
FREEWHEEL MARKET SPOTLIGHT

Streaming's Programmatic Dynamics in France

2025

Key takeaways

- 1 | France's connected TV (CTV) usage is growing, yet the conversion to CTV has been slower than in the U.S. due to traditional TV in France still holding significant viewership.
- 2 | While certain markets such as France and the U.S. have a nearly similar share of programmatic ad views, their strategies for using programmatic guaranteed vs. non-guaranteed deal types differ based on **inventory availability, regulatory environment, and ad buying experience**.
- 3 | For French broadcasters, programmatic guaranteed offers the ability to **sell highly sought-after traditional TV inventory** with the launch of initiatives such as 'TV Retail Connect'.
- 4 | Broadcasters, driven by advertiser demand and empowered by automation and tech modernization, have demonstrated that programmatic delivery can offer both **operational control and revenue growth**.
- 5 | As technology continues to redefine the boundaries of media monetization, broadcasters who stay attuned to regional nuances and embrace **AI-driven programmatic innovation** will be best positioned to lead the next wave of advertising transformation.

Introduction

In today's fragmented and fast-paced media landscape, programmatic advertising offers broadcasters a powerful way to automate, optimize, and scale multiscreen TV advertising. The goal is not to replace sales strategies or client relationships, but to enhance those relationships with data, automation, and real-time flexibility. In recent years, FAST channels and linear addressable have grown rapidly in both France and the U.S. This has accelerated the adoption of programmatic strategies across both streaming and traditional TV, marking a major shift in how video advertising is traded and optimized. While programmatic is growing across many geographic regions, inventory availability, regulatory environments, and ad buying relationships can differ. This report aims to shed light on these differences, while highlighting strategies that French and U.S. broadcasters have used to scale their programmatic businesses.



Traditional TV and dynamic delivery

Many set-top box devices have been upgraded with IP-enablement, allowing some ads within the traditional TV experience to be dynamically delivered.

The evolution of programmatic: early adoption in France and the U.S.

At its core, programmatic is the automation of the buying and selling of digital ad inventory using data and technology. It enables real-time campaign adjustments, granular measurement, and optimized ROI. In the early days of programmatic, it was often perceived as lower-quality inventory due to heavy use for display. Today, programmatic is also used across high-quality, premium video that can power live sports and big-screen connected TV (CTV). Broadcasters were initially cautious about programmatic advertising due to concerns over inventory devaluation, data control, and risks associated to the viewer experience – such as unsuitable or repetitive ads that didn't align with TV standards and regulations.

Unlocking automation

As programmatic technology evolved, some broadcasters seized the opportunities offered by automation, working with ad server vendors to protect the viewer experience and enhance the creative approval process by:



Pre-transcoding creatives, ensuring video files are ready in multiple formats before ad delivery.



Blocking non-validated creatives and flagging last-minute changes to creatives.



Mapping IAB industry categories across channels, preventing competing ads from running back-to-back.



Working with DSPs to implement strict safeguards and increase transparency around creative status.

In 2018, automation from programmatic guaranteed deal adoption made broadcaster transactions 57% more efficient.¹ Broadcasters in France and the U.S. also prioritized data governance and compliance as regulations like GDPR and COPPA emerged, using automation to enhance transparency and scalability.



These advancements have enabled broadcasters to better leverage the benefits of programmatic advertising.

The evolution of programmatic: deal types diverge

With CTV devices and FAST channels now flooding our screens and a greater influx of live events gathering millions of views, there is a huge increase in big-screen, premium inventory with many new opportunities to scale through programmatic delivery. The [1H 2025 FreeWheel Video Marketplace Report](#) shows some similarities between France and the U.S., with both markets having roughly a third of transactions going through programmatic.

Programmatic v. Non-programmatic (1H 2025)



- **Programmatic:** Programmatic, Marketplace Platform Exchange (MPE), Marketplace Platform Private (MPP) – Programmatic
- **Non-Programmatic:** Direct Sold, Reseller Sold, and Marketplace Platform Private (MPP) – Direct

Drilling further into programmatic deal types, there is a stark difference between France and the U.S. with the latter seeing 20% programmatic guaranteed versus 72% in France. This difference holds true for most of Europe where 63% of ad views are programmatic guaranteed.²

Programmatic guaranteed buying, much like direct sold buying, provides broadcasters with the ability to sell highly sought-after inventory. This inventory is typically difficult for advertisers to secure through open auctions or other programmatic media buying methods. For example, if an advertiser wanted a campaign with short flight dates in high-demand periods like ‘French Days’ (France’s equivalent for ‘Black Friday’), they could leverage programmatic guaranteed deals to lock in a guaranteed number of impressions.

Programmatic Ad Views by Deal Type (1H 2025)



- **Guaranteed:** Deal type includes Programmatic Direct
- **Non-Guaranteed:** All other programmatic deal types

Why do programmatic strategies differ between France and the U.S.?

Household streaming occurs differently within each market.

As of 2024, around 88% of U.S. households owned at least one CTV device.³ Inventory availability has historically been broad, scalable, and premium in the U.S. CTV adoption has been increasing in France, with ad views on these large screens going up +46% year-over-year in the first half of 2025.² 84% of French households have internet-enabled TV; 38% of those are CTV.⁴ Recent CTV growth is driven by the increased availability of direct-to-consumer channels such as Disney+ and FAST channels such as Pluto TV and HBO Max available on Canal+. It is also driven by French broadcasters launching their own streaming services such as TF1+ and M6+. French broadcasters have also partnered with U.S. companies to make their content available on U.S. over-the-top (OTT) platforms, with FranceTV content now available on Amazon Prime Video, and TF1+ coming to Netflix in 2026.

Ad buying is predominantly relationship-driven in France, whereas the U.S. tends to be more open to automating deal setups.

Due to the historically scarce traditional TV inventory in France, there have been fewer opportunities for buyers to access that inventory other than through direct relationships with the broadcasters. However, with the growth of CTV and FAST channels, the pool of available supply is becoming wider. While some believe it will open new opportunities for French broadcasters to explore other programmatic delivery (i.e., open exchange), others believe it will remain driven by programmatic guaranteed as broadcasters need to retain control of the buying experience of their premium video inventory.

The regulatory environment is very different.

France (as a member state of the European Union) operates under comprehensive and unified personal data protection regulation known as the GDPR, which is proactively enforced by the European Data Protection Board and by French regulator Commission Nationale de l'Informatique et des Libertés. In contrast, the U.S. has a more fragmented approach to data protection with sectoral and state laws, rather than a comprehensive federal privacy law framework. France has historically had tighter restrictions on how broadcasters can target audience; however, these have gradually lifted over time, creating new opportunities for broadcasters to innovate and monetize their inventory.



See the difference

See below for a comparison chart outlining the differences between the French and U.S. market across multiple categories.

France and U.S. Programmatic Dynamics

	France	United States
Household Digital Streaming	• 38% of internet-enabled households reached via CTV⁴ • +46% YOY CTV growth²	• 88% of households reached via CTV³ • +8% YOY CTV growth²
Deal Setup	• 72% Guaranteed deals, highly relationship-driven	• 80% Non-guaranteed deals, highly automated
Data Usage	• Cautious, first-party and third-party data	• Extensive, first-party and third-party data
Inventory Availability	• Limited but growing (ex. U.S. FAST channels...), premium-focused	• Broad, scalable, premium
Regulatory Environment	• Heavily regulated (GDPR, other local and EU-level laws)	• Less strict compared to France (patchwork of various state-level laws)
Strategic Programmatic Guaranteed Use Cases	• Brand-safe campaigns	• Retail, political, live events (tentpole)

What are French broadcasters doing to maximize programmatic?

The increase of CTV inventory in France has led to broadcasters experimenting with new, innovative ad formats. The latest IAB OpenRTB 2.6 protocol enhances CTV programmatic video through pod bidding, which consolidates ad break requests to reduce demand duplication, ease QPS (queries per second) strain, improve bid diversity, and ultimately help broadcasters boost yield and viewer experience. FreeWheel campaign data in the U.S. shows a -32% decrease in bid requests and a +170% increase in bids won with ad podding.⁵ Pod bidding is currently being tested by French broadcasters.

French broadcasters have adopted yield optimization tools that let them strategically balance direct-sold and programmatic inventory by setting impression caps, prioritization tiers, and targeting rules. These enable them to meet advertisers' requirements, fulfill sales agreements, and direct premium supply to the most valuable demand sources. Broadcasters using yield optimization tools have seen up to +40% eCPM uplift and up to +11% revenue increase according to a FreeWheel study.⁵

In France, where traditional TV remains significant, advertisers have traditionally relied on direct sales to access premium inventory. By educating buyers and introducing collaborative initiatives, French broadcasters have successfully created new opportunities to purchase this inventory through programmatic guaranteed deals.

These initiatives include



TV Retail Connect

FranceTV Publicité, M6 Publicité, and RMC-BFM Ads launched TV Retail Connect, the first Retail Media Marketplace for Addressable TV.⁶ They coupled their traditional TV inventories with retail data to offer a unique linear addressable targeting offering that is only accessible through programmatic. This offering is powered by Unlimitail's 1st-party data and FreeWheel's technology.



Programmatic and AI

Programmatic is allowing French broadcasters to unlock new budgets from smaller agencies and local businesses. For example, in January 2026, TF1 will be launching its TF1 Ad Manager which will allow buying across TF1's traditional TV and digital endpoints. AI will be central to the TF1 Ad Manager, offering a chatbot to assist traders and optimization algorithms for ad insertion. It will also help identify the most relevant data segments to assist smaller businesses in getting a certain level of service which wouldn't be available without AI.

Conclusion

The way programmatic is used largely depends on inventory availability, ad buying relationships, and regulatory environment. Understanding these market dynamics at a regional level enables broadcasters operating in environments similar to France to adopt comparable strategies for scaling programmatic growth. Broadcasters exploring entry into new markets can gain valuable insights by analyzing differences in programmatic dynamics across France and the U.S.

The ad buying landscape has undergone a profound transformation—from direct transactions within limited inventory pools, to large-scale, automated programmatic exchanges. The vast potential of artificial intelligence in further tailoring the buying experience and unlocking additional scale has yet to be fully realized.

As technology continues to redefine the boundaries of media monetization, broadcasters who stay attuned to regional nuances and embrace AI-driven programmatic innovation will be best positioned to lead the next wave of advertising transformation.

About FreeWheel

FreeWheel, a Comcast company, empowers all segments of The New TV Ecosystem. We are structured to provide the full breadth of solutions the advertising industry needs to achieve their goals. We provide the technology, data enablement, and convergent marketplaces required to ensure buyers and sellers can transact across all screens, across all data types, and all sales channels, in order to ensure the ultimate goal – results for marketers. With offices across the globe, FreeWheel, A Comcast Company, stands to advocate for the entire industry through the FreeWheel Council for Premium Video.

For more information, please visit freewheel.com.

About FreeWheel's Advisory Services team

FreeWheel's Advisory Services is a team of dedicated consultants who combine product, business, and industry experience to strategically help clients drive business outcomes. With skill sets that range from ad operations and programmatic to yield management and data science, our global team provides strategic insights, consulting and professional services.

For more information, please visit freewheel.com/advisory-services.



About the author

Kelly Blasco | *Senior Manager, Advisory Services*
thoughtleadership@freewheel.com

Senior Manager on FreeWheel's Advisory Services team where she leads numerous projects focused on simplifying processes and implementing new technologies to meet evolving client needs. Her areas of expertise include linear addressable and programmatic enablement. Prior to FreeWheel, Kelly worked at EY in New York City and Paris where she advised clients on ad sales strategies, process improvements and tech implementations for large media conglomerates.

Glossary

Broadcaster – Owner or licensor of content (content rights owner)

CTV (Connected Television) – A television set that is connected to the internet via OTT devices, Blue-ray players, streaming box or stick, and gaming consoles, or has built-in internet capabilities (e.g. a Smart TV) and can access a variety of long-form and short-form web-based content

Deal – A programmatic transaction between advertisers and publishers

Demand Side Platform (DSP) – Software that enables advertisers to automate the purchase of digital ad space by bidding on inventory in real-time through programmatic advertising

FAST (Free Ad-Supported Streaming Television) – Ad-supported live streaming without a subscription (e.g. Tubi, PlutoTV, Xumo)

GDPR – The General Data Protection Regulation. A regulation that governs the collection, protection and sharing of personal data

Interactive Advertising Bureau (IAB) – An international advertising business organization that develops industry standards, conducts research, and provides legal support for the online advertising industry

Live Event – Content that viewers are watching in the same real-world time and experience simultaneous commercial breaks

Open Exchange – Programmatic advertising model in FreeWheel's platform that allows multiple buyers to bid on ad inventory without targeting a specific deal ID; it represents an open auction

Programmatic Guaranteed – A direct deal between a broadcaster and an advertiser where specific inventory is bought and sold at a fixed price, with a guaranteed set number of ad impressions

Sources

1. [Boston Consulting Group. "A Guaranteed Opportunity in Programmatic Advertising." Jacob Rosenzweig, Anne Nguyen, Neal Zuckerman, Anna Green, Salvatore Cali, Thoams Hosking, Emily Gittins. February 7, 2018.](#)
2. [FreeWheel. "1H 2025 Video Marketplace Report: Delivering the Value of Programmatic." September 2025.](#)
3. [AI Digital. "CTV Device Penetration and Adoption Rates." Moss, Sarah. September 5, 2025.](#)
4. [Minted. "CTV equipment rate and video consumption time: A look back at the latest Arcom figures." May 6, 2025.](#)
5. [VideoNuze. "The Future of Streaming TV Advertising is Dynamic Ad Podding." Dworin, David. September 11, 2025.](#)
6. [FranceTV. "FranceTV Publicité, M6 Publicité and RMC-BFM Ads Launch TV Retail Connect." September 25, 2024.](#)

*Research in this report was provided by Sean Peglow. Sean is a Consultant on FreeWheel Advisory Services where he leverages industry knowledge and platform expertise to empower clients in the global TMT sector.