

IDC MarketScape: Worldwide Connected TV Advertising Platforms 2025 Vendor Assessment

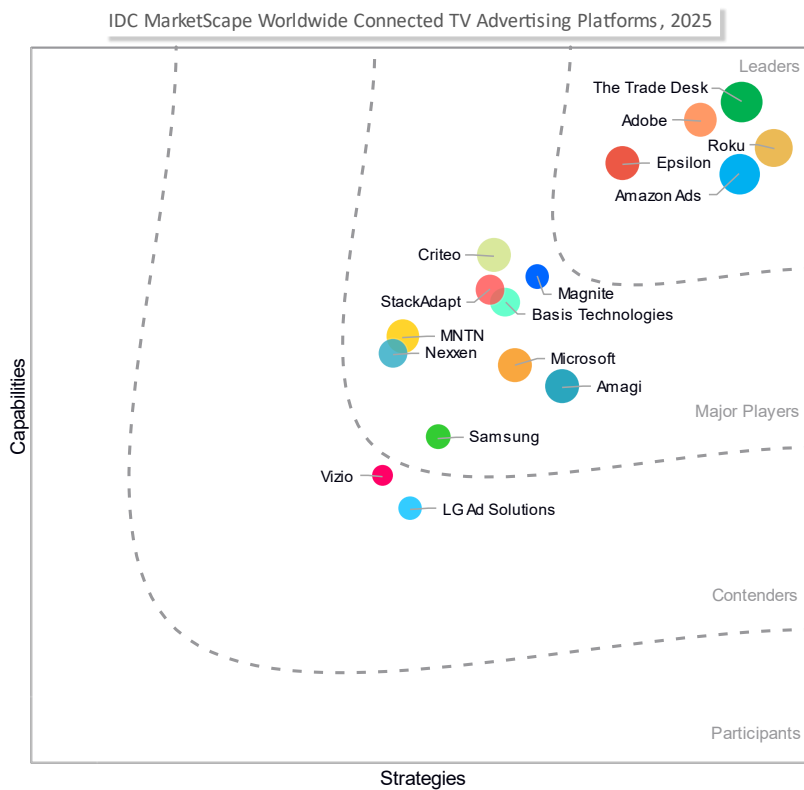
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THIS EXCERPT FEATURES THE TRADE DESK AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Connected TV Advertising Platforms Vendor Assessment



Source: IDC, 2025

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Connected TV Advertising Platforms 2025 Vendor Assessment (Doc # US52039725).

IDC OPINION

The convergence of digital advertising demand-side platforms (DSPs) and connected TV operating systems (CTV OS) as tools to effectively manage connected television (CTV) advertising represents a significant evolution in the media industry. This combination leverages the strengths of both technologies to create a more efficient, targeted, and measurable advertising ecosystem. DSPs, which facilitate the automated buying of digital ad inventory, combined with CTV OS which powers smart TVs and streaming devices, enable advertisers to reach audiences with precision and scale. This new landscape is driven by the increasing shift of viewers from traditional TV to streaming platforms, necessitating advanced tools to manage and optimize ad campaigns across multiple channels.

Benefits of this convergence include enhanced targeting capabilities, improved measurement and analytics, and access to premium inventory. DSPs can tap into vast amounts of data from CTV OS, such as viewing habits and preferences, to deliver highly relevant ads to specific audience segments. This level of granularity ensures that ad spend is optimized, reaching viewers who are more likely to engage with the content. In addition, integration allows for more seamless cross-device targeting, ensuring a cohesive brand message across TVs, mobile devices, and desktops. The ability to measure and analyze ad performance in real time further enhances campaign effectiveness, providing insights that can be used to refine strategies and improve return on investment (ROI).

However, there are challenges associated with this integration. One of the primary issues is the complexity of measuring incremental reach and managing ad frequency across different platforms. Advertisers often struggle to benchmark CTV and OTT performance against traditional digital video metrics, making it difficult to gauge the true impact of their campaigns. Ad fraud is another significant concern, with many advertisers wary of the potential for fraudulent activities in the digital ad space. Ensuring transparency and maintaining the quality of ad inventory are ongoing challenges that need to be addressed to build trust and confidence among advertisers.

This IDC MarketScape hopes to identify those vendors that have developed and validated solutions that address these challenges.

Despite these challenges, there are numerous opportunities for growth and innovation. The rise of programmatic advertising and advancements in AI-driven optimizations is a key trend supporting this convergence. Programmatic buying allows for real-time bidding and automated ad placements, making the process more efficient and scalable. AI technologies enhance targeting and personalization, enabling advertisers to deliver more relevant and engaging ads. The growing adoption of CTV and OTT platforms also presents a significant opportunity for advertisers to reach a broader audience with tailored content.

The key technology and market trends that will shape the future of this convergence include the continued expansion of programmatic advertising, advancements in cross-device targeting, and improvements in measurement and attribution. As DSPs and CTV OS become more sophisticated, advertisers will be able to leverage detailed viewer profiles and real-time data to create highly targeted campaigns. Enhanced measurement tools will provide more accurate insights into ad performance, allowing for better optimization and higher ROI.

CTV continues to evolve rapidly, with several key trends shaping its landscape in 2025:

- **Advanced personalization:** Leveraging artificial intelligence (AI), machine learning, and predictive modeling, CTV platforms offer highly personalized viewing experiences. Advertisers can use first-party data, unique device IDs, and household IP addresses to deliver tailored ads based on viewers' interests and behaviors.
- **Growth in programmatic advertising:** Programmatic advertising is becoming a cornerstone of CTV, allowing for real-time bidding and automated ad placements. This trend is driven by the increasing availability of data and advanced targeting capabilities, enabling more efficient and scalable ad campaigns.
- **Interactive ads:** CTV ads are becoming more interactive, providing engaging experiences for viewers. Shoppable ads, for instance, allow viewers to interact with the ad content and make purchases directly from their TV remotes.
- **Omni-channel strategies:** Integrating CTV into broader marketing strategies is becoming essential. Advertisers are using consistent audience data across multiple channels to create cohesive and compelling customer journeys.
- **Privacy and data security:** With growing concerns about privacy, CTV platforms are prioritizing data security and compliance with privacy regulations. This trend ensures that advertisers can leverage first-party data while respecting user privacy.

- **Enhanced measurement and attribution:** Advances in measurement tools provide more accurate insights into ad performance. This allows advertisers to better understand the impact of their campaigns and optimize their strategies for higher ROI.
- **Increasing viewership:** As more people cut the cord on traditional cable and satellite TV, CTV viewership continues to rise. This shift is driving higher ad spend on CTV platforms, making it a crucial channel for reaching modern audiences.

These trends highlight the dynamic nature of the CTV landscape and the opportunities it presents for advertisers to engage with audiences in innovative and effective ways.

Concurrent with the rise in CTV advertising, retail media networks (RMNs) are reshaping the broader advertising ecosystem by leveraging first-party data to enhance targeting and personalization. This integration allows advertisers to deliver highly relevant ads based on consumer behavior and purchase history, improving engagement and efficiency. As retailers recognize the value of CTV's large, engaged audience, they are increasing ad spend in this channel — a trend expected to continue driving growth. RMNs also enable seamless omni-channel strategies by connecting CTV with in-store, online, mobile, and digital-out-of-home (DOOH) advertising, ensuring a consistent brand message across all touch points. In addition, RMNs enhance measurement and attribution by linking ad exposure to both in-store and online sales, providing advertisers with deeper insights into campaign performance. By democratizing access to premium ad placements, RMNs allow smaller brands to compete more effectively.

The umbrella effect of this convergence is the creation of a more integrated and efficient advertising ecosystem. By combining the capabilities of RMNs, DSPs, and CTV OS, advertisers can achieve greater reach, precision, and effectiveness in their campaigns. This holistic approach not only benefits advertisers but also enhances the viewing experience for consumers by delivering more relevant and engaging content.

In summary, the convergence of digital advertising DSPs and CTV OS offers significant benefits, including enhanced targeting, improved measurement, and access to premium inventory. While challenges such as measurement complexity and ad fraud remain, the opportunities for growth and innovation are substantial. Key trends such as programmatic advertising, AI-driven optimizations, and advancements in measurement will continue to drive this convergence forward, creating a more integrated and efficient advertising ecosystem.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This study was designed to inform advertisers' buying decisions for promotional campaigns on CTV platforms. To focus the study on relevant platforms, vendors were considered for inclusion if they met the following criteria:

- **CTV advertising capabilities:** Vendors offered a CTV advertising application, either as a standalone product or as part of a larger platform (e.g., CTV operating system, adtech/martech stack). In addition, the application should:
 - Enable programmatic buying of CTV ad inventory.
 - Offer at least one advertising format for delivery/execution.
- **Focusing on ad buying capabilities:** Vendors primarily offering CTV advertising measurement or data solutions without direct ad buying capabilities (as described in the first criterion) were outside the scope of inclusion for this document.
- **Independent advertising vendors:** Vendors were arm's-length entities whose primary business involved enabling advertising across multiple CTV sources, rather than solely monetizing their own content. Furthermore:
 - CTV streaming services with advertising limited exclusively to their own platforms were excluded. This ensured a focus on platforms with broader CTV inventory access meeting the broader strategic needs of advertisers.
- **Market presence and experience:**
 - The vendor has offered a CTV advertising application for at least 18 months to ensure inclusion of established players.
 - The vendor should have 50+ employees explicitly focused on its CTV advertising solution and/or demonstrate advertising revenue from CTV exceeding \$50 million.
 - The vendor was recognized as a participant in the CTV advertising space by peers, streaming services, agencies, advertisers, or other stakeholders across the ecosystem. Key qualitative indicators were mentions in key industry reports, partnerships with major stakeholders, and consistently strong revenue.
- **Global scope:** This study was worldwide and had no geographic exclusions. Vendors with greater global presence were viewed favorably, but regional vendors were not excluded.

These criteria were designed to identify established, independent platforms that facilitate the programmatic buying and delivery of CTV advertising across multiple streaming sources, helping advertisers select the most useful tools to expand their promotional efforts.

ADVICE FOR TECHNOLOGY BUYERS

The CTV advertising landscape is defined by a dynamic tension between integrated and independent solutions. Vertically integrated vendors — those controlling both CTV operating systems and DSPs — offer streamlined inventory access, valuable first-party data, and enhanced campaign efficiency. However, independent DSPs play a crucial role by providing neutrality, flexibility, and interoperability, allowing advertisers to access diverse inventory, integrate varied data sources, and avoid platform lock-in.

The ability of independent DSPs to operate across multiple CTV operating systems should not be underestimated. Their neutrality grants advertisers broader inventory access, while their flexibility enables seamless integration of diverse data sources and measurement solutions. This interoperability helps brands optimize campaigns across different audience segments and avoid overreliance on a single ecosystem.

As brands navigate this evolving space, those leveraging DSPs and CTV OS vendors for campaigns should focus on a number of key considerations to maximize return on ad spend (ROAS) and return on investment:

- **Leveraging first-party data:** CTV providers (as well as adjacent RMN vendors) may offer valuable first-party data through their authenticated audiences who can enhance targeting and personalization of campaigns. Integrating this data allows for more precise audience segmentation and tailored ad delivery, improving engagement and conversion rates.
- **Unified campaign management:** Utilize platforms that offer unified workflows for managing campaigns across RMNs, CTV, and other channels. This approach simplifies the process, reduces operational costs, and ensures consistent messaging across all channels.
- **Cross-device targeting:** Ensure that DSP supports cross-device targeting to maintain a cohesive brand message across different screens. This capability allows brands to reach consumers on their preferred devices, enhancing the overall effectiveness of your campaigns.
- **Redefining premium:** With every vendor claiming access to premium inventory, buyers should extend their focus from premium content to premium audiences. Prioritize where target audience engages rather than fixating on specific publishers or content quality per se. Effective alignment and targeting may prove more valuable — and more cost effective — than relying solely on high-quality programming.
- **Expanding your publisher mix:** To prevent overreliance on a few sources and mitigate ad fatigue, advertisers should seek CTV advertising application vendors

that help diversify their publisher selection. This approach helps optimize reach, manage frequency, and control costs across multiple streaming platforms.

- **Prioritizing transparency:** Advertisers should work with partners that provide detailed reporting on delivery, spend, placement, and video metrics at the app and genre level — offering clear insights and demonstrable value to optimize budget management and maximize CTV ad performance.
- **Considering free ad-supported streaming TV (FAST) services:** As advertisers refine their approach to CTV, they should also consider how new FAST offerings can further amplify their reach and efficiency. FAST platforms present a unique opportunity to expand audience engagement, diversify inventory sources, and maximize ROAS without the constraints of subscription-based models.
- **Broadening audience reach:** FAST services offer access to a wide and diverse audience without subscription barriers. This broad reach can help you maximize your ad impressions and engagement.
- **Multiformat monetization:** Utilize various ad formats beyond traditional preroll and midroll ads. FAST platforms often support interactive and shoppable ads, which can drive higher engagement and conversions.
- **Operational efficiency:** Leverage dynamic ad insertion (DAI) and real-time marketplaces for CTV advertising to streamline ad delivery and optimize inventory usage. This efficiency can lead to better ad performance and higher ROI.

With the advent of AI, buyers should also consider the role of artificial intelligence, generative AI, and AI agents. Buyers should seek out vendors with strong AI capabilities/road maps to enhance the effectiveness of their advertising strategies:

- **Advanced targeting and personalization:** AI can analyze vast amounts of data to identify patterns and predict consumer behavior. This capability allows for highly personalized ad experiences that resonate with individual viewers.
- **Creative optimization:** Generative AI can automate the creation of ad content, including headlines, images, and videos. This automation not only speeds up the creative process but also ensures that ads are tailored to specific audience segments.
- **Real-time optimization:** AI agents can monitor ad performance in real time and make adjustments to optimize campaign outcomes. This includes bid adjustments, audience targeting refinements, and creative tweaks to maximize ROAS and ROI.
- **Enhanced measurement and attribution:** AI-driven analytics provide deeper insights into ad performance, helping you understand the impact of your campaigns across different channels.

In summary, maximizing success in CTV advertising requires a strategic approach that integrates across RMNs, DSPs, and CTV OS vendors to harness first-party data, streamline campaign management, and enable precise cross-device targeting. FAST streaming services further strengthen CTV strategies by expanding audience reach, supporting diverse ad formats, and improving operational efficiency. In addition, AI-driven innovations — including generative AI and AI agents — enhance CTV performance through advanced targeting, real-time optimization, and deeper measurement capabilities. As CTV continues to evolve, advertisers who embrace these innovations will gain a competitive edge, driving stronger engagement, higher ROAS, and greater overall impact in the connected TV ecosystem.

VENDOR SUMMARY PROFILE

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

The Trade Desk

After a thorough evaluation of The Trade Desk, IDC has positioned the company in the Leaders category in this 2025 IDC MarketScape for worldwide connected TV advertising platforms.

The Trade Desk's CTV solutions aim to help advertisers maximize reach to increasingly digital audiences, wherever they're watching. By not competing across content and supply, the company has been able to build strong partnerships with top networks and content providers globally. The Trade Desk offers one of the largest scaled CTV inventory marketplaces in the industry, reaching over 120 million households in the United States alone.

Strengths

- Advanced targeting capabilities enable advertisers to reach highly specific audience segments, supported by real-time bidding and data-driven optimization tools for improved campaign performance.
- The platform's transparency provides advertisers with control over data and campaign execution, fostering trust and efficiency.
- As an open platform, The Trade Desk integrates seamlessly with other marketing technologies through an open API and extensive integrations/partnerships.

- In addition to facilitating clients' use of their own first-party data, The Trade Desk has several large retail data partnerships in place across the RMN ecosystem to improve audience targeting.

Challenges

- The platform's advanced features and capabilities may be complex for some users, requiring expertise to fully utilize its potential.
- While the company's pricing model is transparent and it has worked hard to demonstrate value, brands continue to describe The Trade Desk as a significant investment out of reach, especially for less sophisticated or smaller advertisers.
- In 2024, The Trade Desk announced Ventura, its own streaming TV OS, aiming to partner with smart TV OEMs and streaming aggregators for deployment. While long-term benefits such as improved advertising supply chain efficiency and reduced content conflicts of interest may emerge, the strategy presents near-term challenges. Industry adoption has been slow, and gaining traction with established (potentially competing) players requires significant investment, leading to short-term uncertainties and potential resource constraints.

Consider The Trade Desk When

- Advertisers seeking a self-serve DSP with advanced targeting and optimization capabilities will find The Trade Desk's platform effective for reaching specific audience segments and driving campaign performance.
- Brands running omni-channel campaigns across CTV, display, video, and mobile will benefit from the platform's unified approach to multiple channels.
- Marketers that prioritize transparency and control over their data and campaign execution will value The Trade Desk's transparent supply chain and comprehensive controls.
- Larger advertisers with complex needs and the resources to manage the platform will find it well suited to their requirements.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under

this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

For this document, IDC examined connected television (CTV) advertising applications vendors — independent technology platforms that enable advertisers to programmatically buy, deliver, and manage advertisements across multiple internet connected television streaming sources. These applications facilitate the delivery of digital ad formats to engaged audiences on TV screens, offering advanced targeting, measurement, and reporting capabilities.

The market includes various providers of CTV advertising capabilities, such as demand-side platforms (DSPs) and CTV operating systems (CTV OS). However, this market does not include streaming services themselves (e.g., Netflix and Disney+). While advertisers can buy CTV ads directly from streaming services, leveraging DSPs and CTV OS platforms provides access to a wider range of inventory, improving programmatic performance. In addition, any direct arrangements with streaming services can typically be managed through centralized DSP or CTV OS platforms, enhancing reporting and campaign coordination.

CTV advertising applications bridge the gap between brands and audiences consuming streaming content. These platforms offer comprehensive tools for campaign management, including audience targeting, real-time optimization, and measurement. With a focus on performance, they provide advanced analytics to track metrics like reach, frequency, video completion rates, and even offline impacts. By leveraging data and targeting capabilities, CTV apps enable personalized advertising, delivering relevant messages to specific audience segments. This combination of TV's broad reach and digital advertising's precision helps advertisers maximize engagement and optimize ad spend in a rapidly growing, streaming-first media landscape.

For more information on CTV advertising applications, see *IDC's Worldwide Software Taxonomy, 2024* (IDC #US52000924, April 2024).

LEARN MORE

Related Research

- *Free Ad-Supported Streaming Television Update and Impact in 2025* (IDC #US52275625, March 2025)
- *IDC TechBrief: Identity Resolution for CX Use Case* (IDC #US51610724, December 2024)
- *IDC FutureScape: Worldwide Enterprise Connectivity 2025 Predictions — Asia/Pacific Implications: Positioning for Success — Opportunities for Tech Sales and Marketing Leaders* (IDC #AP51577024, November 2024)
- *Market Analysis Perspective: Worldwide Advertising Technologies and SMB Marketing Applications, 2024* (IDC #US51611324, September 2024)
- *The CTV Advertising Landscape: Trends, Challenges, and Priorities* (IDC #US52085524, August 2024)
- *IDC Market Glance: Advertising and Promotional Technology for Growth, 1Q24* (IDC #US50879524, March 2024)
- *From Touchdown to Fumble: Why Traditional Super Bowl Advertising Fails to Meet Data-Driven Marketers' Demands* (IDC #US51883724, March 2024)
- *Update on Advertising on Connected Television with Retail Media Networks* (IDC #US51749724, February 2024)
- *IDC MarketScape: Worldwide Demand-Side Platforms 2023 Vendor Assessment* (IDC #US50403823, November 2023)

Synopsis

The IDC study evaluates the leading vendors in the worldwide connected TV (CTV) advertising platforms market through the IDC MarketScape model. This study examines the ongoing convergence of digital advertising demand-side platforms (DSPs) and connected TV operating systems (CTV OS), marking a pivotal shift in the media landscape. As traditional TV continues to lose ground to streaming, this integration is enhancing targeting precision, measurement capabilities, and access to premium inventory.

Advertisers are seeing clear benefits, including improved audience segmentation, real-time analytics, and seamless cross-device experiences. However, challenges remain, particularly around measurement complexities and the persistent threat of ad fraud. Key industry trends shaping the future of CTV advertising include the rise of programmatic buying, AI-driven optimizations, and advancements in measurement solutions.

Retail media networks (RMNs) are also playing a transformative role, leveraging first-party data to improve targeting and personalization. Meanwhile, free ad-supported streaming TV (FAST) services are expanding opportunities for advertisers, and AI-driven innovations are further refining campaign effectiveness.

To navigate this evolving space, the document advises advertisers to focus on three priorities: maximizing first-party data utilization, unifying campaign management across platforms, and ensuring transparency in buying and measurement. It highlights independent platforms that specialize in supporting the programmatic CTV ad buying and delivery needs of modern advertisers.

“The availability of robust inventory and targeting capabilities across DSPs and OS vendors is advancing CTV advertising, bringing precision targeting, real-time analytics, and cross-device integration to transform how brands engage with audiences.” — Roger Beharry Lall, research director, Advertising Technologies and SMB Marketing Applications at IDC

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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