🌐 **GLOBAL CONNECTED TV (CTV) AD SUPPLY CHAIN TRENDS**

Q2.2025

An analysis of the state of open programmatic CTV advertising, including trending categories and ad fraud risk.

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COMPARE WITH ➜ UNITED STATES

SCOPE:

Pixalate's data science team analyzed programmatic advertising activity across over 115 thousand Connected TV ("CTV") apps and over 8 billion global open programmatic ad transactions in Q2 2025 to compile the research in this series. Pixalate's datasets consist predominantly of buy-side open auction programmatic traffic sources.

Pixalate is sharing this data not to impugn the standing or reputation of any person, entity or app, but instead, to render opinions and report trends pertaining to CTV programmatic advertising activity in the time period studied.

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Q2 2025: Global CTV Ad Supply Chain Trends

$5.7 billion in estimated global **open programmatic CTV ad spend** was recorded in Q2 2025, reflecting a 3% year-over-year decrease, *inclusive of invalid traffic (IVT)*.

18% of global open programmatic CTV traffic in Q2 2025 was identified as **ad fraud (IVT)**, a rate lower than in LATAM (30%), APAC (26%), and EMEA (19%).

Bundle IDs associated with **Fubo** saw the **highest volume of non-IVT open programmatic ad impressions** on Apple TV.

46K apps are **listed on the Roku Channel Store** globally, including 11K that have app-ads.txt files. This is more than Amazon Fire TV (39K, 8K), Apple TV (26K, 3K), and Samsung Smart TV (5K, <1K).

72% of global Amazon Fire TV ad traffic went to apps in the **'Movies & TV'** category, while 15% went to 'Sports' apps and 10% to 'News' apps.
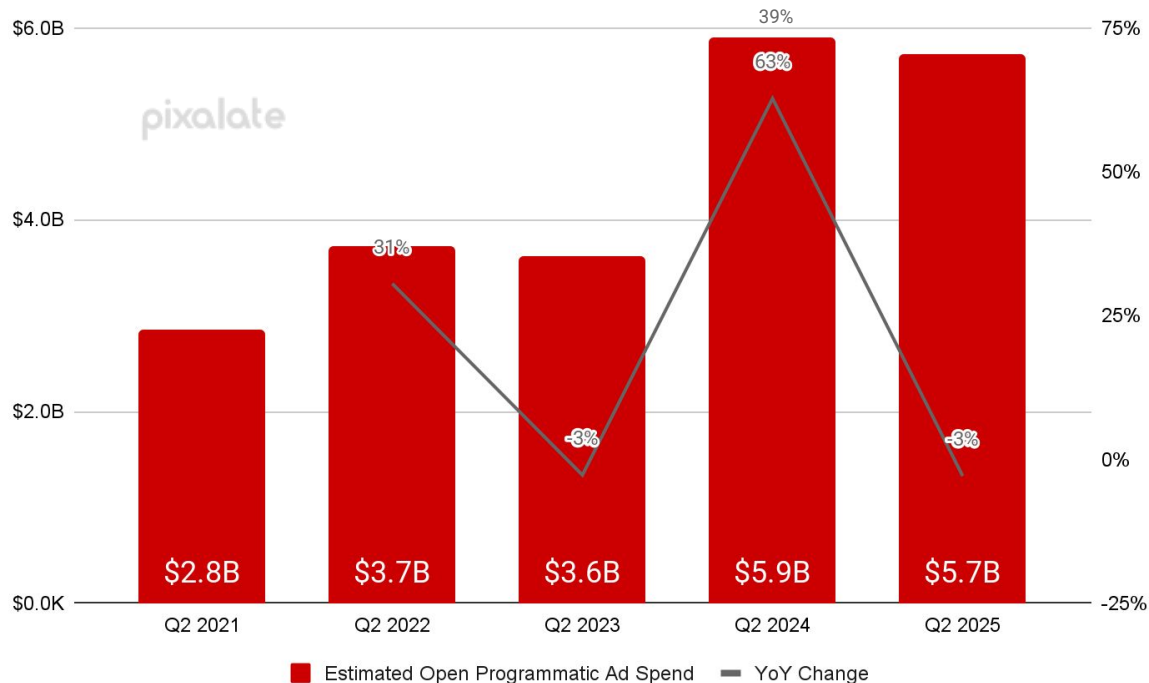
$5.7B

in estimated global **open programmatic CTV ad spend** was recorded in Q2 2025, a 3% YoY decrease, according to Pixalate.

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GLOBAL: Q2 2025 Estimated Open Programmatic CTV Ad Spend

Inclusive of Invalid Traffic (IVT); as estimated by Pixalate.

18%

of global open programmatic CTV traffic in Q2 2025 was **identified as ad fraud (IVT)**, according to Pixalate.

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GLOBAL: CTV Ad Fraud (IVT) Remains Steady at 18% in Q2 2025

Invalid traffic ("IVT" - inclusive of ad fraud) per quarter in open programmatic CTV; global; as measured by Pixalate.
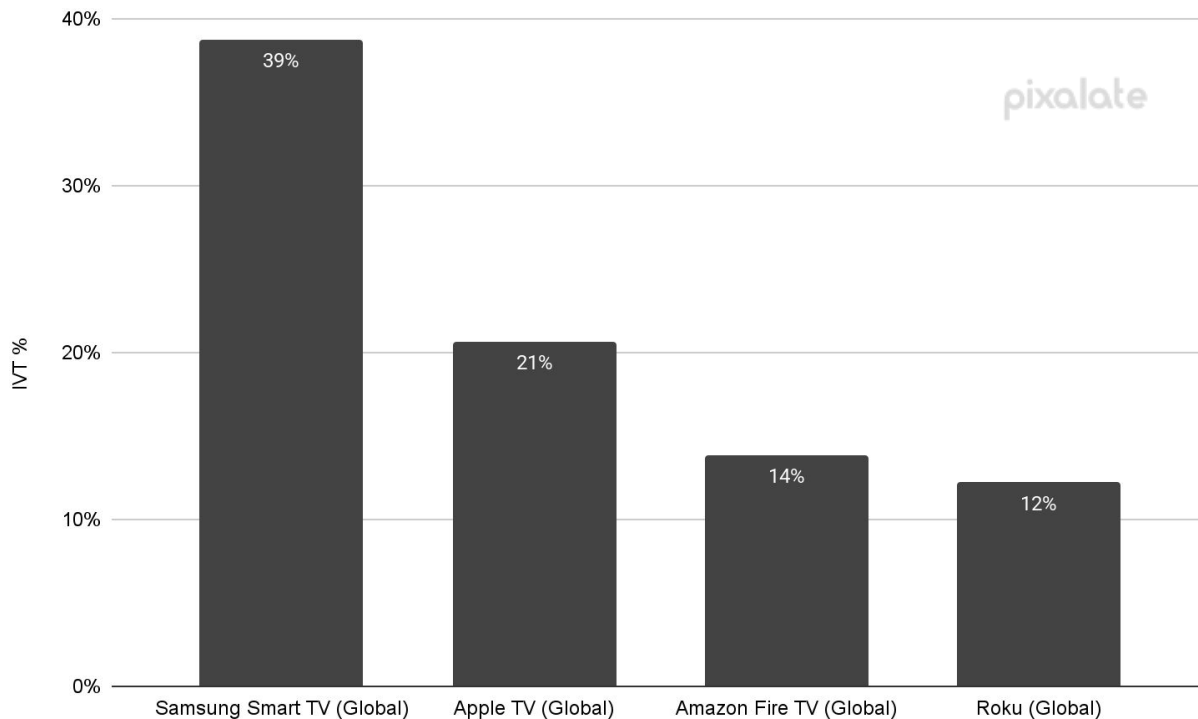
COMPARE ➜ United States, United Kingdom, Canada, Mexico
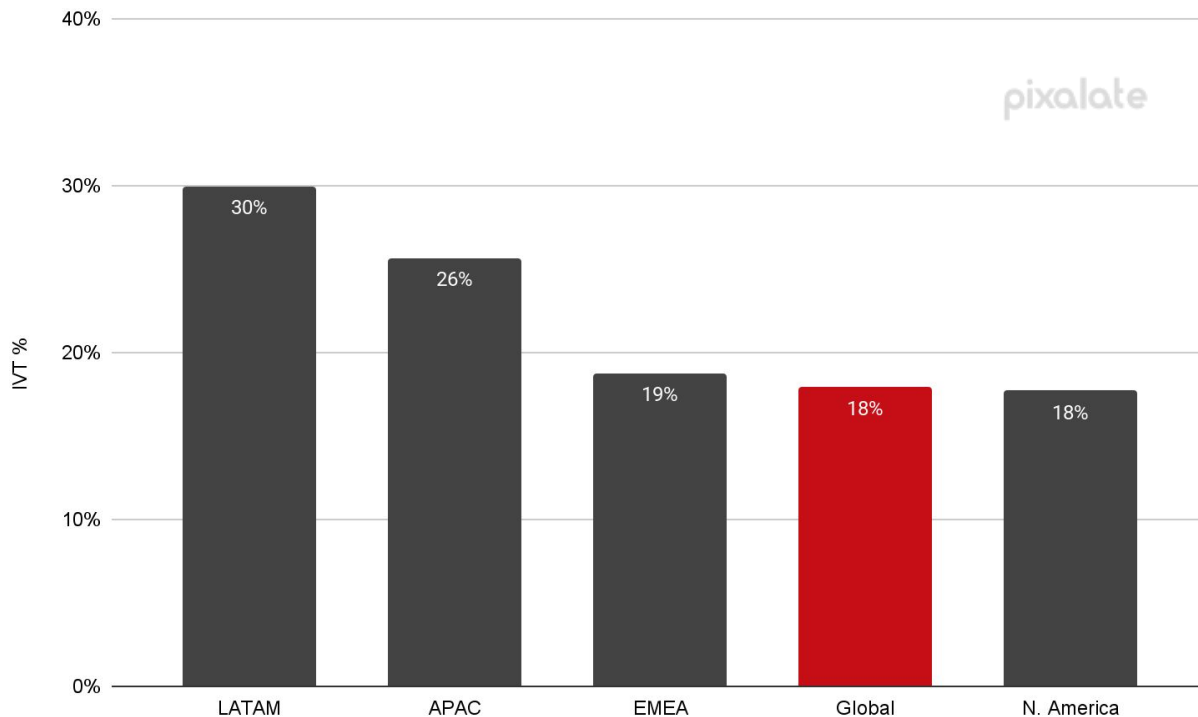
Want more data? Schedule a demo: pixal.at/demo

GLOBAL: Roku Apps Have the Lowest Ad Fraud (IVT) Rates

Invalid traffic ("IVT" - inclusive of ad fraud) by device type in open programmatic CTV; global; Q2 2025; as measured by Pixalate

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IVT %

- 40%
- 39% — Samsung Smart TV (Global)
- 30%
- 21% — Apple TV (Global)
- 20%
- 14% — Amazon Fire TV (Global)
- 12% — Roku (Global)
- 10%
- 0%

COMPARE ➔ United States, United Kingdom, Canada, Mexico

Fubo

Bundle IDs associated with fuboTV Inc. saw the **highest volume of non-IVT open programmatic ad impressions** on Apple TV, as assessed by Pixalate.

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GLOBAL: Top CTV Bundle IDs by Platform

Jun. 2025; based on volume of non-IVT open programmatic ad impressions by platform; as estimated by Pixalate.

Roku ▼

Hulu
by Hulu LLC
Bundle ID: com.hulu.plus.roku
Top Seller: Magnite

The Roku Channel by Roku
Bundle ID: 151908
Top Seller: PubMatic

Tubi
by Tubi, Inc
Bundle ID: 41468
Top Seller: Magnite

Fubo
by fubo
Bundle ID: 43465
Top Seller: PubMatic

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tv ▼

Fubo
by fuboTV Inc.
Bundle ID: 905401434
Top Seller: Nexxen

Peacock TV
by Peacock TV LLC
Bundle ID: 1508186374
Top Seller: Screencore

MLB
by MLB
Bundle ID: 493619333
Top Seller: Sonobi

Plex
by Plex Inc.
Bundle ID: 383457673
Top Seller: Nexxen

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fire tv ▼

Pluto TV
by Pluto TV
Bundle ID: b00kdsgipk
Top Seller: Sovrn

Fubo
by fubo TV
Bundle ID: b019dchdzk
Top Seller: Nexxen

Lifetime
by A+E Networks
Bundle ID: b00e5nh6yg
Top Seller: PubMatic

Plex
by Plex, Inc.
Bundle ID: b004y1wcde
Top Seller: Nexxen

SEE MORE ➜ Latest Rankings

Samsung SMART TV ▼

SAMSUNG TV PLUS
by Samsung Electronics Co., Ltd.
Bundle ID: g15147002586
Top Seller: Magnite

ESPN
by Disney Electronic Content, Inc.
Bundle ID: g17243010190
Top Seller: TVIQ

Fubo
by fubo
Bundle ID: g19068012619
Top Seller: PubMatic

Plex
by Plex, Inc.
Bundle ID: g00002687241
Top Seller: PubMatic
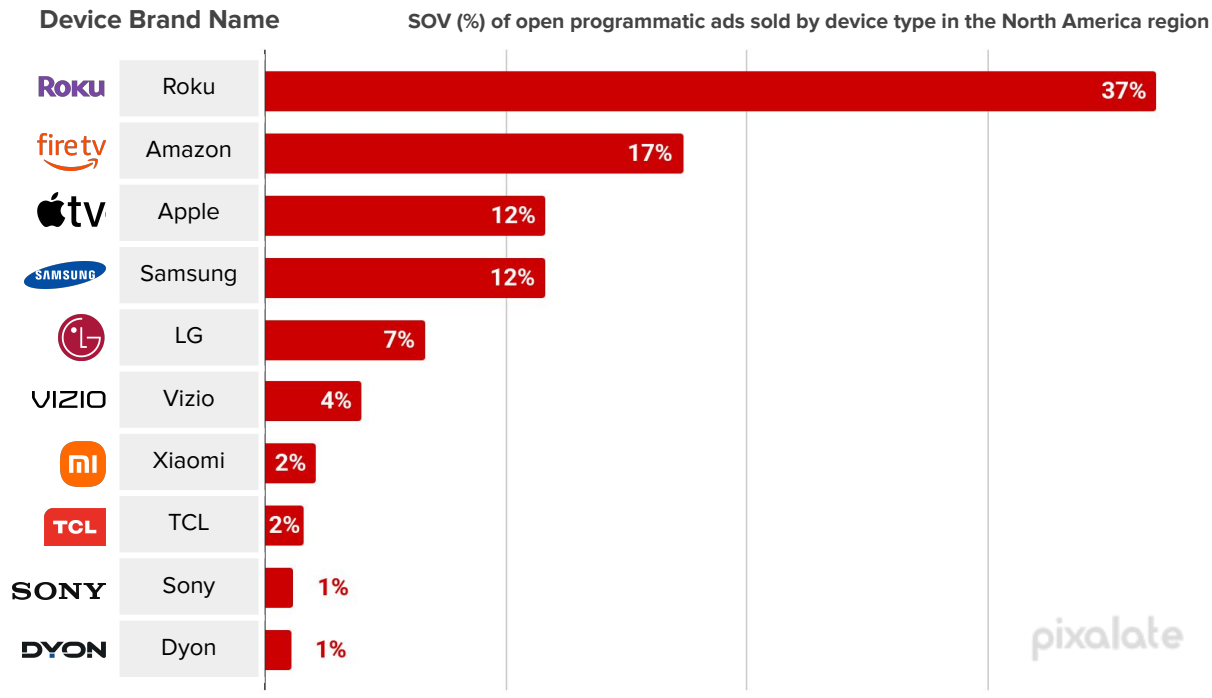
SEE MORE ➜ Latest Rankings

37%

Roku had the highest **CTV device market share** in North America in Q2 2025, according to Pixalate.

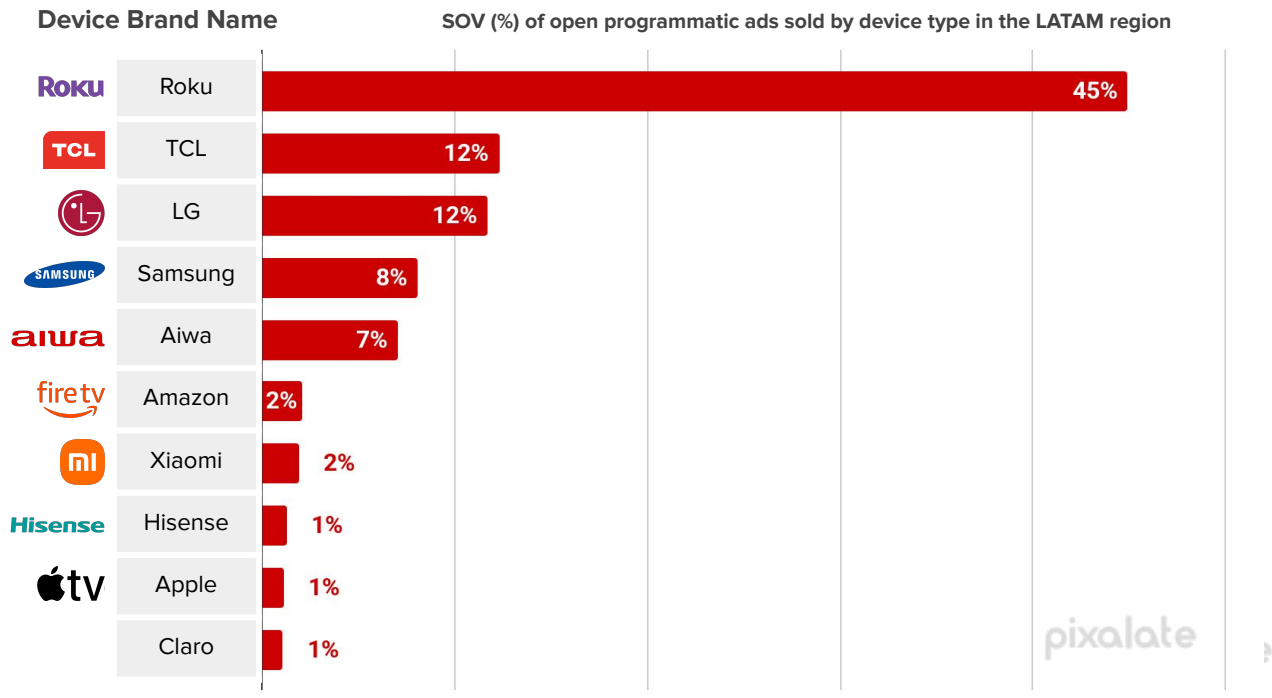**pixalate**

NORTH AMERICA: Top 10 CTV Devices by Share of Voice (%)

Based on open programmatic advertising traffic in North America; Q2 2025; as measured by Pixalate.

NORTH AMERICA

Device Brand Name

SOV (%) of open programmatic ads sold by device type in the North America region

Device Brand Name	SOV (%)
Roku	37%
Amazon	17%
Apple	12%
Samsung	12%
LG	7%
Vizio	4%
Xiaomi	2%
TCL	2%
Sony	1%
Dyon	1%

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LATAM: Top 10 CTV Devices by Share of Voice (%)

Based on open programmatic advertising traffic in LATAM; Q2 2025; as measured by Pixalate.

Device Brand Name

SOV (%) of open programmatic ads sold by device type in the LATAM region

Device Brand Name	SOV (%)
Roku	45%
TCL	12%
LG	12%
Samsung	8%
Aiwa	7%
Amazon	2%
Xiaomi	2%
Hisense	1%
Apple	1%
Claro	1%

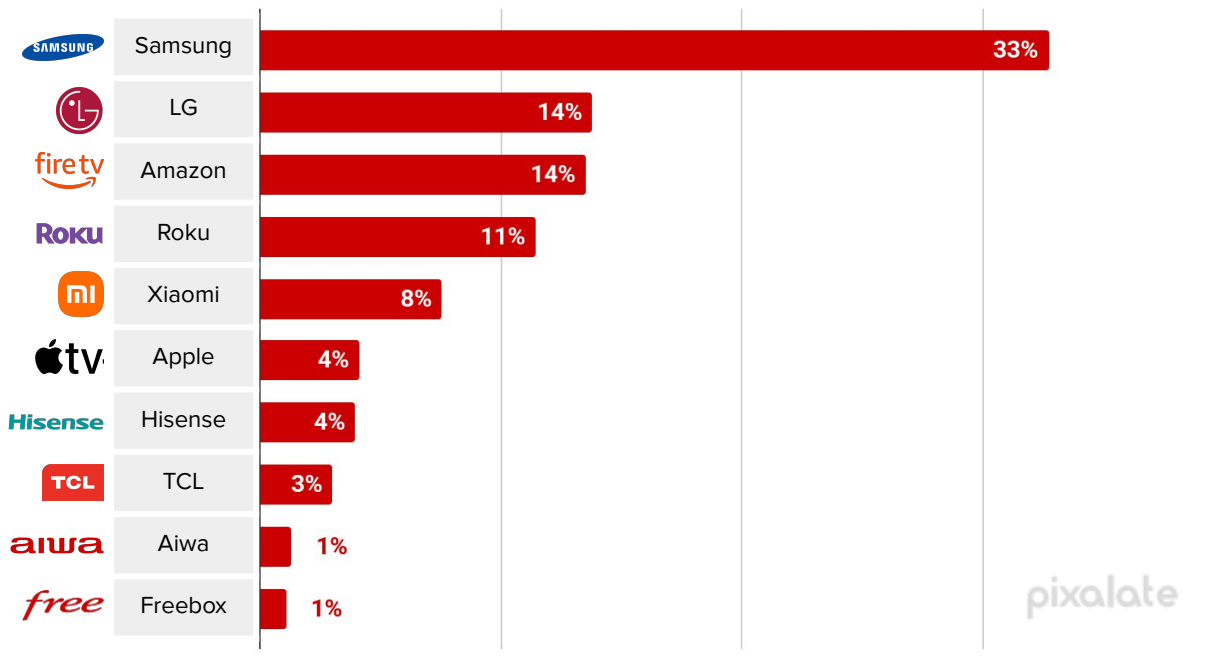**SEE MORE ➜** Download the latest global and country-level reports

EMEA: Top 10 CTV Devices by Share of Voice (%)

Based on open programmatic advertising traffic in EMEA; Q2 2025; as measured by Pixalate.

Device Brand Name

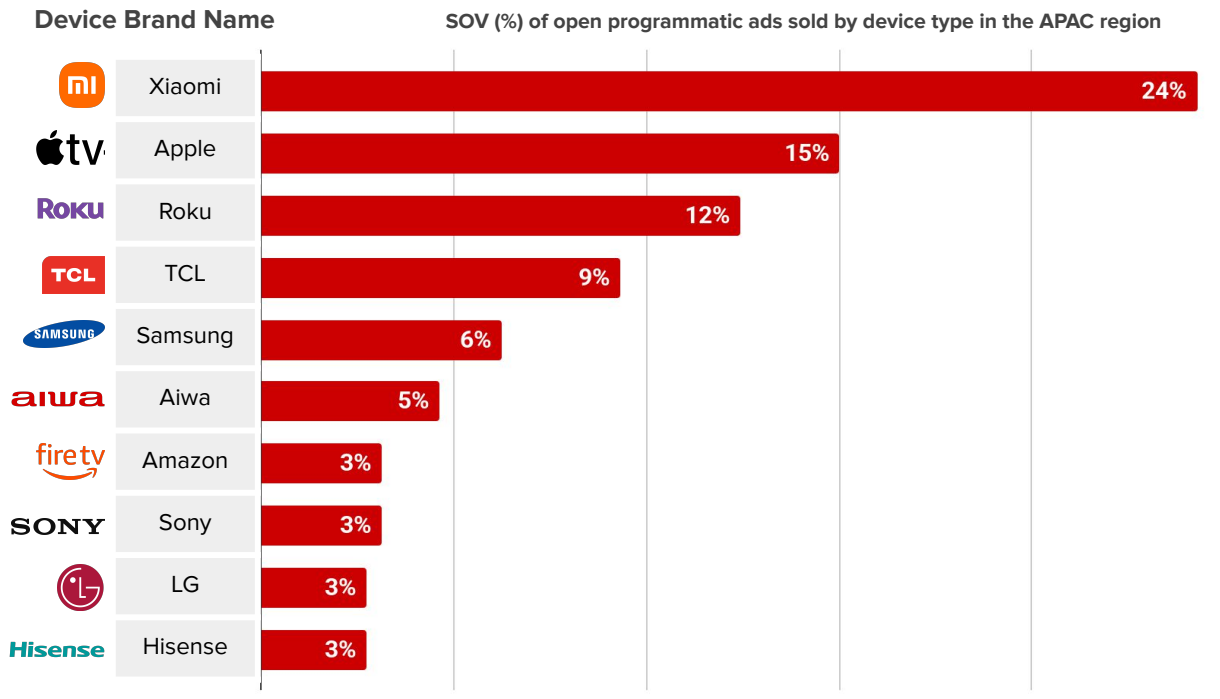**SOV (%) of open programmatic ads sold by device type in the EMEA region**

Device Brand Name	SOV (%)
Samsung	33%
LG	14%
Amazon	14%
Roku	11%
Xiaomi	8%
Apple	4%
Hisense	4%
TCL	3%
Aiwa	1%
Freebox	1%

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APAC: Top 10 CTV Devices by Share of Voice (%)

Based on open programmatic advertising traffic in APAC; Q2 2025; as measured by Pixalate.

Device Brand Name

SOV (%) of open programmatic ads sold by device type in the APAC region

Device Brand Name	SOV (%)
Xiaomi	24%
Apple	15%
Roku	12%
TCL	9%
Samsung	6%
Aiwa	5%
Amazon	3%
Sony	3%
LG	3%
Hisense	3%

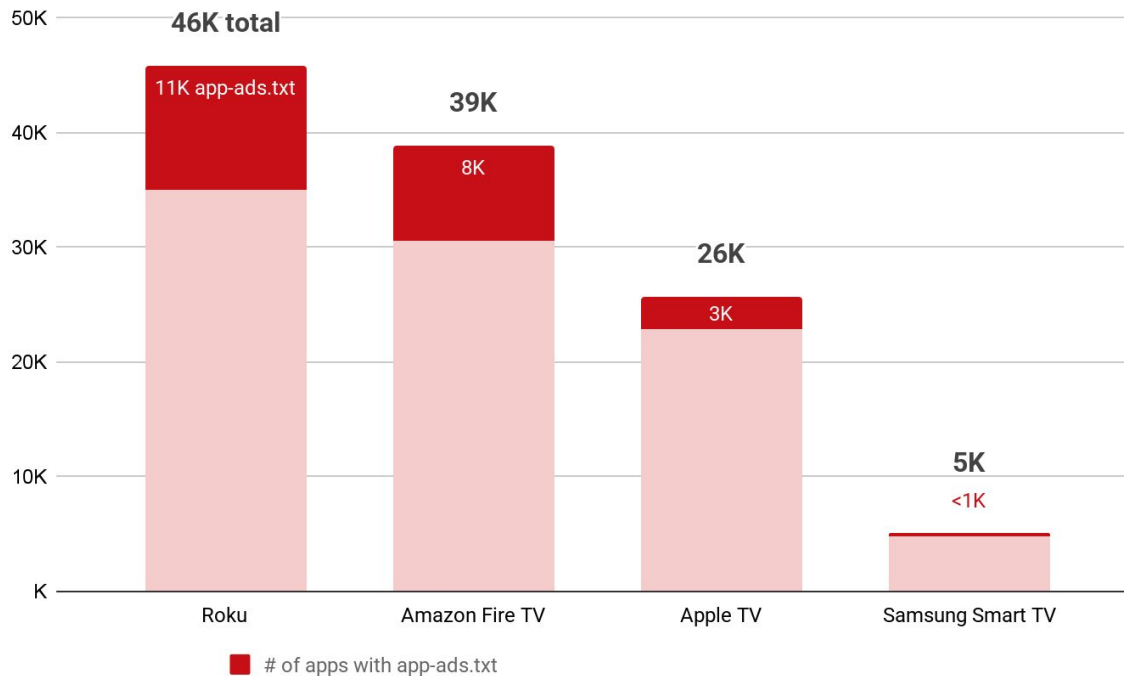**SEE MORE ➜ Download the latest global and country-level reports**

APAC

46K

apps are **listed on the Roku Channel Store** globally, including 11K that have app-ads.txt files, according to Pixalate.

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GLOBAL: Count of Apps in Leading CTV App Stores, Including Apps with app-ads.txt

Apr. 2025; as estimated by Pixalate.

46K total

11K app-ads.txt

39K

8K

26K

3K

5K

<1K

- Roku
- Amazon Fire TV
- Apple TV
- Samsung Smart TV

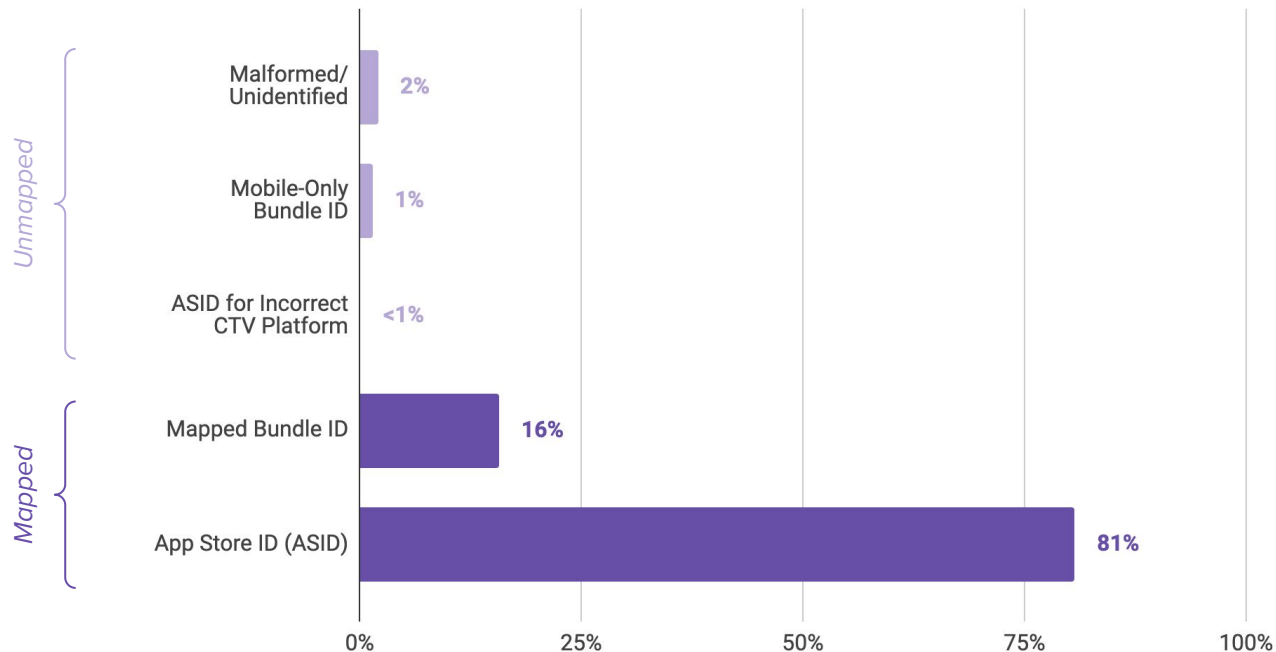■ # of apps with app-ads.txt

19%

of global Roku open programmatic advertising traffic did not use official App Store IDs in Q2 2025, according to Pixalate.

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Roku: 19% of Ad Traffic Did Not Use Official App Store IDs

Roku global open programmatic advertising impressions, Jun. 2025, as measured by Pixalate.
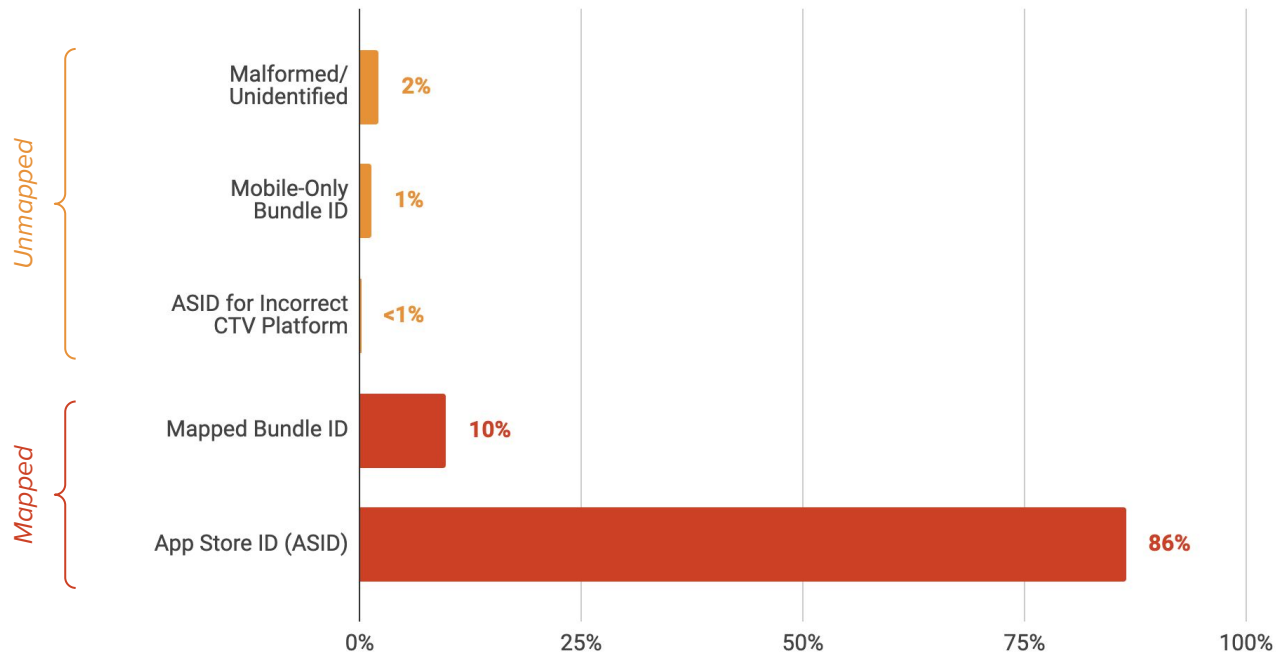
ROKU®

Want more data? Schedule a demo: pixal.at/demo

Unmapped

- Malformed/Unidentified — 2%
- Mobile-Only Bundle ID — 1%
- ASID for Incorrect CTV Platform — <1%

Mapped

- Mapped Bundle ID — 16%
- App Store ID (ASID) — 81%

0%   25%   50%   75%   100%

SEE MORE ➜ Roku Malformed and Fraudulent CTV Bundle ID Risks

Amazon Fire TV: 13% of Ad Traffic Did Not Use Official App Store IDs

Amazon Fire TV global open programmatic advertising impressions, Jun. 2025, as measured by Pixalate.
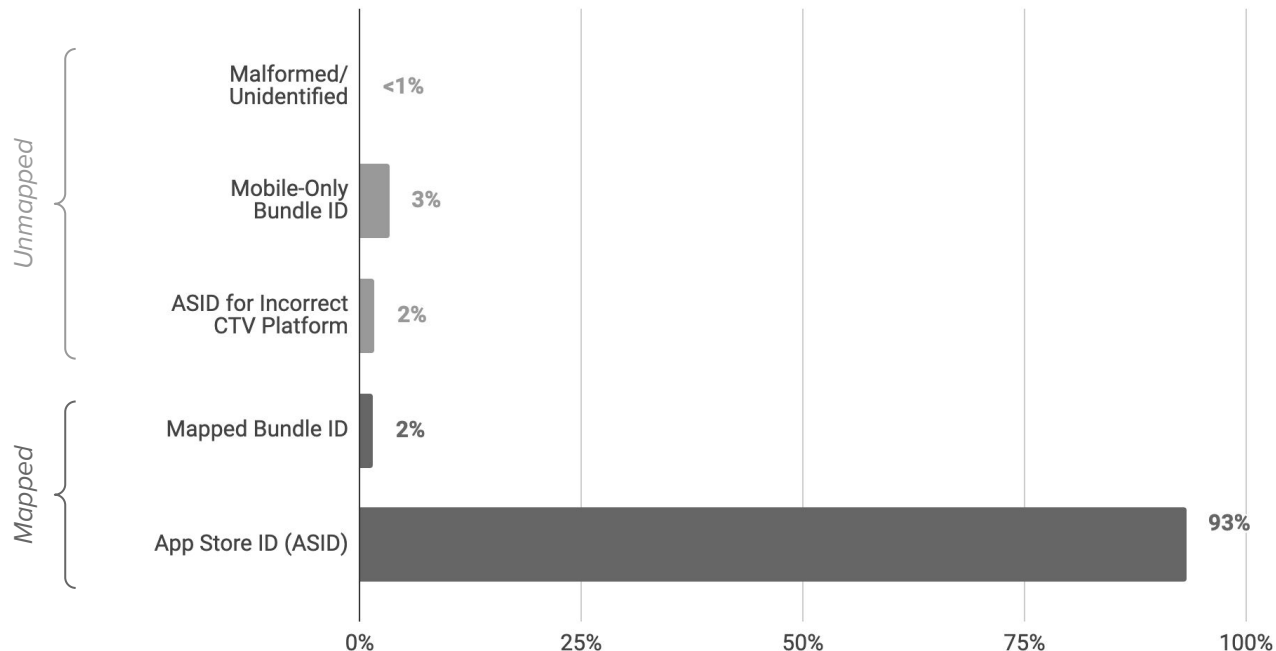

Unmapped
- Malformed/Unidentified — **2%**
- Mobile-Only Bundle ID — **1%**
- ASID for Incorrect CTV Platform — **<1%**

Mapped
- Mapped Bundle ID — **10%**
- App Store ID (ASID) — **86%**

SEE MORE ➜ Amazon Fire TV Malformed and Fraudulent CTV Bundle ID Risks

Apple TV: 7% of Ad Traffic Did Not Use Official App Store IDs

Apple TV global open programmatic advertising impressions, Jun. 2025, as measured by Pixalate.

Unmapped

- Malformed/Unidentified — <1%
- Mobile-Only Bundle ID — 3%
- ASID for Incorrect CTV Platform — 2%

Mapped

- Mapped Bundle ID — 2%
- App Store ID (ASID) — 93%

0%   25%   50%   75%   100%

SEE MORE ➜ Apple TV Malformed and Fraudulent CTV Bundle ID Risks

Samsung Smart TV: 5% of Ad Traffic Did Not Use Official App Store IDs

Samsung Smart TV global open programmatic advertising impressions, Jun. 2025, as measured by Pixalate.
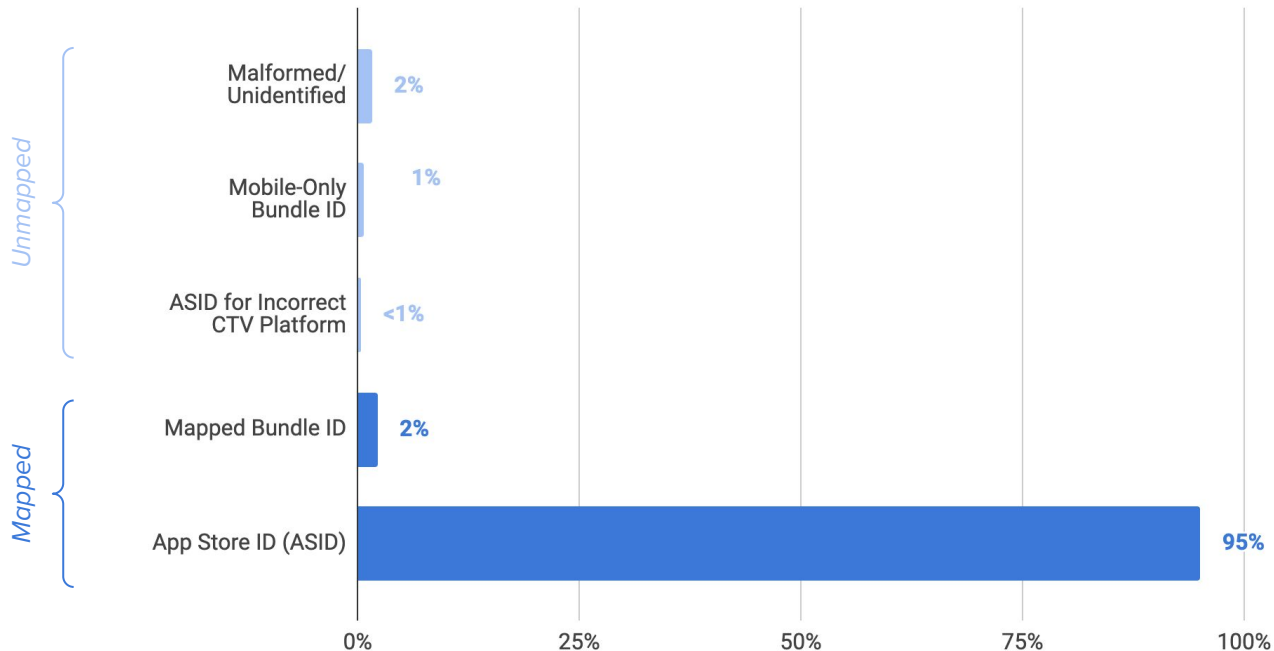
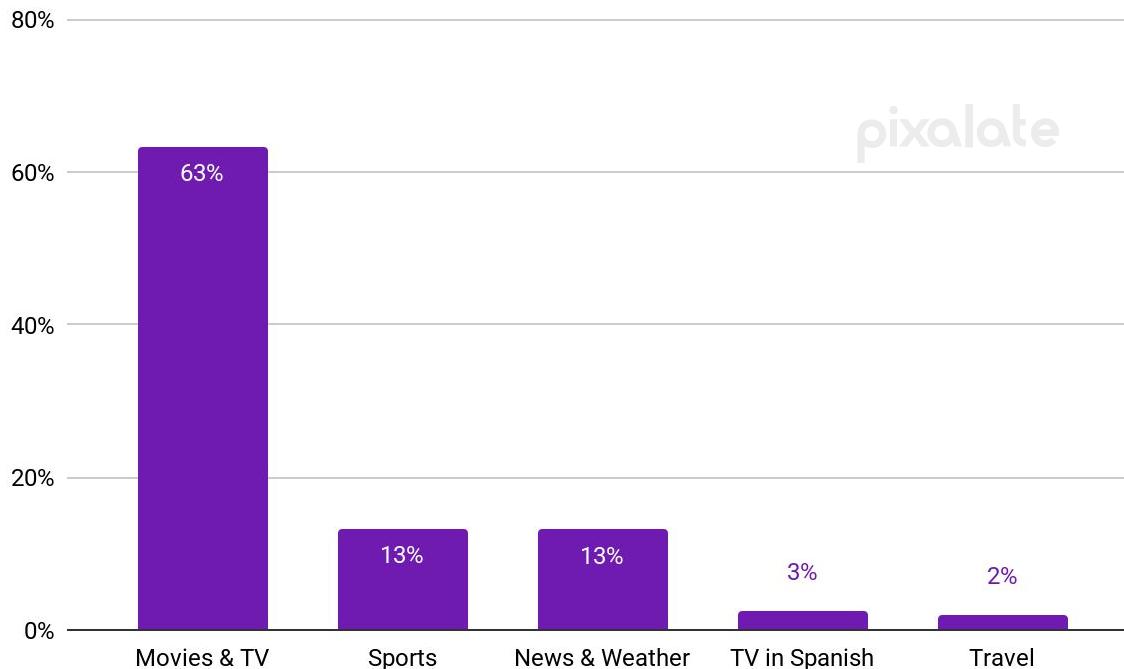**SEE MORE ➜ Samsung Smart TV Malformed and Fraudulent CTV Bundle ID Risks**

72%

of global open programmatic Amazon Fire TV ad traffic goes to apps in the **'Movies & TV'** category, according to Pixalate.
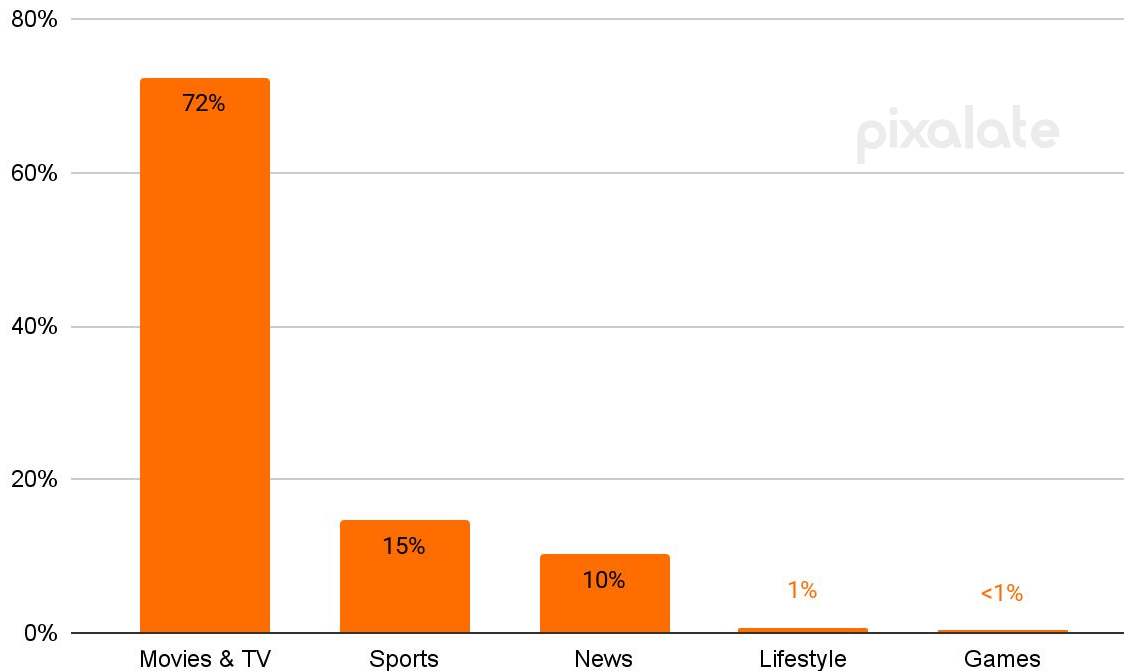
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GLOBAL: Top 5 Amazon Fire TV App Categories (Ad SOV %)

Jun. 2025; based on open programmatic ad SOV % (impressions, IVT included), according to Pixalate.

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Category	Ad SOV %
Movies & TV	72%
Sports	15%
News	10%
Lifestyle	1%
Games	<1%

GLOBAL: Top 5 Apple TV App Categories (Ad SOV %)
Jun. 2025; based on open programmatic ad SOV % (impressions, IVT included), according to Pixalate.

Want more data? Schedule a demo: pixal.at/demo

Chart data:
- Lifestyle: 53%
- Entertainment: 26%
- News: 11%
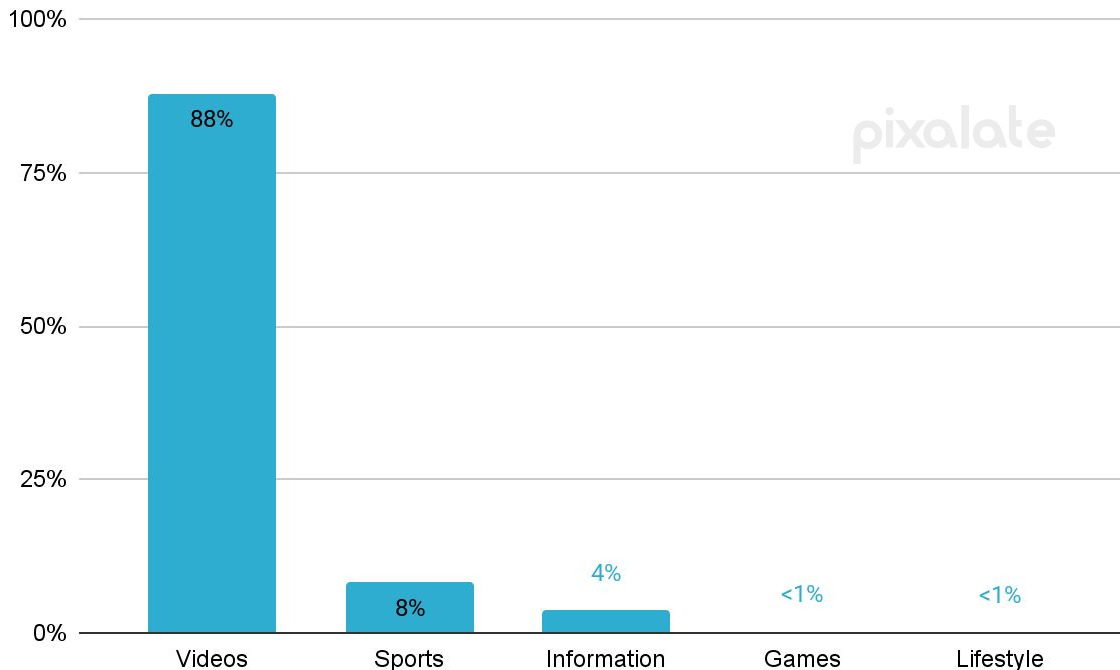- Sports: 8%
- Photo & Video: 2%
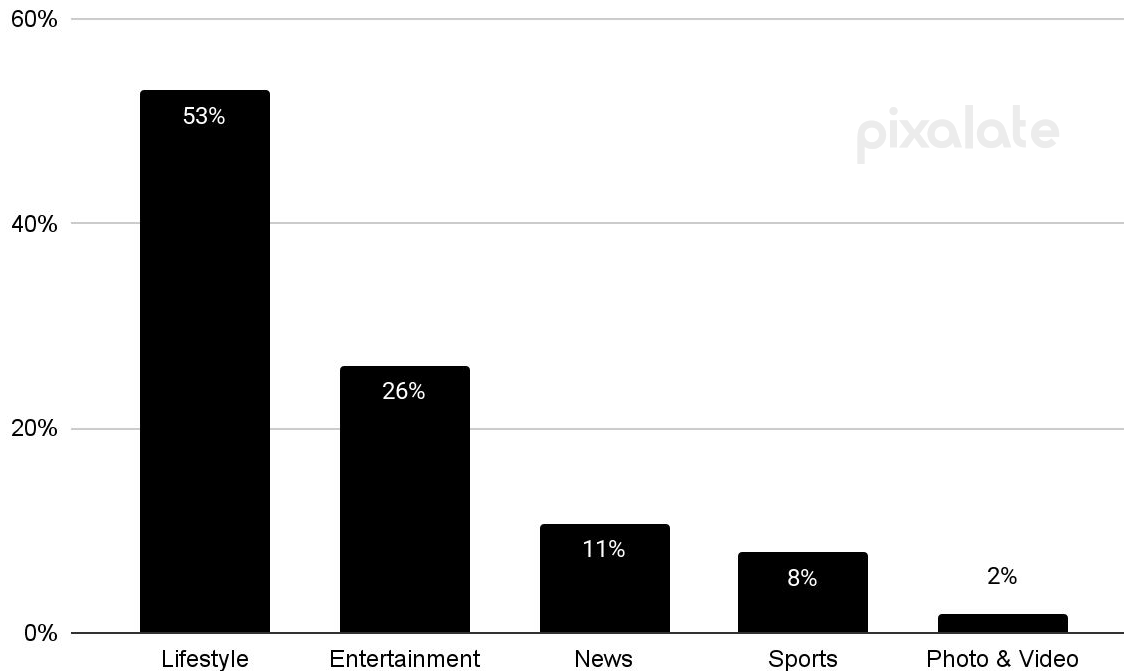
GLOBAL: Top 5 Samsung Smart TV App Categories (Ad SOV %)

Jun. 2025; based on open programmatic ad SOV % (impressions, IVT included), according to Pixalate.

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METHODOLOGY

General

Pixalate's data science team analyzed programmatic advertising activity across over 115 thousand Connected TV ("CTV") apps and over 8 billion global open programmatic ad transactions in Q2 2025 to compile the research in this series. Pixalate's datasets — which are used exclusively to derive these insights — consist predominantly of buy-side open auction programmatic traffic sources.

Estimated Ad Spend

Pixalate calculates estimated programmatic ad spend through proprietary statistical models that incorporate programmatic monthly active users (MAU), the average session duration per user, the average CPM for the category of a given app, and ad density.

Global Ad Spend Estimates - CTV Apps

Pixalate global open programmatic CTV ad spend figures (see pages 5 and 6) were calculated by integrating externally sourced data with Pixalate's internally tracked metrics. In the context of this report, third-party data is used to estimate the annual dollar value in 2025. Pixalate's derived quarterly share is then applied to determine the dollar value for Q2 2025 ($5.7B), and proprietary estimates are utilized to determine QoQ time series and regional trends in 2025.

- Total estimated global digital ad spend (2023): $627 billion (Statista)
- CTV's estimated share (2023): 9.5% (eMarketer)
- Upfronts' estimated share (2023): 34% (eMarketer)
- Open programmatic estimated share (2023): 50% (Simpli.fi)
- Estimated share of spend by quarter (Q4 2023, Pixalate): 32.1%
- Yearly and quarterly changes of open programmatic advertising traffic, as measured by Pixalate, are used as a proxy for estimates of changes in ad spend. This is inclusive of invalid traffic.

GLOSSARY

Ad market share / share of voice (SOV)

This is based on the proportion of sold programmatic ads that go to a certain device, operating system, category, etc. For example, if Device X received 20 of 100 total ads one quarter, its market share would be 20% SOV. If Device X then received 36 of 120 total ads the next quarter, its market share would have increased by 50% (from 20% SOV to 30% SOV). This is not inclusive of invalid traffic.

SSP Market Share

Pixalate defines "SSP Market Share" as the percentage of impressions associated with a given SSP out of all impressions within a country for a given platform. For example, if 100 total impressions were measured in Germany, and 10 of them were sold by Google AdExchange, then Google AdExchange would have a 10% market share. Pixalate's SCO mapping technology identifies instances where multiple sellers should receive market share credit for the same impression (i.e., reselling). This can result in a country's total SSP market share exceeding 100%.

Connected TV/OTT

Also referred to as "CTV" in this report. Pixalate defines CTV based on the device being used by the end-user. Examples of CTV devices include Apple TV, Roku, Amazon Fire TV, Smart TVs, and gaming platforms.

Invalid Traffic

Per the Media Rating Council (MRC), "'Invalid Traffic' is defined generally as traffic that does not meet certain ad serving quality or completeness criteria, or otherwise does not represent legitimate ad traffic that should be included in measurement counts. Among the reasons why ad traffic may be deemed invalid is it is a result of non-human traffic (spiders, bots, etc.), or activity designed to produce fraudulent traffic." Certain IVT is also sometimes referred to as "ad fraud." Per the MRC, "'Fraud' is not intended to represent fraud as defined in various laws, statutes and ordinances or as conventionally used in U.S. Court or other legal proceedings, but rather a custom definition strictly for advertising measurement purposes.

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Pixalate is a global platform for privacy compliance, ad fraud prevention, and data intelligence in the digital ad supply chain. Founded in 2012, Pixalate's platform is trusted by regulators, data researchers, advertisers, publishers, ad tech platforms, and financial analysts across the Connected TV (CTV), mobile app, and website ecosystems. Pixalate is MRC-accredited for the detection and filtration of Sophisticated Invalid Traffic (SIVT).

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