

A hand holding a black remote control, with the thumb pressing one of the buttons. The remote has various buttons, including a large circular button in the center and several smaller buttons around it. The background is a blurred image of a television screen showing a colorful scene.

CONNECTED TV IN EUROPE: THE PARADIGM OF TRANSPARENCY AND CONSISTENT MEASUREMENT

CONTEXT

Connected TV (CTV) is entering a phase of sophistication and scale, but the industry must address transparency and measurement standards to sustain investment confidence. CTV is gaining traction among media buyers. While it offers scalable access to premium programming and extends linear TV reach, transparency and quality assurance in outcomes measurement are becoming a central debate point for advertisers and publishers alike.

Only 30% of advertisers and publishers have full visibility into ad placements, and less than half use quality verification*. Additionally, 27% lack consistent insight into brand suitability, underscoring the need for stronger safeguards and standards.

This overview sets out the challenge from both the buy-side and sell-side perspectives, along with the steps IAB Europe is taking to help the industry address it.



*IAB Europe & DoubleVerify - The Power and Potential of CTV Report -
https://iabeurope.eu/knowledge_hub/iab-europe-doubleverifys-the-power-and-potential-of-ctv-in-europe-report/

BUY-SIDE PERSPECTIVE AND CHALLENGES

1. PERFORMANCE VISIBILITY & ATTRIBUTION

- TV-like formats (AVOD, FAST) are full-screen and audible, but lack clear signals of actual viewer attention.
- Advertisers struggle to answer: "Was the ad truly seen?"
- Attribution remains murky, especially across fragmented platforms and devices.

2. TRANSPARENCY OF INVENTORY

- Buyers often only have access to inventory at genre or bundle level, not specific shows or placements.
- Buyers have limited visibility into where ads appear.

3. DATA TRADE-OFFS: SCALE VS. GRANULARITY

- Platforms offer reach, but granular audience insights (e.g., household-level behaviour, frequency) are often restricted, meaning there is often a trade-off between broad exposure and precise targeting.
- Advertisers expect measurable outcomes beyond reach, e.g. attention, brand lift, conversions.

4. INCONSISTENT METRIC DEFINITIONS

- Key CTV metrics (e.g., "viewable impression," "completion rate," "reach") are defined differently across platforms and vendors.
- Some count impressions at ad start, others only after a few seconds; completion rates may include auto-play or forced viewing.
- These inconsistencies make benchmarking unreliable and hinder cross-platform comparability.

SELL-SIDE PERSPECTIVE AND CHALLENGES

1. REDEFINING MEASUREMENT FOR CTV

- Traditional KPIs don't adequately capture CTV's distinct characteristics across devices and viewing behaviours.

2. INTEGRATION & STANDARDISATION NEEDED

- Fragmented planning between AV and digital teams creates confusion over ownership and KPIs.
- Clear definitions of CTV formats and consistent standards are vital for transparency and scale.

3. TECHNICAL AND MEASUREMENT GAPS

- CTV ad tech stacks and set-ups vary significantly, making it difficult to compare data and apply consistent measurement.
- Traditional linear TV metrics don't translate effectively, and existing online video tagging lacks precision for CTV.

4. VERIFICATION & CONTROL

- Audience verification remains a key hurdle. Some platforms allow granular tagging or buyer control over placement, while others do not, leading to inconsistencies in transparency and measurement.

5. VIEWING BEHAVIOURS

- Co-viewing and longer-form content impact ad effectiveness and measurement strategies, complicating comparisons with other digital environments.



IAB EUROPE'S ROLE

IAB Europe is aiming to develop a unified framework to strengthen CTV measurement by creating clear industry guidelines, aligning buy- and sell-side stakeholders, and pinpointing the core challenges limiting consistency today. Through workshops and roundtables, it will gather broad industry feedback to refine these guidelines, then drive practical adoption to ensure they are implemented effectively across the market.

FOR MORE INFORMATION, PLEASE CONTACT:

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