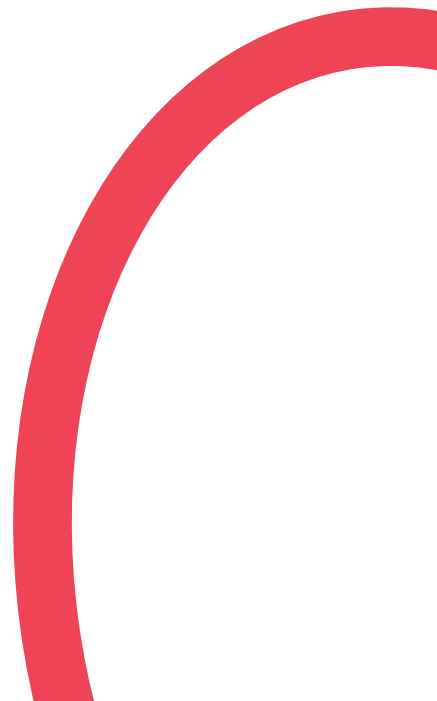
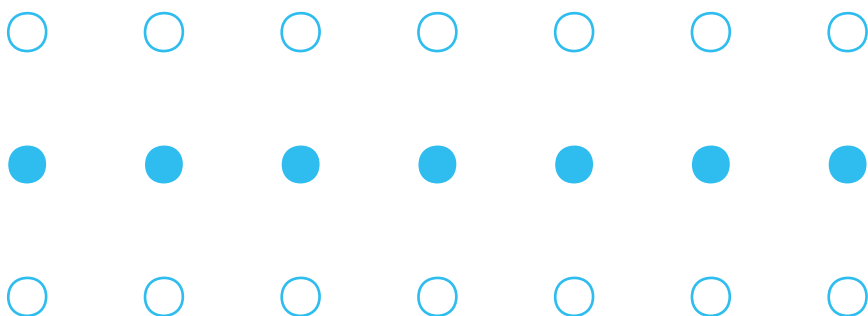




**Hopprr BTR-100 Survey on
Connected TV- and CPE-based
Programmatic Advertising
Trends in Europe**



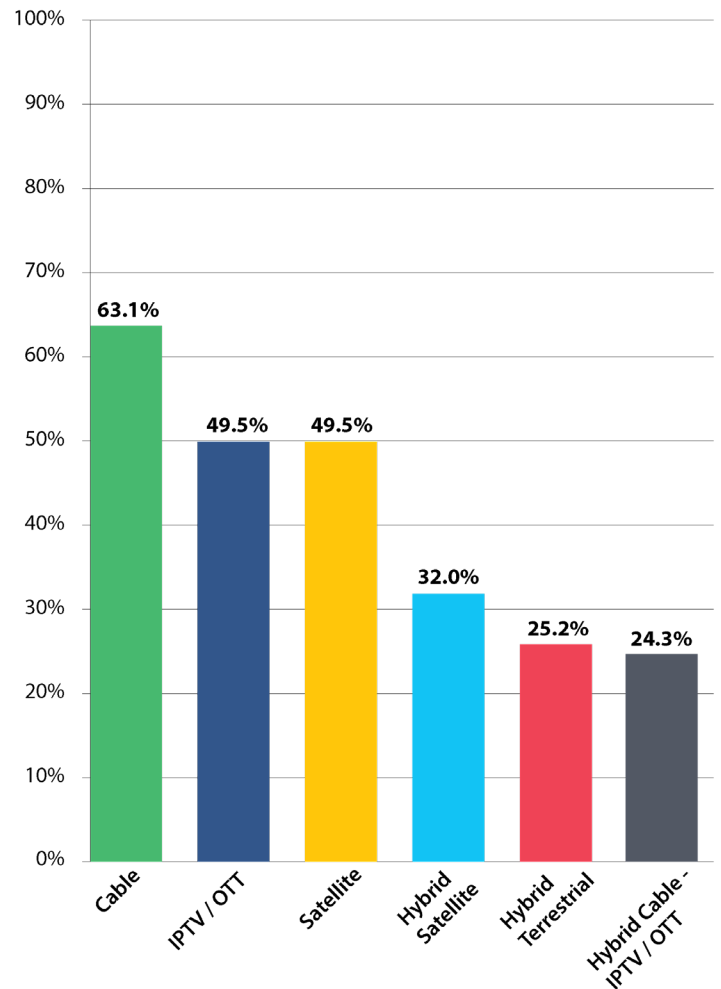
2021 shaping up to be the year of programmatic advertising for pay TV and network service providers in Europe

An overwhelming majority (87.4%) of network service provider executives agree that programmatic advertising delivered through smart/connected TVs and/or customer premises equipment (such as set-top boxes) will be an important source of revenue for network service providers and pay TV operators in Europe.

These are among the findings of a recent BTR-100 survey of senior executives from European communications service providers across the full array of delivery mediums.

The project was commissioned by Hopper, an innovative startup that is introducing new interactive, programmatic technologies and business models to advertisers, brands and network service providers.

“The uptake of Connected TVs by consumers across Europe through the pandemic year of 2020 has created an intelligent infrastructure that allows pay TV operators and network service providers to deliver highly targeted messages to connected-home audiences in an automated manner;” - Cyril Daoud, CEO of Hopper



“Our first annual survey of European operators reveals a thriving new business model that is creating much more intimate ties between consumers and brands. European service providers are in an ideal position to tailor engaging advertising content with a level of precision and transparency that is already revolutionizing the industry”



European pay TV operators and network service providers plan to expand investments in programmatic advertising initiatives to generate high-margin revenue streams from brand managers and marketing agencies over the course of 2021.

In so doing, executives are exploring new business models and advertising technology solutions that will monetize access to connected home audiences across the region without disrupting end-user entertainment experiences.

The survey of 103 European network service provider executives also revealed the following:

- 85.4% of respondents believe new developments in “ad-tech solutions” are making it easier for network service providers in Europe to deploy programmatic advertising initiatives.
- Over half (58.3% of executives surveyed) say generating revenues from programmatic advertising initiatives is a complicated business model to develop.
- Nearly three quarters (74.8%) indicated that their NSPs are already generating programmatic advertising revenues in one form or another.
- 67% reported their organization generated more programmatic advertising revenues in 2020 compared to 2019.
- Just over three quarters (75.7%) of respondents indicated that their NSPs will generate more programmatic advertising revenues in 2021 than in 2020.
- As a result, 72.8% of organizations represented in the European survey are planning to invest more resources into developing programmatic advertising programs over the course of 2021.

In rank order of priorities, here is how NSPs in Europe currently plan to roll out programmatic advertising initiatives:

- Interactive advertising - 63.1%
- Video advertising - 58.3%
- Banner advertising - 36.9%
- Rich media overlays - 35.0%
- Affiliate marketing - 35.0%
- Brand surveys - 33.0%
- Native advertising - 26.2%
- Walk-through advertising - 25.2%

(Total Respondents: 103 executives representing service providers operating across all European time zones -- including Turkey and Russia.)

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