



# CTV in Europe

Power Programmatic Quality  
and Performance



# Executive Summary

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**Nick Reid**

SVP & Managing Director  
EMEA

As we've seen viewers shift from traditional TV to digital platforms, CTV advertising has experienced a massive global transformation over the past several years. CTV's growth is undoubtedly recognised on a global scale, but Europe has a particularly unique market dynamic that requires special attention. While CTV cultivation in the U.S. was influenced primarily by content newcomers like Netflix and Hulu, Europe's market looks a little different, with established broadcasters like the BBC installing the first major European on-demand platforms. This, coupled with regional differences in culture, language and consumption habits, make media growth and investments vary significantly throughout Europe and around the world.

This is why I am pleased that DV is partnering with IAB Europe — a steady voice in CTV advertising from the beginning — to analyse the maturing European CTV advertising landscape and discover how it is altering media budgets and changing the way brands strategise their media buys.

## This comprehensive report dives into the following:

- The state of CTV adoption throughout Europe
- What advertisers and publishers can hope to get out of their CTV investments
- Challenges advertisers and publishers are facing with CTV adoption
- The truth about CTV quality, transparency and brand suitability
- What European CTV advertisers can expect over the next few years

CTV advertising is reshaping European brand strategies, and media buyers are driven to find new ways to connect with consumers in an evolving digital landscape. I am excited to see these data points help guide advertisers and publishers as they navigate through these changes and realise the full potential of CTV as an effective advertising medium.

# Methodology

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The survey leveraged the national IAB network in Europe and received 422 advertiser and publisher responses from across 29 markets between June and August 2023. The respondents were split evenly, with 51 percent representing advertisers and 49 percent representing publishers.

For the purposes of this report, we've designated advertisers and agencies as "advertisers" and publishers, media owners, broadcasters and CTV apps as "publishers."

## Defining CTV

Connected TV (CTV) is a subset of digital video inventory delivered via connected and dedicated devices — including smart TVs, gaming consoles and streaming devices — that are displayed on a TV screen, such as a home television.

## Regional Breakout

In this report, regions within Europe are broken down as follows:

### Northern Europe

Denmark, Finland, Latvia, Norway, Sweden

### Southern Europe

Croatia, Greece, Italy, Portugal, Serbia, Slovenia, Spain

### Central & Eastern Europe

Austria, Bulgaria, Czech Republic, Hungary, Macedonia, Poland, Romania, Serbia, Slovakia, Turkey, Ukraine

### Western Europe

Belgium, France, Germany, Ireland, Netherlands, Switzerland, UK

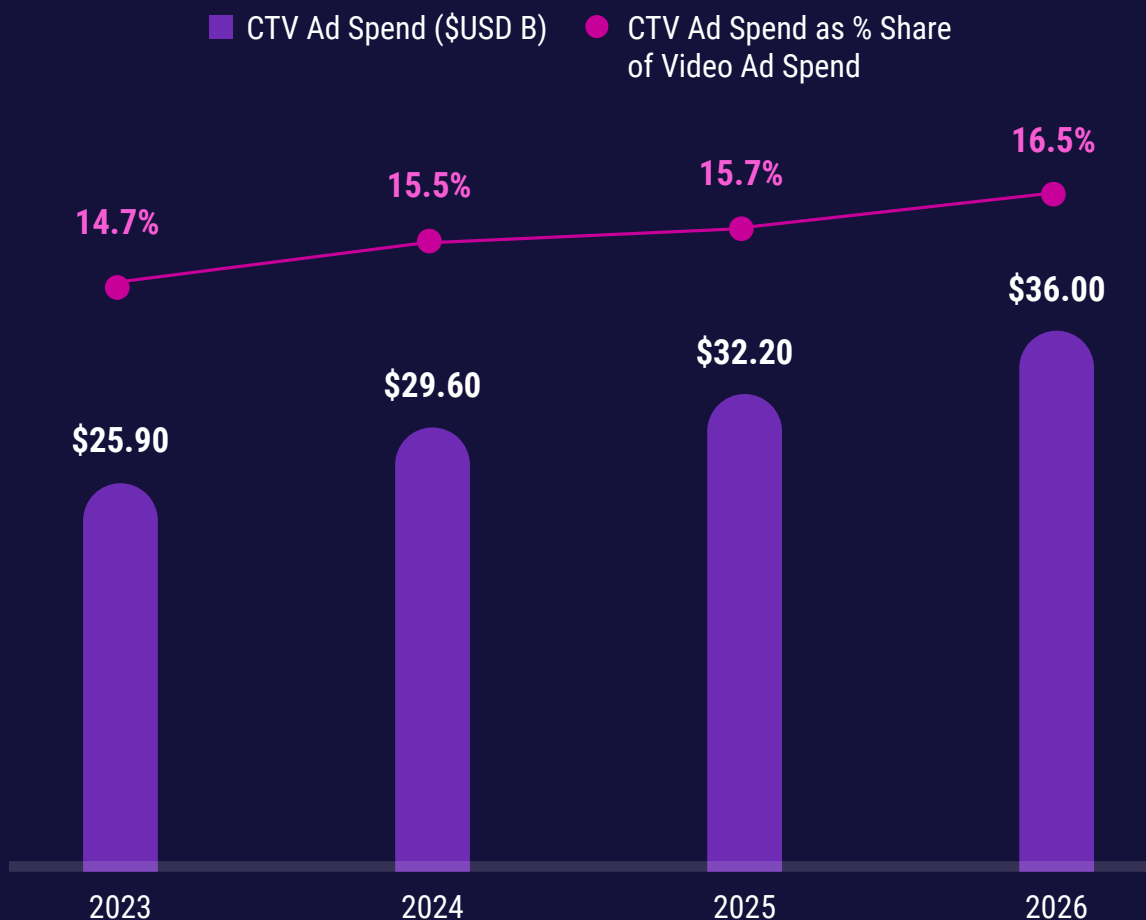
# The State of CTV Advertising in Europe

CTV Investment Snapshot

THE STATE OF CTV ADVERTISING IN EUROPE

# Worldwide CTV Ad Spend is Strong and Growing

Before diving into the detailed report findings, it's important to recognise CTV's growth — both from a consumer and advertiser perspective — over the past several years. CTV ad spend worldwide is robust and rising. In fact, [eMarketer](#) reports that while mobile spend currently dominates in the UK, non-mobile spend — fueled by CTV — will surpass traditional media spend this year.



Source: Statista

THE STATE OF CTV ADVERTISING IN EUROPE

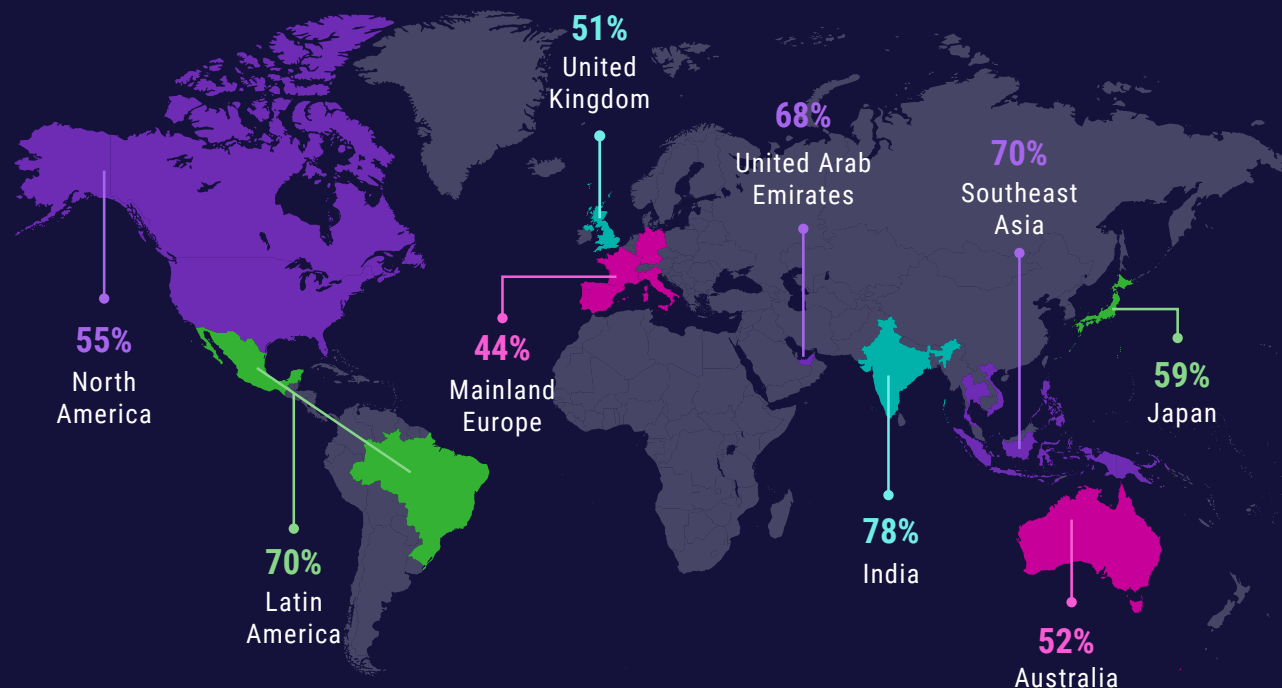
# Consumer Appetite for Content Continues to Soar – Led by CTV and Streaming

The adoption of CTV and streaming services show clear momentum.

An increase in subscriptions (including free, ad-supported plans) is fueling CTV's ascension, with 55 percent of respondents in the UK and 49 percent in mainland Europe having subscribed to additional streaming services in the past 12 months.

A move to ad-supported and free options is a priority for both streaming platforms and consumers, with over half of respondents (59 percent) being open to ad-supported video content across streaming apps.

**Percent of respondents that spend more time consuming content Online each day now compared with pre-pandemic**



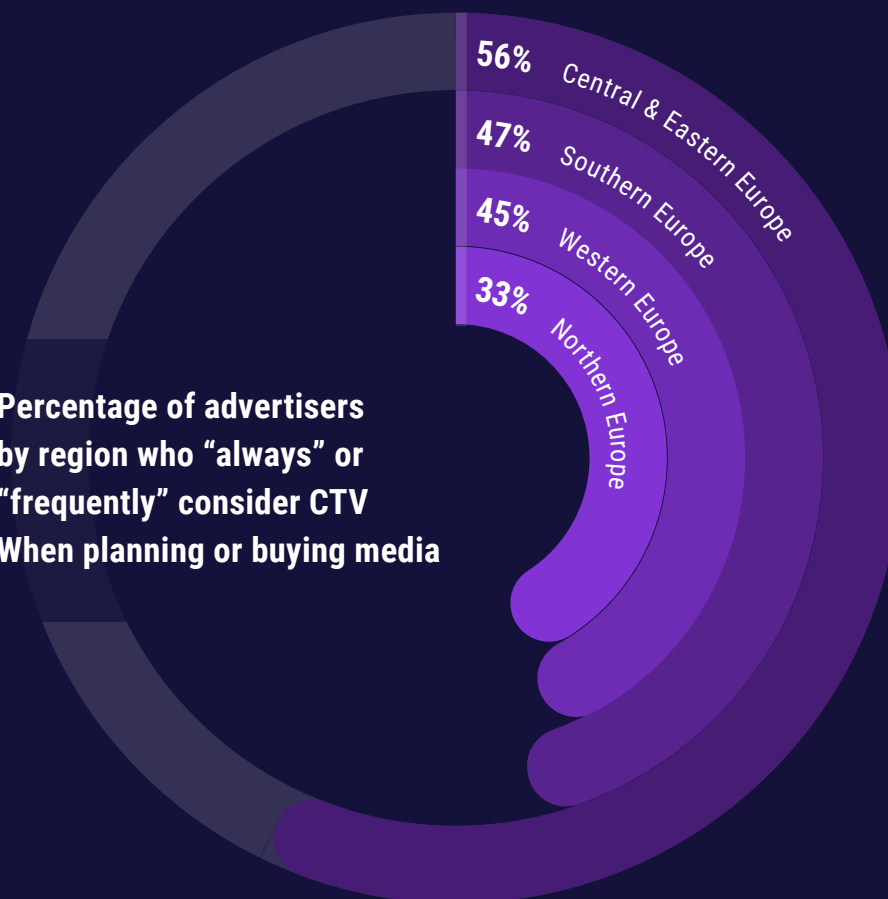
Source: DV's Four Fundamental Shifts 2022

THE STATE OF CTV ADVERTISING IN EUROPE

# CTV Is an Increasingly Important Media Channel in Europe, but Opportunities for Growth Remain

Our research shows that CTV is top-of-mind for brands and agencies when developing their media strategies. In fact, over 50 percent of all respondents said that they “always” or “frequently” consider CTV when planning or buying media. The sentiment is not consistent across Europe, with northern Europe lagging behind at 33 percent. More education around CTV could spur further consideration.

Percentage of advertisers by region who “always” or “frequently” consider CTV When planning or buying media



THE STATE OF CTV ADVERTISING IN EUROPE

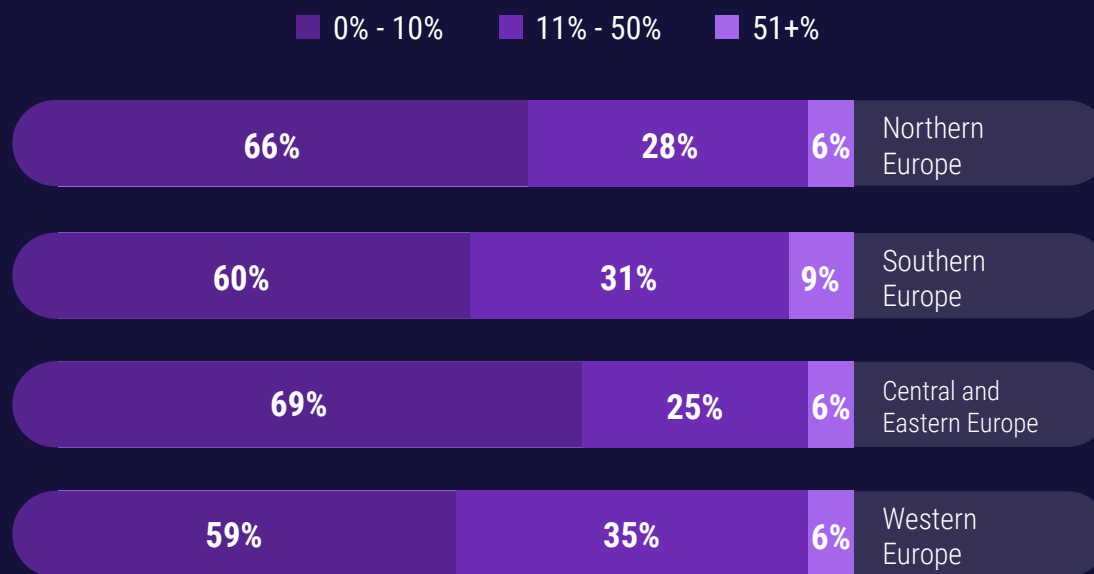
# Higher Consideration Does Not Necessarily Translate into Higher Spend

Markets across Europe are not homogenous – languages and consumption habits vary, and each region relies on different technology and infrastructure. How each region grows and invests in CTV is also significantly different.

In central and eastern Europe, for example, high levels of consideration (56 percent, as illustrated on page 7) did not directly translate into higher allocation of CTV ad spend. In fact, only 31 percent of respondents in the region indicated that they allocated 11 percent or more of their ad spend to CTV. Instead, investments are heaviest in southern and western Europe, where respectively 40 and 41 percent of respondents said they allocated 11 percent or more of their ad spend to CTV.

Southern Europe (9 percent) and western Europe (6 percent) had the highest percentage of respondents who reported allocating 51 percent or more to CTV spend.

Advertisers: CTV Ad Spend Allocation by Region





THE STATE OF CTV ADVERTISING IN EUROPE

# Programmatic Advertising on CTV Gains Ground, but Lags Behind Traditional Media Buys

According to a recent [IAB Europe report](#), programmatic advertising on CTV is in its infancy, with most transactions structured as Programmatic Guaranteed and Private Marketplaces (PMPs) deals.

This trend is reflected in our research as well. Only 21 percent of programmatic advertisers report allocating over 10 percent of their ad spend to CTV compared to 36 percent of traditional media advertisers.

Demand outstripping premium supply may be an initial factor to wider usage of programmatic advertising. As has been the case with other media channels (like mobile app), this may change over time as advertisers look to expand the scale of their CTV campaigns by tapping into programmatic scale.

## What percentage of your total advertising spend is allocated to CTV advertising?

### Allocated 0-10% of Spend on CTV



### Allocated Over 10% on CTV



# The State of CTV Advertising in Europe

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**Shaaf Tauqeer**  
Audience & Martech Manager,  
easyJet

CTV has emerged as a pivotal component in our media mix, offering a tailored solution to our evolving needs in a dynamic market. As an airline, we are looking to expand our investment in areas that are measurable and able to reach relevant audiences due to the nature of airline industry. Our investment in CTV is becoming far more significant, as it can complement other media channels and optimise our media for performance. Younger audiences are omnipresent on all devices, which highlights the important role CTV can play in allowing us to reach them effectively. Programmatic capabilities also help us to fine-tune our approach, making our media buys more efficient and contextually relevant. Factors such as the decline in Linear TV viewership could potentially further influence our decision to explore investment in CTV advertising. The ability to conduct incrementality tests and provide transparency regarding costs make it an attractive option in today's media landscape.

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**Rupert Tonn**  
Senior Director AdTech,  
e-dialog

Advertisers have already strategically integrated CTV into their media mix to engage diverse audiences, many of whom have shifted away from Traditional Linear TV. Advertisers frequently approach us with the desire to make an impact on younger demographics and prospective customers. They often express an interest in CTV and rely on our guidance to achieve their awareness objectives using this format. Similar to Linear TV, CTV allows consumers to view an advertiser's message on a large screen, but its digital nature provides advertisers with enhanced control over frequency, context and, most importantly, measurement. Clients prioritise programmatic purchases to uphold data ownership, maintain pricing transparency when executed through their own DSP technology and streamline unified tag management. However, some CTV providers may not accommodate programmatic purchases, requiring direct transactions instead.

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# The State of CTV Advertising in Europe

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**Melinda Clow**

Managing Partner,  
Programmatic Activation at  
Omnicom Media Group UK

It is undeniable that consumption of media on CTV is increasing, largely driven by the accessibility of connected devices, the growing audience demand for streaming content and the increasing availability of high-quality content.

We have to navigate changing AV and video media consumption to plan and measure advertising strategies effectively. The beauty of having the big screen and the addressability options of this environment means that CTV can be used in multiple ways to answer different strategic objectives.

Depending on the objective, CTV could be used to drive incremental reach to other AV – for delivering brand metrics, audience data matching, interactivity in creative and contextual alignment. But the big screen doesn't deliver the whole picture. It is important to consider how media is consumed across different devices and what that offers in mood, moment, potential viewing attention and accessibility.

There is demand and a right for brands to understand exactly where their ads are appearing and that needs to be shown at a content and ad positioning level. There is still work needed from the supply side to enable these signals in a seamless way through to the buy side technology. We are working closely with streaming providers and ad technology partners to leverage the insight and signals that allow us to drive efficiencies and access to desirable content and audiences.

Buying programmatically can both deliver efficiencies that come with managing multiple supply routes in a single platform and enable campaigns to respond to signals that will drive relevancy of messaging, creativity and delivery against the campaign strategy through targeting control.

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# The Power and Promise of CTV

What Advertisers and Publishers Hope  
to Get Out of Their CTV Investment



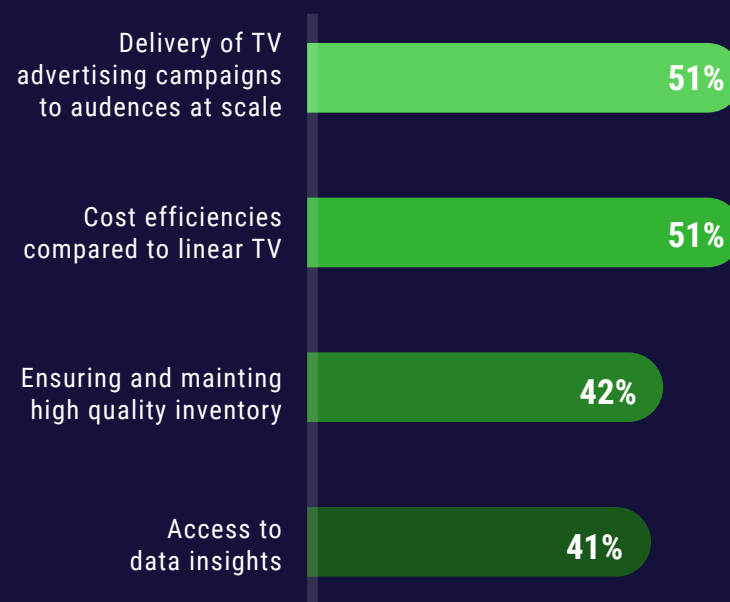
THE POWER AND PROMISE OF CTV

# Advertisers Prioritise CTV's Ability to Deliver Cost-Efficient Access to Premium Inventory at Scale

For advertisers, CTV provides an opportunity to access premium programming at scale – expanding and augmenting audiences they may already reach on linear TV. Fifty-one percent of respondents cited scale as one of their key priorities.

Even though CPMs on CTV are typically higher than those of other digital channels, 51 percent of advertisers see investing in CTV as a way to achieve cost efficiencies compared with linear TV.

## Advertiser (Buy-side) Priorities in CTV Campaigns



THE POWER AND PROMISE OF CTV

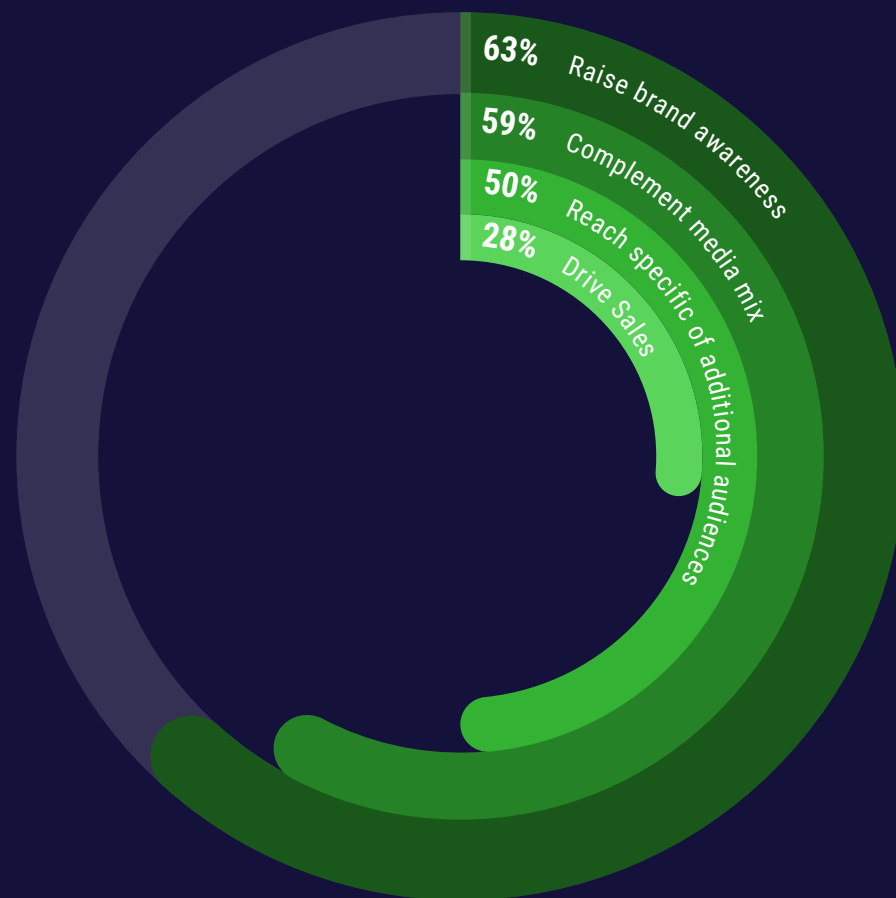
# CTV Rounds Out Top-of-Funnel Strategies for Advertisers, Helping Them Reach New Audiences

When asked what their top three drivers were for investing in CTV, nearly two-thirds of advertisers (63 percent) cited raising brand awareness as a key objective.

Further, half of advertisers said that reaching specific or additional audiences was a key driver. The ability to align advertising with certain shows or genres is a big incentive to advertisers who see it as an opportunity to engage new audiences.

It's clear that CTV advertisers are currently focused on top-of-funnel metrics, while digital metrics such as conversion, viewability or directly tying activity to sales is less of a concern.

Advertisers (Buy-side) Drivers for Investing in CTV



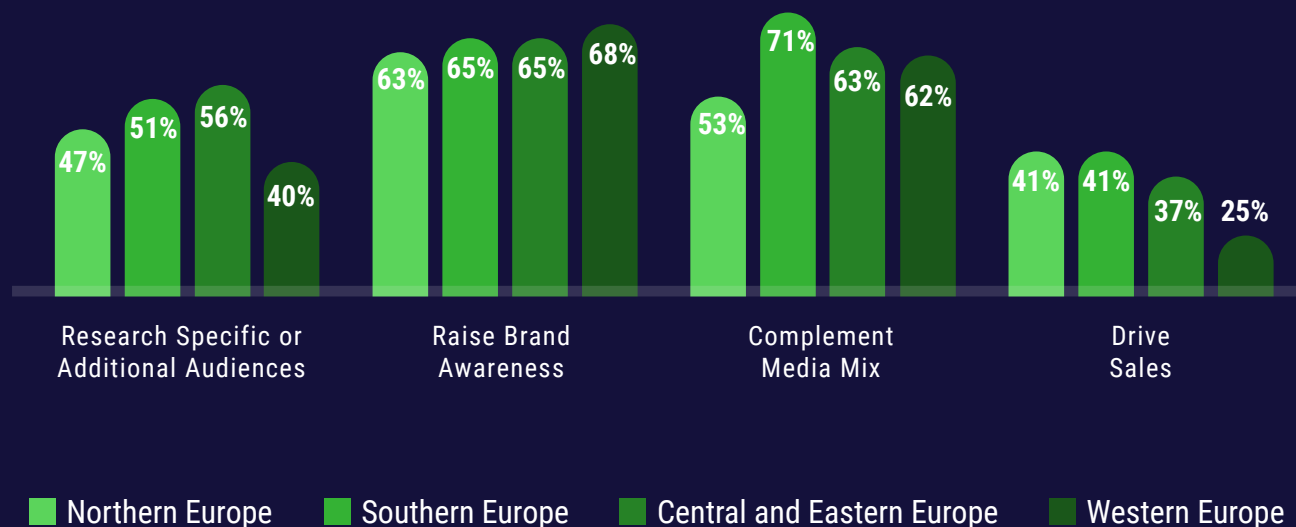
THE POWER AND PROMISE OF CTV

# Regionally, Drivers for Investing in CTV Are Largely Consistent

Drivers for investing in CTV remained largely consistent across European regions where the majority of respondents cited raising brand awareness as the main reason to invest in CTV.

Interestingly, western Europe was the least bullish on CTV's ability to reach specific audiences (40 percent) or drive sales (25 percent), which are typically lower-funnel activities.

Advertiser Motivation for Investing in CTV by Region



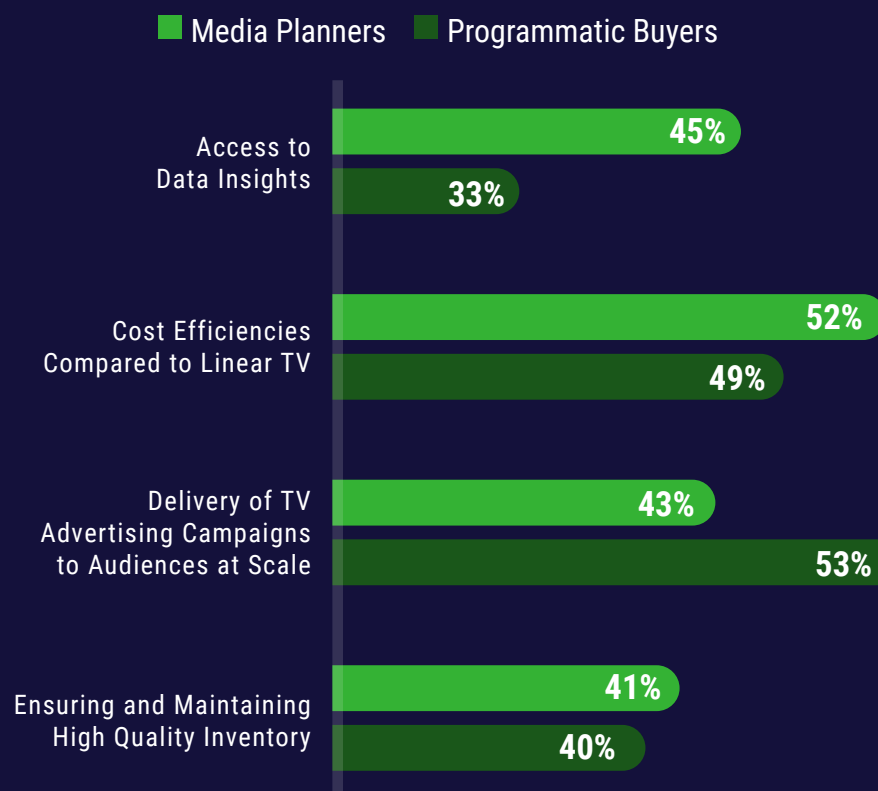
THE POWER AND PROMISE OF CTV

# Programmatic vs. Traditional Media Advertisers: Key Priorities in Investing in CTV

Advertisers are mostly aligned in terms of priorities when buying CTV inventory, but there are a few marked differences between traditional media advertisers/planners and programmatic advertisers.

Access to data insights, for example, is a higher priority for traditional media advertisers/planners (45 percent), as opposed to programmatic advertisers (33 percent). Programmatic advertisers prioritise CTV advertising to achieve scale (53 percent vs. 43 percent for traditional media advertisers/planners).

**Key Priorities:**  
**Traditional Media Planners vs. Programmatic Buyers**





THE POWER AND PROMISE OF CTV

# Traditional Media Planners See Potential of CTV to Help Drive Sales

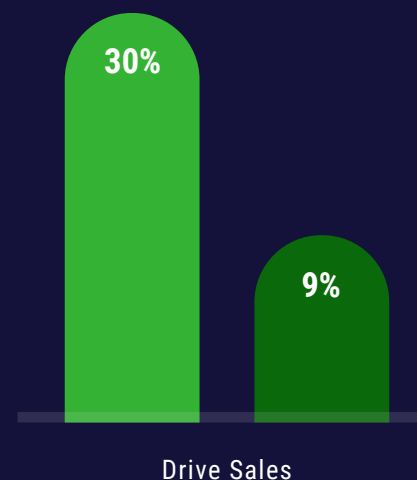
Given the “lean-back” nature of CTV, driving sales was not considered a high priority for most advertisers investing in CTV.

However, when examining programmatic advertisers vs. traditional media advertisers, the story changed somewhat. Only 9 percent of programmatic advertisers saw CTV as a means of driving sales, compared with 30 percent of traditional media planners.

This trend may shift over time as technology makes it easier for consumers to engage and interact directly with ads within a CTV environment.

**Objective: Driving Sales**  
**Traditional Media Planners vs. Programmatic Advertisers**

■ Media Planners    ■ Programmatic Buyers



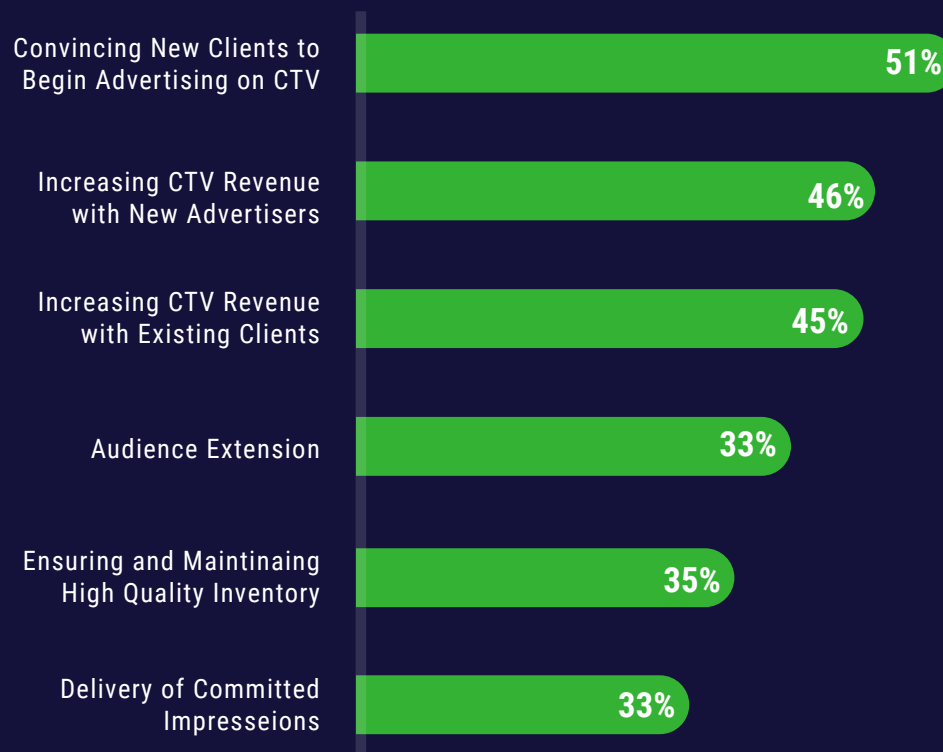
THE POWER AND PROMISE OF CTV

# Publisher Respondents Prioritise Advertiser Acquisition and Delivering Audiences at Scale

Convincing new advertiser partners to begin advertising on CTV is considered the top priority for half (51 percent) of publishers. This is closely followed by increased CTV revenues with new clients (46 percent) and existing clients (45 percent). Audience extension (38 percent) is also a high priority for publishers looking to help their advertiser partners amplify their reach.

It's not surprising to see the focus on expanding and deepening revenue and yield. But there's another story here — the demand for high-quality inventory and delivery of qualified audiences. CTV can be instrumental in achieving these priorities.

Publisher Priorities in CTV Campaigns



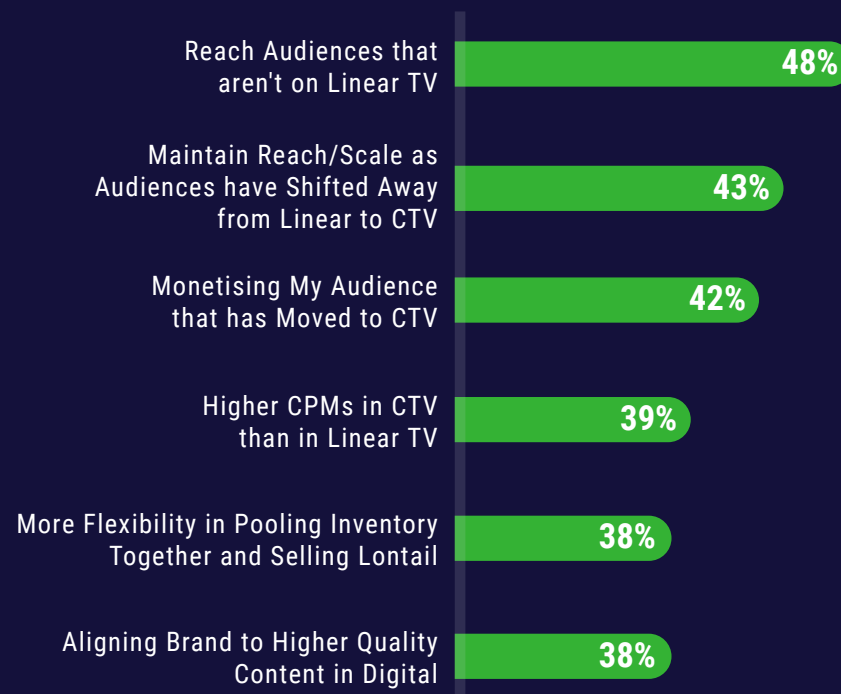
THE POWER AND PROMISE OF CTV

# Publishers Seek to Capture Audiences Shifting from Linear TV to Streaming Viewing

The rise of CTV has impacted broadcasters as they see their traditional linear TV audiences shift to viewing content on their CTV devices.

Almost half (48 percent) of publisher respondents also acknowledge that CTV is necessary to reach so called “cord-cutters” or “cord-nevers” — audiences that may not be present on linear TV.

## Publisher Drivers for Investing in CTV



# The Power and Promise of CTV

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**Thomas Allemand**

VP Adtech & Supply, Jellyfish  
France

At Jellyfish, we've witnessed firsthand the transformative power of CTV in shaping advertising strategies. Enhanced CTV measurement capabilities empower brands to optimise their campaigns, driving better performance and business outcomes. Even in its infancy across Europe, our multidisciplinary task force has developed comprehensive CTV solutions that combine Linear TV with CTV. By adopting this dual approach, we're tapping into diverse audience demographics and effectively delivering KPIs across all stages of the marketing funnel. However, amidst the opportunities, advertisers face a myriad of challenges, such as fraud. This is a critically important market issue, and it is essential to be vigilant to avoid replicating certain errors of the programmatic digital ecosystem in CTV. Fortunately, there are solutions available to detect and prevent fraud. We must uphold the shared commitment of advertisers and publishers to address these challenges and build trust within the CTV ecosystem.

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**Olya Dyachuk**

Global Media & Data Director,  
The HEINEKEN Company

Broadly speaking, CTV offers advertisers a versatile platform to achieve business objectives. While brand awareness remains a primary focus due to the available capabilities, CTV's shows strong potential in markets with robust retailer data availability and capabilities, serving as a catalyst for driving revenue. We see it via existing and most importantly new category buyers. Unlocking this potential hinge on integration at media planning and execution levels and incorporation of CTV into the media mix seamlessly alongside traditional AV and Programmatic Online Video. Planning for high quality inventory, contextual relevance, and brilliant fit-for-purpose creative are also critical for success in the CTV space. This unified approach allows for optimum attention, resulting in better mental availability and maximum brand impact. Approaching CTV as part of a connected strategy empowers brands to create transformative experiences and achieve significant business results.

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# Making the Grade

## CTV Measurement Challenges and Expectations



MAKING THE GRADE

# Challenges Faced by Advertisers and Publishers are Similar, but Prioritisation Differs

Advertisers and publishers of CTV advertising face similar challenges, though their priorities differ with the publishers focused on data and performance and the advertisers focused on delivering new audiences.

## Advertiser Top Challenges in CTV

42%

Availability and Quality of Data

39%

Campaign Measurement and Performance

37%

Inventory Availability and Scale; Cost of Technology (Shared priority)

## Publisher Top Challenges in CTV

40%

Incremental Reach

39%

Availability and Quality of Data; Inconsistencies Across CTV Offerings; Cost of Technology (Shared priority)

37%

Large Scale Audience; Supply (Shared priority)

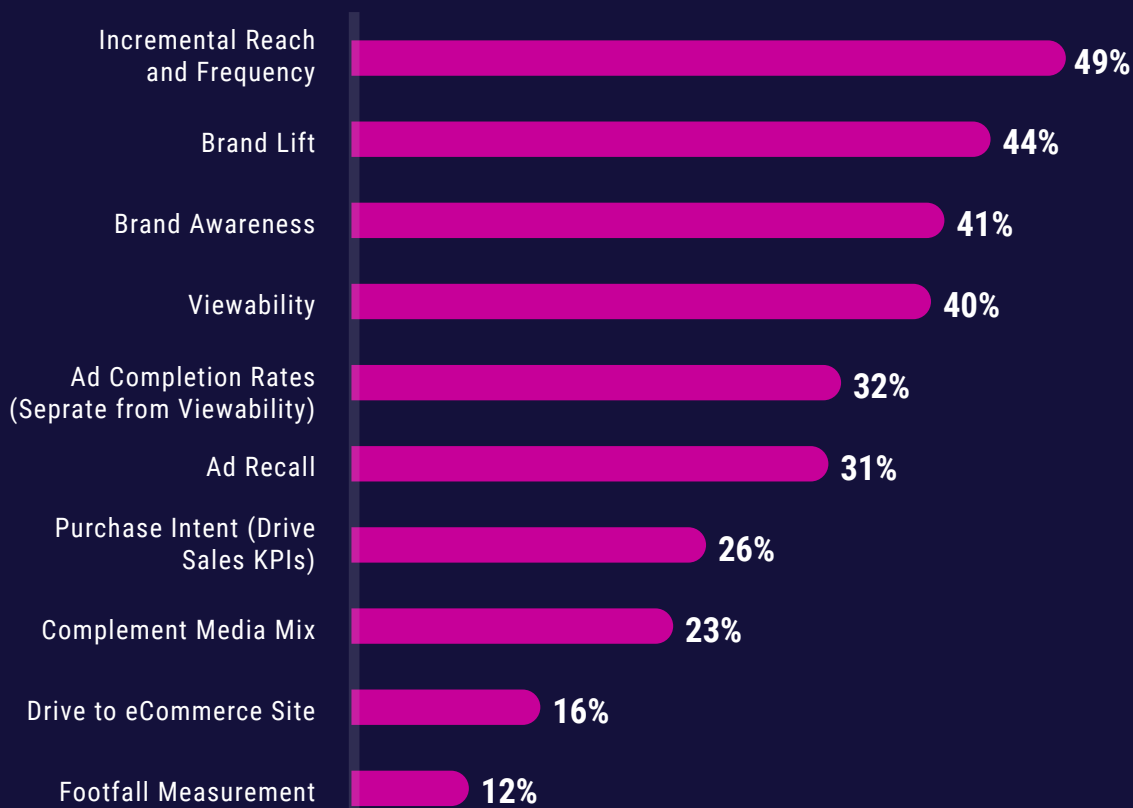
MAKING THE GRADE

# Awareness Measurement Is a Priority on CTV; Viewability Is Seen as Critical to Success

Given advertisers' reported priorities, it's not surprising to find that the top metrics centered around reach and frequency (49 percent), brand lift (44 percent) and brand awareness (41 percent).

Viewability ranks as a key metric (40 percent) on CTV. Many advertisers believe that viewability is a given on CTV, but this is not necessarily true. Ensuring an ad is fully on-screen and plays all the way through is critical in measuring the effectiveness CTV ads.

Advertiser Top Success Metrics for CTV



MAKING THE GRADE

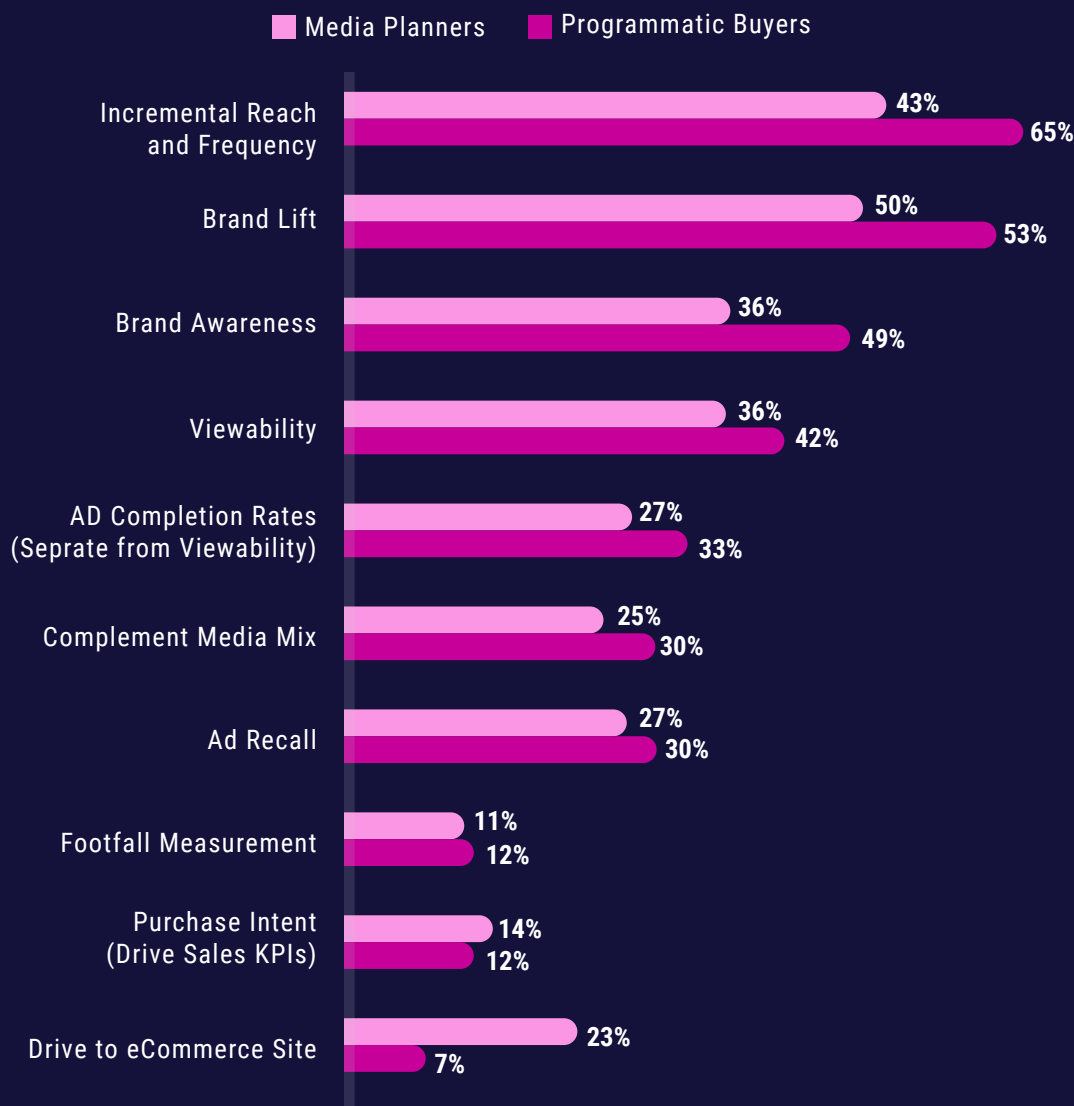
# Programmatic Advertisers Are More Focused on Data-Driven Outcomes

In general, programmatic advertisers appear to be more attuned to leveraging specific data points to gauge the success of their CTV campaigns.

Notably, programmatic advertisers' ability to measure incremental reach and frequency within their CTV campaigns was 22 percentage points higher than traditional media advertisers. They were also more focused on achieving specific brand awareness and lift goals, as well as measuring viewability on CTV.

This does not mean that traditional media advertisers don't value those outcomes, but rather that programmatic advertisers are more likely to demand proof that they have met their objectives.

Top Metrics for CTV: Traditional Media Planners vs. Programmatic Buyers





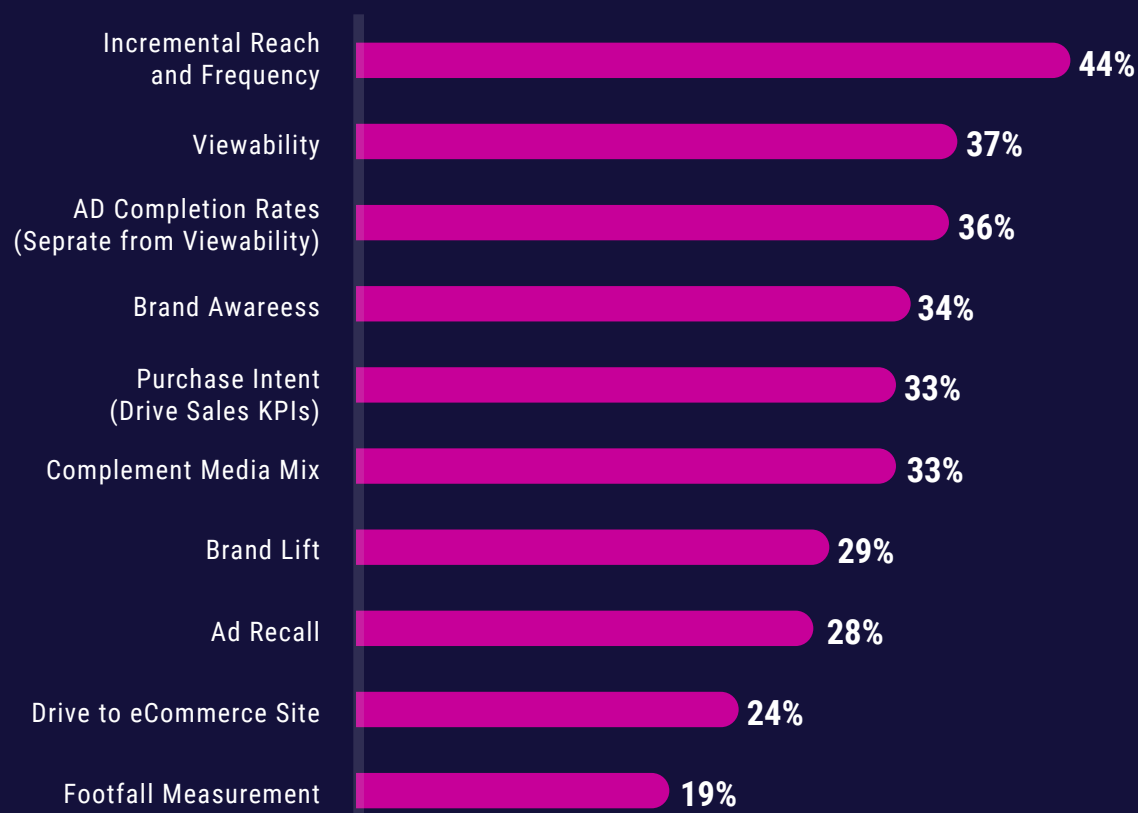
MAKING THE GRADE

# Publisher CTV Metrics Align with Advertiser Goals

Publishers' performance metrics for CTV mirror those of advertisers, leading with incremental reach and frequency (44 percent).

In general, action-oriented performance metrics, such as completion rates (36 percent for publishers and 32 percent for advertisers) and purchase intent (33 percent for publishers and 26 percent for advertisers), were slightly more important metrics to publishers than to advertisers.

Publisher Top Success Metrics for CTV



# Making The Grade

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**Michelle Sarpong**

Commercial Lead  
the7stars

“In the dynamic landscape of Connected TV (CTV) advertising, alignment between buyers and sellers is paramount to address evolving challenges. We must confront issues head-on, particularly in the realm of CTV, where measurement and reporting standards vary. Publishers should spearhead initiatives to establish a unified framework for CTV, addressing concerns like frequency capping and ensuring transparent pricing reflective of inventory quality and device specifications. By collectively defining buying routes based on client objectives and KPIs, and integrating CTV into the briefing process from the outset, we can elevate its significance and prevent it from being an afterthought.

Furthermore, it's important to debunk the misconception that viewability is inherent in CTV. As the market expands with new providers competing alongside traditional players, ensuring ads are fully viewable and play-through is non-negotiable. This safeguards against disparities in inventory quality and reinforces the value of premium CTV experiences.

The rise of data-driven outcomes in programmatic buying reflects broader trends in digital media. As traditional channels embrace digitalisation, the focus on measurable performance intensifies. The dwindling efficacy of cookies underscores the importance of first-party data, prompting businesses to capitalize on their data assets. This shift underscores the need for adaptable strategies and a departure from linear TV mindsets. In essence, success in the modern advertising landscape hinges on collaboration, innovation, and a commitment to performance and outcomes.”

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# The Missing Ingredients

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Quality, Transparency and  
Brand Suitability



THE MISSING INGREDIENTS

# The Truth About CTV Quality

While many advertisers consider CTV to be safe, many challenges still remain. For example, DV discovered that CTV fraud schemes have tripled over the past few years as

fraudsters find new and creative ways to siphon dollars from high-value campaigns.

Additionally, we found that one in three CTV impressions on top apps serve into environments where the television is actually turned off.

As inventory volume increases, so too does reputation risk for brands if they do not know where their ads are running. There is a wide variety of potentially harmful or inappropriate content, even in top CTV apps, including Inflammatory Politics & News and Children’s content.

Unfortunately, this can result in ads playing in environments that damage a brand’s reputation — even when buying directly from publishers who may be tapping into their first party data to help extend campaign reach beyond their own native properties.



**The number of CTV fraud schemes has tripled since 2020 \***



**CTV impressions on top apps serve into environments that fire ads when the TV is turned off\*\***



**Of both advertisers and publishers report that brand safety and suitability on CTV is either a significant challenge, or the biggest challenge to investing in CTV**

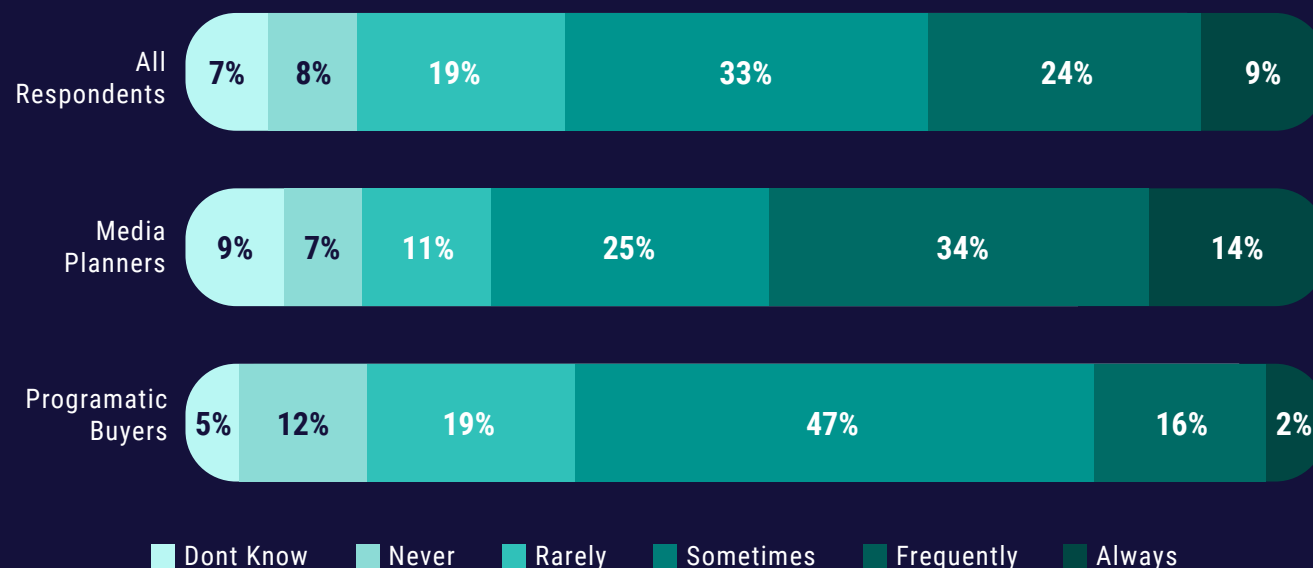
\*Source: DV Global Insights Report 2023  
 \*\*Source: DV's Ultimate Guide to CTV Measurement

THE MISSING INGREDIENTS

# The Need for Brand Safety and Program-Level Transparency

While some metadata can be gathered to assess CTV brand suitability, only one-third (33 percent) of advertisers state that their CTV campaigns are always or frequently focused on specific shows, genres or other video-level data, whilst the same number of advertisers state that this only happens sometimes.

How Often are your CTV Campaigns Focused on Specific Shows, Genres, or Other Video-level Data?

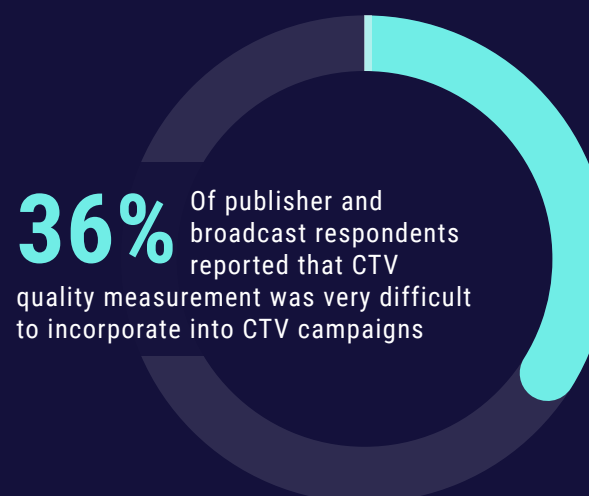
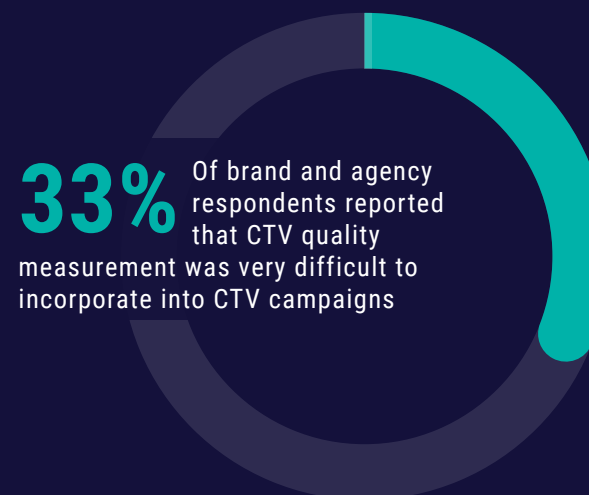


THE MISSING INGREDIENTS

# Media Quality Measurement Is a Major Challenge for CTV Advertising and Publishing in Europe

While quality measurement is important to both advertisers and publishers, many are struggling with how to incorporate it into their CTV campaigns. Thirty-three percent of advertisers and 36 percent of publishers stated that incorporating media quality measurement into CTV campaigns is a “significant” or “the biggest” challenge, and 8 percent of advertisers stated that it is “the biggest” challenge they face. On the publisher side, 29 percent of traditional media planners and 30 percent of programmatic advertisers say that incorporating media quality measurement is a “significant” or “the biggest” challenge.

How challenging is it to incorporate media quality measurement into CTV campaigns on a scale of 1 (not at all challenging) to 5 (extremely challenging)?



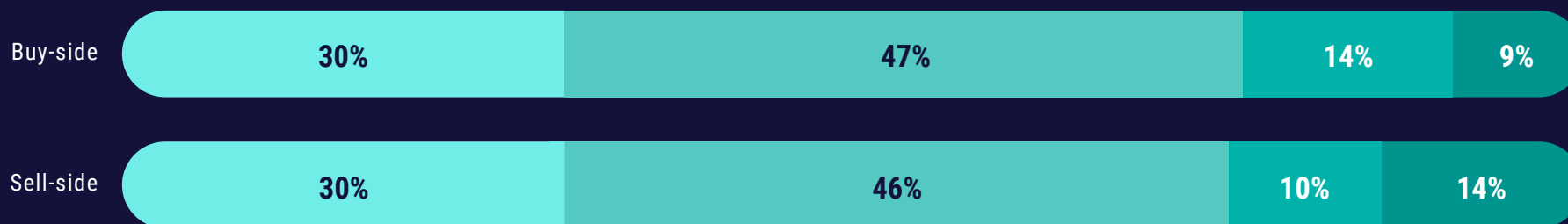
THE MISSING INGREDIENTS

# Transparency into Where Ad Placements Appear On CTV Is Surprisingly Low



Of all respondents surveyed (on both the advertiser and the publisher side), one-third (30 percent) stated that they know exactly which apps or placements the ads are run on. With programmatic advertisers, this number was even lower at 21 percent, as opposed to 34 percent for traditional media planners. This makes the need for verification clear, especially as investments in CTV – including programmatic CTV advertising – grow.

**Do you have transparency into which CTV apps/ placements your adverts are placed on from the supply or demand side?**



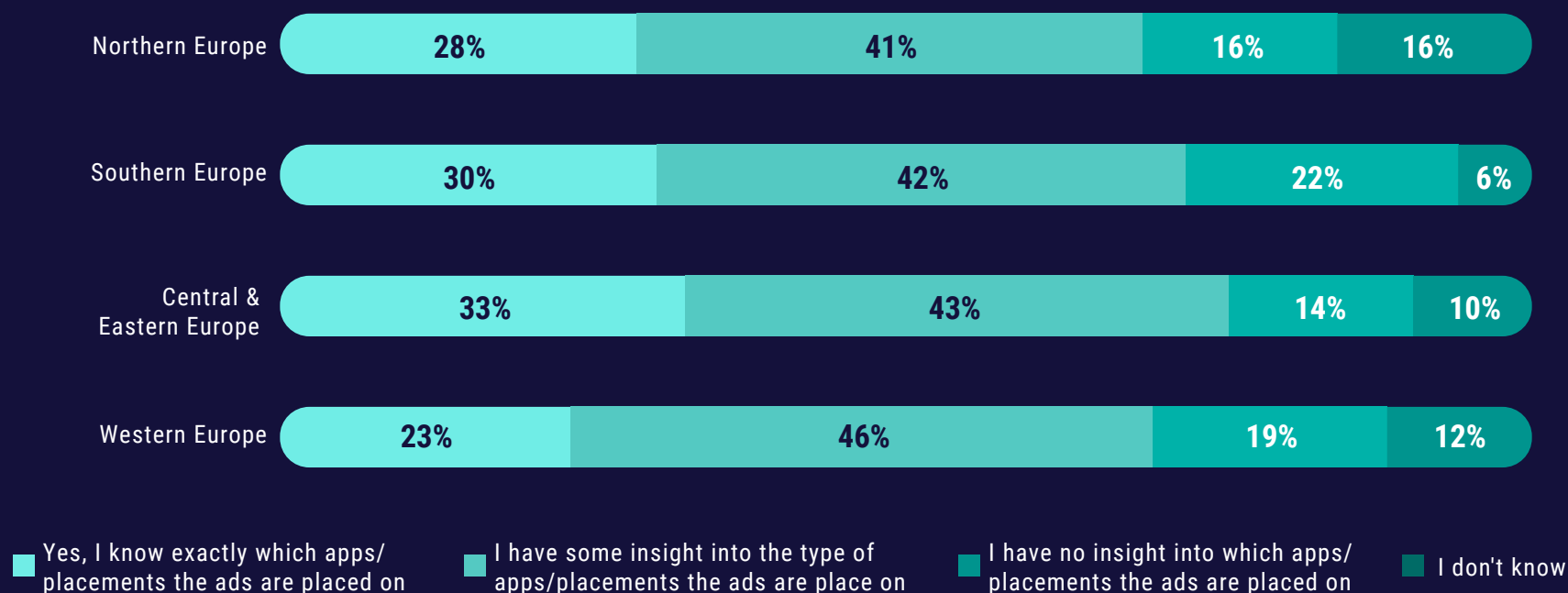
- Yes, I know exactly which apps/placements the ads are placed on
- I have some insight into the type of apps/placements the ads are placed on
- I have no insight into which apps/placements the ads are placed on
- I don't know

THE MISSING INGREDIENTS

# Transparency Must Be Addressed Across Europe

Despite the share of CTV investment in western Europe being reported as the second highest in Europe, they had the lowest percentage of respondents who stated they “know exactly” where their ads are placed. Meanwhile, central and eastern Europe, the region that reported the highest consideration of CTV when advertising/planning, reported the highest percentage of respondents who “know exactly” where their ads are placed.

## Do you have transparency into which CTV apps/placements your adverts are placed on from the supply side?



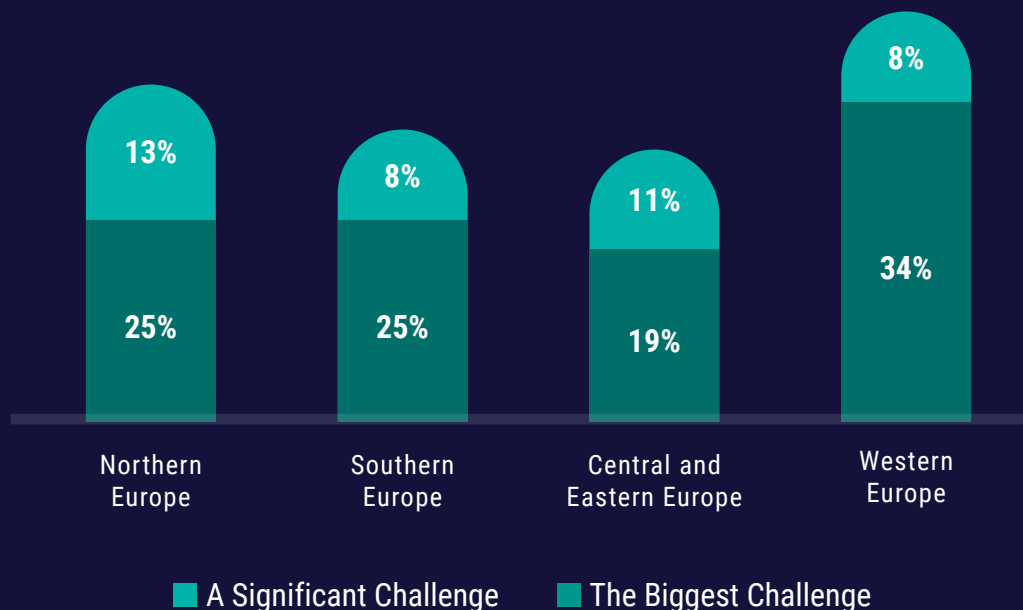


THE MISSING INGREDIENTS

# Western Europe Is Most Challenged by Incorporating Media Quality into CTV Campaigns

When we look regionally across Europe, 42 percent of western Europe respondents say that incorporating media quality measurement is a “significant” or “the biggest” challenge, followed by northern Europe at 38 percent. Notably, central and eastern Europe, the region that considers CTV most when planning and advertising, reported the lowest percentage of “significant” or “the biggest” challenge responses, at 30 percent.

How Challenging is it to Incorporate Media Quality Measurement into CTV Campaigns? (Buy-side)

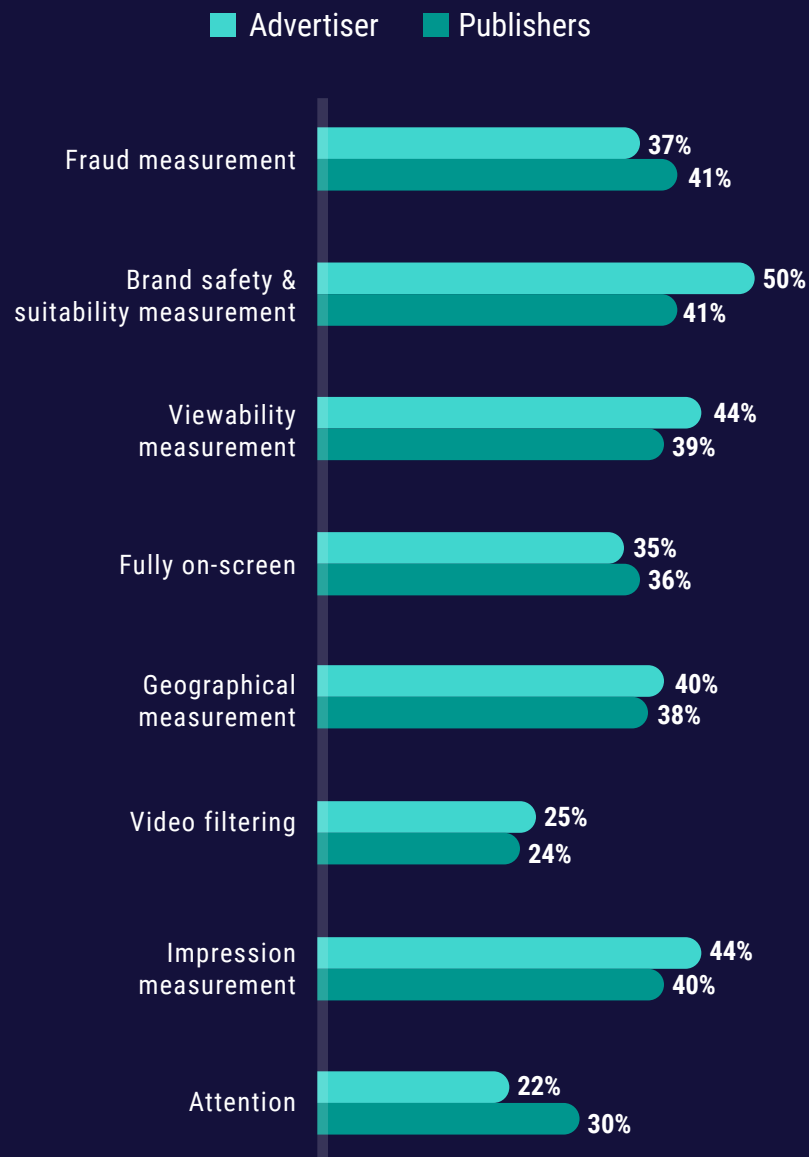


THE MISSING INGREDIENTS

# Quality Verification on CTV Is Used by Half or Less of Both Advertisers and Publishers

Adopting verification as part of CTV buys is part of the equation for some CTV advertisers and publishers. However, in most cases, advertisers and publishers of CTV inventory across Europe have not adopted basic quality protections. The highest level of adoption is around brand safety, where half of advertisers say they are leveraging some form of verification.

Which solutions are you using for CTV activation?

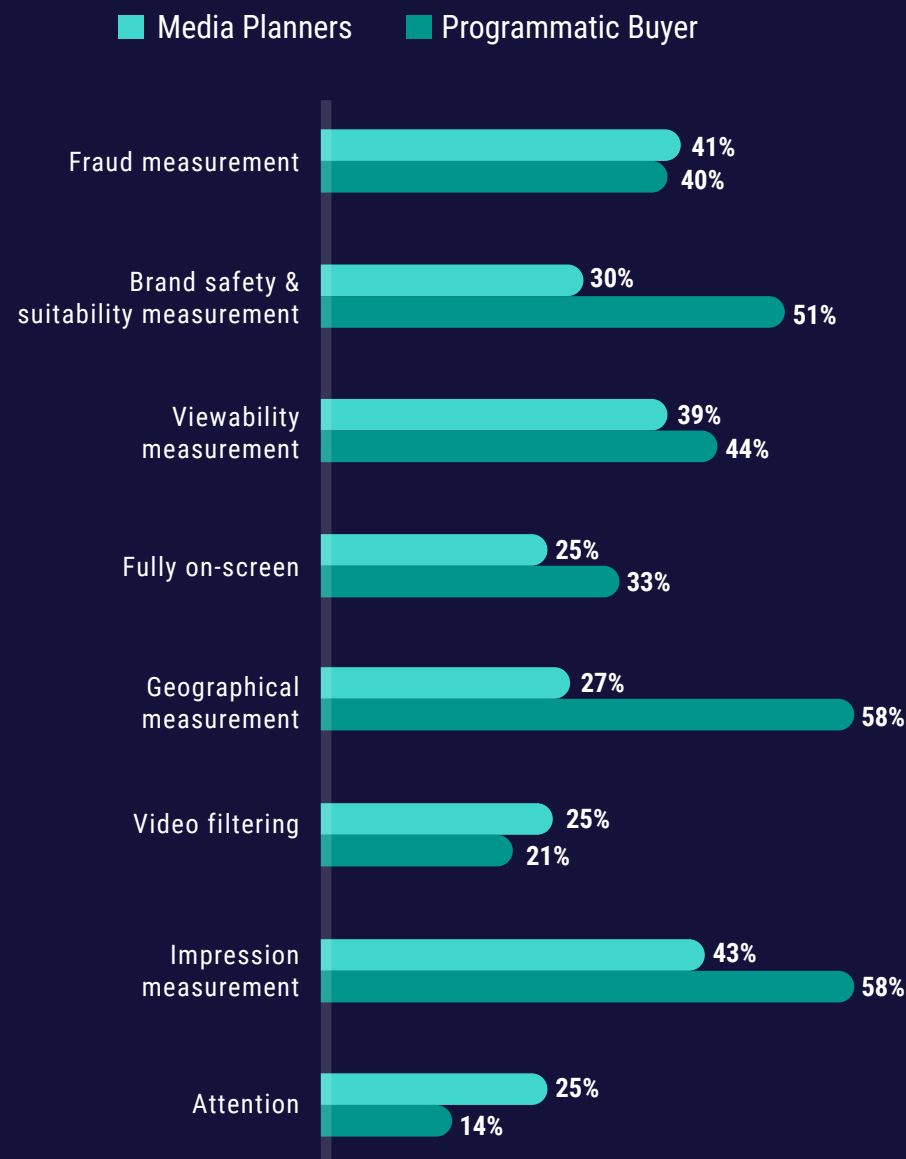


THE MISSING INGREDIENTS

# Programmatic Advertisers Are Ahead of Traditional Media Advertisers in Their Use of Quality Protection

With the exception of fraud and attention measurement, programmatic advertisers are more likely to leverage quality tools when executing buys on CTV. This may be due to the fact that traditional media buyers consider CTV to be an inherently safe environment.

Which solutions are you using for CTV activation?



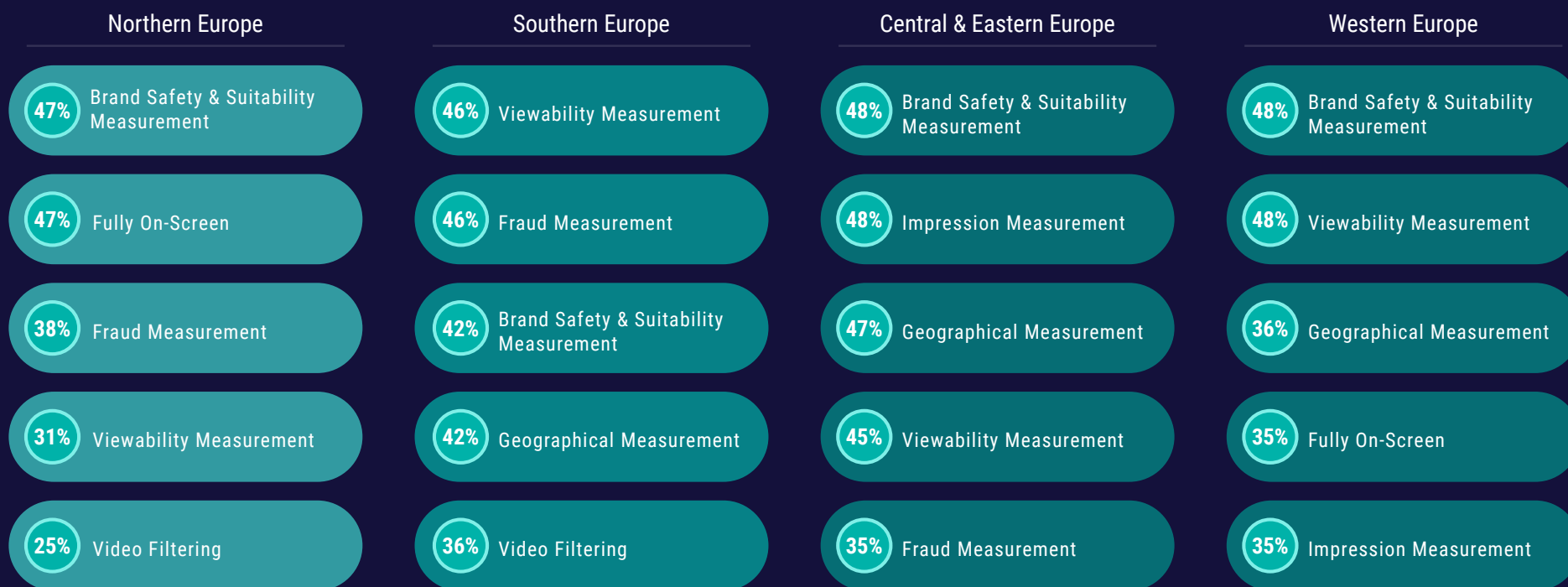
THE MISSING INGREDIENTS

# Quality Solutions: Advertiser Regional Differences

While use of different solutions varies across regions, brand safety and suitability and viewability are consistently prioritised.

(Top 5)

## Which Solutions are you Using for CTV Activations?



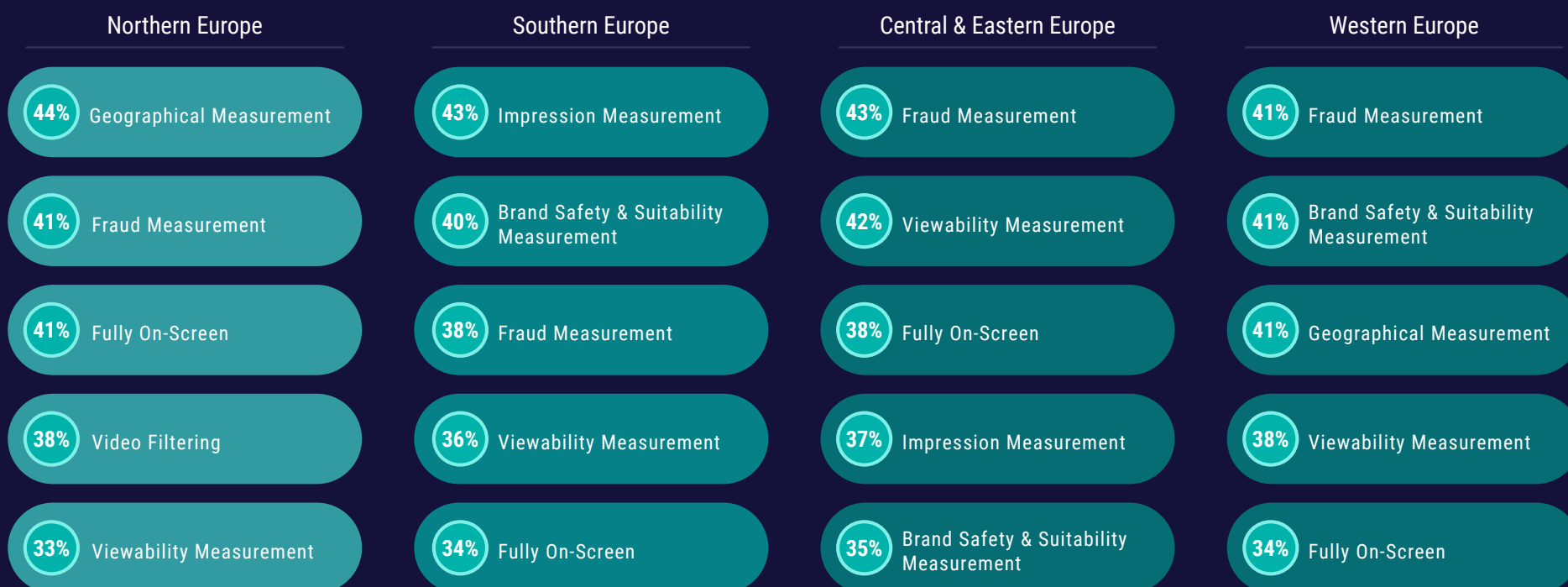
THE MISSING INGREDIENTS

# Quality Solutions: Publisher Regional Differences

For publishers, deploying solutions to combat fraud is consistent across all regions, and fully on-screen also ranks amongst the top solutions across regions – suggesting publishers are focused on ensuring ads are delivered in a well-lit, impactful environment.

(Top 5)

## Which Solutions are you Using for CTV Activations?



# The Missing Ingredients

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**Alex Hole**

Vice President and General  
Manager, Samsung Ads EMEA

Show-level transparency easily wins the hearts and minds of many advertisers across the CTV landscape as it marries critical information and insight with flexibility. Those who previously opted for exclusively traditional TV no longer need to solely rely on a specific show to capture their key audience, with the availability of real-time data. A data-driven streaming strategy allows for accuracy and precision at a level that remains irreplaceable across traditional TV. In today's TV landscape, advertisers should opt for a total TV approach and utilise the multitude of opportunities at their disposal to reach those they might have previously missed. Arguably more important than show-level transparency to the overall success of any advertising campaign is, however, audience data. With an in-depth understanding of a target audience such as which apps they prefer, their favourite content type or their acceptability of adverts varying across TV environments, advertisers can see maximum effectiveness.

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**Adam Lynch**

Director Broadcaster Partnerships,  
Microsoft Advertising

Quality measurement in CTV isn't just about inventory; it's about brand suitability. What resonates or is suitable for one audience, may not be for another. Embracing brand safety and verification solutions, fosters trust and credibility by contextualising ad placements. Encouraging tag acceptance is crucial in enhancing transparency. Advertisers and publishers alike should collaborate on tagging standards and content sensitivity to ensure a balanced approach to content monetization.

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# The Missing Ingredients

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**Alex Thomas**

Director, Brand Safety &  
Responsible Investment, GroupM

CTV and broadcasting platforms have long been viewed as high-quality environments. However, this reputation can also render CTV a target for fraudsters aiming to exploit and capitalise on the revenue linked with premium media placements. Moreover, while CTV is typically perceived as highly viewable, there are nuanced factors to consider. For example, if an advertisement is displayed on a device with the TV screen turned off, it cannot be deemed viewable. Measurement providers like DoubleVerify are actively tackling these concerns. The core principles of Brand Safety and Suitability remain consistent regardless of channel, which are transparency, control and measurement. Understanding precisely where your advertisement is placed and having the ability to drive optimisation is as crucial as ever for brands. The CTV landscape has historically grappled with fragmentation and technological limitations, hindering the development of these vital elements through the ecosystem. While progress has certainly been made, there is still room for further advancement, which are key to reducing brand safety and suitability concerns across CTV.

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# Looking to Tomorrow

## What's Next for CTV Advertising in Europe?



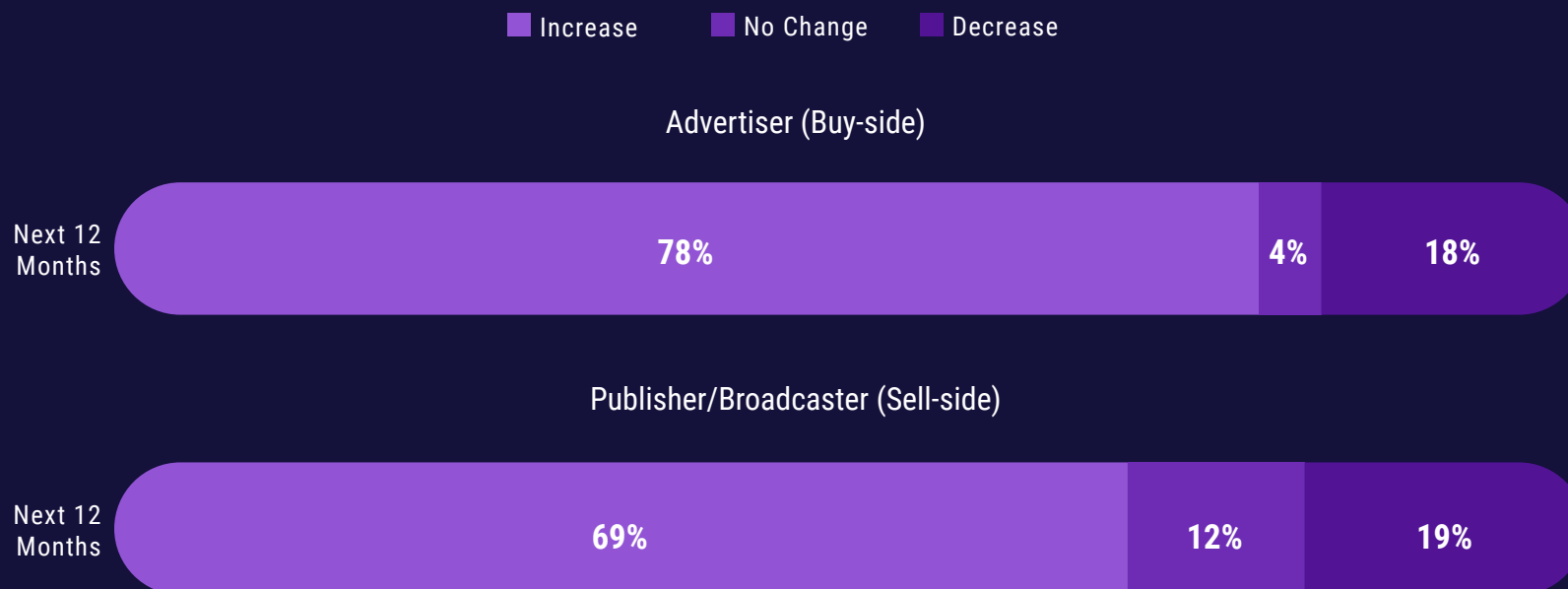


LOOKING TO TOMORROW

# CTV Spend Outlook is Positive Across Publishers and Advertisers

In the next 12 months, both publishers and advertisers are bullish on the amount they intend to spend or invest in CTV. Over three quarters (78 percent) of advertisers plan to raise their spend over the next 12 months. Publishers are not planning to increase spend as significantly, but just over two-thirds (69 percent) plan an increase in the next 12 months.

## Do you plan to increase your planning/spend on Connected TV over the next 12 months?

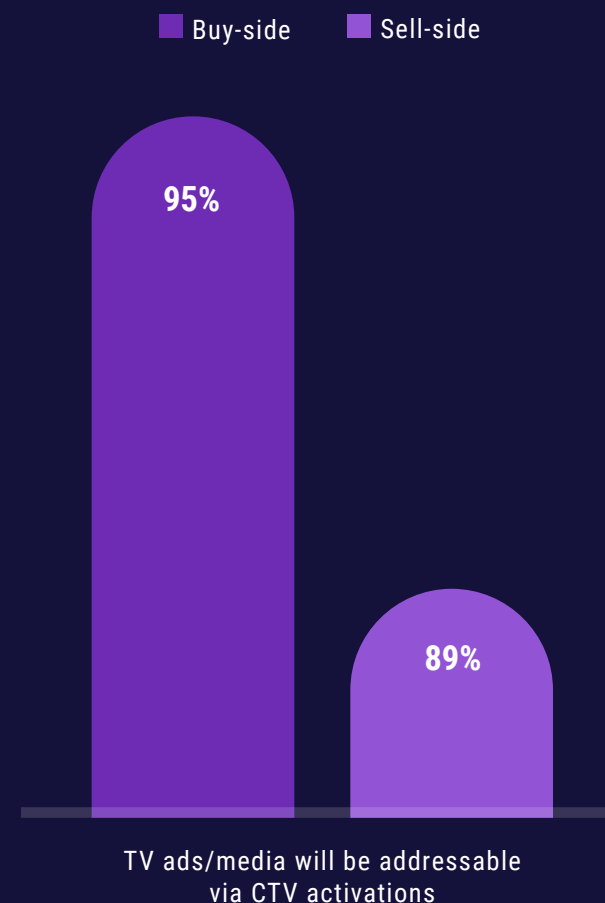


LOOKING TO TOMORROW

# Addressability and Actionability the Next Frontier of CTV Advertising

Both advertisers and publishers strongly believe that addressability and actionability are on the horizon. The ability to take action or purchase directly from ads shown on CTV devices has the potential to shift the way CTV is used in the media mix to drive outcomes for advertisers and publishers, which has the potential to make their inventory even more attractive.

Which do you think is the most likely for the future of our industry?



# Summary of Key Takeaways From Research

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**Helen Mussard**  
Chief Marketing Officer  
IAB Europe

The CTV (Connected TV) investment landscape is poised for significant growth, driven by the capacity to scale audiences and achieve cost efficiencies. However, to capitalise on this growth there is a recognised need for improvements in reporting and measurement. Incorporating media quality measurement presents a current challenge, with just half of buyers implementing brand safety and suitability solutions to safeguard their ad spend. Furthermore, transparency into the placement of ads is lacking, as less than a third of buyers consider transparency in CTV ad placement to be satisfactory. Despite these challenges, CTV ad investments are anticipated to rise, with a projection for an increase in the addressable TV ads via CTV activations. This outlook reflects the evolving nature of CTV advertising and the growing importance of this channel in the broader media landscape.

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**Felicity Dudley**  
EMEA Marketing Director,  
DoubleVerify

CTV is a necessary string to an advertisers bow, and although the emphasis remains on building brand awareness and reach, its digital nature provides enhanced control over frequency, context, and measurement, winning advertisers with transparency and flexibility. As highlighted in this first-of-its-kind research, there exists a common misconception among advertisers that every CTV impression is inherently safe and aligns with an advertisers brand values. However, this assumption is often far from reality. The fact is, a diverse range of potentially harmful or inappropriate content can be found across various CTV apps. By embracing CTV as an integral part of a connected strategy, alongside a verification strategy, brands gain the ability to craft transformative experiences, ultimately driving significant business results in a brand safe environment.

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# Summary of Key Takeaways From Research

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- CTV is top of mind for brands and agencies when developing their media strategies. More than 50% of buyers said that they “always” or “frequently” consider CTV when planning or buying media. This is most prevalent in Central and Eastern Europe.
- Programmatic Advertising on CTV gains ground, but lags behind traditional media buys
- For advertisers, CTV provides an opportunity to access premium programming at scale — expanding and augmenting audiences they may already reach on linear TV. More than 50 percent of advertisers cited scale as one of their key priorities.
- CTV is driven by advertisers’ need to increase brand awareness as well as the desire to reach new audiences.
- CTV is key to the media plan as just under two thirds of buyers are investing to complement the media mix. These drivers are largely consistent across regions in Europe.
- Publishers operating a CTV offer are prioritising ‘convincing new buyers to begin advertising on CTV’ to grow their business.
- The implementation of media quality measurement is a challenge with two thirds of buyers and just over two thirds of sell-side respondents reporting that quality measurement was very difficult to incorporate into CTV campaigns.
- Quality Verification on CTV Is used by just less than half of both advertisers and publishers, highlighting that more education is needed to raise awareness of the importance of quality.
- There is work to be done in terms of transparency. Less than one third of all respondents reported that they know exactly where their CTV ads are being placed and this is even lower for programmatic placements. This further demonstrates the importance of media verification and quality control measures.



[www.DoubleVerify.com](http://www.DoubleVerify.com)