101 GUIDE
CONNECTED TV

A FOUNDATIONAL OVERVIEW OF THE CONNECTED TV (CTV) ECOSYSTEM IN EUROPE

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INTRODUCTION

The purpose of this guide is to provide a clear introduction to Connected TV (CTV) in Europe. What it is, how it works, and why it matters for the future of digital advertising. It aims to demystify the CTV ecosystem, explain the opportunities and challenges it presents, and offer practical guidance on how advertisers, publishers and technology partners can engage with CTV in a privacy-first, standards-aligned way.

By establishing a shared baseline of knowledge, the guide supports a more consistent understanding of CTV across the industry and helps accelerate responsible, sustainable growth in this rapidly evolving channel.

For guidance specifically on programmatic buying and selling in CTV, readers should also refer to IAB Europe's Programmatic Guide to CTV.

AUDIENCE

- Advertisers and agencies seeking to understand how CTV fits into their media strategies and how to plan, buy and measure campaigns effectively.
- Publishers, broadcasters and streaming platforms looking to navigate the CTV value chain and monetisation opportunities.
- Technology providers (SSPs, DSPs, data and measurement partners) who want a common reference point for standards, terminology and best practice.
- Industry newcomers and non-specialists who require a foundational overview of CTV concepts, trends and terminology.

1. WHAT IS CONNECTED TV?

Connected TV (CTV) refers to any television set that can access internet-delivered video content, either natively through a smart TV operating system or via a connected device such as a streaming stick, games console or set-top box. This distinguishes CTV from traditional linear broadcast, which is delivered via satellite, cable or terrestrial signal, and allows advertising to be delivered over IP rather than through the traditional broadcast chain.

The CTV ecosystem spans several content models, commonly described using the following terms:
BVOD (Broadcaster Video on Demand): on-demand streaming services operated by broadcasters, sitting alongside their linear channels.
AVOD (Advertising-based Video on Demand): free, ad-supported on-demand video content.
SVOD (Subscription Video on Demand): subscription-based streaming services, an increasing number of which now also offer ad-supported tiers.
FAST (Free Ad-Supported Streaming TV): free, live, linear-style channels delivered over the internet.
HbbTV (Hybrid Broadcast Broadband TV): a European standard that enables broadcasters to layer interactive and on-demand services on top of traditional linear broadcast infrastructure.

Advertisers and their agencies typically access CTV inventory through demand-side platforms (DSPs), using first- and third-party data to target specific audiences. Transactions take place either programmatically, through real-time bidding, or via direct deals with publishers, with measurement tools providing performance insight and demonstrating return on investment.

2. WHY CTV MATTERS IN EUROPE NOW

The European CTV landscape is evolving rapidly, with viewing habits expanding to include a broader range of choices than ever before. While broadcaster-led streaming (BVOD) remains a premium cornerstone, the experience is increasingly shaped by a diverse ecosystem of TV original equipment manufacturers (OEM) operating system interfaces, free ad-supported streaming TV (FAST), and hybrid on-demand models from AVOD and SVOD apps. Advertisers are responding by leaning further into programmatic buying tools, such as demand-side platforms (DSPs), to reach these streaming audiences as they move fluidly between electronic programme guides and app-based environments. At the same time, newer ad formats — including homescreen takeovers and non-intrusive pause ads — are creating fresh opportunities for brands to engage audiences in ways that complement, rather than interrupt, the viewing experience.

The barrier to entry has also diminished significantly. Small and medium-sized enterprises (SMEs) are increasingly able to access the CTV landscape via demand-side platforms (DSPs) and sell-side platforms (SSPs), as advertising technology broadens access to one of the most impactful screens in the home. With ad-supported services now delivering premium content at scale across Europe, streaming is no longer an add-on to television planning; it is a foundational part of it.

Marketers in Europe are ready for CTV

Streaming has matured from an emerging test bed into a central medium. Industry data indicates that a significant majority of European marketers are increasing their CTV budgets to keep pace with viewers' growing preference for choice, convenience and flexibility. This momentum was largely fuelled by SVOD and BVOD, the key CTV formats driving digital video advertising growth in 2025, up 222.4% and 59.6% respectively (*source: IAB Europe AdEx Benchmark 2025*).

- A unified ecosystem: the television screen is now a convergence point where broadcast content and streaming innovation sit side by side. Brands are increasingly treating traditional and digital television as a single environment, using both to capture different layers of audience intent and maximise reach.
- A shift towards accountability: buyers are moving towards outcomes-based planning, seeking greater verification of incremental reach and cross-screen impact. As IP-based infrastructure expands, the industry is moving towards more fully addressable television — combining the brand-safe scale of broadcast with the precision of digital measurement.

CTV can drive performance

Performance marketers, long focused on smaller mobile and social screens, are increasingly looking to the living room to capture undivided attention and escape creative fatigue.

- Immersive engagement: CTV offers a "lean-back" viewing environment with high viewability, in contrast to the faster, often distracted scrolling common on social feeds. Programmatic buying paths allow performance marketers to apply audience targeting, including custom segments, within a premium, brand-safe environment.
- Second-screen activation: with many viewers using a smartphone while watching TV, CTV can function as a performance driver in its own right. Interactive formats such as shoppable codes help bridge big-screen inspiration and mobile conversion, supported by device-graph technology that enables closed-loop attribution.

Supply path optimisation and curated marketplaces

As the CTV opportunity has matured, the market has moved beyond simple inventory access towards curated marketplaces (see IAB Europe's Guide to Curation here). Sell-side platforms increasingly use audience segmentation, such as household demographics, content genre affinity and device-level signals, to package fragmented European inventory into more addressable, outcome-oriented deals, helping agencies navigate cross-border complexity.

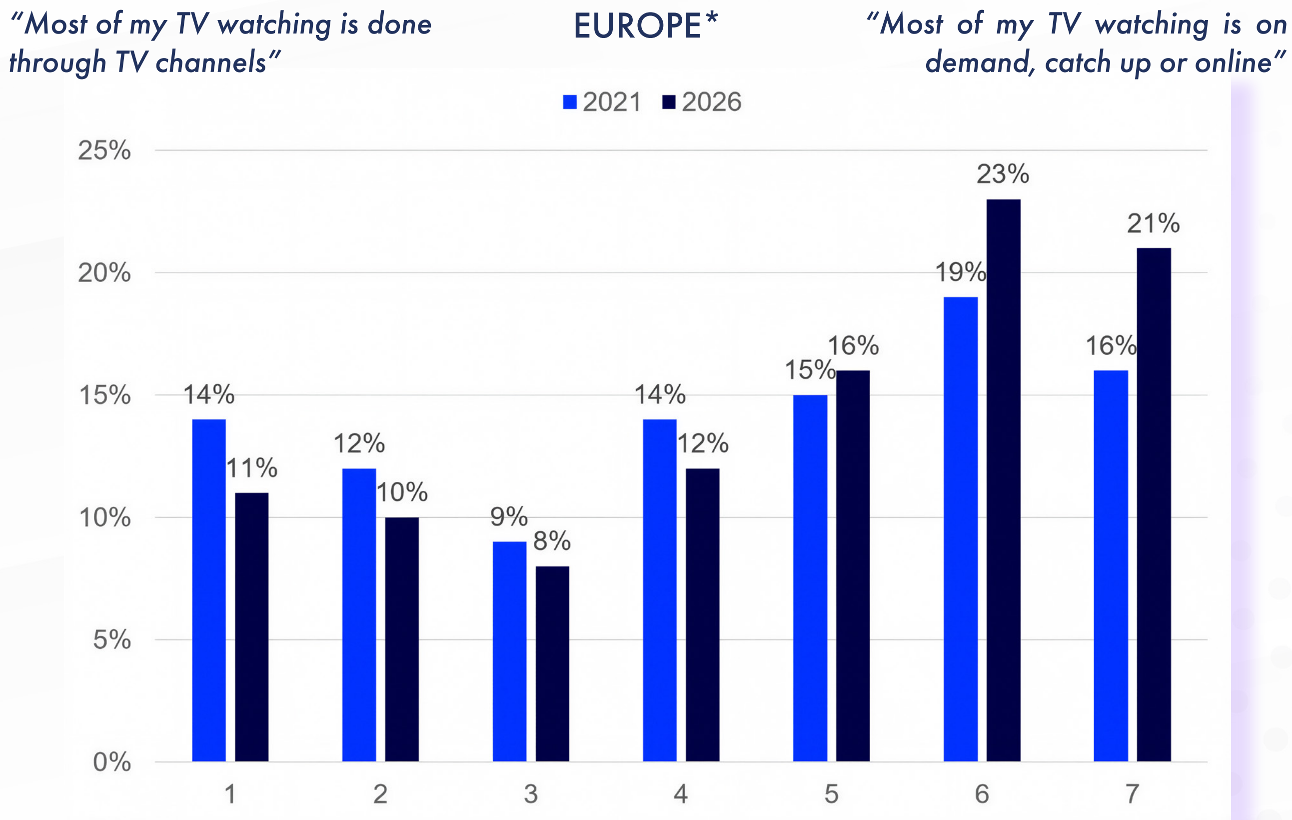
- Curated marketplaces for precision targeting: private marketplaces (PMPs) built around specific outcomes allow buyers to prioritise higher-performing inventory and reach more specific

audience cohorts across fragmented European markets.
- Supply path optimisation (SPO) as an efficiency lever: consolidating access to premium streaming publishers can reduce technical latency, improve supply-chain clarity, and help ensure spend flows towards verified, high-attention environments.
- Streamlined programmatic workflows: unified deal management allows agencies to combine multi-market campaigns into a single workflow, layering first- or third-party data onto streaming inventory in pursuit of viewability, brand safety and scaled outcomes.

Together, these developments mean that premium brand storytelling and performance marketing on the largest screen in the household are less constrained by the historical buying complexity of the European TV landscape than they once were, with programmatic infrastructure increasingly supplementing traditional linear buying.

3. THE EUROPEAN CTV LANDSCAPE

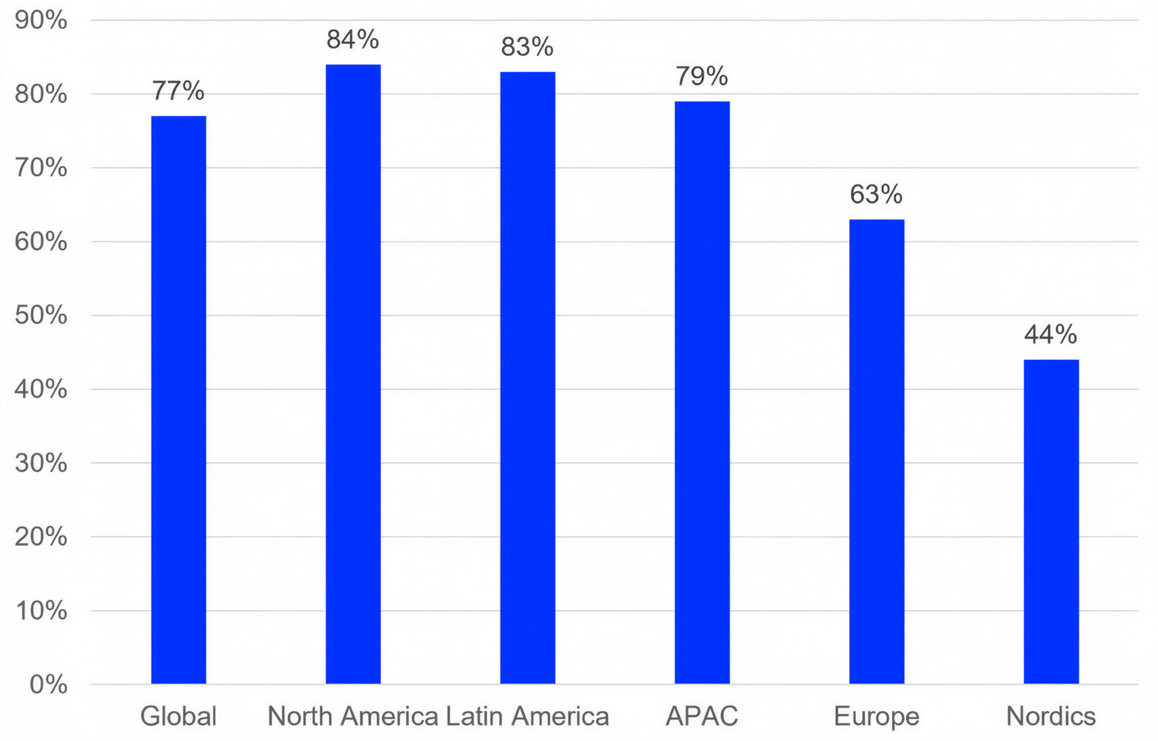
Viewing habits across Europe continue to shift decisively towards non-linear consumption. Survey data tracking a seven-point scale of linear versus non-linear viewing shows a marked rise in the proportion of Europeans stating that most of their viewing is now non-linear, compared with five years earlier.



Source: TGI Global Quick View. Base: All internet-using adults in European countries.
**Europe: AT, BE, CH, DE, DK, ES, FR, GB, IT, NL, NO, PL, SE, TR*

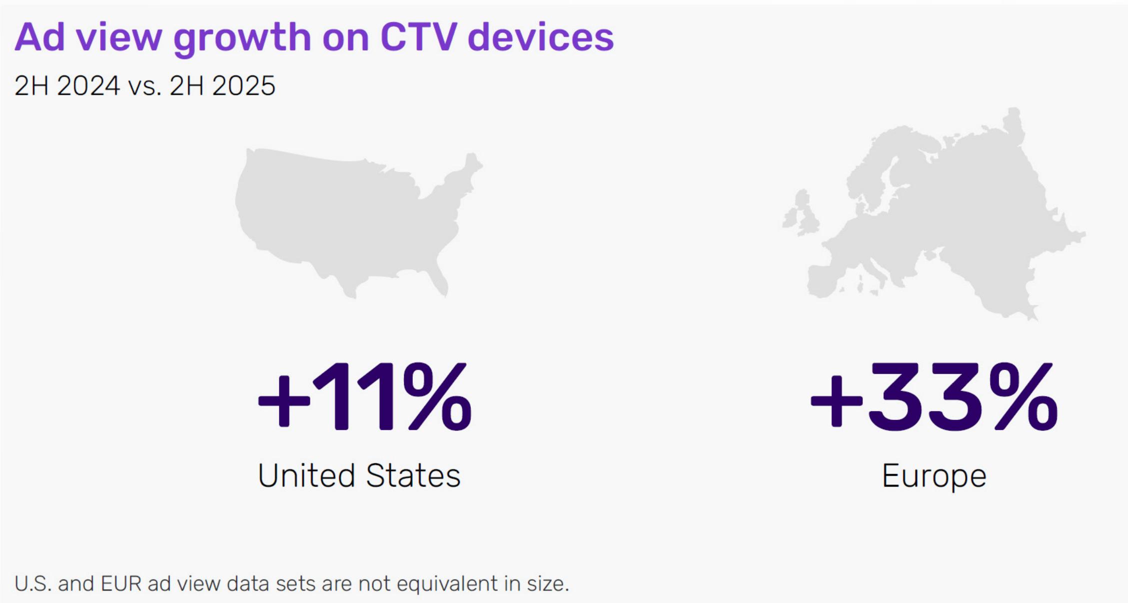
When it comes to heavy video streaming (defined as 3+ hours per day), however, Europe (63%) and the Nordics (44%) currently lag behind the global average (77%), suggesting continued headroom for growth in streaming intensity across the region.

Total video streaming: % who watch 3+ hours per day



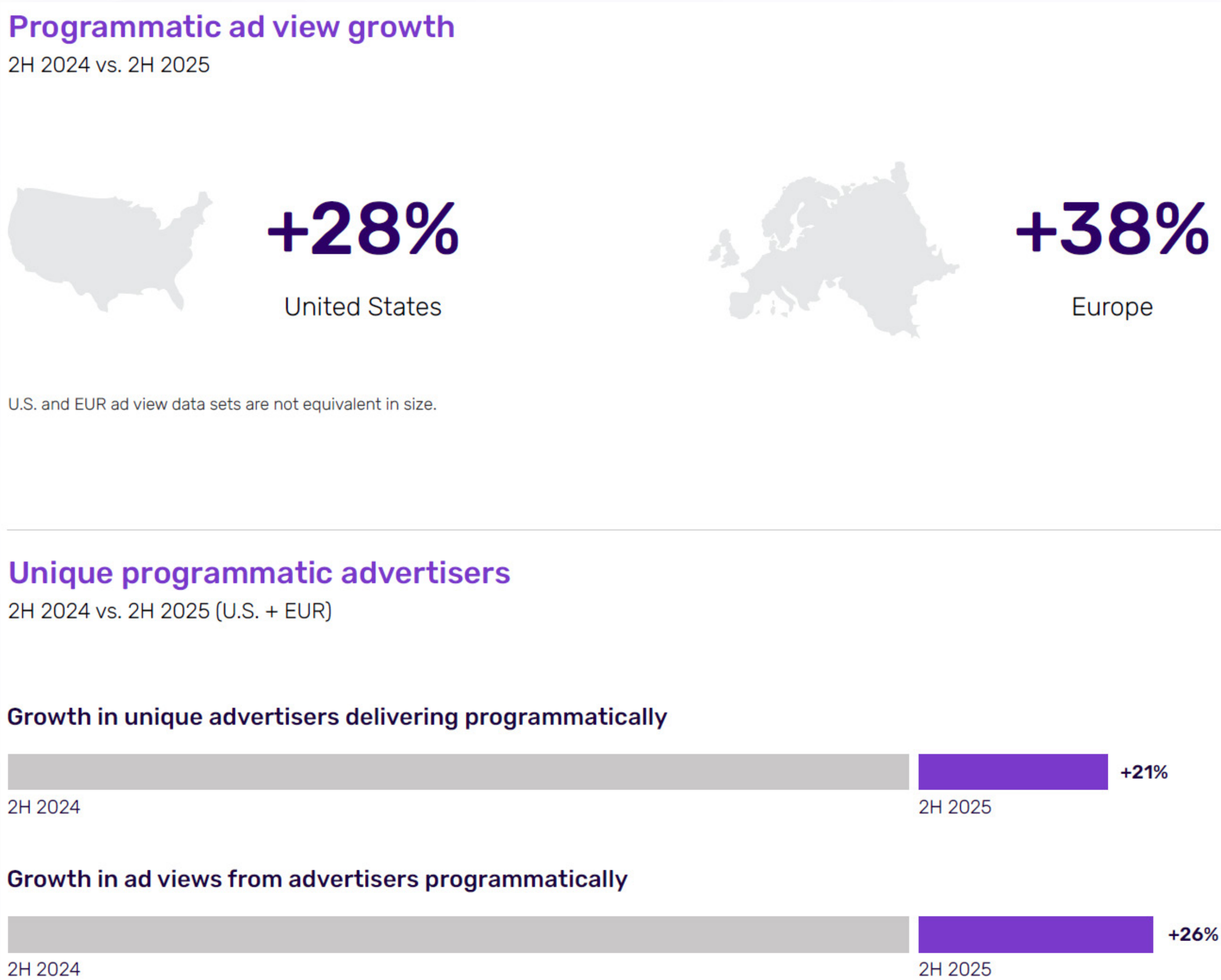
Source: TGI Global Quick View. Base: All internet-using adults

This is reinforced by advertising delivery data. Comparing the second half of 2025 with the same period in 2024, ad view growth on CTV devices specifically rose by 33% in Europe, notably outpacing the 11% growth recorded in the United States over the same period.



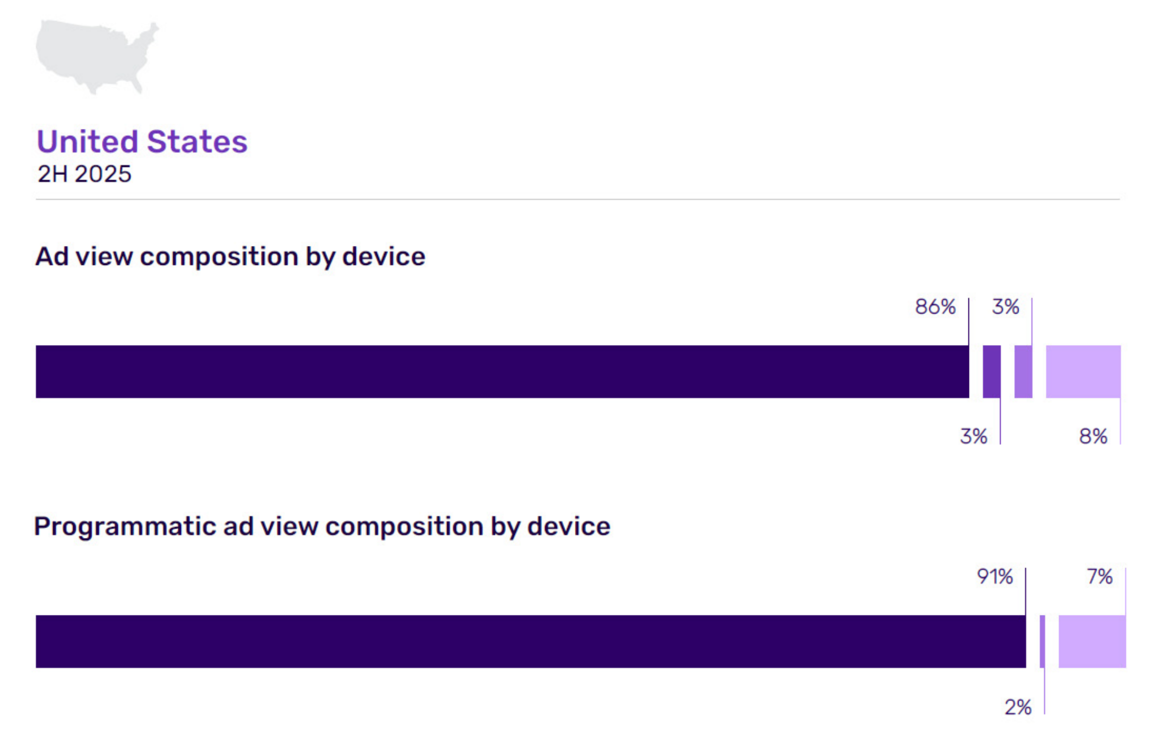
Source: FreeWheel Video Marketplace Report (VMR), 2H 2025.

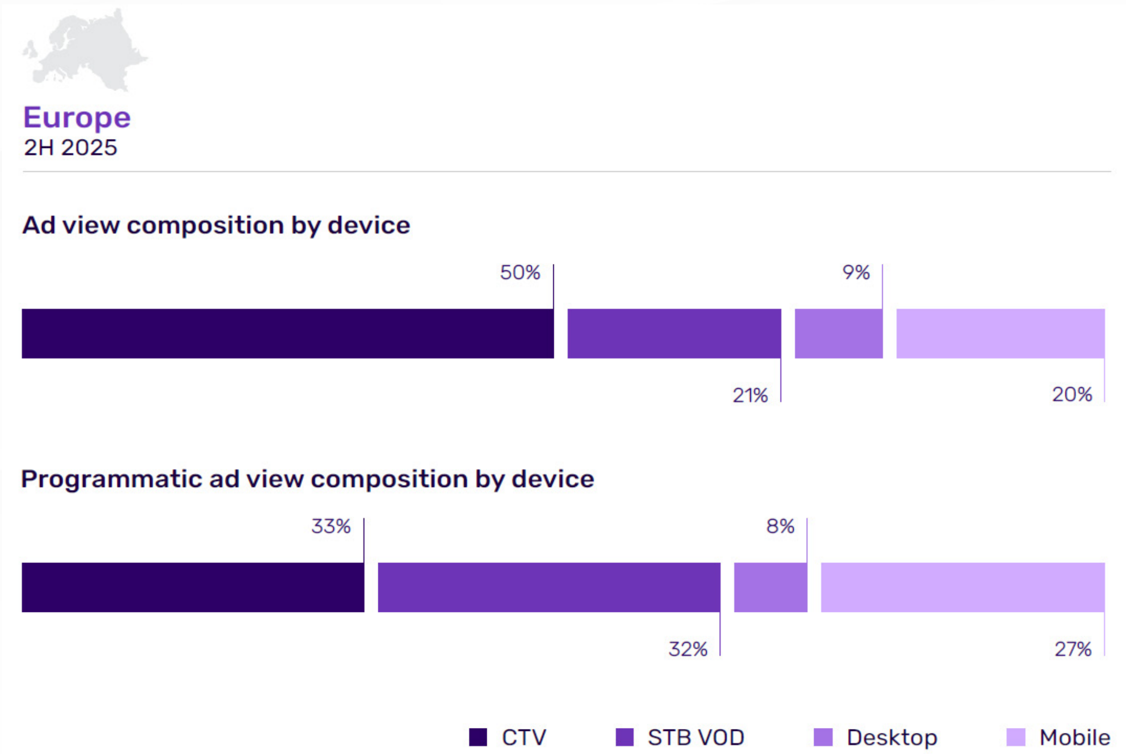
Programmatic activation is also accelerating. Programmatic ad view growth in Europe reached +38% year-on-year, alongside a 21% rise in the number of unique advertisers transacting programmatically and a 26% increase in ad views delivered programmatically across the market.



Source: FreeWheel Video Marketplace Report (VMR), 2H 2025.

Device composition data further illustrates how large-screen delivery is coming to dominate viewership: in Europe, CTV accounts for around half of ad views by device, with programmatic CTV representing roughly a third of programmatic ad view composition.





Source: FreeWheel Video Marketplace Report (VMR), 2H 2025. Additional detail available at freewheel.com/wp-content/uploads/2026/03/FreeWheel_VMR_2H_2025.pdf.

4. HOW CTV WORKS

CTV advertising gives brands access to inventory on streaming content delivered through internet-connected devices. Advertisers and their agencies generally access this inventory through DSPs, using first- and third-party data to target specific audiences. Transactions are made either programmatically, via real-time bidding, or through direct publisher deals.

Programmatic deployment has developed unevenly across the region. France, for example, is at the forefront of this shift, with 36% of its premium CTV and streaming TV ads now served programmatically, surpassing the European average of 19% (source: FreeWheel Video Marketplace Report (VMR), 2H 2025).

4.1 Buying Considerations

Audience and data strategy

In the CTV environment, audiences are generally bought at household level rather than individual level, using first-party data, third-party data, or contextual signals. A key structural challenge is that CTV environments are largely cookieless, creating addressability gaps that differ from those seen in web or app-based advertising. While no single solution currently allows audience targeting across all CTV inventory, several approaches have emerged:

- IP address-based geo-targeting: the ad server detects a device's IP address and uses an IP database to convert it into a geographic location. This method carries a meaningful margin of error and is further complicated in markets where household IP addresses can change within 48 hours.
- Deterministic subscriber-data targeting: many subscription-based and FAST channels hold subscriber data, including location and email address, which can support more precise geo-targeting. This can be applied in pre-bid deals, where a segment is built from subscriber data and served only to households within the relevant geography.
- Content and contextual targeting: reaching viewers based on the content they are watching. Not all CTV publishers currently supply content information aligned with the latest OpenRTB standards, and not all SSPs or DSPs can process it fully, so this is often best implemented directly with the CTV provider as a pre-bid, PMP or programmatic guaranteed (PG) deal. Granularity varies by provider, from broad genre or topic targeting through to single-title booking.
- Data clean rooms: these allow first-party data from different market participants — for example, an advertiser's hashed emails and a CTV provider's login data — to be matched in a privacy-compliant environment.
- One-ID solutions: cross-device identity providers (such as ID5, Adform ID Fusion, The Trade Desk's identity solution, LiveRamp, netID and utiq) attempt to connect a central identifier across devices to support cross-device targeting, frequency capping and measurement. Approaches vary; some rely on household graphs, others on deterministic data such as email addresses or

mobile operator data and no single ID solution currently works across all CTV channels. A DSP capable of processing the relevant ID is also required.

Inventory quality and supply strategy

CTV differs fundamentally from mobile or social advertising: it typically sits within premium, long-form content, is predominantly a big-screen, lean-back and often shared viewing experience, and tends to command higher attention. Supply is highly fragmented across broadcaster apps (BVOD), streaming platforms (AVOD, FAST, ad-supported SVOD) and OEM ecosystems. This fragmentation has driven growing use of private marketplaces (PMPs) and curated deals to support quality and control, alongside supply path optimisation (SPO) to reduce intermediaries, improve transparency and limit fee leakage.

Transparency and fraud considerations

CTV is not immune to fraud, and some content may raise brand suitability considerations. Relevant factors include:

- how and where inventory is bought; IO, PMP and PG bookings tend to be less susceptible to invalid traffic than open-market programmatic buying
- whether pre-bid brand safety and verification tools are supported (not all tools are usable across every CTV environment and DSP)
- whether targeting is applied at programme level rather than app level, to help avoid unsuitable content adjacencies

Invalid traffic (IVT) figures for CTV vary widely across sources and are not always directly comparable. Most verification providers agree, however, that IVT rates in IO, PG or PMP-based bookings are substantially lower than in open-market CTV bookings, often well below 5%, and not infrequently below 1%, since the majority of European CTV bookings take place through direct or preferred/guaranteed deals. Of the invalid traffic identified in the European CTV market, most is not classified as sophisticated invalid traffic (SIVT); it more commonly relates to unrecognised app bundle IDs or impressions not actually delivered to a CTV device, and impressions attributable to deliberate fraudulent intent remain comparatively rare.

4.2 Measurement and Attribution

Measurement remains one of the more complex aspects of CTV, shaped by a fragmented ecosystem, a continued lack of standardised metrics across platforms, complex cross-device attribution, the distinction between household and individual exposure, and variable transparency between vendors. CTV measurement is progressively moving from impression-based measurement (the current baseline) towards reach and impressions, and ultimately towards outcomes and attention-based metrics all while balancing privacy, fragmentation and cross-platform consistency.

A number of distinct roles combine to make up the CTV measurement ecosystem:

- CTV data providers (SSPs, DSPs and ad tech platforms) offer large-scale, census-level data, for example from smart TVs, streaming devices and apps, typically at device or household level. This data can lack demographic and behavioural depth (i.e. who is actually watching).
- Panel operating companies (for example Fifty5Blue, Audience Project, GEMIUS, Nielsen and GfK) collect and validate large-scale data using representative panels of individuals, offering observed, people-based data.
- Joint Industry Committees (JICs), such as BARB, AGF and NMO, govern the industry (bringing together broadcasters, advertisers and agencies), define official measurement standards or "currencies", and help ensure transparency and trust in reported (and audited) figures. JICs can be slower to evolve than digital platforms, and tend to focus more on content measurement, where platforms often focus on advertising measurement.

In combination: CTV data providers contribute scale and granularity (what was watched, when, and on which device); panel companies add people-based insight (who watched, alone or with someone); JICs standardise and validate measurement into a trusted currency; and other ecosystem participants connect data sources, enable attribution and support privacy compliance.

IAB Europe's CTV Measurement Framework provides further industry guidance in this area, setting out shared definitions and principles to help bring greater consistency to how CTV campaigns are measured across the region.

Billing structures are also evolving to reflect co-viewing. CTV campaigns bought through DSPs are typically billed on ad impressions, but IO-based bookings increasingly incorporate a co-viewing factor, since studies indicate that, on average, more than one person is often present for a given CTV ad impression. Cited co-viewing factors range from roughly 1.3 to 2.5 or higher; where a provider applies a co-viewing factor (for example 2.3) to bill for a larger implied audience.

4.3 KPI Framework and Expectations

CTV should be understood as a complement to, rather than simply a replacement for, linear and other digital video, combining linear TV's mass reach with CTV's precision, incremental reach and frequency management. CTV can help brands reach viewers who have shifted away from broadcast and cable, deliver incremental reach on top of traditional TV campaigns, and provide access to streaming-first audiences across multiple platforms and devices.

CTV can support brand-building and performance objectives simultaneously, spanning awareness (through big-screen impact), consideration (through targeted messaging) and conversion (through measurable outcomes). Setting clear KPI expectations up front, whether the focus is reach and frequency, completion rate, incremental reach, or cross-device conversions, helps ensure campaigns are evaluated against appropriate benchmarks.

4.4 Creative Considerations

Creative is an increasingly important performance lever in CTV, a trend reinforced by the growing use of AI-assisted tools in ad production and optimisation. These developments enable interactive, gamified and shoppable ad formats, support dynamic creative optimisation and contextual messaging, and unlock new formats such as homescreen ads and native OS-level placements.

5. REGULATORY CONSIDERATIONS

In Europe, CTV targeting must be designed with privacy by default. Though deterministic signals, such as ACR data, typically operate at the household or device level and therefore do not rely on direct personal identifiers, strong governance is still essential, as they may still enable identification when combined with other data sources.

Buyers and sellers should ensure that consent signals are collected and respected, data sources are clearly disclosed, and data usage aligns with regional regulatory requirements, including GDPR and the associated ePrivacy framework. Establishing trust through transparent and accountable data practices is a prerequisite for sustainable growth in programmatic CTV.

There is a rise in interest around Transparency and Consent Framework (TCF) implementation in the CTV ecosystem. More CMPs are actively seeking validation to operate in this environment, signalling that the TCF is gaining traction beyond web and mobile to manage users' consent. This suggests that CTV is becoming a key focus area for the industry players. 18 CMPs are currently validated for CTV, while 466 Vendors registered to TCF support the CTV environment.

CTV measurement in Europe should also take account of the audience measurement provisions introduced under the European Media Freedom Act (EMFA), specifically Article 24, which came into force in 2024.

EMFA defines “audience measurement” as “the activity of collecting, interpreting or otherwise processing data about the number and characteristics of users of media services or users of content on online platforms for the purposes of decisions regarding advertising allocation, pricing, purchases or sales or regarding the planning or distribution of content” (Article 2(16)). Providers of audience measurement systems are required to ensure that their systems, and the methodologies they use, comply with the principles of transparency, impartiality, inclusiveness, proportionality, non-discrimination, comparability and verifiability (Article 24(2)).

EMFA envisages measurement being organised primarily under a Joint Industry Committee (JIC) structure, or similar, while also allowing for proprietary audience measurement systems operating outside such structures, provided they are independently audited on an annual basis and make data, including non-aggregated data, available to the media services they measure.

A CTV operator that redistributes content and serves advertising, for example, may need to consider whether its own measurement solution constitutes a proprietary audience measurement system if it does not cooperate with a JIC, and if so, the associated audit obligations and data-sharing mechanisms that follow. EMFA's audience measurement provisions are overseen by the European Board for Media Services, working in concert with national media regulatory authorities.

6. BENEFITS OF CTV ADVERTISING

CTV offers distinct benefits across the value chain. For advertisers, it combines reach with precision, enabling access to incremental audiences that may no longer be reachable through linear TV alone, and reproduces the HD, big-screen viewing experience for audiences that might otherwise only be reached on smaller social or in-app placements. For publishers, it represents a premium, monetisable inventory source with a growing range of formats through which to build a compelling proposition to buyers. For consumers, it can mean more relevant advertising and a viewing experience that better reflects their preferences.

Innovative ad formats and retail media

In today's multi-screen environment, where competition for attention is intense, advertisers are turning to increasingly creative formats to engage viewers on the big screen. Innovative formats, including native ads, pause ads, frame ads, interactive and shoppable ads, are capturing audience attention through memorable, more relevant delivery.

CTV is also opening new possibilities in retail media, combining television's reach and engagement with the precision of digital targeting. By leveraging first-party shopper data, retailers can serve relevant advertising to in-market consumers on premium streaming platforms and, in some cases, enable closed-loop attribution, creating a channel capable of driving incremental revenue for retailers while delivering measurable performance for brands.

FAST as a growth pillar

Free Ad-Supported Streaming TV (FAST) has moved well beyond its early phase to become a central pillar of the premium video ecosystem. By combining the familiar, lean-back quality of traditional TV with free access, FAST is reshaping how audiences engage with the big screen, while giving marketers a way to reach viewers at scale. Platforms such as Pluto TV, Tubi, Roku Channel, Samsung TV Plus and Xumo have moved from niche propositions to mainstream, household names, offering curated live channels, premium programming and branded content that mirror much of the traditional television experience.

For viewers, FAST offers the comfort and simplicity of television without a subscription cost. For advertisers, industry data suggests FAST audiences show meaningfully higher ad recall than on short-form video, reflecting the strength of a premium viewing environment. With the majority of FAST viewing occurring on the big screen, formats tend to be more immersive and viewing sessions often involve multiple people, amplifying the reach of a single impression relative to smaller-screen environments.

Advertisers looking to make the most of FAST inventory typically focus on four areas:
- Unlocking incremental reach: FAST can extend audience coverage into households that traditional TV does not capture, supporting genuine audience expansion rather than duplication.
- Capitalising on live content: the growth of live programming, particularly sport and news, creates high-attention environments that can be effective for brand messaging.
- Enhancing relevance through context: aligning advertising with relevant content tends to improve recall and effectiveness, reinforcing the value of contextual placement.
- Leveraging programmatic activation: increasing programmatic access to FAST inventory simplifies execution, supports optimisation, and allows advertisers to scale more efficiently across platforms.

7. CHALLENGES AND BARRIERS TO SCALE

Market and supply-side fragmentation

The most significant challenge currently facing CTV is fragmentation across the ecosystem. This is unsurprising given the industry's rapid growth and its position at the intersection of digital and linear TV advertising: solutions built for web and mobile are not fully suited to CTV, and neither are those built for traditional broadcast. This fragmentation contributes directly to a lack of measurement consistency, with different OEMs, publishers and content owners often returning disparate signals through the supply chain — which in turn can discourage buyers from diversifying campaigns across the CTV landscape and realising its full potential. Greater alignment on standard metrics would help CTV move towards the level of interoperability already achieved in other areas of digital advertising.

Measurement inconsistency

Reaching consensus on measurement across buyers, sellers and content producers is essential; without it, each party tends to default to the metrics that best serve its own interests. This is precisely why JICs, industry bodies and independent measurement companies play such a critical role. A significant knowledge gap in cross-media measurement persists, driven largely by legacy data silos and the growing complexity of the media ecosystem. Demonstrating reach achieved within a specific target audience remains a further challenge, and European markets vary considerably in how developed their measurement infrastructure is — with established linear TV and traditional media measurement providers sometimes competing with ad validation providers from the digital sector.

Transparency and verification

Beyond measurement, the CTV ecosystem also faces gaps in transparency and tracking. Established digital solutions such as ads.txt and pixel-based tracking are not always as easily replicated across the diverse range of CTV environments in the market. These gaps affect not only reporting accuracy but can also make the ecosystem more vulnerable to fraud, since malicious activity is harder to identify. Left unaddressed, these issues can undermine buy-side trust; resolving them is likely to unlock further advertising investment into the channel.

Co-viewing and billing complexity

The emergence of co-viewing-adjusted billing adds a further layer of complexity. Because CTV impressions are often viewed by more than one person, some providers now sell impression-based reach using a co-viewing factor (commonly cited in the range of 1.3 to 2.5 or higher) as part of IO bookings, effectively billing for a larger implied audience. Where this applies, buyers should expect the CPM for an IO booking to be correspondingly lower than that of an equivalent DSP-based booking, and should factor this into cross-format comparisons.

8. BEST PRACTICES

The following recommendations bring together the practical implications of the considerations set out earlier in this guide, framed as actionable guidance for teams planning, buying and measuring CTV campaigns.

Targeting and data strategy

- Match the targeting method to the objective. Where precise geography matters, prioritise deterministic approaches (subscriber data, HEM/ID matching) over IP-based geo-targeting, which carries a material margin of error and can degrade quickly as household IP addresses change.
- Treat content and contextual targeting as a direct-deal conversation. Because OpenRTB signal support varies by publisher and DSP, the most reliable way to secure content- or genre-level targeting is often to agree directly with the CTV provider as a pre-bid, PMP or PG deal, rather than assume it will work reliably in the open market.
- Confirm DSP-ID compatibility before planning around a specific identity solution. No single ID currently works across all CTV channels, so campaigns built around one identity graph should be checked against actual publisher and DSP support up front.
- Use data clean rooms where cross-party matching is required, to combine first-party data (e.g. advertiser hashed emails, CTV provider login data) without exposing raw personal data to either party.

Inventory quality and supply path

- Utilise PMPs, PG and direct IO deals where brand suitability or invalid traffic (IVT) risk is a priority, since these routes could provide lower IVT than open-market programmatic buying.
- Apply supply path optimisation deliberately rather than defaulting to the broadest possible reach. Consolidating access to premium, verified publishers tends to reduce fee leakage and improve transparency, even where it narrows the pool of available inventory.
- Target at programme level rather than app level where the tooling allows it, to reduce the risk of unsuitable content adjacencies within otherwise brand-safe apps.

Transparency, verification and fraud mitigation

- Verify that pre-bid brand safety and verification tools are actually supported end-to-end for the specific CTV environment and DSP being used.
- Treat reported IVT figures with appropriate scrutiny. Ask vendors to disclose the booking type (open market vs. IO/PMP/PG) and inventory source behind any IVT rate quoted, since these factors affect the number.
- Build basic transparency checks (e.g. confirming app bundle IDs are recognised, and that impressions are verifiably delivered to a CTV device) into standard campaign QA.

Measurement, attribution and billing

- Apply critical thinking to ad server dashboards rather than taking reported outcomes at face value. Cross-check headline metrics against panel or JIC data where available, and work towards genuinely like-for-like (apples-to-apples) comparisons across datasets, particularly given the measurement inconsistencies and fragmentation described in Section 7.
- Factor co-viewing into cost comparisons. Where a booking is billed using a co-viewing factor (commonly 1.3–2.5 or higher), the CPM should be correspondingly lower than an equivalent DSP-based, impression-only booking; compare cost-per-person-reached rather than cost-per-impression alone when evaluating value across booking types.
- Where relevant, align internal measurement approaches with IAB Europe's CTV Measurement Framework to support consistency with the wider industry direction of travel.

Planning, KPIs and creative

- Set the KPI framework before planning media, not after. Be explicit about whether a campaign is being evaluated on reach and frequency, completion rate, incremental reach versus linear, or cross-device conversion, since these require different buying approaches and different success benchmarks.
- Plan CTV as a complement to linear and other digital video, not a straight substitute; using it deliberately to capture incremental reach among viewers who over-index on streaming, rather than duplicating an audience already reached elsewhere.

- Invest in creative solutions suited to the environment. Big-screen, lean-back viewing rewards different creative treatments than mobile or social; where budgets allow, use dynamic creative optimisation and interactive or shoppable formats to make the most of the format's higher attention levels.

Compliance and governance

- Review targeting and measurement setups against GDPR and the Transparency & Consent Framework, particularly for any approach that relies on hashed identifiers, subscriber data matching or cross-device graphs.
- Where a business operates or commissions a proprietary audience measurement system rather than participating in a JIC, check whether it falls within scope of the EMFA Article 24 obligations (independent annual audit, data-sharing with measured media services) before relying on it for commercial reporting.

9. USE CASES

HbbTV Measurement in Practice

CTVs enabled through HbbTV measurement protocols can support accurate, census-level measurement of linear TV consumption. This capability is already being incorporated into currency initiatives in markets including Spain and Austria.

Use of VAST Tags

In Norway, the deployment of VAST tags across CTV inventory has provided a scalable, standardised and efficient approach to capturing census-level ad exposure data. This data can then be combined with panel-based measurement to deliver more robust, cross-platform audience insight.

Use of ACR Data

One example of the power of ACR data in practice comes from a recent Nexxen campaign for a global homecare brand. Using automatic content recognition (ACR) data, the brand identified households that had been exposed to a competitor's TV advertising and reached them across premium CTV inventory. The campaign delivered 1.5 million unique competitor buyers, increased brand favourability by 30% and purchase intent by 31%, and achieved a 95% video completion rate. The results demonstrate how deterministic TV intelligence can enable advertisers to activate highly relevant audiences, extend the value of CTV and deliver measurable outcomes beyond traditional demographic targeting.

10. CONCLUSION

Connected TV has moved decisively from an emerging channel to a core pillar of the European television and video advertising landscape. Viewing habits continue to shift towards non-linear and streaming consumption, ad view growth across CTV devices in Europe continues to outpace many other markets, and formats such as FAST and retail media are creating meaningful new opportunities for advertisers, publishers and retailers alike.

Realising the full potential of CTV, however, depends on the industry continuing to address the structural challenges set out in this guide; particularly fragmentation across markets, devices and platforms, and the resulting inconsistency in measurement and verification. Continued collaboration between industry bodies, Joint Industry Committees, measurement providers and technology platforms will be central to establishing the standards, transparency and trust needed to unlock further investment in the channel.

Looking ahead, emerging technologies — including AI-assisted creative production, dynamic optimisation and more sophisticated audience and attribution modelling; are likely to play an increasing role in how CTV campaigns are planned, delivered and measured. As these tools mature, they have the potential to help address some of today's fragmentation and measurement challenges, provided their adoption continues to be guided by the same principles of transparency, privacy and interoperability that underpin responsible growth across the wider digital advertising ecosystem.

11. THANK YOU TO OUR CONTRIBUTORS

This guide was developed by IAB Europe with content and expert input contributed by representatives of the following member organisations. Individual contributions have been consolidated and edited into the sections above rather than attributed section-by-section.

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