



TV & DIGITAL REPORT

NOVEMBER 2020





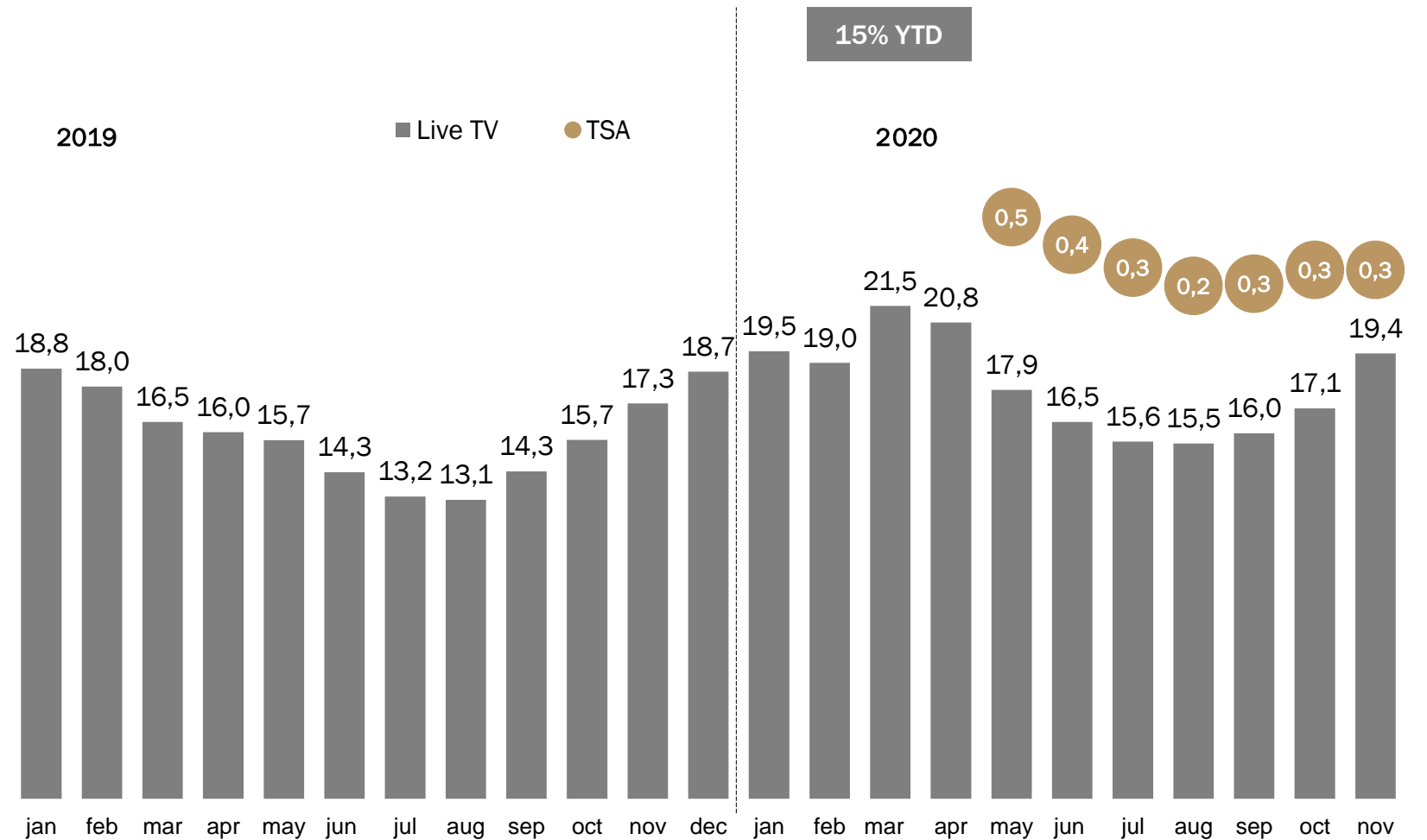
TV REPORT

FOCUSED ON CENTRAL PT NEWS

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

HIGHEST LIVE AUDIENCE SINCE APRIL

Double digit increase on YTD base.

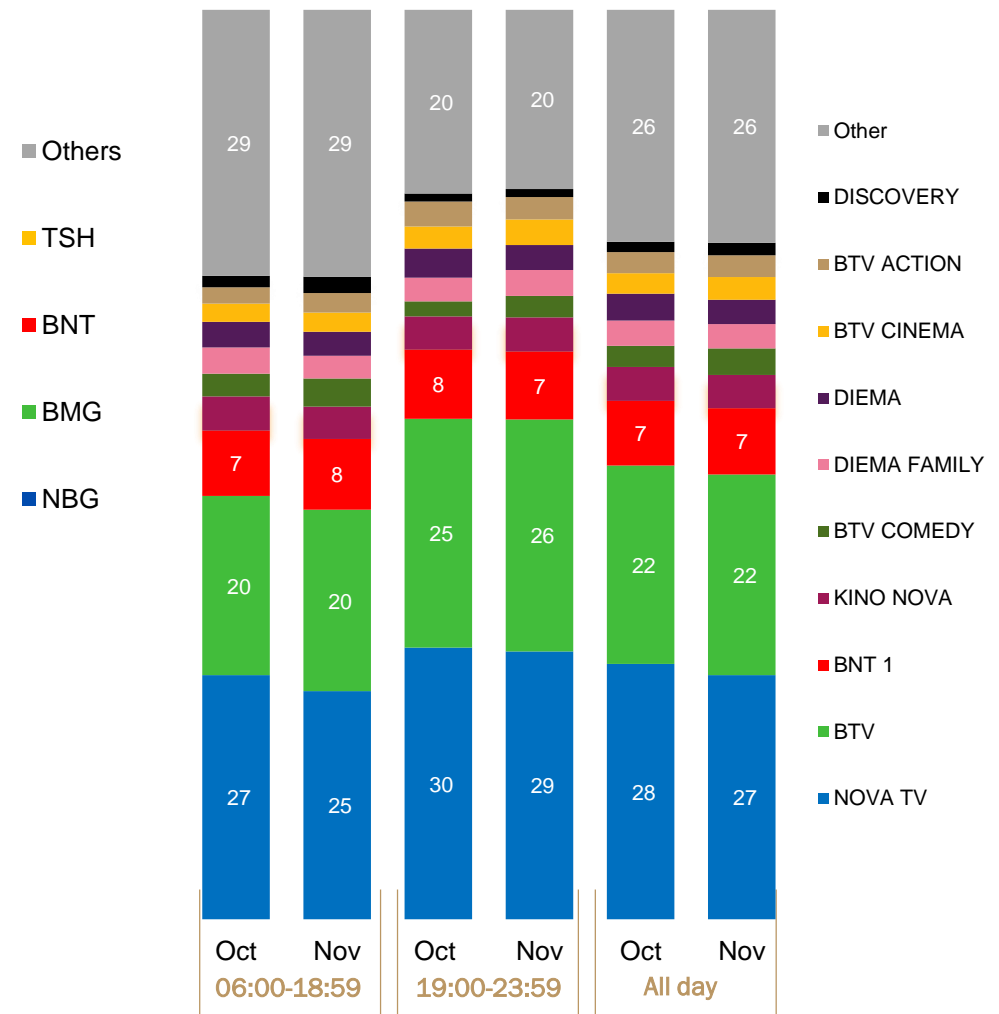
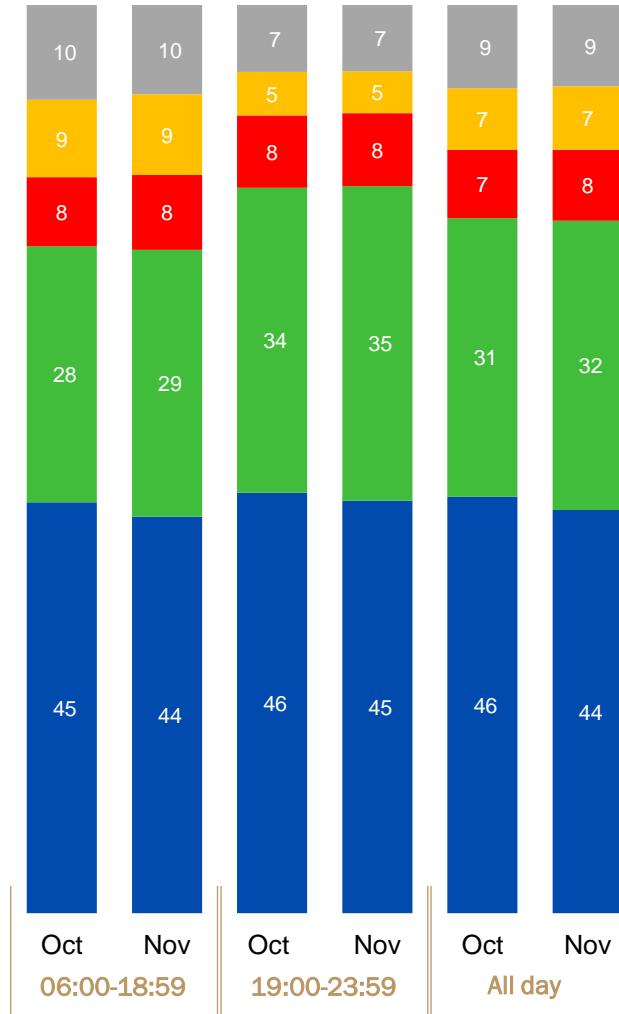


Source: GARB, A18-49

BMG GAINED SOME AUDIENCE ON THE ACCOUNT OF NBG IN NOVEMBER

Nova sustained stable leadership.

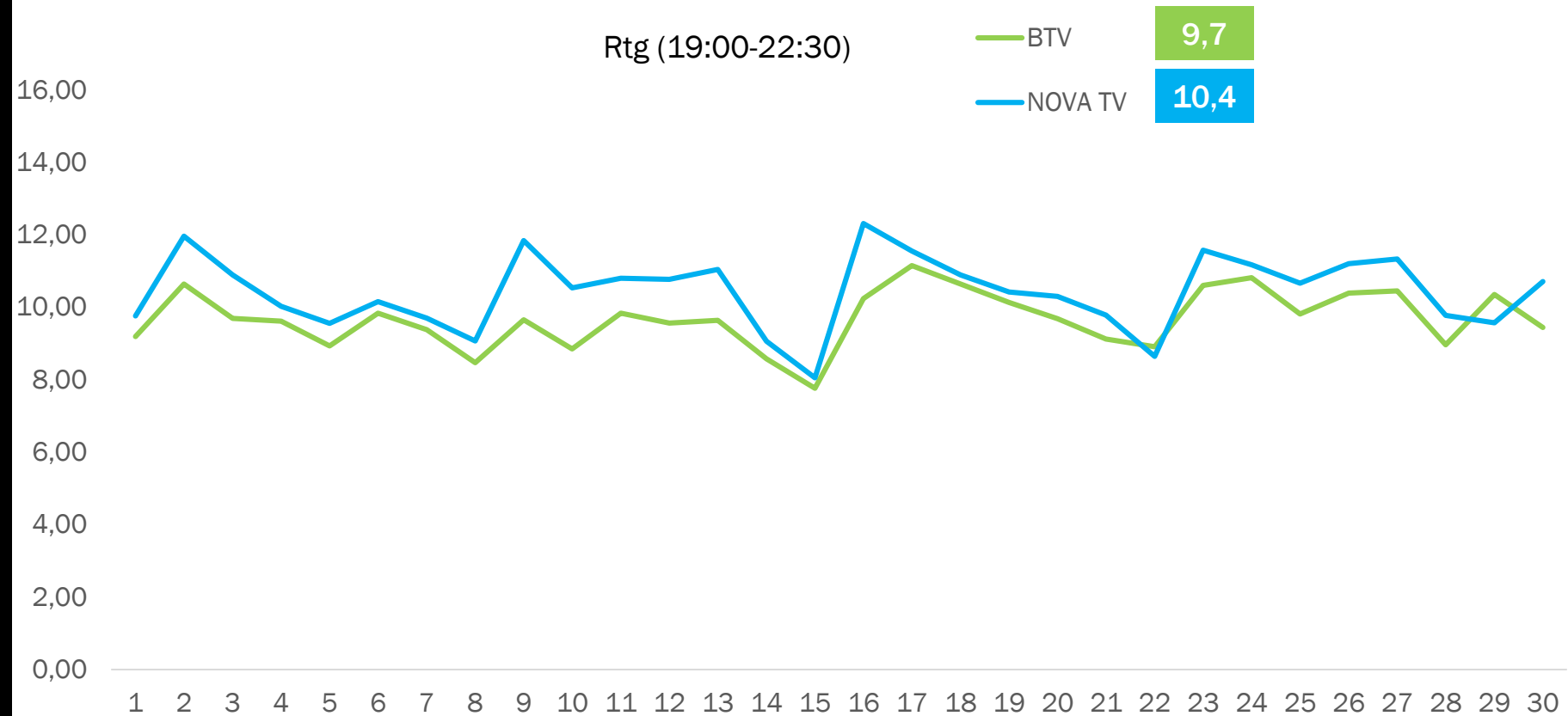
Kino Nova remained the top niche channel followed by bTV Comedy.



Source: GARB, A18-49

8% HIGHER RATING PT AUDIENCE FOR NOVA IN NOVEMBER

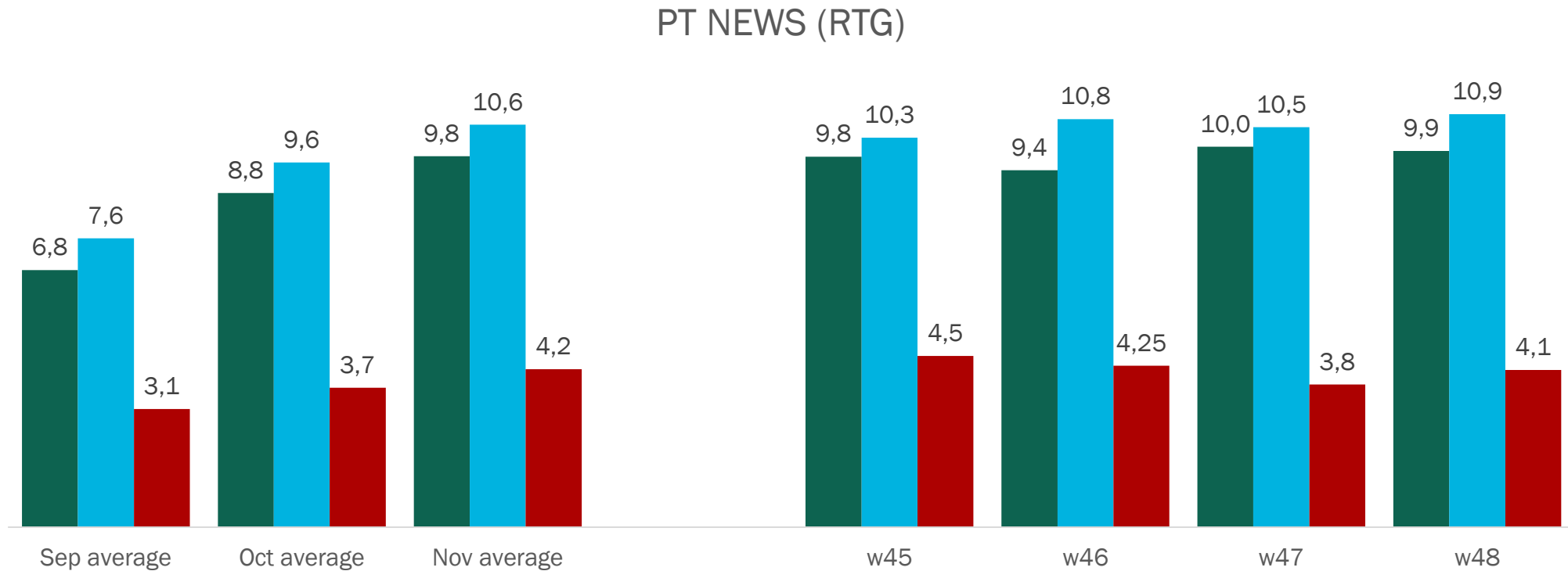
bTV was closer to the Nova's audience during the weekends



Source: GARB, A18-49

PT NEWS AUDIENCE IS GROWING STEADILY MoM

In November Nova kept at least 0.5pp higher rating than bTV every week

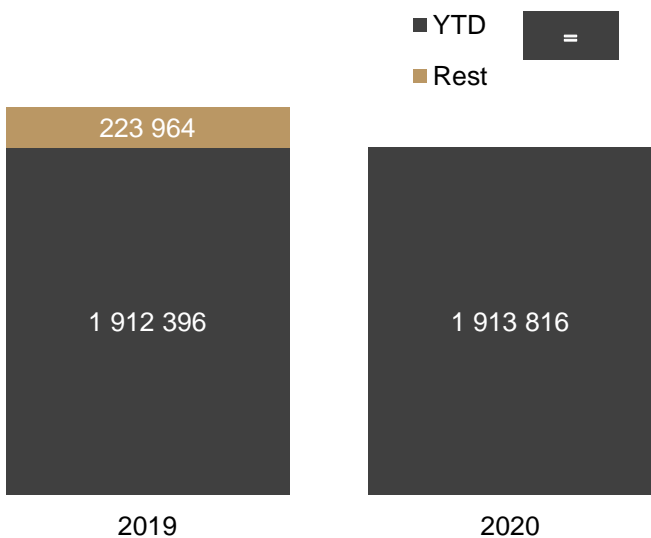


TRP30s IN 2020 FINALLY REACHED LAST YEAR'S FIGURES

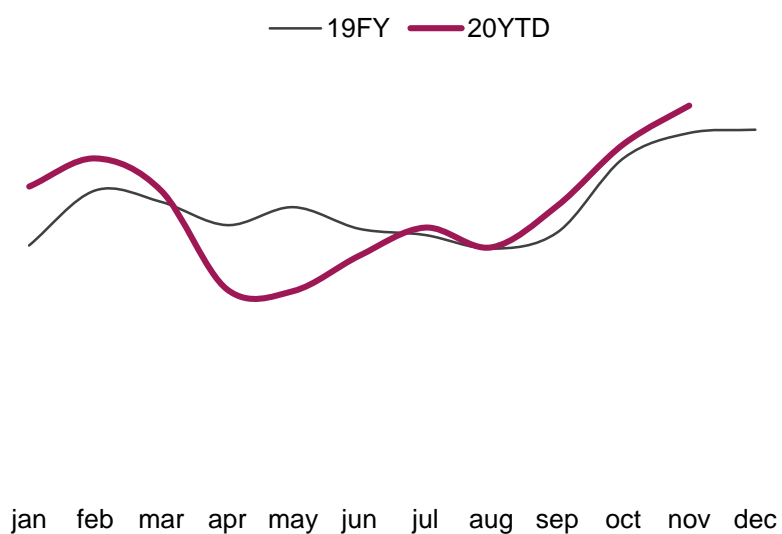
Nov '20 was the most intense month in terms of TV communication

P&G sustained leadership, followed by Ferrero and Naturpharma

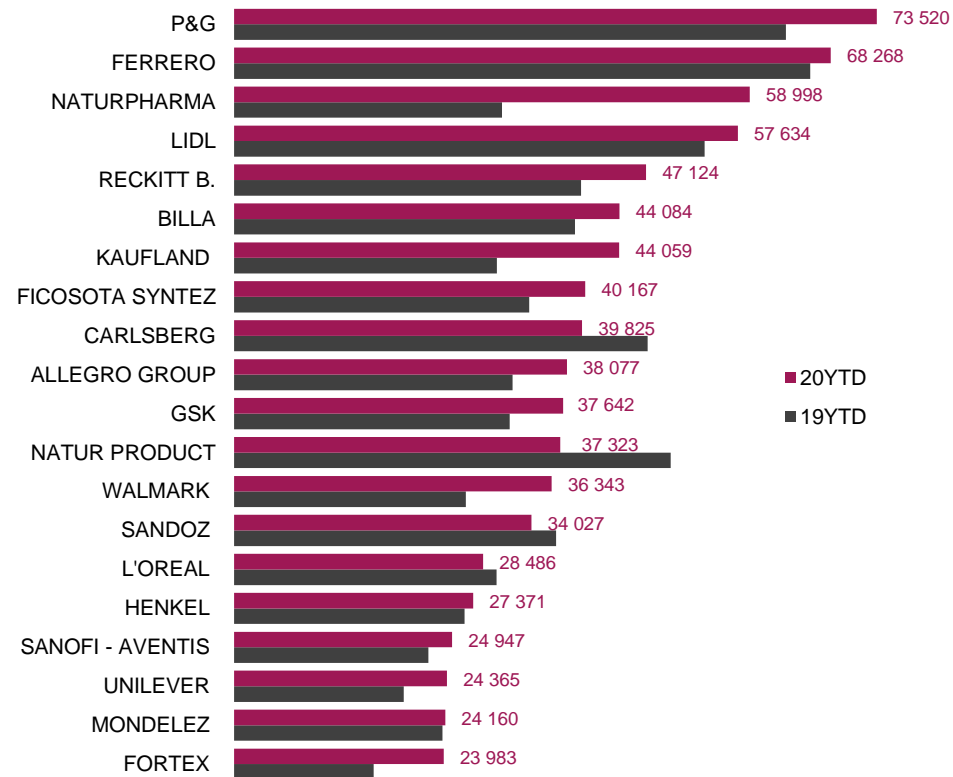
TOTAL TRP30



SEASONALITY

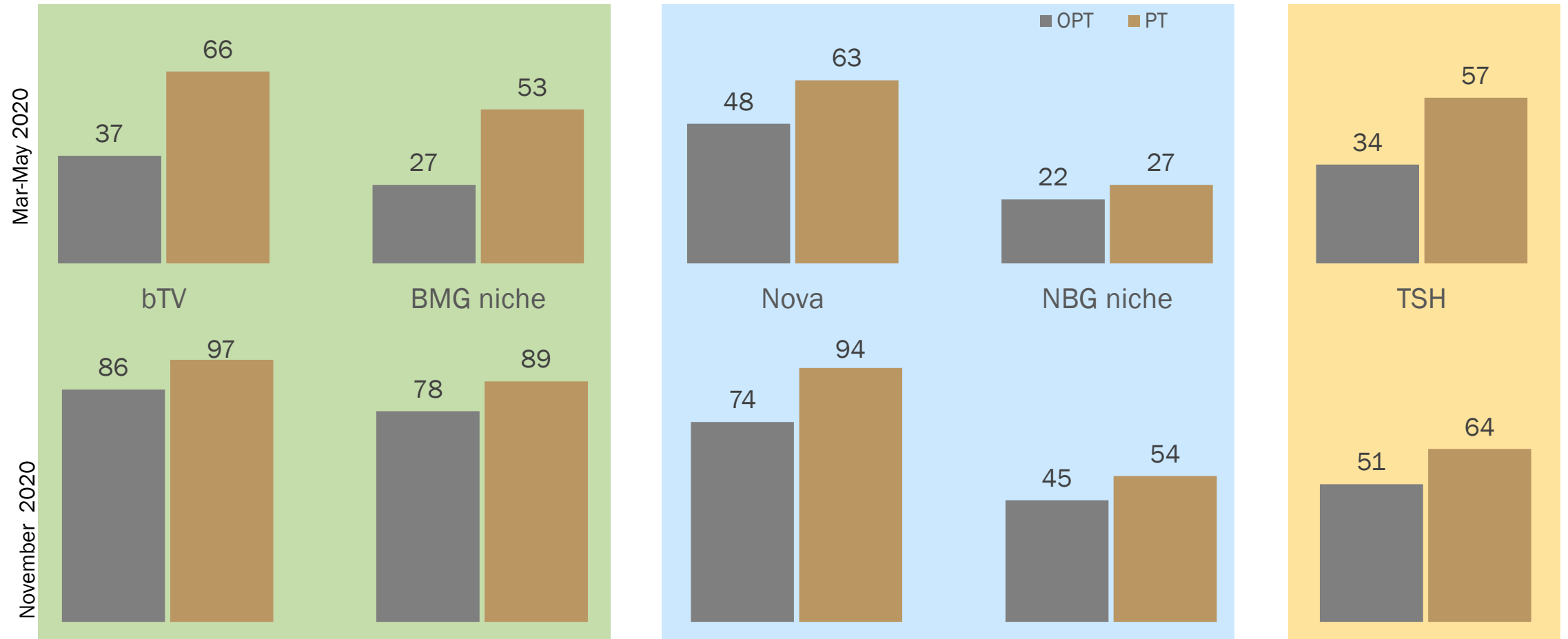


TOP ADVERTISERS



NOVA & NBG NICHE REMAINED LESS CLUTTERED THAN BTV HOWEVER, BOTH ARE CLOSE TO THE MAXIMUM

All TV groups keep higher figures compared to the lockdown period



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



DIGITAL REPORT

FOCUSED ON DIGITAL REVOLUTION IN A POST
PANDEMIC WORLD



What to expect in the digital world after the crisis?

Digital nomadism, philanthropy, and sustainable development goals (SDG) will be popular keywords in 2021, and we will also see rapid changes in top technological and business innovation – all based on people's experience during the pandemic.

Here are a few technology and business trends we will see in 2021.

Drug development

Researchers have put many traditional clinical trials on hold, or they have shifted to a virtual structure by performing consultations online and collecting data remotely. Remote clinical trials and other changes may permanently alter pharmaceutical development.

Videoconferencing

Zoom, which grew from a startup in 2011 to going public in 2019, became a household name during the pandemic. Other existing large corporate tools such as Cisco's Webex, Microsoft's Teams, Google Hangouts, GoToMeeting, and Verizon's BlueJeans are also providing state-of-the-art videoconferencing systems, facilitating remote work across the globe.

A person wearing a grey t-shirt, a black face mask, and a tan apron is loading groceries into a white Starship robot. The robot has an orange flag on top and a sign that says "Hungry? I can help. www.starship-modesto.com". In the background, another person wearing a black face mask is visible. The scene is set in a brightly lit indoor space, possibly a grocery store or a warehouse.

Contactless delivery & shipping remain as the new normal

China-based delivery apps like [Meituan Dianping](#), which was the first company in China to implement contactless delivery in Wuhan, began using autonomous vehicles to help fulfill grocery orders to customers. While Meituan tested this technology last year, the company recently launched this service publicly.

China is not the only country looking to push robotic deliveries into its next phase. U.S.-based startups [Manna](#), [Starship Technologies](#), and [Nuro](#) are tackling this problem using robotics and artificial intelligence-based applications.

In a post pandemic world the new reality is more digitalized than ever before



Online education and e-learning as part of the educational system



A.I., robotics, internet of things, and industrial automation grow rapidly



Virtual reality (VR) and augmented reality (AR) technologies usage rises

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	2 221 673	647 324	2 099 161	32 107 954	11 883 313	20 224 641	0:15:56	0:21:25	0:10:15	47,62%	22,52%	47,38%
2	abv.bg	2 060 800	1 240 765	1 414 127	212 008 967	127 492 196	84 516 771	1:54:07	1:56:32	1:04:03	44,18%	43,17%	31,92%
3	novini.bg	1 915 540	231 247	1 891 799	27 698 960	4 130 393	23 568 567	0:15:06	0:26:13	0:12:05	41,06%	8,05%	42,70%
4	olx.bg	1 879 871	639 011	1 806 795	282 457 183	43 169 611	239 287 572	1:32:55	1:03:19	1:14:17	40,30%	22,23%	40,78%
5	btvnovinite.bg	1 808 138	293 518	1 751 270	10 680 999	1 552 277	9 128 721	0:05:15	0:07:26	0:04:10	38,76%	10,21%	39,52%
6	24chasa.bg	1 660 847	316 020	1 564 717	26 938 834	7 431 242	19 507 592	0:24:04	0:53:01	0:14:50	35,60%	11,00%	35,31%
7	dariknews.bg	1 594 862	387 528	1 480 757	16 628 539	3 331 948	13 296 591	0:09:37	0:08:55	0:08:01	34,19%	13,48%	33,42%
8	fakti.bg	1 571 477	311 904	1 461 575	34 408 811	7 003 724	27 405 087	0:30:48	0:35:41	0:25:30	33,69%	10,85%	32,99%
9	framar.bg	1 558 389	467 805	1 402 516	11 377 574	2 607 234	8 770 340	0:09:54	0:08:46	0:08:04	33,41%	16,28%	31,65%
10	dir.bg	1 440 113	360 840	1 276 072	37 887 608	18 405 239	19 482 370	0:36:51	1:17:40	0:19:38	30,87%	12,55%	28,80%
11	actualno.com	1 428 597	266 230	1 295 736	19 621 433	1 613 036	18 008 397	0:15:16	0:20:33	0:12:36	30,62%	9,26%	29,24%
12	blitz.bg	1 378 501	280 540	1 327 337	68 311 970	20 741 792	47 570 178	1:14:43	2:01:56	0:51:50	29,55%	9,76%	29,96%
13	bazar.bg	1 368 951	446 666	1 169 635	74 454 179	24 605 391	49 848 788	0:36:55	0:44:11	0:26:20	29,35%	15,54%	26,40%
14	vesti.bg	1 340 907	484 052	1 165 299	20 878 930	7 646 527	13 232 403	0:17:57	0:22:37	0:11:15	28,74%	16,84%	26,30%
15	marica.bg	1 302 892	118 058	1 281 424	22 929 842	1 697 087	21 232 755	0:24:24	0:19:48	0:22:59	27,93%	4,11%	28,92%
16	dnes.bg	1 219 413	237 818	1 136 064	17 891 794	5 285 397	12 606 397	0:16:55	0:36:13	0:10:34	26,14%	8,27%	25,64%
17	bnr.bg	1 143 837	276 882	1 016 780	6 412 114	3 089 128	3 322 987	0:16:43	0:55:49	0:03:36	24,52%	9,63%	22,95%
18	vbox7.com	1 134 847	378 653	1 058 240	20 656 263	7 415 953	13 240 309	0:52:00	1:03:57	0:32:53	24,33%	13,17%	23,88%
19	news.bg	1 111 308	202 107	1 004 411	10 397 392	2 031 263	8 366 129	0:10:41	0:15:16	0:08:45	23,82%	7,03%	22,67%
20	sportal.bg	1 096 006	198 049	1 068 156	46 706 128	9 019 514	37 686 614	0:43:40	1:04:14	0:32:54	23,49%	6,89%	24,11%



THANK YOU!

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