



TV & DIGITAL REPORT

JULY 2020





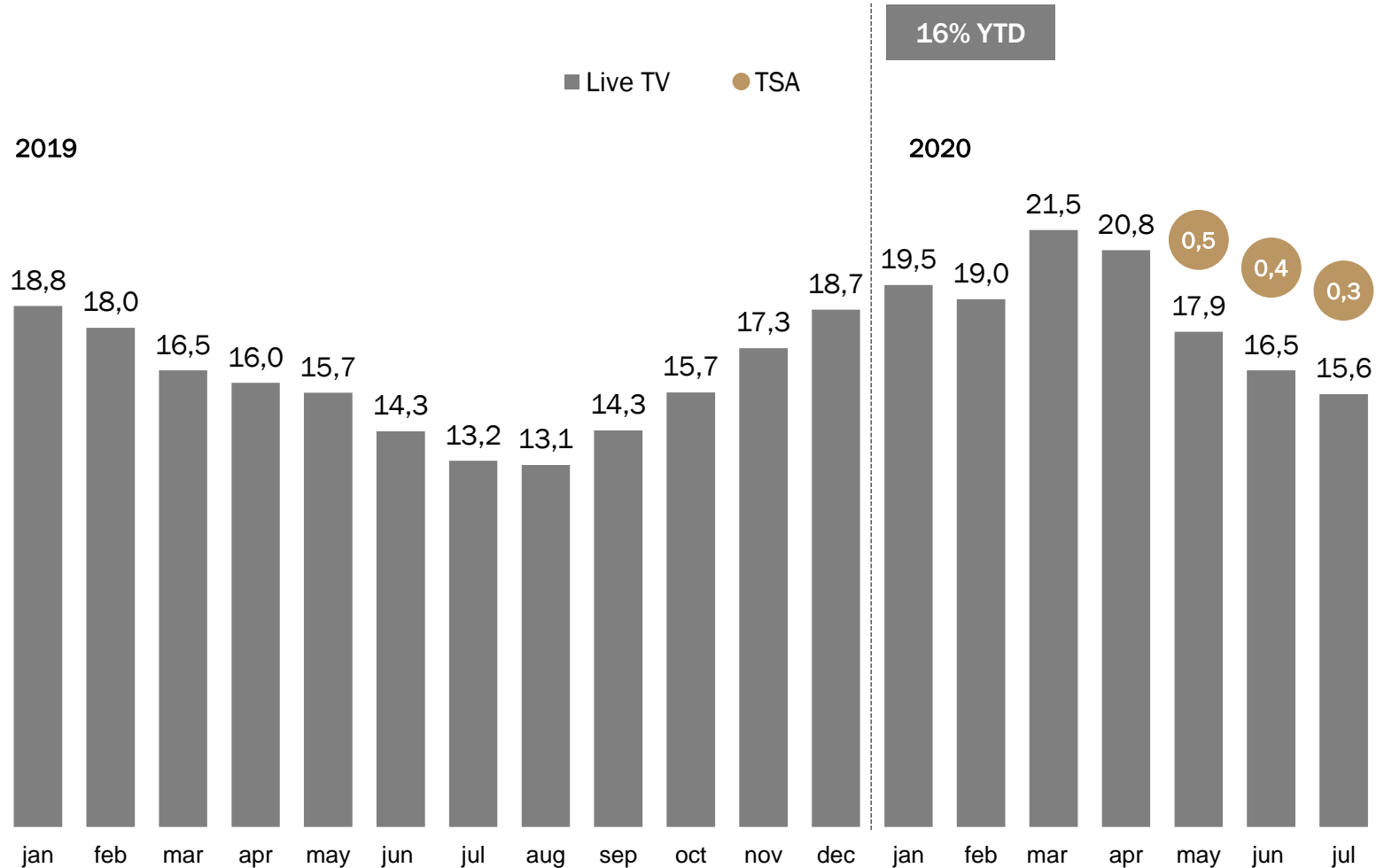
TV REPORT

FOCUSED ON NEWS GENRE

Source: GARB and Nielsen Admosphere
Data: People meter, national base
TG: A 18-49
Currency: BGN gross

TV VIEWERSHIP IS CONSTANTLY DECREASING SINCE MAY.

The overall TV consumption on YTD base however increased mostly due to the Covid-19 crisis.



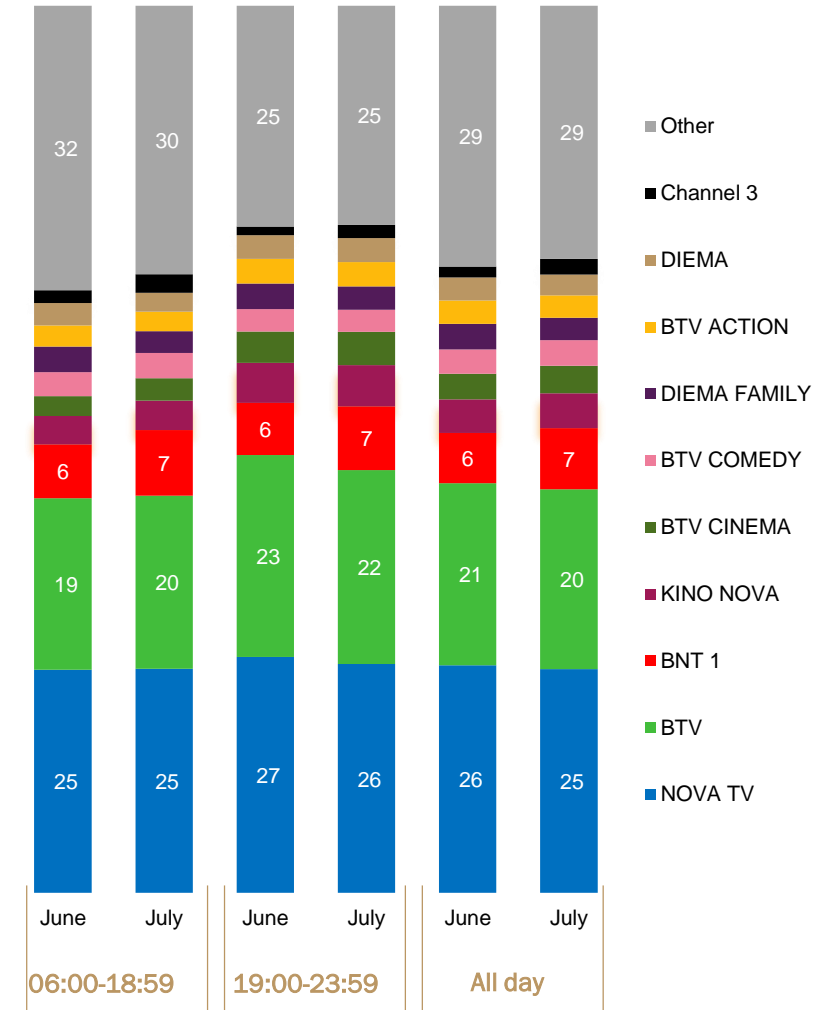
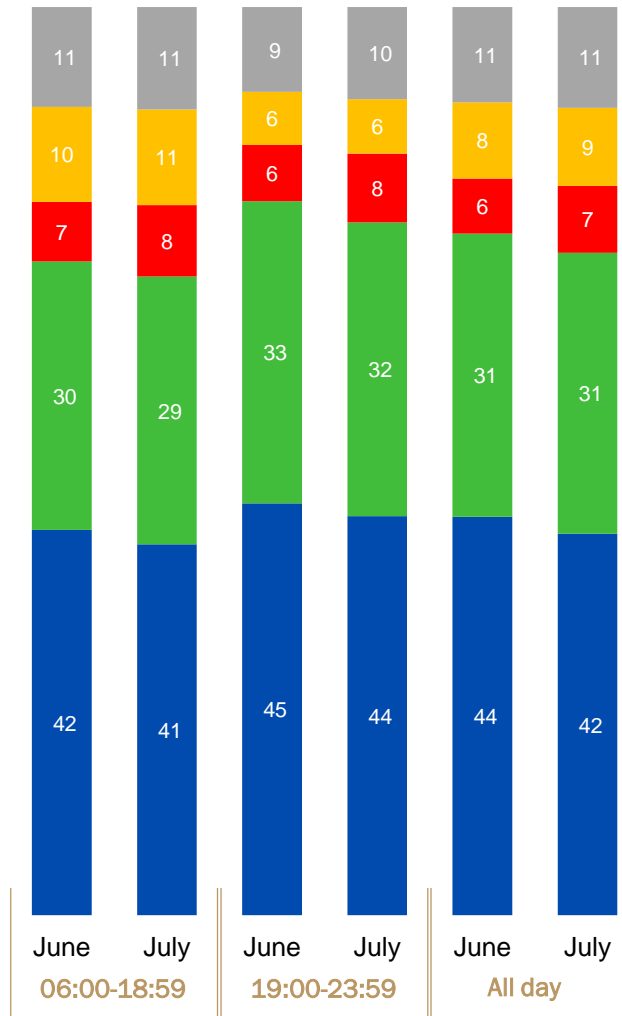
Source: GARB, A18-49

NBG DECLINED SHARE SLIGHTLY IN EACH TIME SLOT

BGM kept stable overall share.

Similar trend on channel basis.

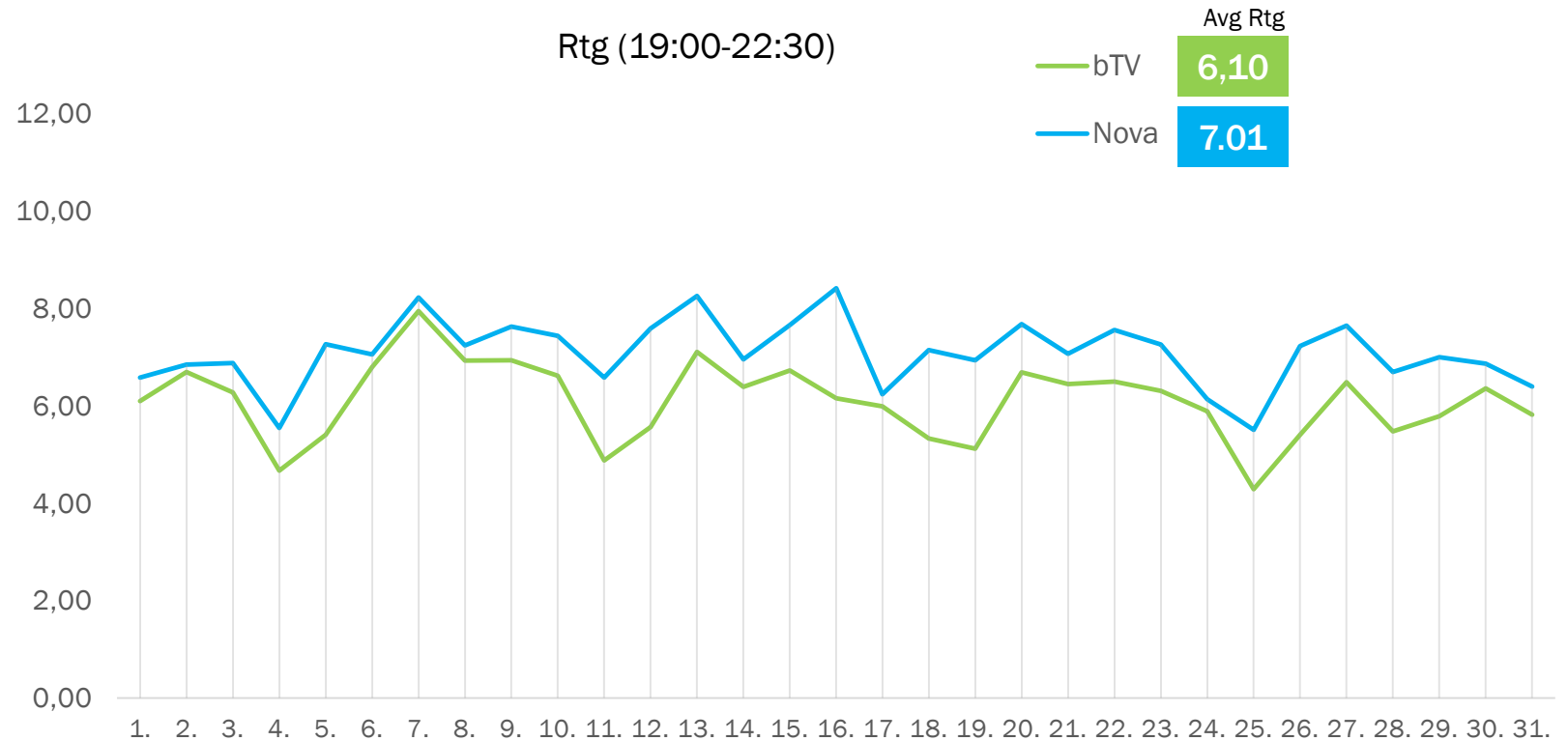
Channel 3 replaced Cartoon Network within top 10.



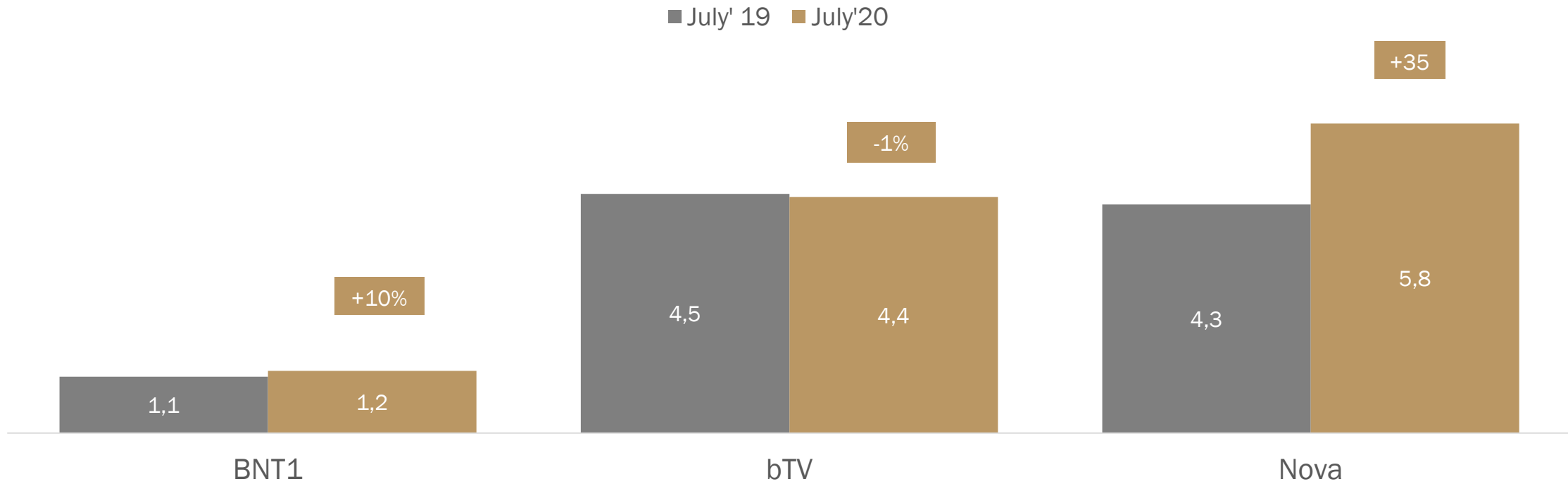
Source: GARB, A18-49

NOVA DOMINATED CENTRAL PT HOURS IN JULY

16% higher audience
attracted by Nova vs bTV



IN THE CONTEXT OF SERIOUS POLITICAL CRISIS, GARB REPORTED STABLE OR RISING INTEREST TOWARDS NEWS GENRE

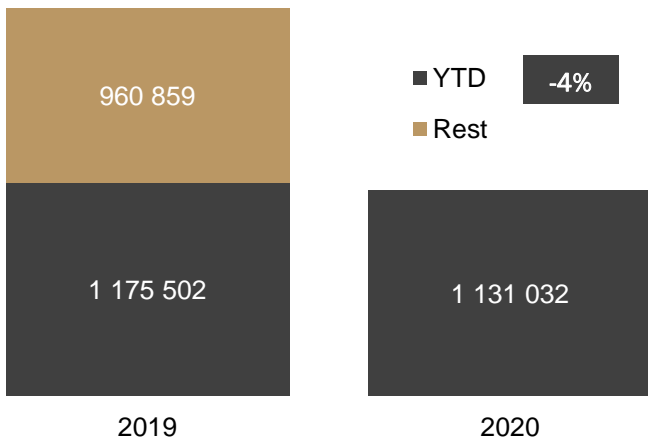


THE MARKET IS RECOVERING

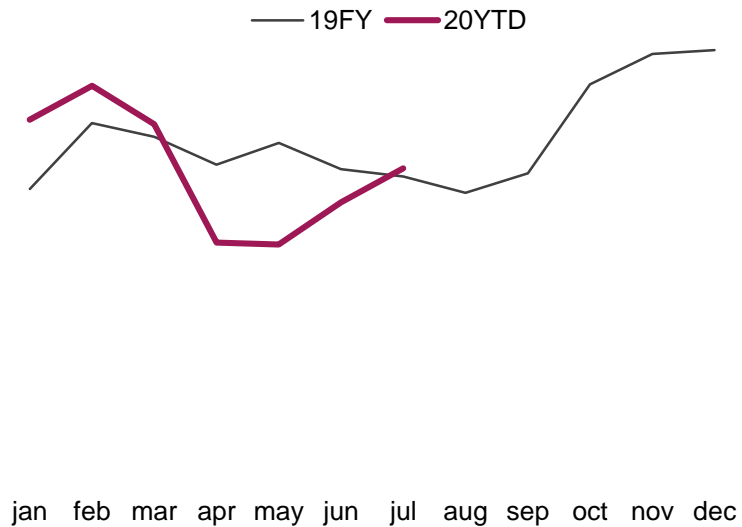
TRP30 IN JULY SURPASSED LAST YEAR'S FIGURE

P&G sustained leadership. Lidl replaced Ferrero within top 3
Retailers entered top 10 TV advertisers in 20YTD

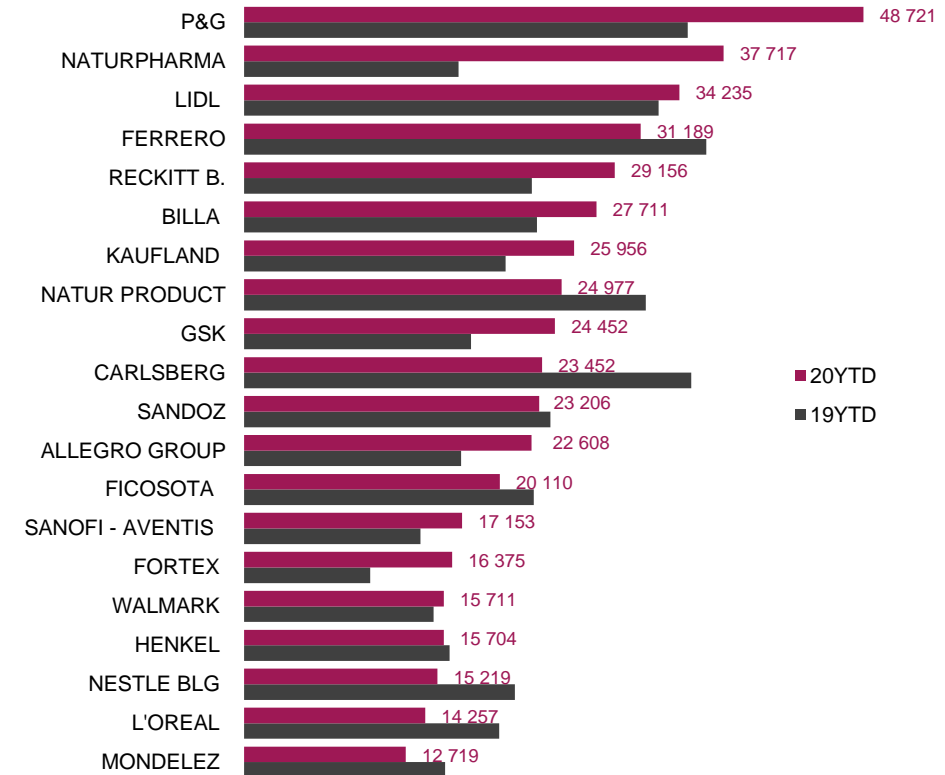
TOTAL TRP30



SEASONALITY

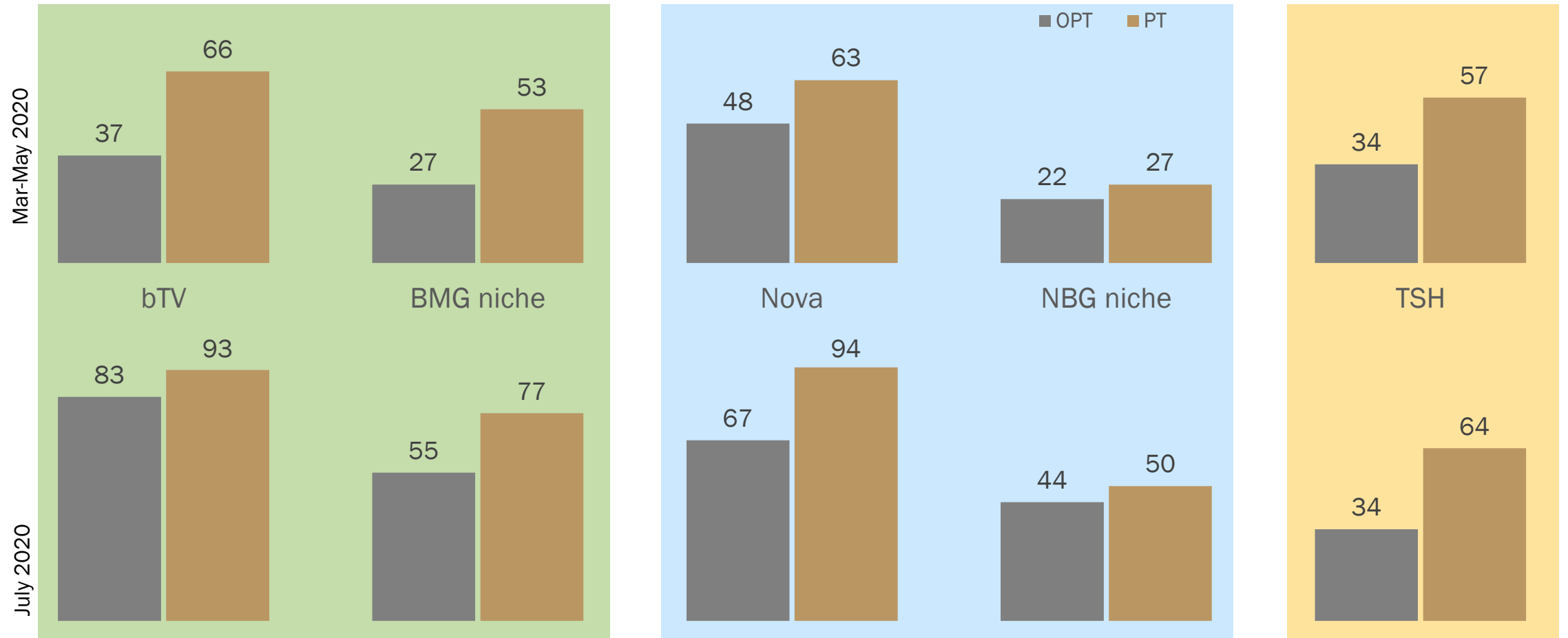


TOP ADVERTISERS



ANOTHER INDICATOR FOR THE RECOVERY PROCESS BTV & NOVA EXCEEDED 90% INVENTORY FULFILMENT

TSH seems to be less affected in terms of demand during the Lockdown but still improved PT performance

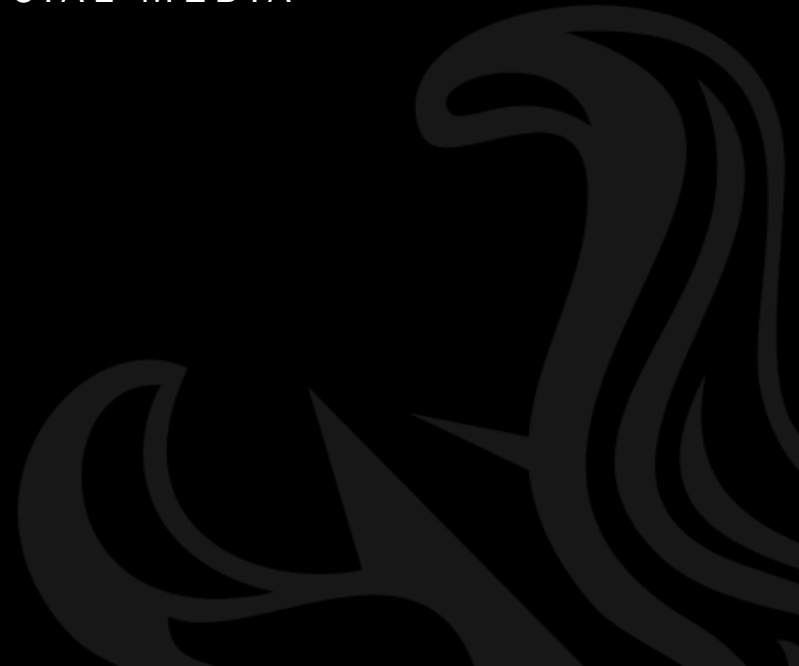


Source: GARB, based on 12 min/hour ad time. PT (19:00-24:00)

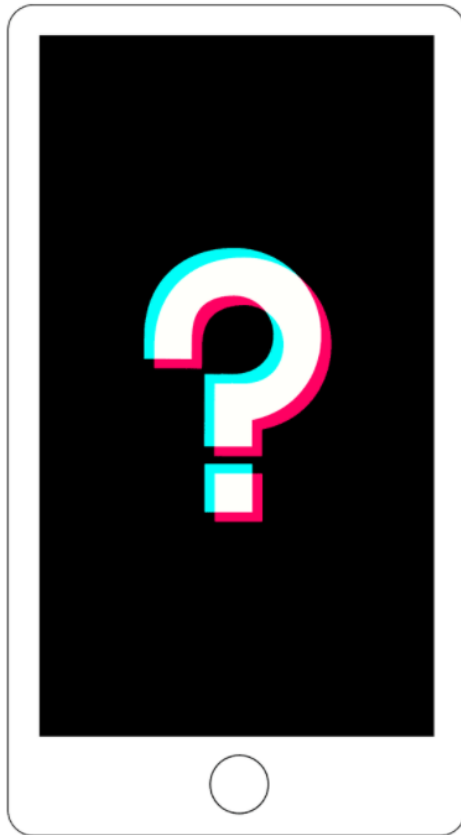


DIGITAL REPORT

FOCUSED ON TIKTOK AS SOCIAL MEDIA



WHAT IS TikTok?



In short, TikTok is a free app for iOS and Android that specializes in 15-second, musically-oriented videos. While the app was previously known as Musical.ly and initially found its fame through videos featuring lip-syncing to good tunes, it has become so much more.

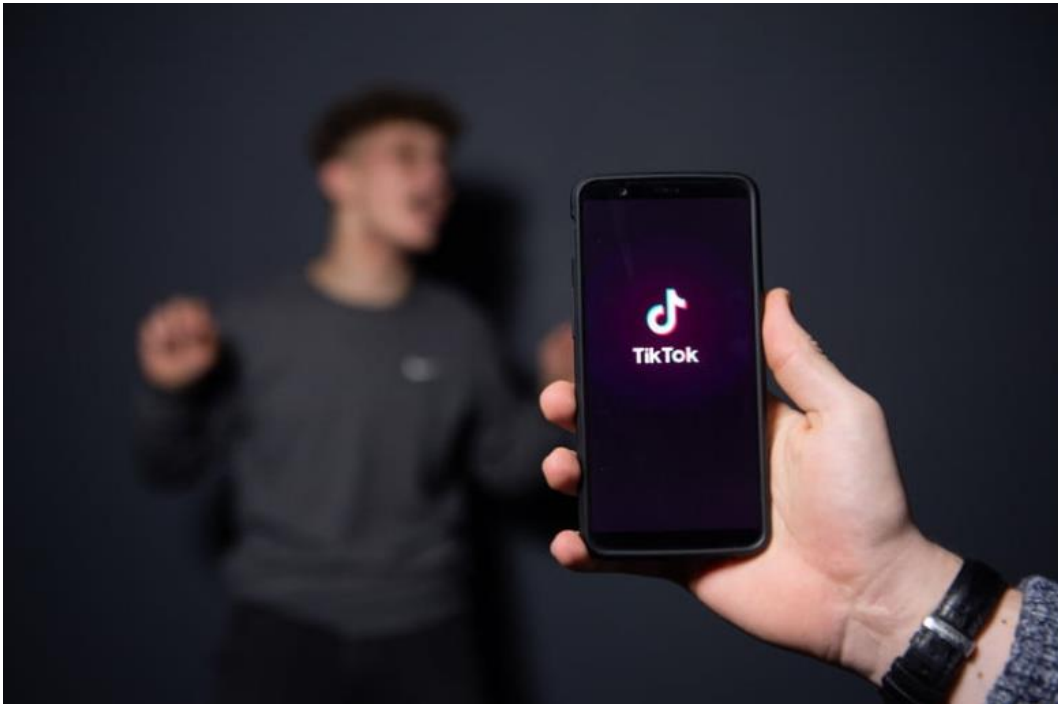
Users create vertical videos that typically run 15 seconds before looping to restart. They can also connect clips together to create videos up to 60 seconds long. Videos incorporate music samples, filters, quick cuts, stickers and other creative add-ons that allow users to make the most of the short length.

TikTok videos can feature musical genres such as hip-hop, electronic dance music (EDM), pop, rock, rap, and country in video categories like dance, comedy, food, sports, DIY, animals – pretty much anything. Just to keep it weird, some videos have no music at all.

TikTok isn't designed to be your big sister's old Vine account, either. According to TikTok, "It's raw, real, and without boundaries...It's from the gut, 'come as you are' storytelling told in 15 seconds." Got it.

In the ever-changing, politically-divided, pandemic-spreading, killer hornet-buzzing, crazy rollercoaster world that is 2020, TikTok has found a home in every nook and cranny. You'll find TikTok influencers creating content about everything, including politics, financial advice, quick 15-second diaries of their childhoods, how to drive in Texas, what life is like as the #maincharacter in their own movie, and absolutely anything in between. This mad shuffle between topics is driven by the app experience, and content creators are driven by trends that come and go rather than the simple lip-syncing roots of the past.

WHAT IS TikTok ALL ABOUT?



On most social networks the first step to showing your content to a lot of people is grinding to build an audience, or having lots of friends, or being incredibly beautiful or wealthy or idle and willing to display that or getting lucky or striking viral gold.

TikTok instead encourages users to jump from audience to audience, trend to trend, creating something like simulated temporary friend groups, who get together to do friend-group things: to share an inside joke; to riff on a song; to talk idly and aimlessly about whatever is in front of you.

Feedback is instant and frequently abundant; virality has a stiff tailwind. Stimulation is constant. There is an unmistakable sense that you're using something that's expanding in every direction.

The pool of content is enormous. Most of it is meaningless. Some of it becomes popular, and some is great, and some gets to be both. As The Atlantic's Taylor Lorenz put it, "Watching too many in a row can feel like you're about to have a brain freeze. They're incredibly addictive."

TikTok STATISTICS

Top Apps Worldwide for May 2020 by Downloads (Non-Game)



Overall Downloads	App Store Downloads	Google Play Downloads
1 TikTok	1 ZOOM	1 TikTok
2 ZOOM	2 TikTok	2 WhatsApp
3 WhatsApp	3 YouTube	3 ZOOM
4 Facebook	4 Facebook	4 Facebook
5 Messenger	5 Google Meet	5 Messenger
6 Instagram	6 Instagram	6 Instagram
7 Google Meet	7 Messenger	7 Aarogya Setu
8 Aarogya Setu	8 WhatsApp	8 Google Meet
9 YouTube	9 Gmail	9 Snapchat
10 Snapchat	10 Microsoft Teams	10 SHAREit

Note: Does not include downloads from third-party Android stores in China or other regions.

- TikTok has been downloaded over 2 billion times
- TikTok users spend 45 minutes on the app on average
- TikTok users open the app 8 times everyday on average
- TikTok gained more users in one month than Instagram gained in any 2019 quarter
- TikTok installs are up 96% year-over-year
- TikTok's 800 million MAUs surpasses LinkedIn, Reddit, Snapchat, Twitter, and Pinterest
- TikTok's monthly engagement rate is over 70%
- Over 63% of TikTok users are between the ages of 10 and 29
- Females on TikTok outnumber males nearly 2:1 in the U.S.
- 3x the number of U.S. users 18+ downloaded TikTok in April vs. last year
- Over \$456 million have been spent buying coins on TikTok
- The top 50 TikTok influencers have more followers than 16% of the world's population
- TikTok is the only top 5 social media app not owned by Facebook
- Nearly 80% of TikTok sessions are from Android users
- TikTok's #RaindropChallenge has over 1 billion views
- TikTok is available in 155 countries and 75 languages
- India, contributing over 30% of TikTok downloads, is a huge driver of the app's growth
- TikTok lost \$8 million in one week during the brief India 2019 ban
- Over 30% of all U.S. TikTok users are adolescents
- CoverGirl got over 6.5 billion ad impressions on a sponsored TikTok campaign

TikTok DEMOGRAPHICS



TikTok App Conquers the Teens of the World

41%

of Tik Tok users are aged **between 16 and 24.**

(Globalwebindex, 2019)



- 41 percent of TikTok users are aged between 16 and 24 years
- 56% of TikTok users are male and 44% are female
- Roughly 50% of TikTok's global audience is under the age of 34 with 26% between 18 and 24 years
- Chinese users account for 80% of the total time spent using TikTok in 2019
- 43% of new TikTok users are from India

TIKTOK SHIFTS GLOBAL MEDIA ACCOUNT TO PUBLICIS GROUPE'S ZENITH



A TikTok spokesperson confirmed to Ad Age that the video-sharing app has appointed Publicis Media's Zenith as its new global buying agency of record.

Zenith takes that account from Omnicom Media Group's PHD, which only won the business in August last year. Lead global buying duties were awarded to Zenith following a competitive pitch that involved "multiple holding companies".

TOP 20 WEBSITES

N	Node	Real users			Page views			Time spent per user			Reach-Internet		
		total	pc	mobile	total	pc	mobile	total	pc	mobile	total	pc	mobile
1	nova.bg	1 895 331	455 622	1 802 291	19 668 903	5 150 792	14 518 111	0:10:11	0:13:34	0:07:17	40,63%	15,85%	40,68%
2	novini.bg	1 874 752	247 228	1 832 110	25 480 713	4 518 166	20 962 547	0:13:06	0:26:07	0:09:53	40,19%	8,60%	41,35%
3	btvnovinite.bg	1 804 556	321 738	1 750 091	13 363 457	1 965 531	11 397 926	0:06:47	0:08:35	0:05:25	38,68%	11,19%	39,50%
4	olx.bg	1 762 856	591 706	1 679 427	225 759 143	39 773 315	185 985 828	1:21:39	0:59:20	1:04:49	37,79%	20,59%	37,90%
5	abv.bg	1 706 967	1 117 912	1 107 376	188 578 158	116 871 052	71 707 106	2:09:06	2:06:07	1:11:41	36,59%	38,90%	24,99%
6	blitz.bg	1 652 910	307 925	1 616 365	81 352 949	22 960 915	58 392 034	1:10:27	1:56:35	0:49:50	35,43%	10,71%	36,48%
7	24chasa.bg	1 627 845	332 452	1 540 130	29 519 440	7 934 758	21 584 682	0:27:35	0:53:11	0:17:41	34,90%	11,57%	34,76%
8	dariknews.bg	1 462 929	355 001	1 354 129	14 061 980	3 155 663	10 906 317	0:08:33	0:09:13	0:06:49	31,36%	12,35%	30,56%
9	fakti.bg	1 455 127	292 832	1 346 266	30 668 926	7 360 781	23 308 145	0:28:46	0:39:13	0:22:33	31,19%	10,19%	30,38%
10	dir.bg	1 434 610	365 022	1 268 217	41 298 276	19 370 757	21 927 519	0:38:52	1:15:21	0:22:17	30,75%	12,70%	28,62%
11	framar.bg	1 283 326	331 088	1 159 876	7 602 352	1 840 783	5 761 569	0:07:42	0:08:38	0:06:04	27,51%	11,52%	26,18%
12	bazar.bg	1 280 579	399 177	1 119 761	66 624 543	20 944 324	45 680 218	0:33:51	0:40:06	0:24:25	27,45%	13,89%	25,27%
13	dnevnik.bg	1 215 073	272 959	1 139 739	19 791 988	5 781 958	14 010 030	0:23:39	0:38:11	0:16:04	26,05%	9,50%	25,72%
14	vesti.bg	1 169 666	502 020	944 231	22 078 131	9 690 482	12 387 648	0:22:31	0:26:55	0:13:35	25,07%	17,47%	21,31%
15	dnes.bg	1 104 510	219 499	1 003 511	16 889 695	5 343 111	11 546 584	0:17:30	0:37:32	0:11:03	23,68%	7,64%	22,65%
16	actualno.com	1 097 006	210 555	964 295	9 658 879	1 443 191	8 215 688	0:08:26	0:22:22	0:04:43	23,52%	7,33%	21,76%
17	sinoptik.bg	1 088 154	310 280	984 069	35 015 977	5 450 777	29 565 200	0:13:13	0:09:13	0:11:43	23,33%	10,80%	22,21%
18	news.bg	1 070 266	199 397	958 341	10 226 301	2 307 105	7 919 196	0:10:30	0:17:01	0:08:11	22,94%	6,94%	21,63%
19	mobile.bg	1 053 440	273 444	960 552	188 247 378	33 844 137	154 403 241	1:10:07	1:21:36	0:53:40	22,58%	9,51%	21,68%
20	bnr.bg	1 036 996	241 083	921 822	5 998 361	3 010 501	2 987 859	0:16:56	0:59:54	0:03:23	22,23%	8,39%	20,80%



THANK YOU!

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