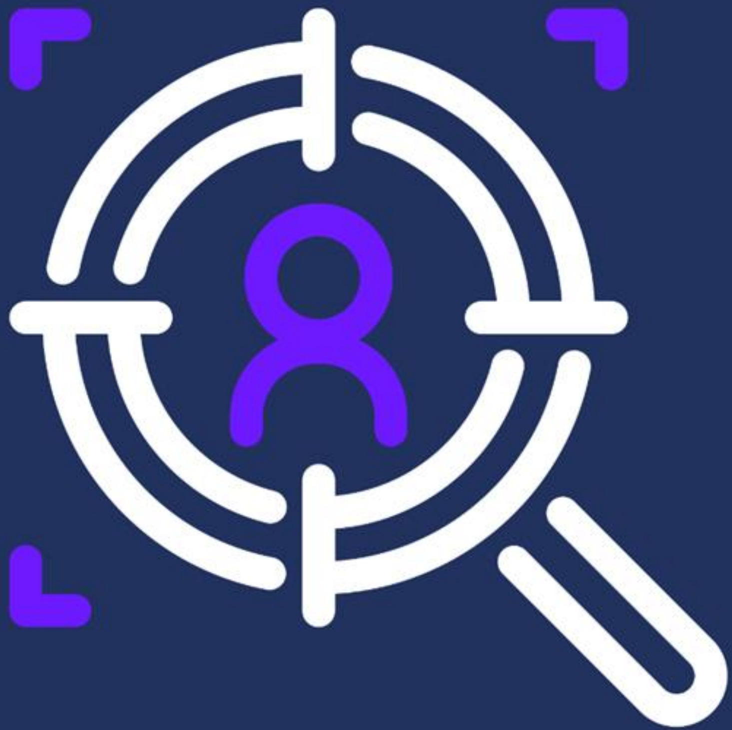
November 2025



ADOPTION OF ADDRESSABILITY & MEASUREMENT SOLUTIONS REPORT

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Executive Summary

Knowledge of Addressability: Nearly 9 in 10 respondents are at least moderately familiar with addressability in digital advertising, with Ad Tech companies and agencies being most likely to have experts. Advertisers, however, showed a lack of expertise beyond moderate familiarity.

Key Addressability Challenges: The most significant challenge cited by 68% of respondents is the **lack of cross-platform data access and transparency**. Privacy regulations (58%) and signal loss due to cookie deprecation (48%) are also major concerns. Buy-side organisations are most concerned with cross-platform data access (78%) and privacy regulations (56%), while publishers focus more on signal loss and audience segmentation/activation challenges.

User Identification Methods: The most common user identification methods are **first-party data and cookies**, followed by IP addresses, third-party cookies, hashed email addresses, and publisher-based identifiers.

Addressability Solution Adoption: Over half of respondents are adopting or testing **Data Clean Rooms** and **Unified ID solutions**. Contextual Data solutions (46%), Seller-Defined Audiences (38%), and Customer Match (36%) also show strong uptake. Buy-side organisations show higher adoption rates for activation-focused solutions (Customer Match, probabilistic cohorts, ID-less approaches), while publishers lean towards first-party data and contextual solutions

Knowledge and Challenges in Measurement: Over 70% of respondents report high familiarity ("Very familiar" or "Expert") with privacy-first measurement. Key challenges are **attribution without cookies (53%)** and **lack of standardisation (53%)**.

Measurement Adoption: Traditional KPIs dominate, with 94% using media metrics and 86% relying on campaign metrics. Advanced, privacy-safe, aggregated, and modelled approaches, such as **Media Mix Modelling (46%)** and **Reach Estimation (46%)**, are emerging, but adoption remains fragmented. Measurement solutions are most commonly deployed in desktop and mobile web, CTV, and mobile apps.

Introduction

As the digital advertising industry continues its move towards a privacy-first future, organisations across Europe are reassessing how they identify, reach, and measure audiences. Addressability has become a critical focal point in this transition, underpinning everything from audience targeting and activation to frequency management, measurement, and campaign optimisation. At the same time, increasing regulatory scrutiny, heightened consumer expectations, and fragmented solutions across markets have created new complexities for stakeholders on both the buy and sell side.

To better understand how addressability and measurement solutions are currently being adopted in Europe, IAB Europe's Addressability and Measurement Working Group surveyed advertisers, agencies, publishers, and technology providers to capture a clear picture of:

- Current usage of addressability and measurement solutions
- Perceived value and benefits
- Barriers to adoption and implementation

This research provides essential insight into the industry's progress, remaining gaps, and the areas where further education, collaboration, and standardisation are needed.

To learn more about the IAB Europe's Addressability & Measurement Working Group and how you can get involved, please reach out to Lucio Gagliardi at gagliardi@iabeurope.eu.

> ***Wayne Tassie***
> **Group Director NL, DoubleVerify & Chair of IAB Europe's Advertising & Media Committee**
> *As Europe accelerates toward a privacy-first advertising ecosystem, Addressability and Measurement sit at the core of this transformation. This research shows momentum across the industry and highlights the uneven adoption and fragmentation that continue to slow progress.*
>
> *Organisations require clarity to map their vision. Regardless of whether you are an advertiser, agency, publisher, or technology provider, there is a common need for consistent guidance, interoperable solutions, and stronger alignment across markets. The goal of the Advertising and Media Committee is to help bridge these gaps by supporting industry education, fostering collaboration, and championing practical standards that allow every part of the ecosystem to move forward with confidence.*

Methodology & Respondent Overview

The survey was conducted online and shared via IAB Europe's channels with IAB Europe members and the broader digital advertising community. Supported by our network of National IABs and Federations across 27+ European countries, it gathered responses from over 79 participants between August and September 2025, representing advertisers, agencies, publishers, and ad tech providers.

Figure 1: Breakdown of Respondents by Stakeholder Type

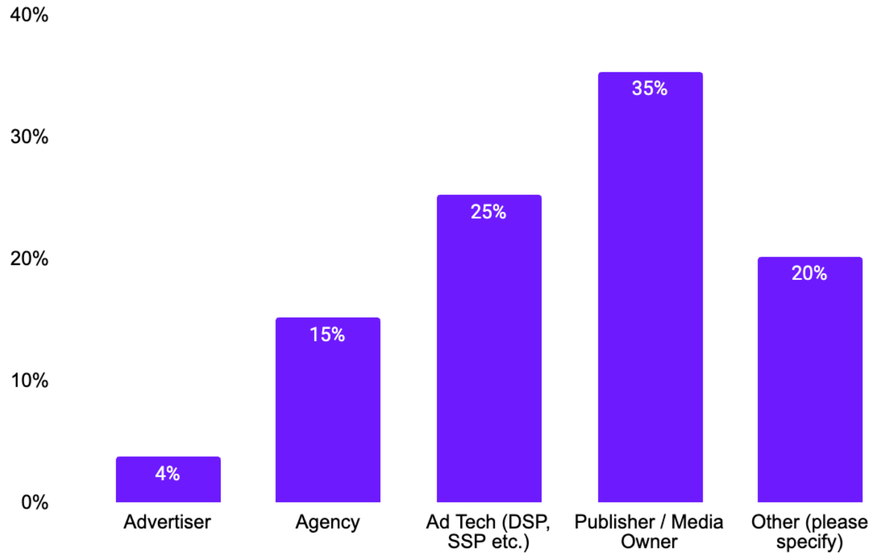
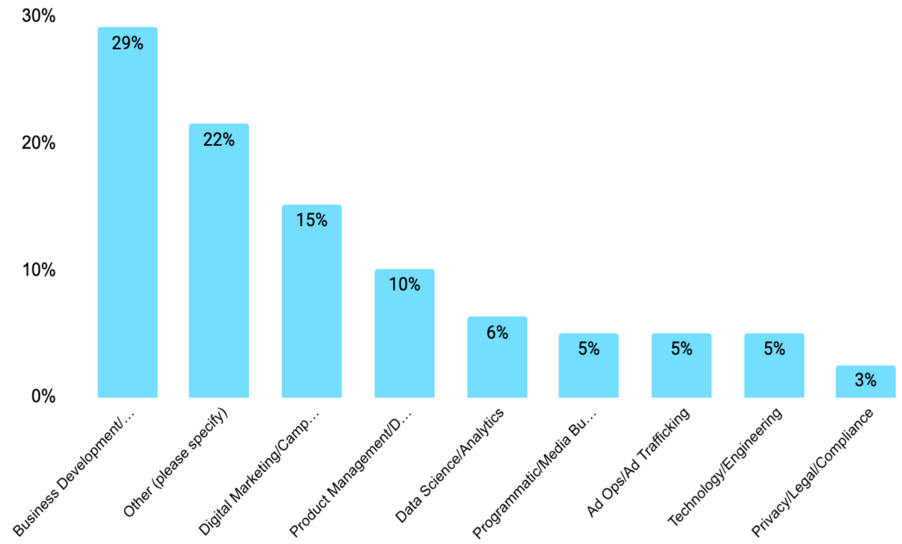


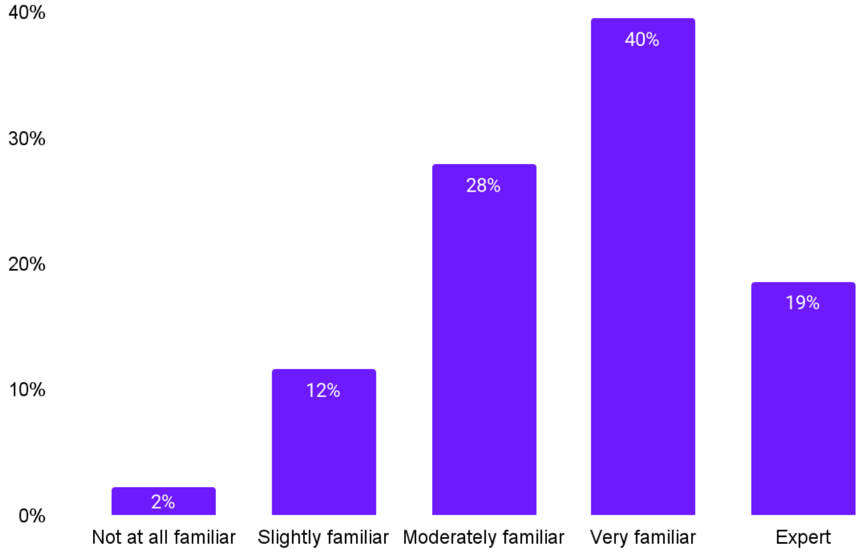
Figure 2: Breakdown of Respondents by Job Role



Knowledge of Addressability & Challenges

The industry is lacking experts in digital advertising addressability, but many consider having some familiarity with it. Nearly 9 in 10 respondents are at least moderately familiar with addressability in digital advertising, with nearly 1 in 5 identifying as experts. Ad Tech companies and agencies are most likely to have experts within their organisations, while advertisers are lacking anyone who is beyond moderately familiar. The results also show that those with a more technical role (e.g. programmatic, technology/engineer) are more likely to classify themselves as an expert in addressability.

Figure 3: Familiarity / Knowledge of Addressability in Digital Advertising (all respondents)



Q. How familiar are you with the concept of addressability in digital advertising?

Kofi Amoako
Regional Vice President, Addressability, EMEA PubMatic

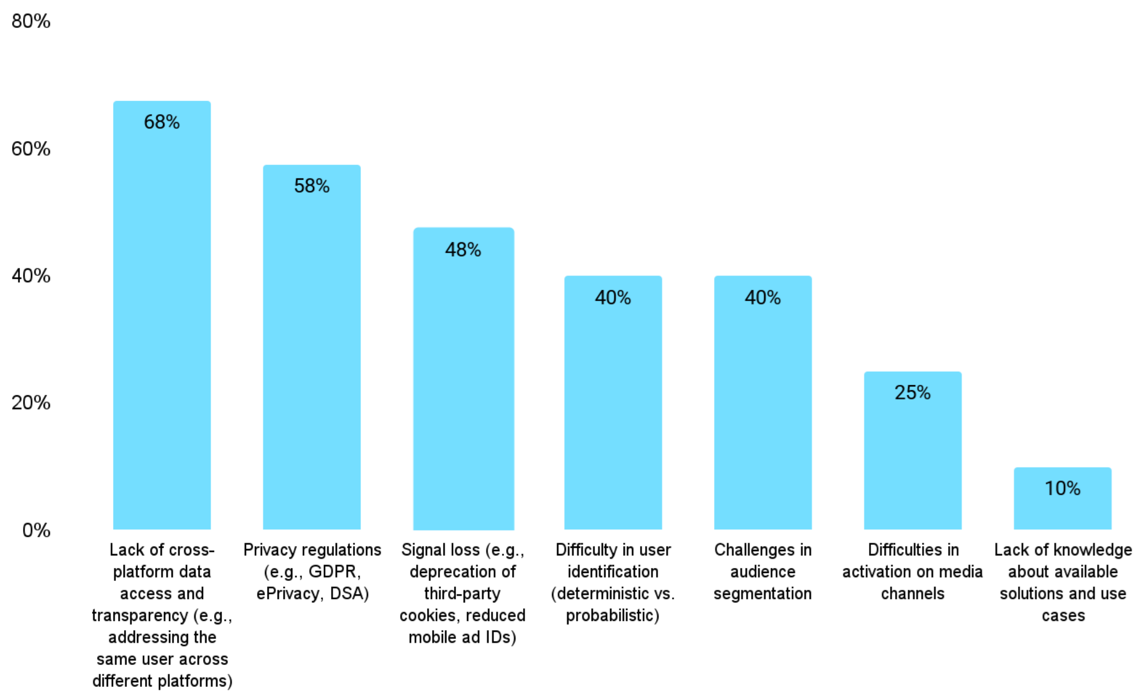
As the industry continues to evolve beyond third-party cookies and into a new era of privacy-first advertising, intelligent curation offers a tangible way forward for addressability. It allows buyers and sellers to connect quality inventory with trusted data and transparent supply paths — delivering better outcomes while respecting user expectations. What's exciting is that curation bridges many of the gaps highlighted in this report, from cross-platform data challenges to measurement consistency, by creating an infrastructure where collaboration, control, and accountability can coexist. The next stage of programmatic growth will come from how effectively we align around these curated, privacy-safe and performance-driven solutions.

Knowledge of Addressability & Challenges

Analysis of organisation size by ad spend/revenue budget demonstrates that those with smaller budgets are less familiar with/have less expertise in the areas of addressability. Further analysis by country/market type shows that those in a global role are more likely to be very familiar or even an expert in addressability.

The most pressing challenge in terms of addressability solutions is the lack of cross-platform data access, cited by 68% of respondents. Privacy regulations and signal loss due to cookie deprecation follow closely, affecting approximately half of the industry.

Figure 4: Addressability challenges (all respondents)



Q. What are the key challenges your organisation faces regarding addressability in the current digital advertising landscape?

Knowledge of Addressability & Challenges

Organisations with smaller budgets tend to express greater concern about limited cross-platform data and knowledge gaps, likely due to constrained resources for training and expert support, resulting in reliance on a narrower set of platforms.

Analysis by organisation type reveals that publishers report a higher number of challenges than any other stakeholder group, unsurprising given their reliance on robust addressability and measurement solutions as core components of their business model.

Further analysis by country and market type indicates that stakeholders in emerging markets express heightened concern around limited awareness and education regarding available solutions, as well as inconsistent standards across platforms, reflecting the evolving and fragmented nature of these markets.

Stakeholders in business-facing roles are primarily concerned with the lack of industry standards, reflecting their focus on consistency and interoperability across partners. In contrast, those in product roles cite integration challenges and cost pressures as their key concerns, highlighting operational and technical barriers to implementation.

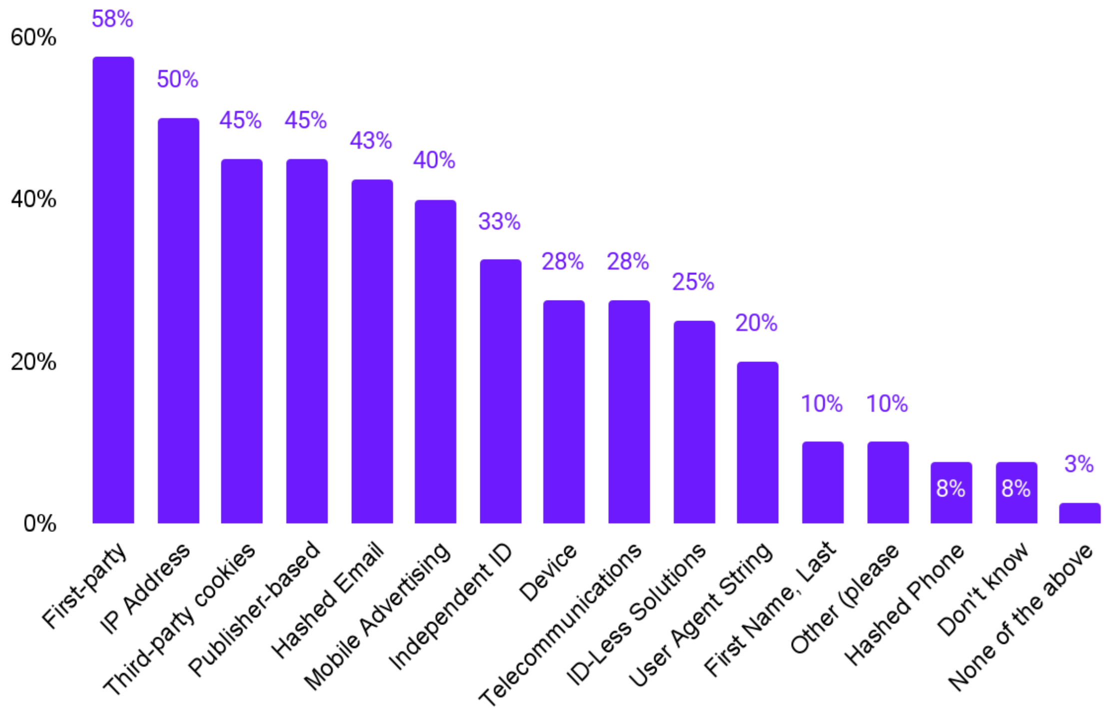
Adoption of Addressability Solutions

User ID Solutions

Organisations most commonly rely on first-party data and cookies (58%) for user identification in digital advertising. Other prevalent methods include IP addresses (50%), third-party cookies (45%), hashed email addresses (43%), and publisher-based identifiers (45%).

Analysis of organisation by ad spend/revenue budget highlights that those with larger budgets are using more user ID solutions. Further analysis by organisation type reveals a clear divide in user ID solution adoption; advertisers show relatively low uptake, while publishers and media owners report significantly higher adoption. Among the limited solutions employed by advertisers, first-party and third-party data emerge as the most commonly used.

Figure 5: Adoption of User ID Solutions (all respondents)



Q. Which types of user identification methods does your organisation currently use for addressability?

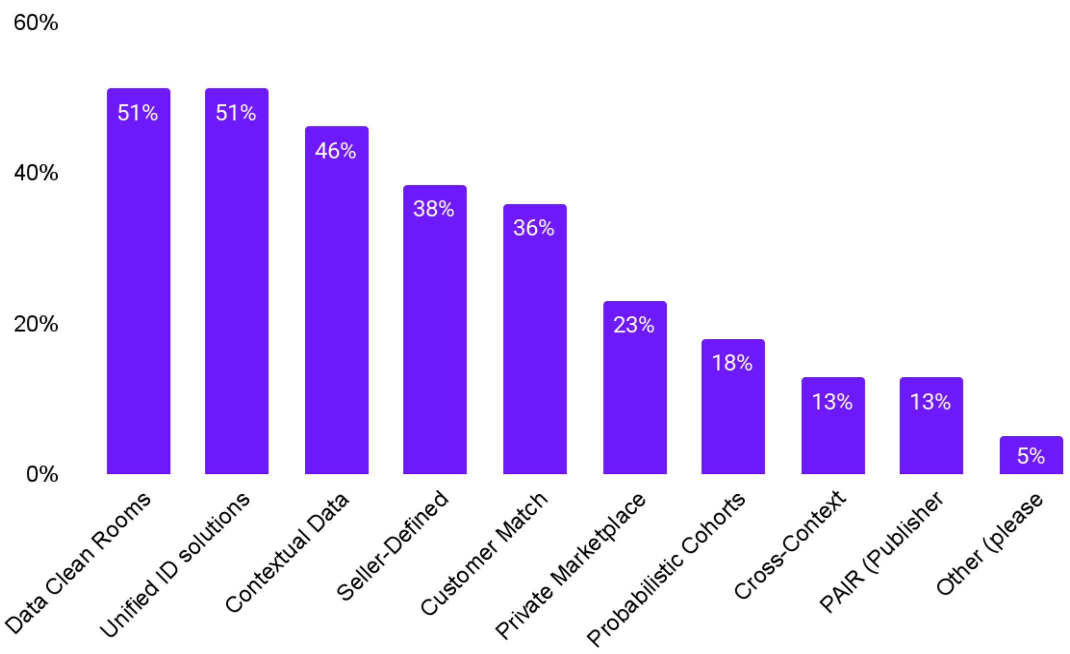
Adoption of Addressability Solutions

Additional Addressability Solutions

Over half of respondents are adopting or testing Data Clean Rooms and Unified ID solutions, making them the most popular addressability technologies. Contextual Data solutions, Seller-Defined Audiences, and Customer Match also show strong uptake across the industry.

Buy-side organisations favour activation-focused solutions like Customer Match, probabilistic cohorts, and ID-less approaches, showing higher adoption rates than publishers. In contrast, publishers lean heavily on first-party data, publisher-based identifiers, and contextual solutions to maintain audience addressability.

Figure 6: Adoption of Addressability Solutions (all respondents)



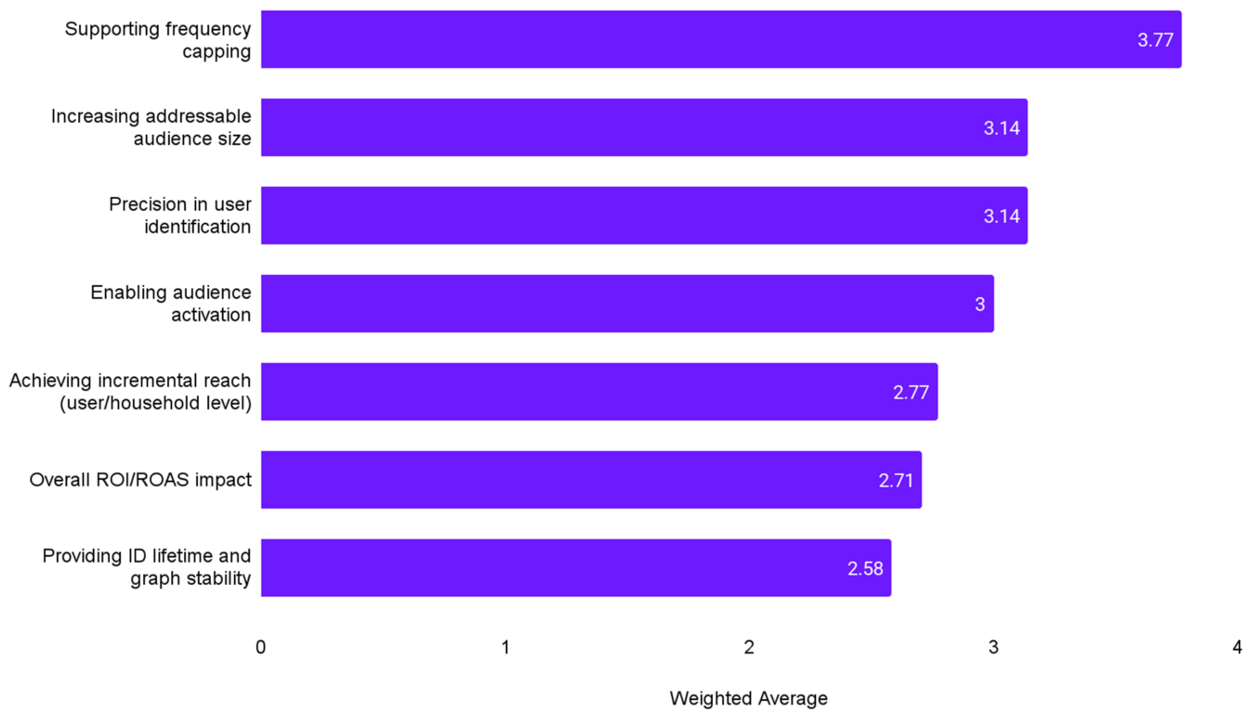
Q. Which Addressability solutions/technologies is your organisation currently adopting or testing?

Adoption of Addressability Solutions

When asking respondents about which media environments they use addressability solutions in, desktop web stands out as the dominant environment for the adoption of most addressability solutions, while mobile app and mobile web show strong uptake for Customer Match, Data Clean Rooms, and Contextual Data. By contrast, addressability solutions in DOOH and in-game channels are still underutilised, and Retail Media is emerging but has yet to reach mainstream adoption.

Respondents were asked to rank how addressability solutions are performing (from 1 to 5) and the data reveals that they are strongest in supporting frequency capping (3.70) and increasing addressable audience size (3.52). They also show solid effectiveness in enabling audience activation (3.45) and achieving incremental reach (3.19).

Figure 7: Adoption of Addressability Solutions (all respondents)

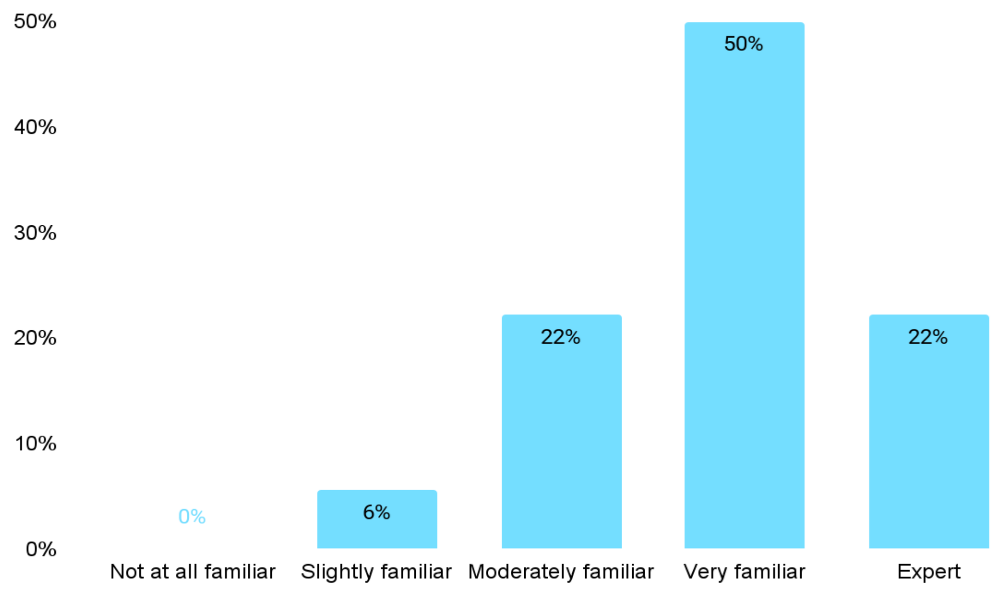


Q. For the addressability solutions your organisation has adopted, how would you rate their performance in the following areas? (1=Poor, 5=Excellent)

Knowledge of Measurement & Challenges

Over 70% of respondents report being “Very familiar” or “Expert” in privacy-first measurement, indicating strong overall confidence. This expertise is more pronounced on the buy-side (75%) compared to publishers/media owners (53.3%), suggesting a need for targeted education to close the gap.

Figure 8: Familiarity / Knowledge of Measurement in Digital Advertising (all respondents)

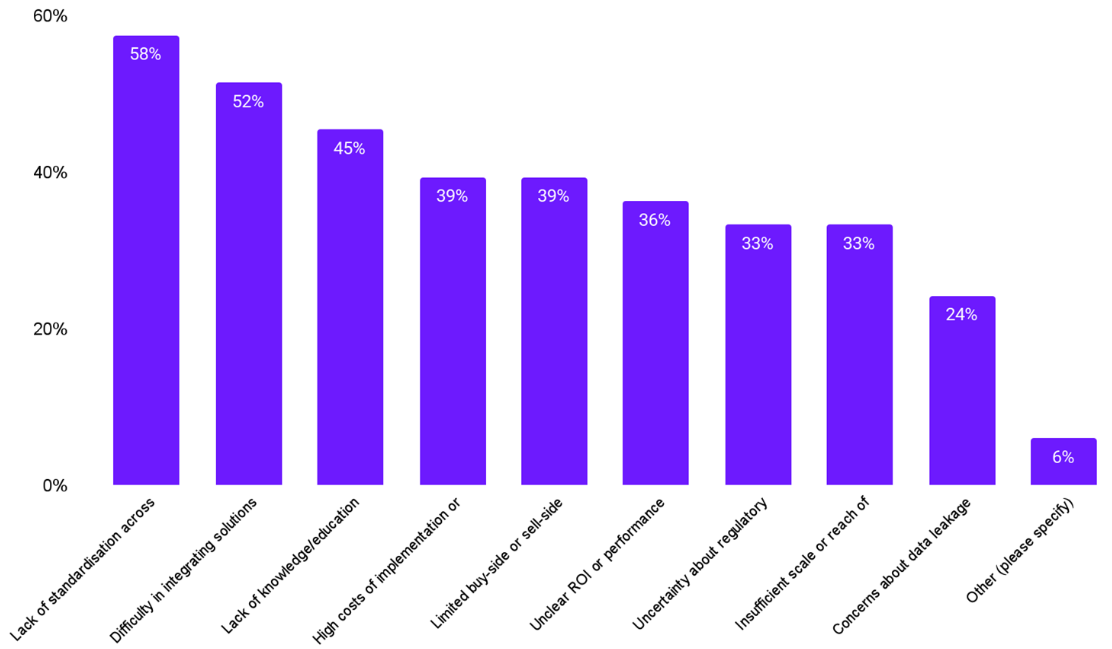


Q: How familiar are you with the concept of measurement in digital advertising, particularly in a privacy-first context?

Knowledge of Measurement & Challenges

Measurement in digital advertising faces persistent challenges, with attribution without cookies (53%) and lack of standardisation (58%) topping the list. Buy-side respondents are more impacted by tracking limitations, while publishers highlight regulatory compliance and fragmented standards. These findings underscore the need for unified frameworks and privacy-resilient methodologies across the ecosystem.

Figure 9: Measurement Challenges (all respondents)



Q: What are the biggest barriers to wider adoption of new addressability and measurement solutions within the industry?

Knowledge of Measurement & Challenges

Further analysis by country and market type indicates that stakeholders in mature markets are less likely to cite challenges in measurement, whilst those in emerging markets cite widespread challenges in this area - particularly in the lack of standardisation and cross-device measurement.

Stakeholders in business-facing roles are primarily concerned with the lack of industry standards, reflecting their focus on consistency and interoperability across partners, whilst those in campaign manager roles are more concerned with effective attribution without cookies.

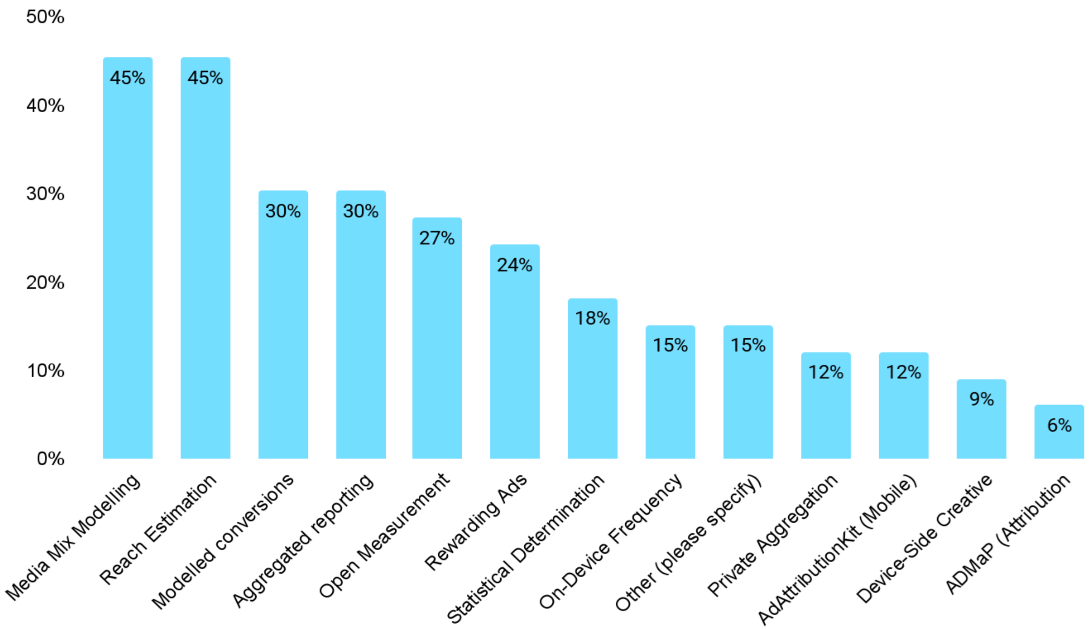
Adoption of Measurement Solutions

Measurement remains anchored in traditional KPIs, with 94% of respondents using media metrics and 86% relying on campaign metrics. While engagement, attribution, and brand lift methods show growing interest (50–65%), advanced approaches like cross-channel measurement and attention scores are still emerging. This suggests a gradual shift toward deeper performance insights, though mainstream adoption is still limited.

Measurement adoption is shifting toward privacy-safe, aggregated, and modelled approaches, with Media Mix Modelling and Reach Estimation leading at 45% each. Buy-side respondents favour modelled conversions and statistical techniques, while publishers lean into reach estimation and media mix modelling. Despite this momentum, analysis by organisation size (in terms of ad revenue or ad spend) shows that adoption of solutions remains fragmented.

Measurement solutions are being deployed across a range of environments, with desktop and mobile web, CTV, and mobile apps most commonly used. Buy-side respondents show broader channel adoption, particularly in mobile and CTV, while publishers are more concentrated in desktop and Retail Media. Despite this cross-channel activity, consistency and interoperability remain key challenges for the industry.

Figure 10: Adoption of Measurement Solutions (all respondents)



Q. For each selected Measurement Solution selected, in which environments is your organisation currently using it?

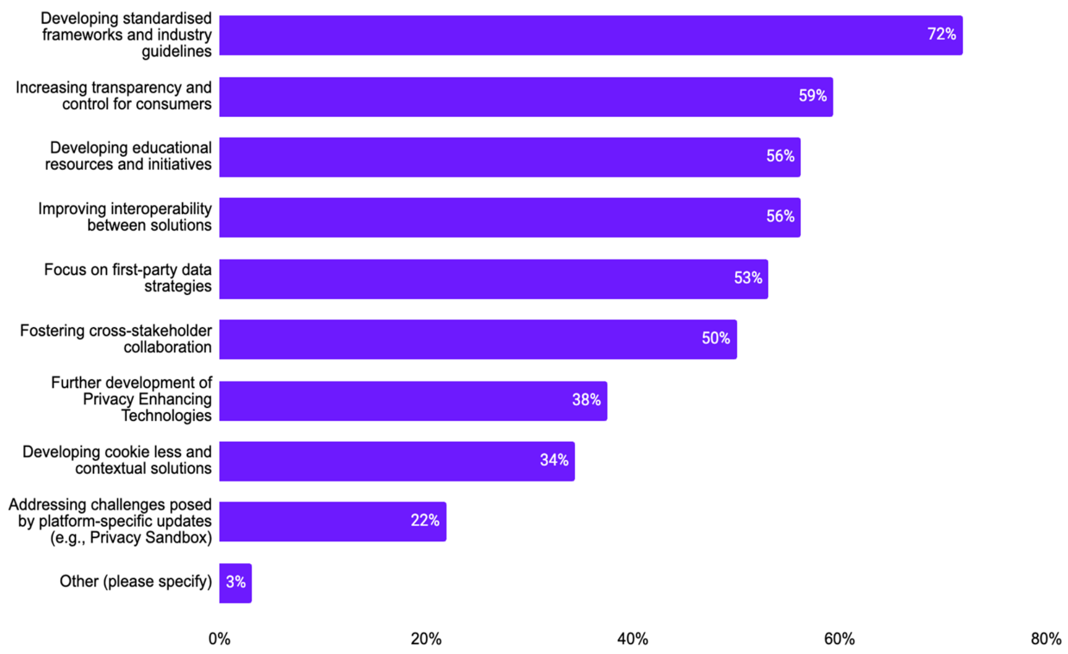
Implications for the Industry

The top priority for advancing addressability and measurement is the development of standardised frameworks and industry guidelines (72%), underscoring a strong need for consistency and alignment. Other key focus areas include consumer transparency (59%), educational initiatives (56%), and improved interoperability (56%), highlighting the industry's emphasis on strengthening foundational infrastructure.

Martin Beauchamp
Chief Solutions Officer, Mediabrands

The industry continues to foster a culture of ambition, innovation, and resilience. This study points to numerous initiatives from Data Clean Rooms to various modelled approaches that drive better audience creation, targeting, and measurement. This progression is clearly a response to the deprecation of the cookie and the consequence of advancing technology. Crucially, the data shows an overwhelming call for standardised frameworks, improved interoperability, and greater consumer transparency as the highest priority. As more channel spend becomes addressable, complexity will rise, proving we must concentrate on skills development and redefining which blend of KPIs truly leads to a tangible outcome for advertisers.

Figure 11: Industry Focus Areas (all respondents)



Q. What are the most important areas for the digital advertising industry to focus on to facilitate the evolution of addressability and measurement?

Summary

The report shows that Europe's digital advertising industry is moving toward a privacy-first future, with moderate familiarity in addressability, but expertise is concentrated among ad tech firms and agencies. Key challenges include cross-platform data access, privacy regulations, and signal loss, while adoption of solutions like Data Clean Rooms, Unified IDs, and Customer Match is growing but fragmented. Measurement remains anchored in traditional KPIs, yet privacy-safe, modelled approaches are emerging, underscoring the urgent need for standardised frameworks, interoperability, and consumer transparency.

In parallel, IAB Europe's Addressability and Measurement Working Group is developing a comprehensive Solution Mapping to give the industry clearer visibility into the ecosystem of available addressability and measurement tools, solutions and use-cases, to increase the number of educational resources to strengthen industry understanding of addressability solutions and deepen awareness of privacy regulations and their impact on identity and addressability practices.

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