for 78% of video consumption

Viewing on all devices 2024



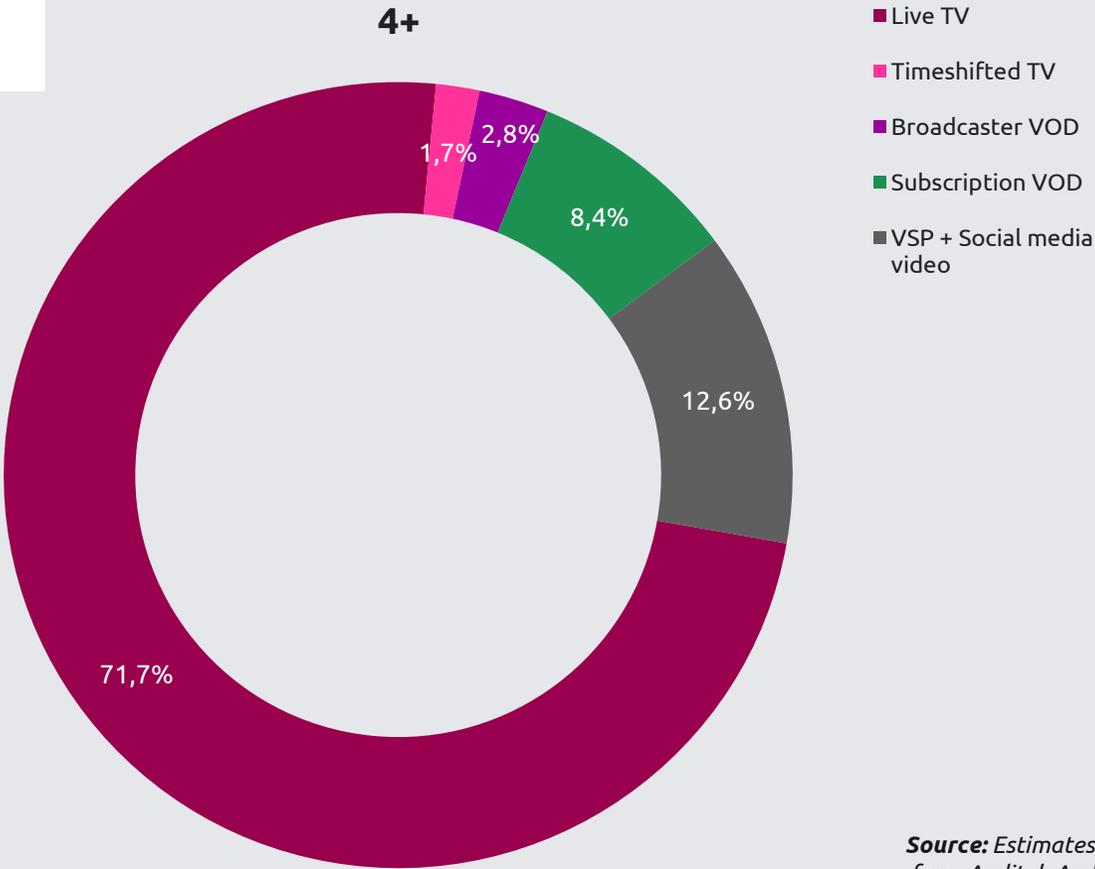
Average video time per day:

- 4+: 276 minutes

Source: Estimates by Mediaset/Publitalia '80 based on data from Auditel, Audiweb, Comscore, internal surveys 2024

Italy: Multiplatform TV accounts for 76% of video consumption

Viewing on all devices
H1 2025



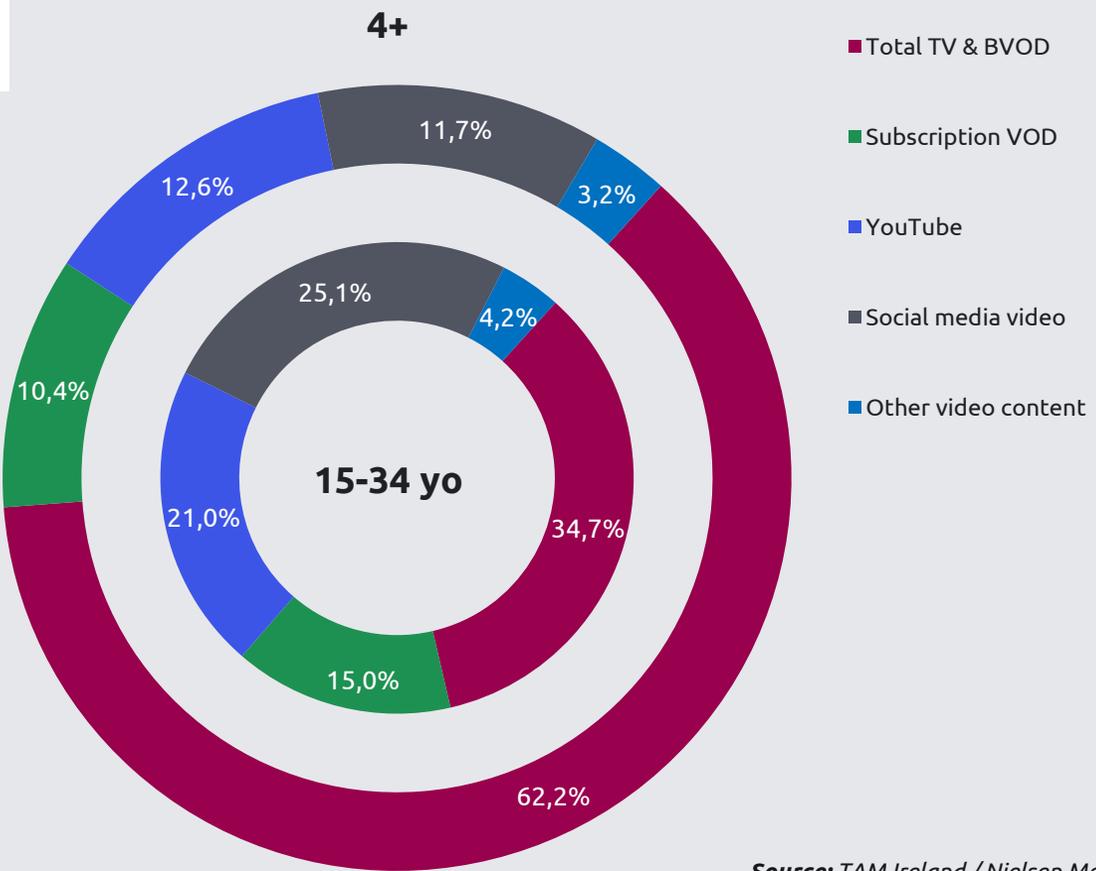
Average video time per day:

- 4+: 286 minutes

Source: Estimates by Mediaset/Publitalia '80 based on data from Auditel, Audiweb, Comscore, internal surveys H1 2025

Ireland: Total TV accounts for 62% of video consumption

Viewing on all devices 2024



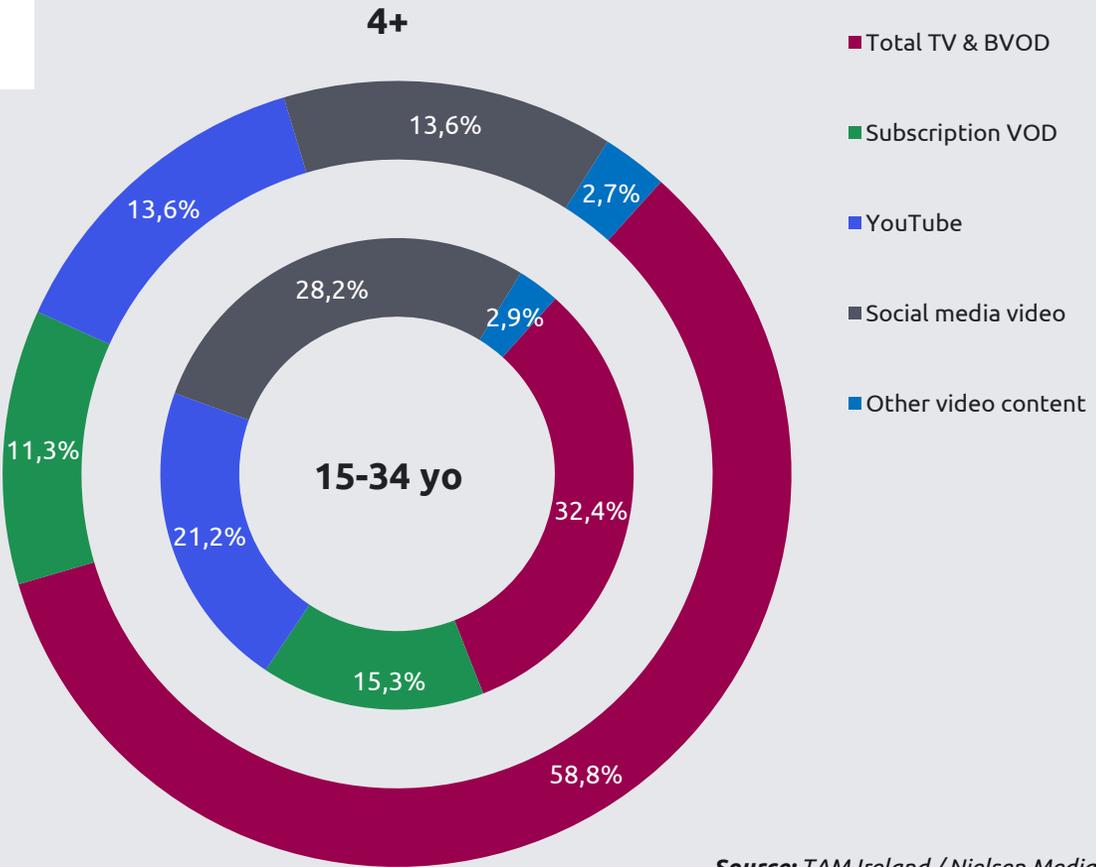
Average video time per day:

- **4+:** 222 minutes
- **15-34 yo:** 167 minutes

Source: TAM Ireland / Nielsen Media Ireland. Based on Total Video Panel 2024

Ireland: Total TV accounts for 59% of video consumption

Viewing on all devices
H1 2025



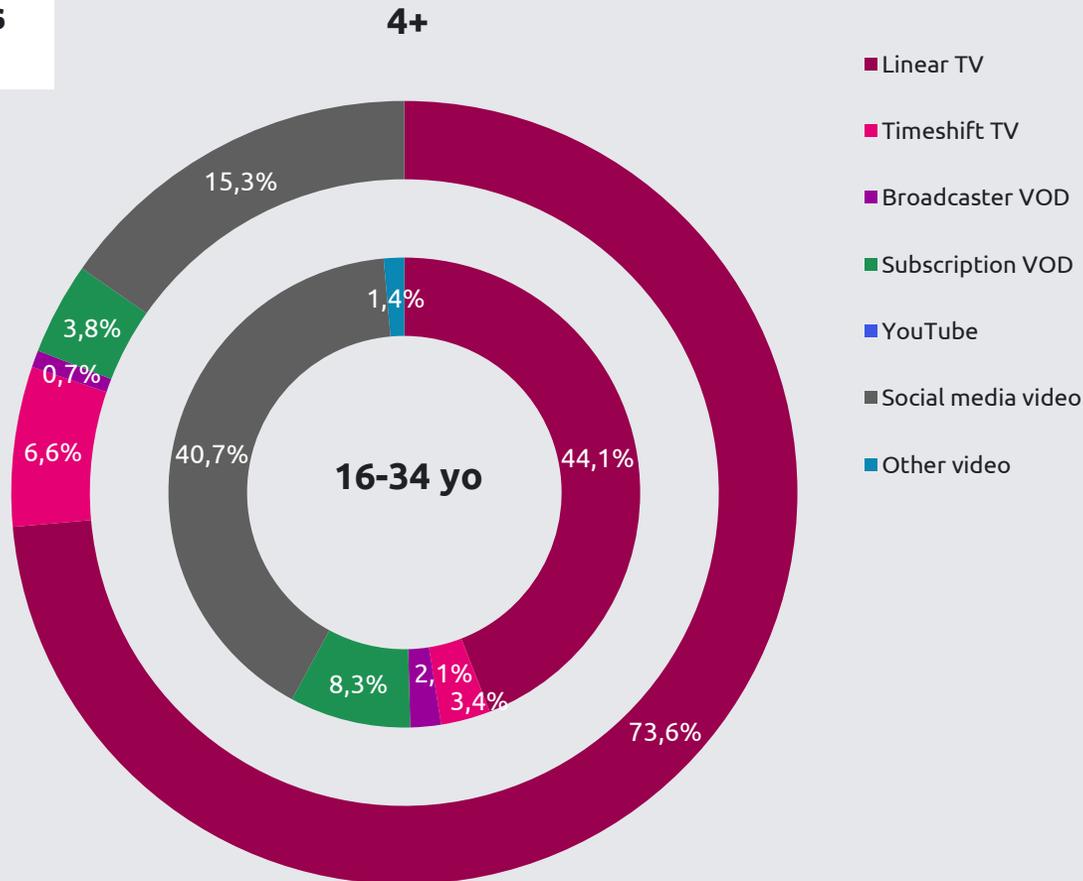
Average video time per day:

- **4+:**
221 minutes
- **15-34 yo:**
170 minutes

Source: TAM Ireland / Nielsen Media Ireland. Based on Total Video Panel H1 2025

Japan: Total TV accounts for 81% of video consumption

Viewing on
all devices
H1 2025



Average video time per day:

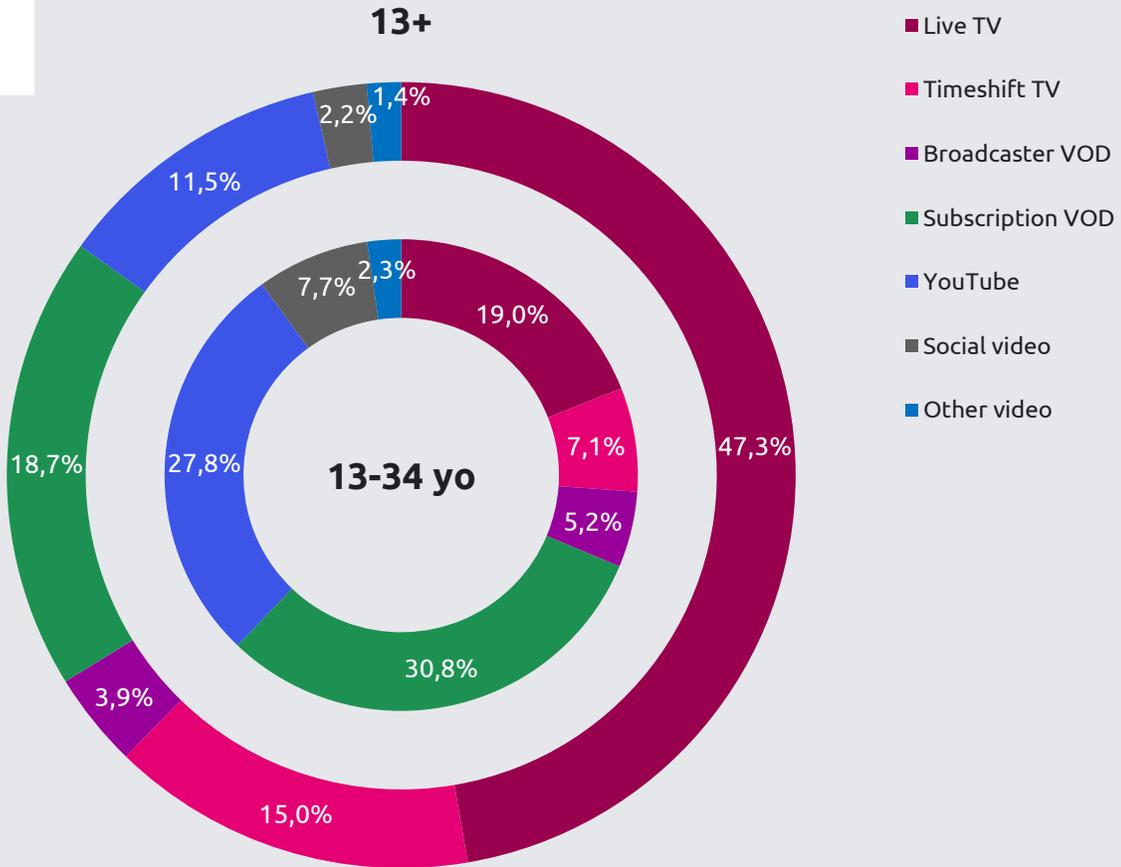
- **4+:**
288 minutes
- **16-34 yo:**
145 minutes

Source: Video Research H1 2025



The Netherlands: Total TV accounts for 66% of video consumption

Viewing on TV set only 2024



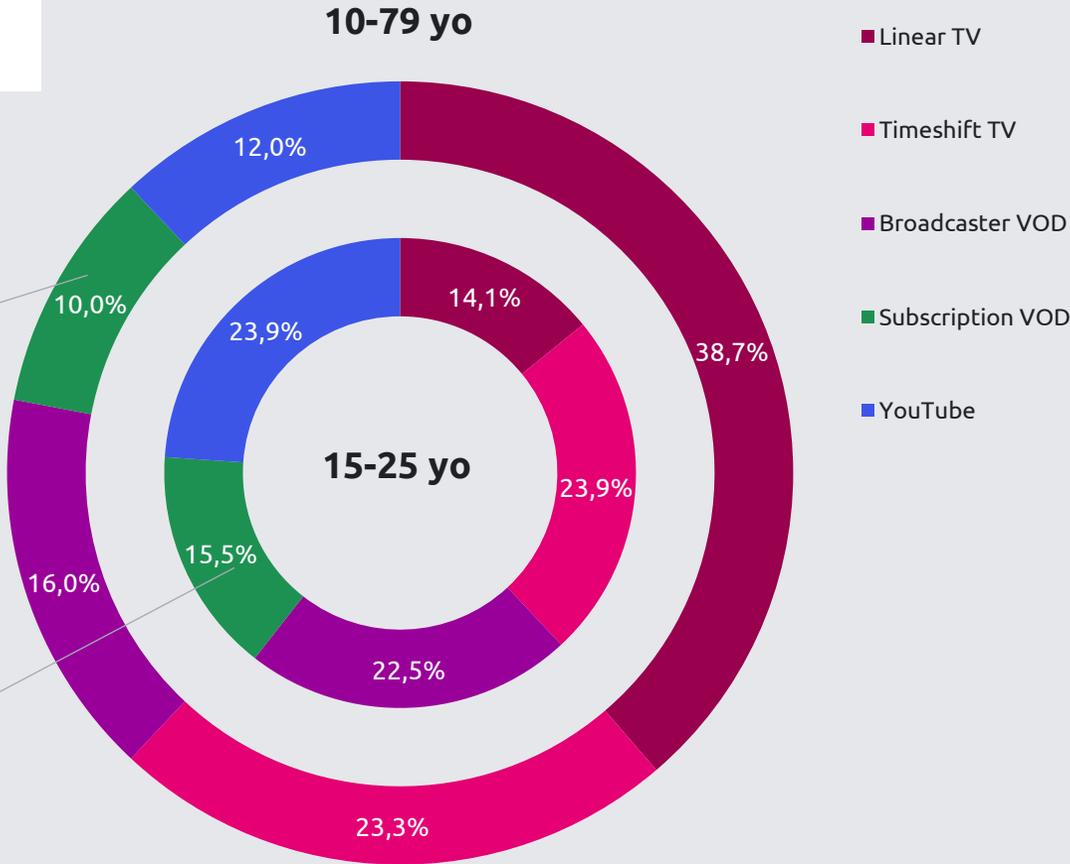
Average video time per day:

- 13+ : 222minutes
- 13-34 yo: 165 minutes

Source: SKO/NMO/GfK 2024

Norway: Multiplatform TV accounts for 78% of video consumption

Viewing on all devices 2024



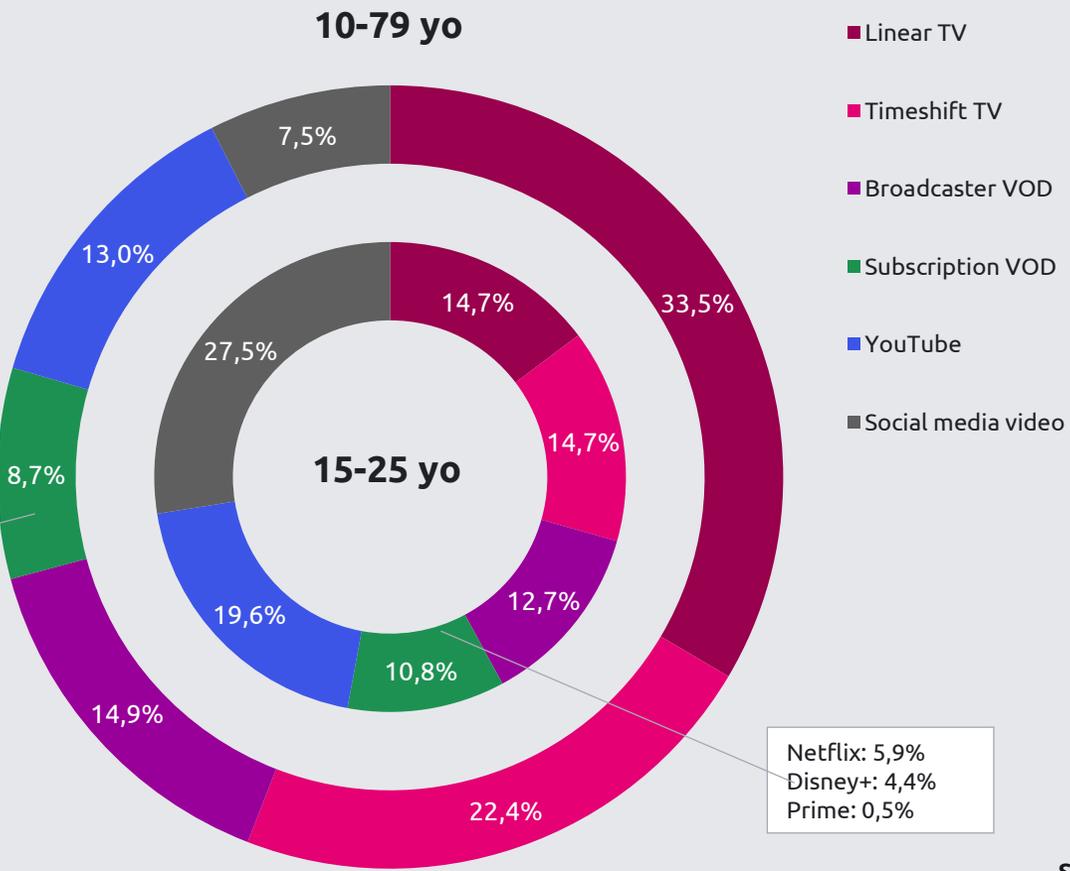
Average video time per day :

- 10-79 yo: 150 minutes
- 15-25 yo: 71 minutes

Source: Kantar Media Norge, TVOV 2024

Norway: Multiplatform TV accounts for 71% of video consumption

Viewing on all devices
H1 2025



Netflix: 5,0%
Disney+: 3,1%
Prime: 0,6%

Netflix: 5,9%
Disney+: 4,4%
Prime: 0,5%

Average video time per day :

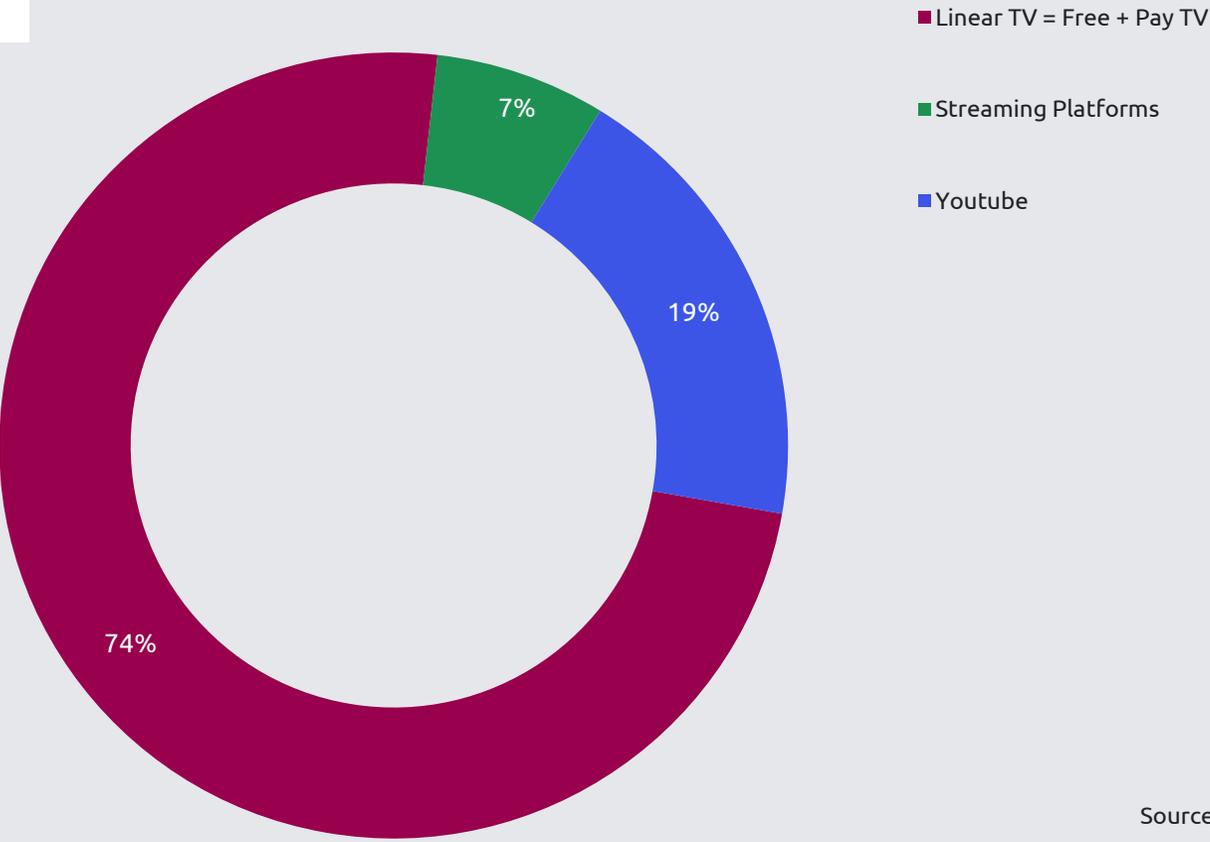
- 10-79 yo: 161minutes
- 15-25 yo: 102 minutes

Source: Kantar Media Norge, TVOV H1 2025

Peru: linear TV accounts for 74% of video consumption

Viewing on all devices
H1 2025

Total individuals

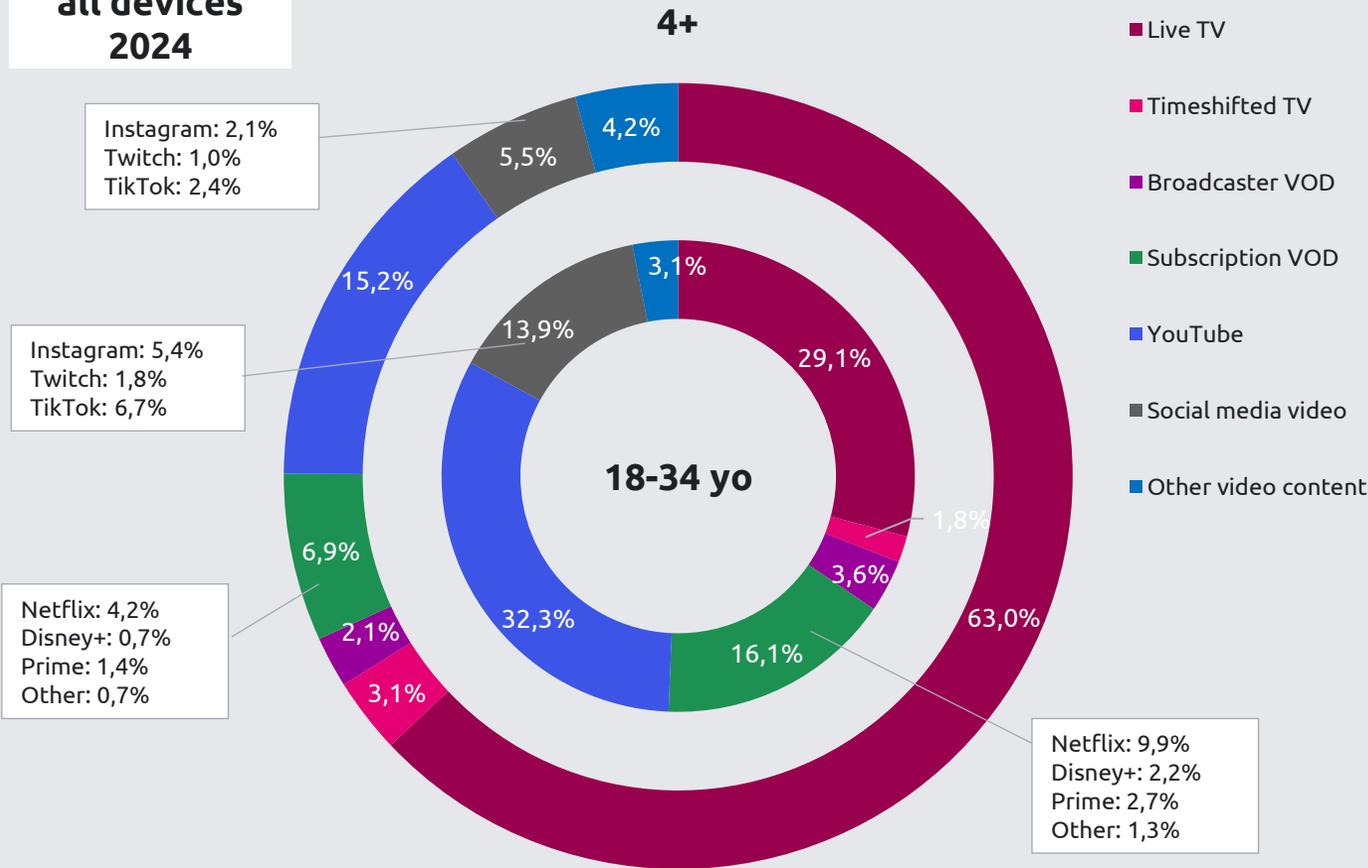


Source: Kantar IBOPE Media H1 2025

Shr% [Total Video] | Aggregate Viewing | Video Platforms, Pay TV, Broadcast TV | TV/CTVs | All Day | Excluding Non-Identified Video Consumption and Other uses of the TV set (Consoles / Games / etc).

Spain: Multiplatform TV accounts for 68% of video consumption

Viewing on all devices 2024



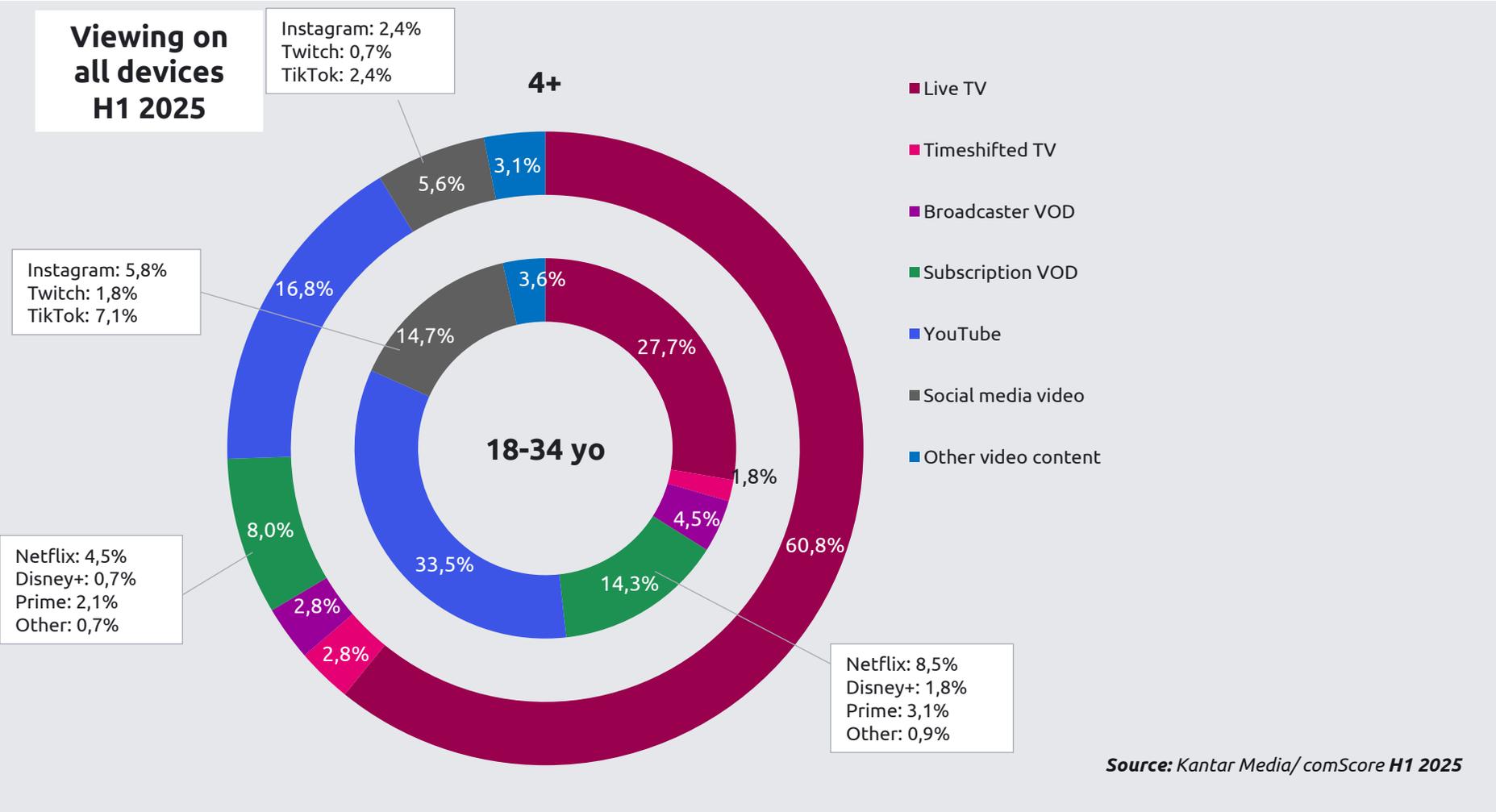
Average video time per day:

- **4+:** 289 minutes
- **18-34 yo:** 223 minutes

Source: Kantar Media/comScore 2024



Spain: Multiplatform TV accounts for 66% of video consumption



Average video time per day:

- **4+:** 286 minutes
- **18-34 yo:** 224 minutes

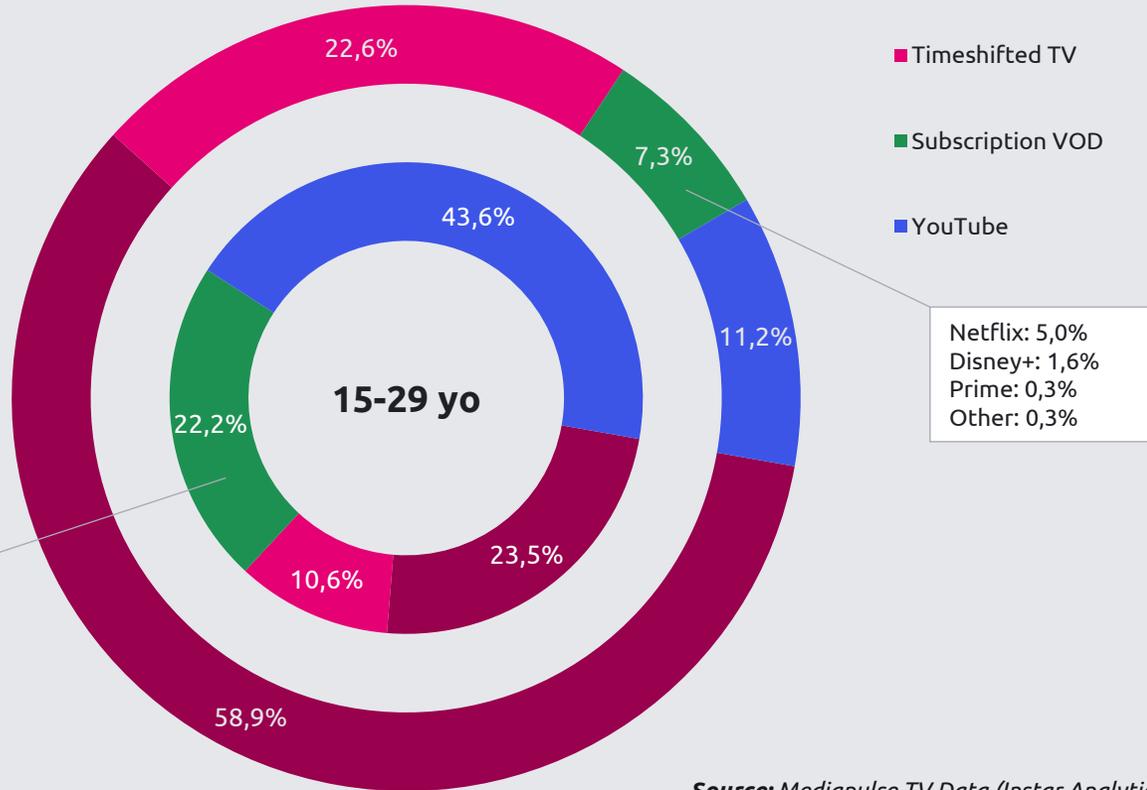
Switzerland: Total TV accounts for 81,5% of video consumption

Viewing on
all devices
2024

All individuals 3+

15-29 yo

- Live TV
- Timeshifted TV
- Subscription VOD
- YouTube



Source: Mediapulse TV Data (Instar Analytics) / Mediapulse Streaming Data 2024

Average video time per day:

- **3+:**
133 minutes
- **15-29 yo:**
55 minutes



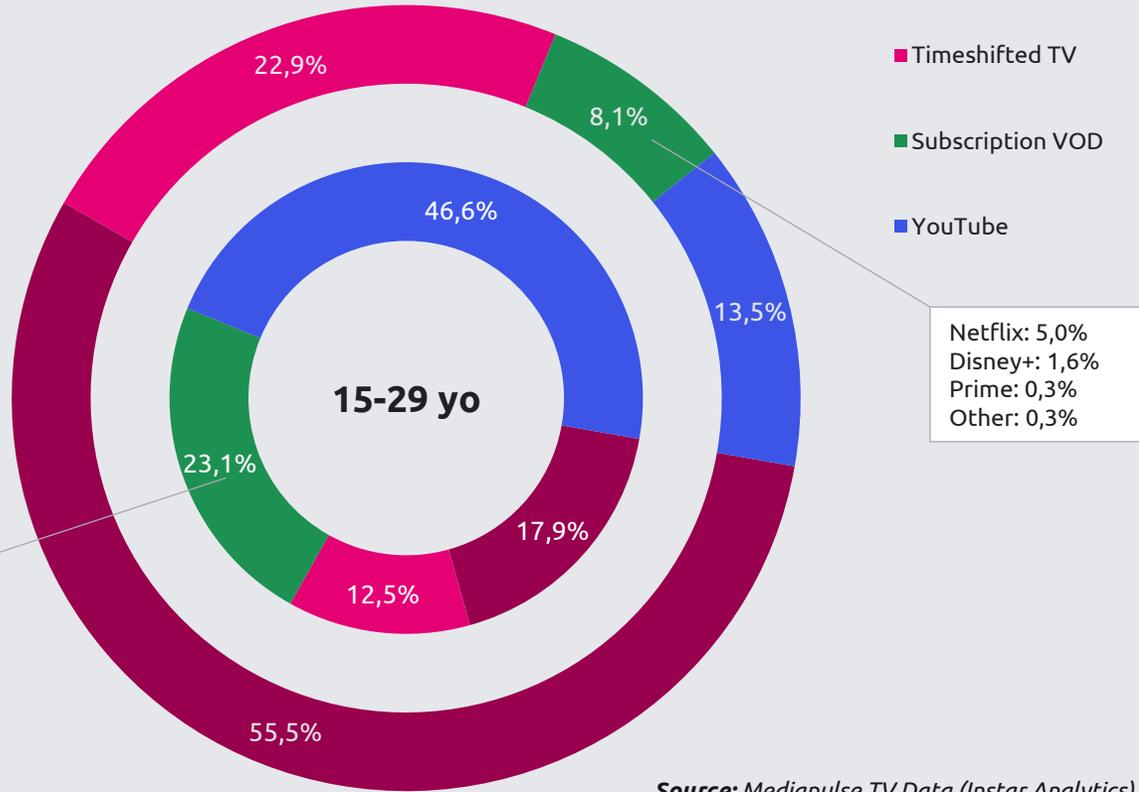
Switzerland: Total TV accounts for 78% of video consumption

Viewing on all devices
H1 2025

All individuals 3+

15-29 yo

- Live TV
- Timeshifted TV
- Subscription VOD
- YouTube



Source: Mediapulse TV Data (Instar Analytics) / Mediapulse Streaming Data H1 2025

Average video time per day:

- **3+:**
134 minutes
- **15-29 yo:**
58 minutes



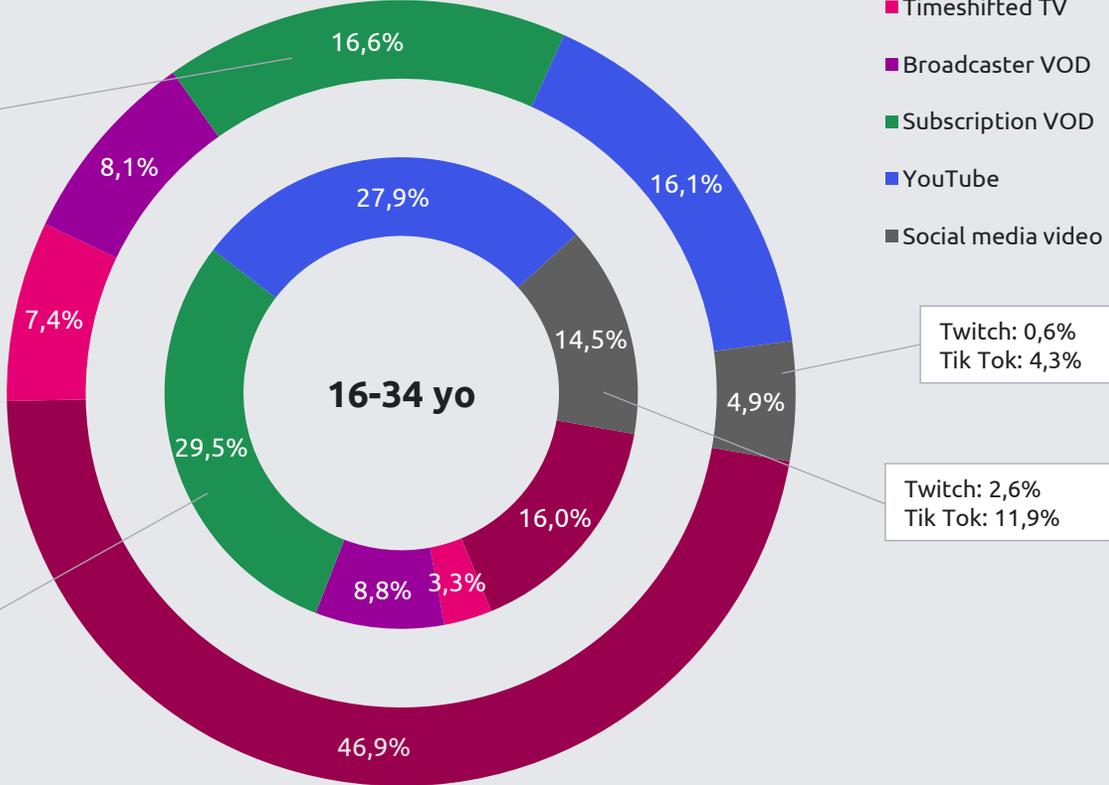
UK: Total TV accounts for 62% of video consumption

Viewing on all devices 2024

All individuals 4+

Netflix: 9,2%
Disney+: 3,6%
Prime: 2,9%
Other: 0,9%

Netflix: 15,8%
Disney+: 7,9%
Prime: 4,5%
Other: 1,3%



- Live TV
- Timeshifted TV
- Broadcaster VOD
- Subscription VOD
- YouTube
- Social media video

Twitch: 0,6%
Tik Tok: 4,3%

Twitch: 2,6%
Tik Tok: 11,9%

Source: Barb /2024

Average video advertising time per day:

- **4+:**
241 minutes
- **16-34 yo:**
186 minutes

UK: Total TV accounts for 61% of video consumption

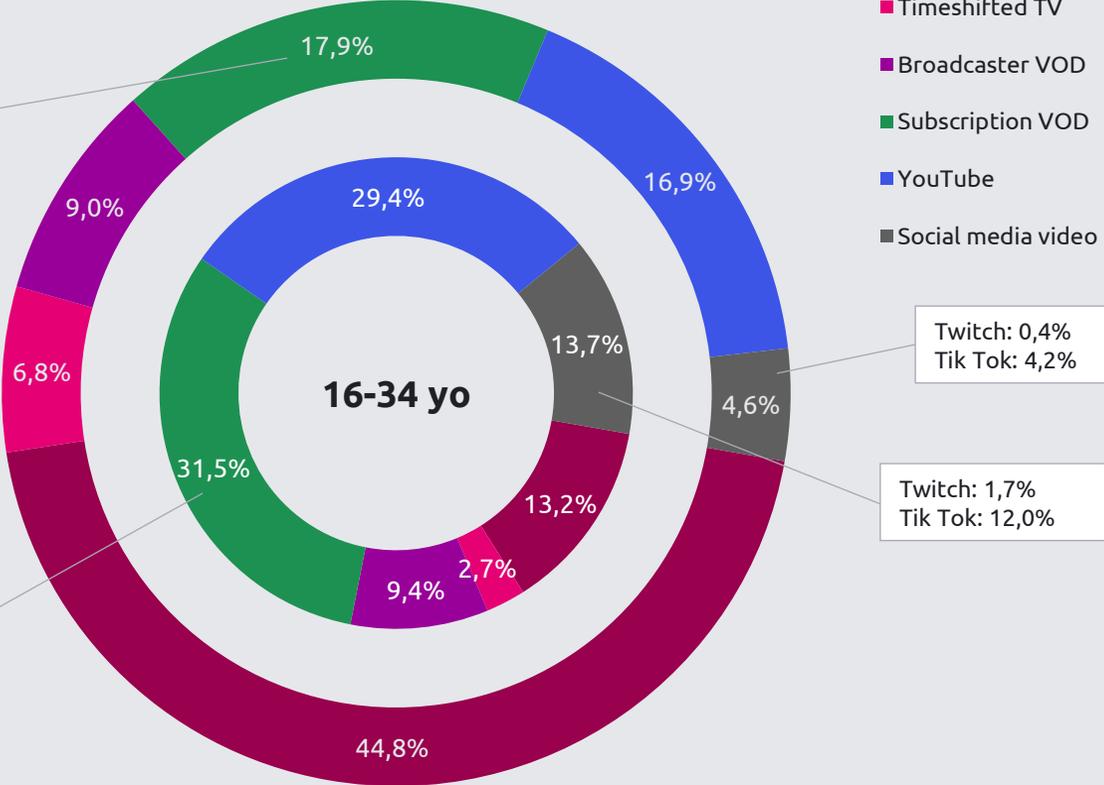
Viewing on all devices
H1 2025

All individuals 4+

16-34 yo

Netflix: 9,9%
Disney+: 3,4%
Prime: 3,5%
Other: 1,1%

Netflix: 17,6%
Disney+: 7,3%
Prime: 5,3%
Other: 1,4%



- Live TV
- Timeshifted TV
- Broadcaster VOD
- Subscription VOD
- YouTube
- Social media video

Twitch: 0,4%
Tik Tok: 4,2%

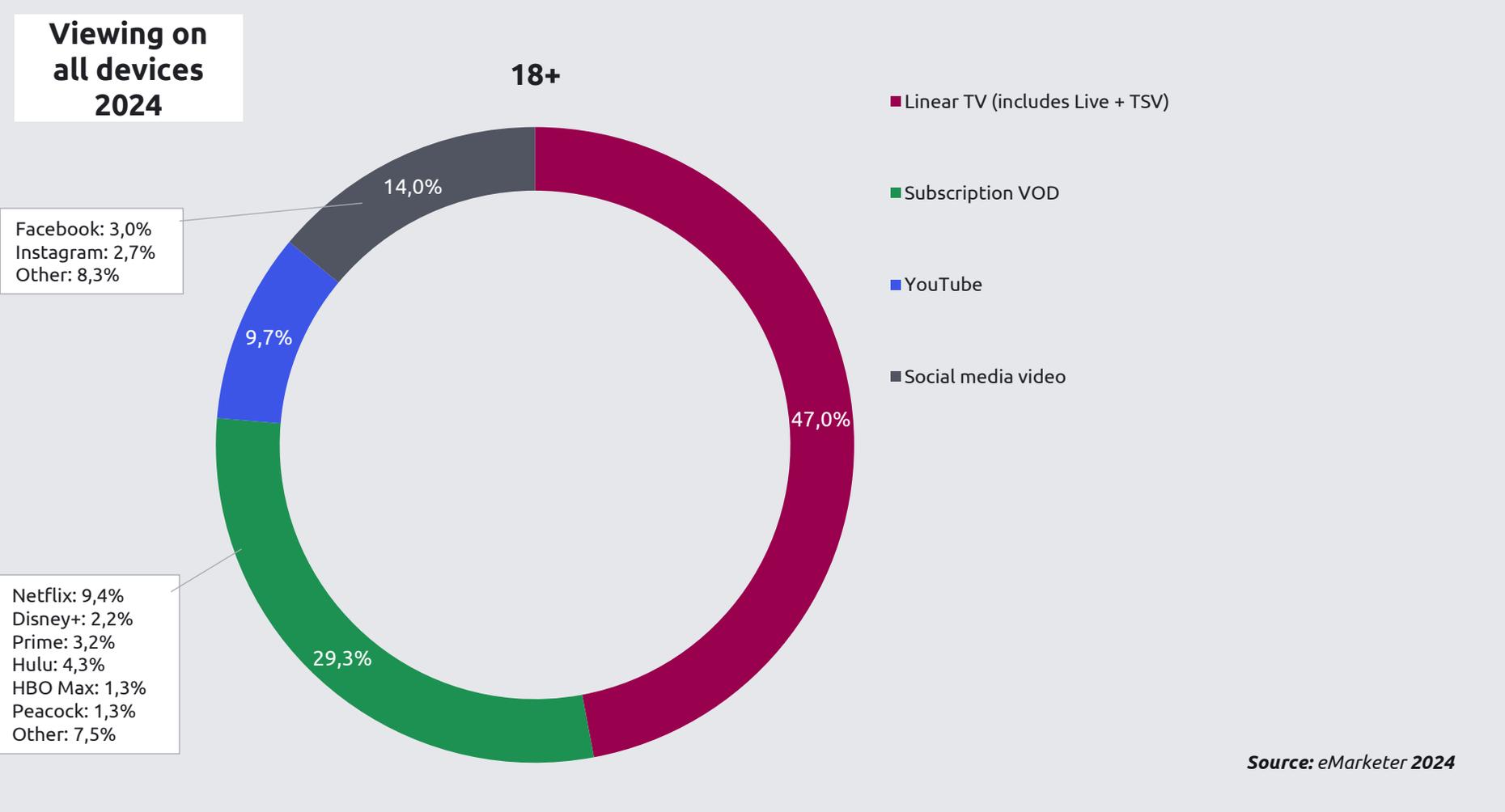
Twitch: 1,7%
Tik Tok: 12,0%

Average video advertising time per day:

- **4+:**
234 minutes
- **16-34 yo:**
173 minutes

Source: Barb /H1 2025

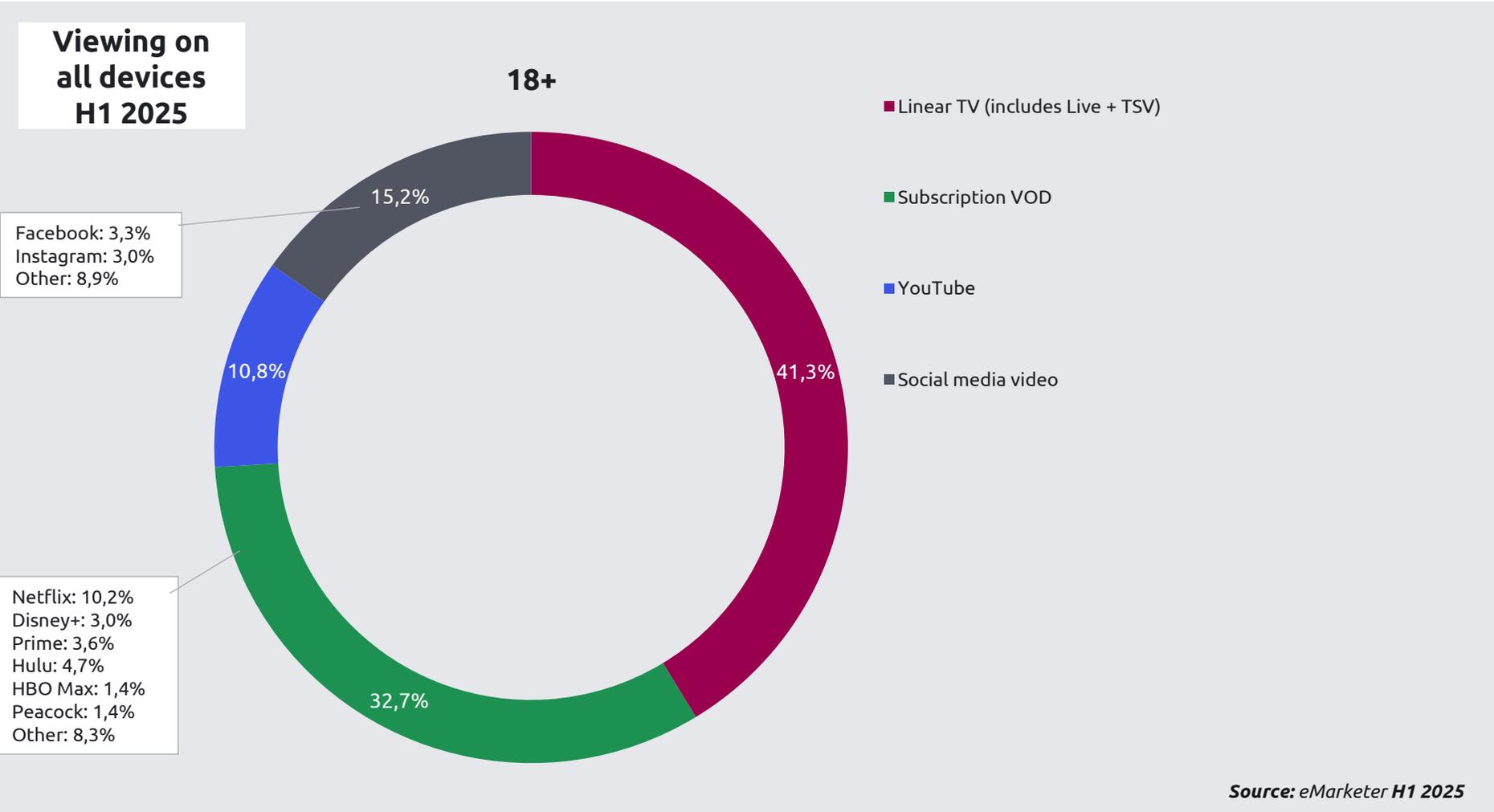
USA: linear TV accounts for 47% of video consumption



Average video time per day:

- **18+:**
372 minutes

USA: linear TV accounts for 41% of video consumption



Average video time per day:

- **18+:**
361 minutes

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