



TV & DIGITAL REPORT

DECEMBER 2020





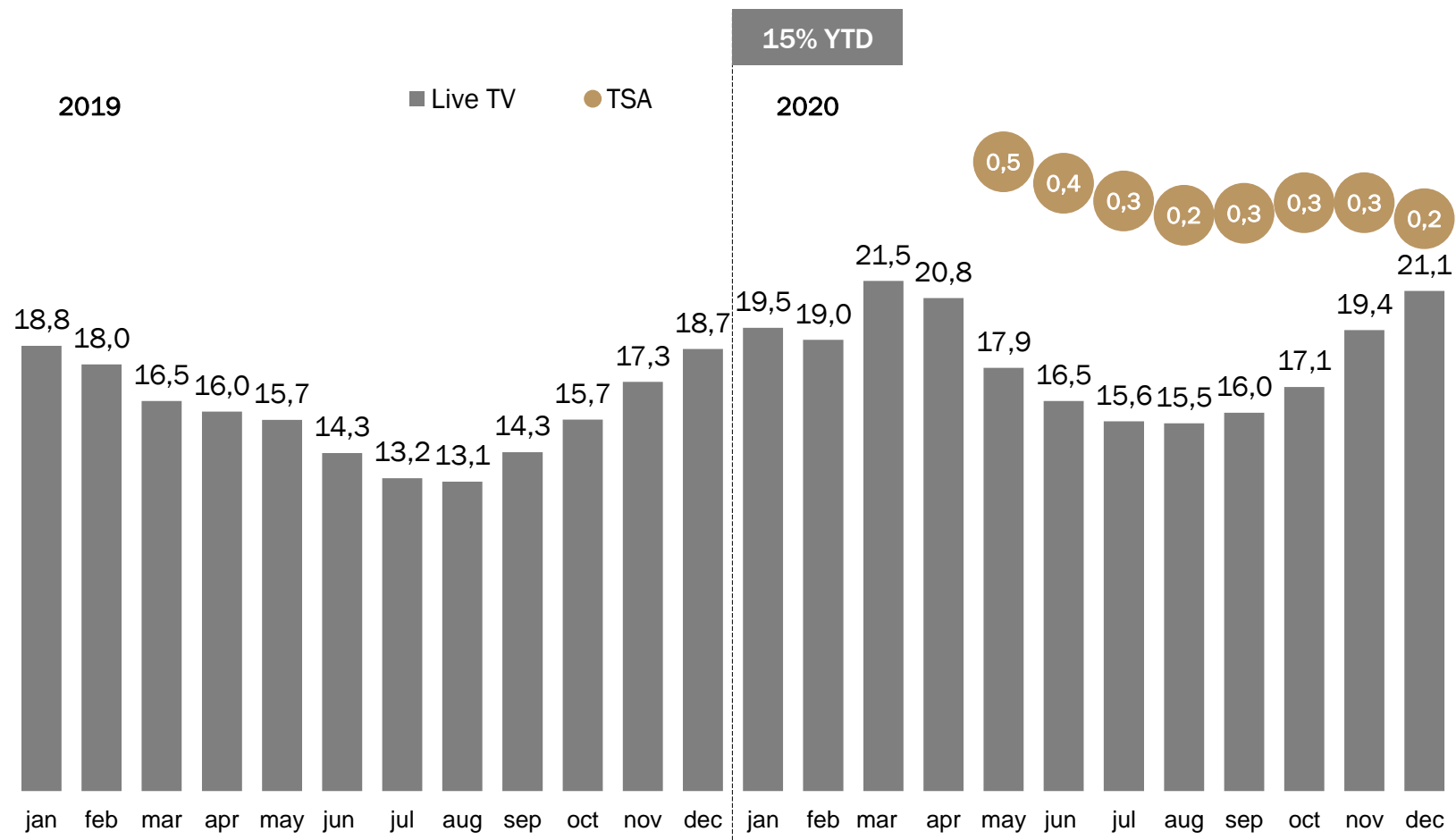
TV REPORT

FOCUSED ON 2020 TOP PT SHOWS

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

DECEMBER REGISTERED THE 2ND HIGHEST MONTHLY LIVE AUDIENCE IN 2020

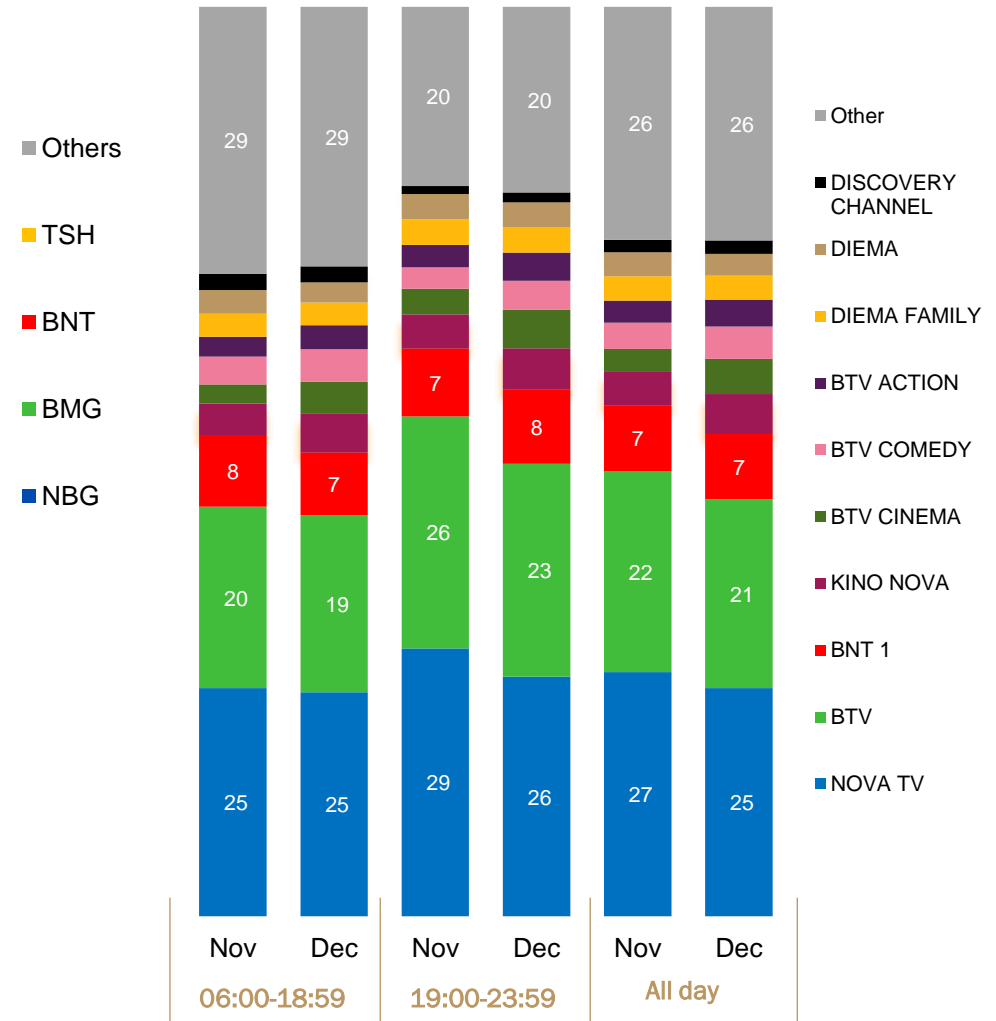
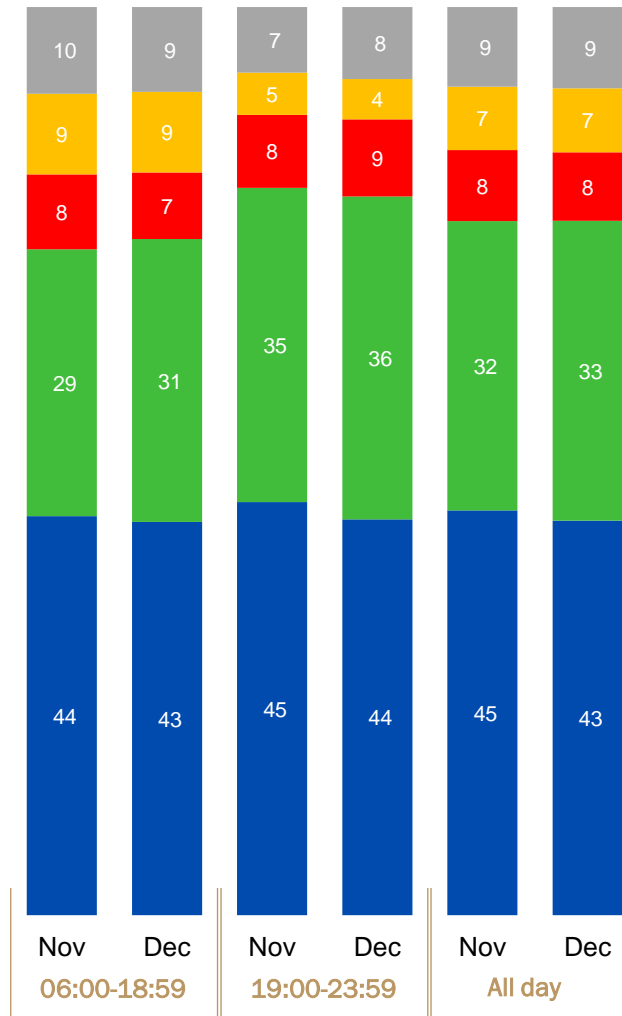
15% increase in TV viewership on annual base



Source: GARB, A18-49

ALL TV GROUPS KEPT STABLE PT AUDIENCE

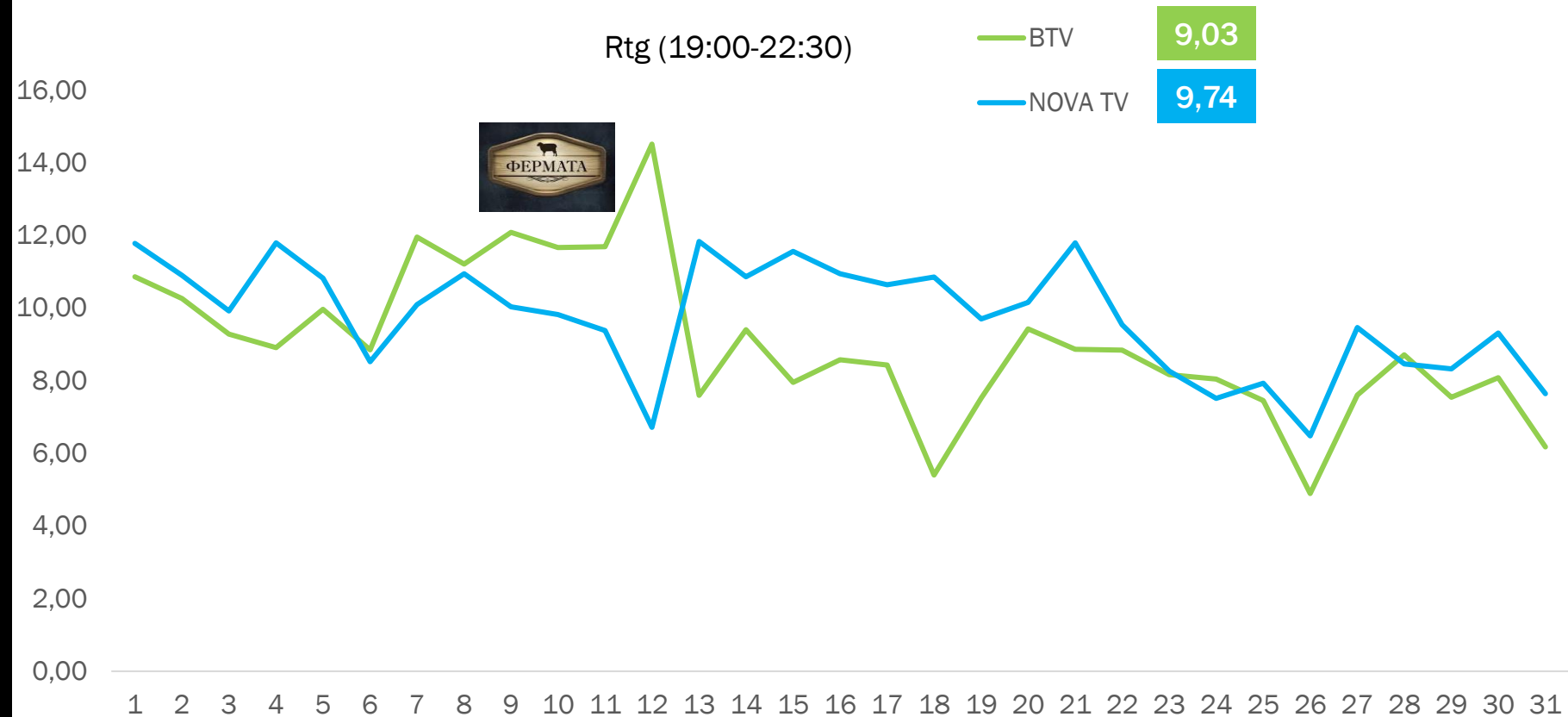
On channel basis Nova and bTV declined PT audience on the account of niche channels such as Kino Nova and bTV Cinema



Source: GARB, A18-49

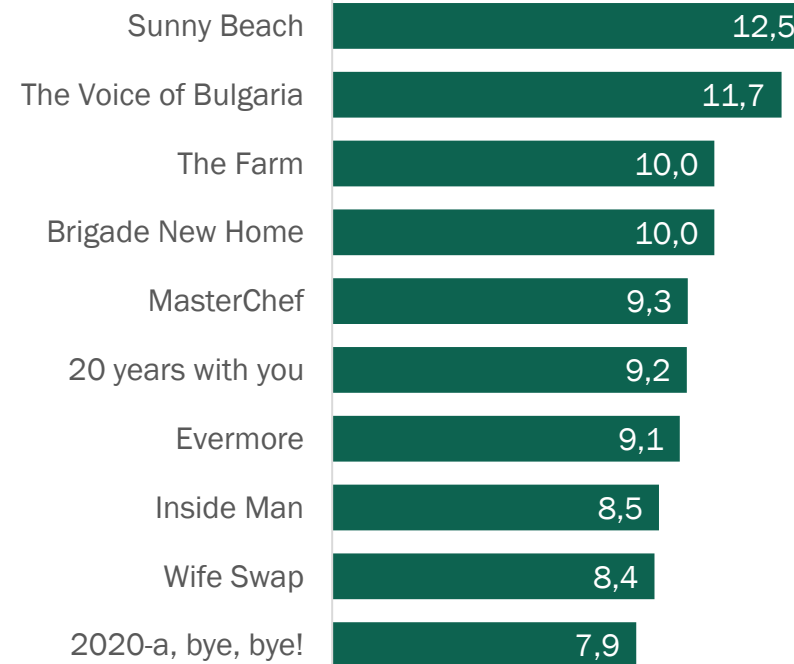
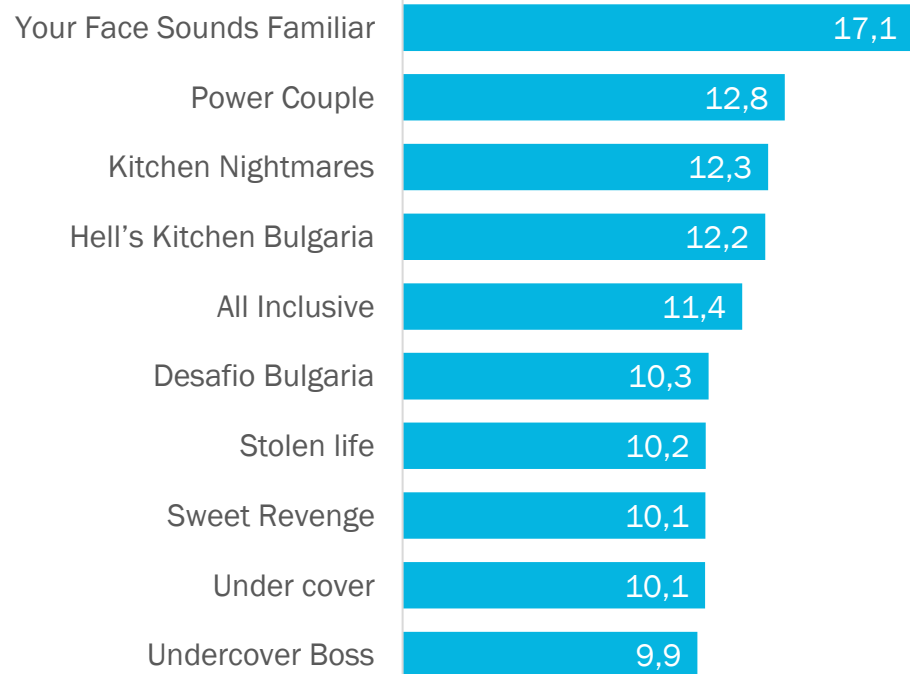
NOVE KEPT 8% HIGHER OVERALL PT AUDIENCE THAN BTV

bTV outperformed Nova significantly during the final week of The Farm



Source: GARB, A18-49

TOP 2020 PT ENTERTAINMENT SHOWS



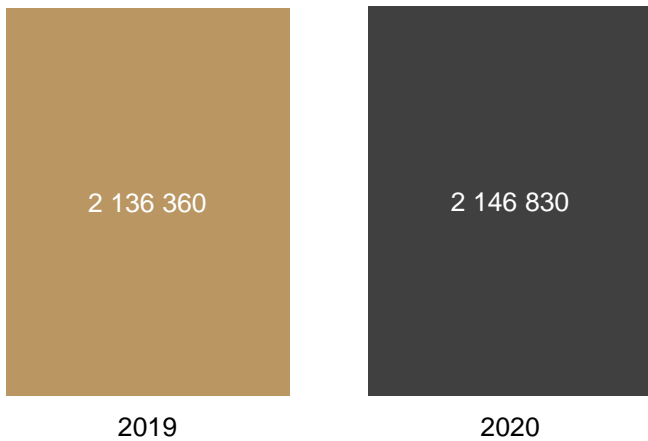
Source: GARB, A18-49, rating

2020 ENDED WITH 0,5% MORE TRPs THAN 2019 SHOWING THAT TV MARKET HAS RECOVERED

P&G was the top advertiser followed by Ferrero and Naturpharma

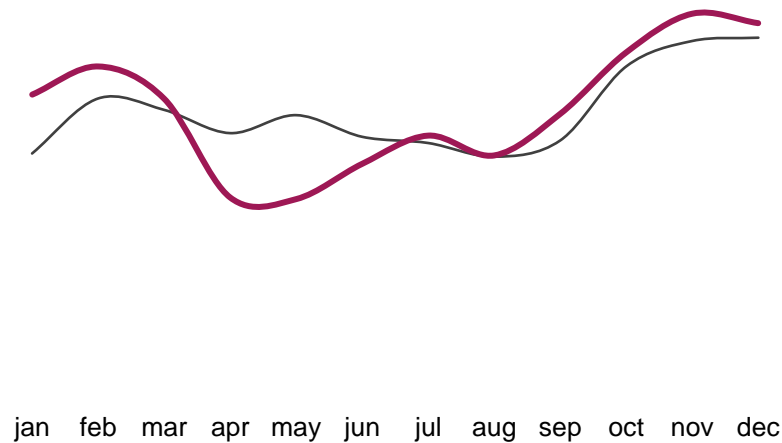
TOTAL TRP30

■ 2019 ■ 2020 +0,5%

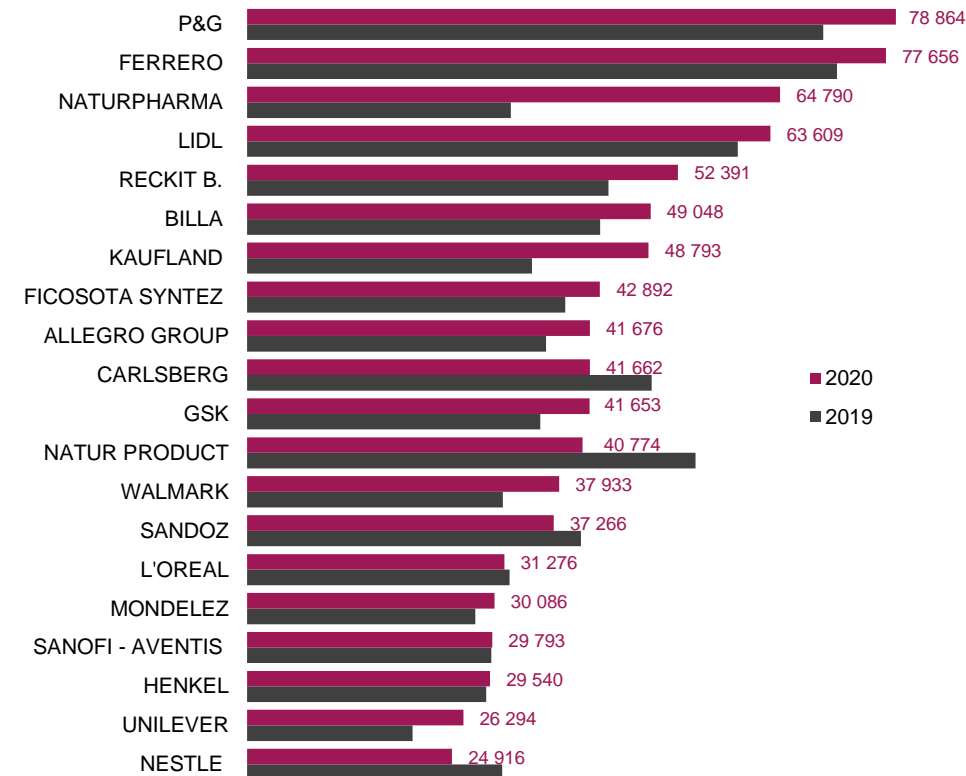


SEASONALITY

— 19FY — 20FY

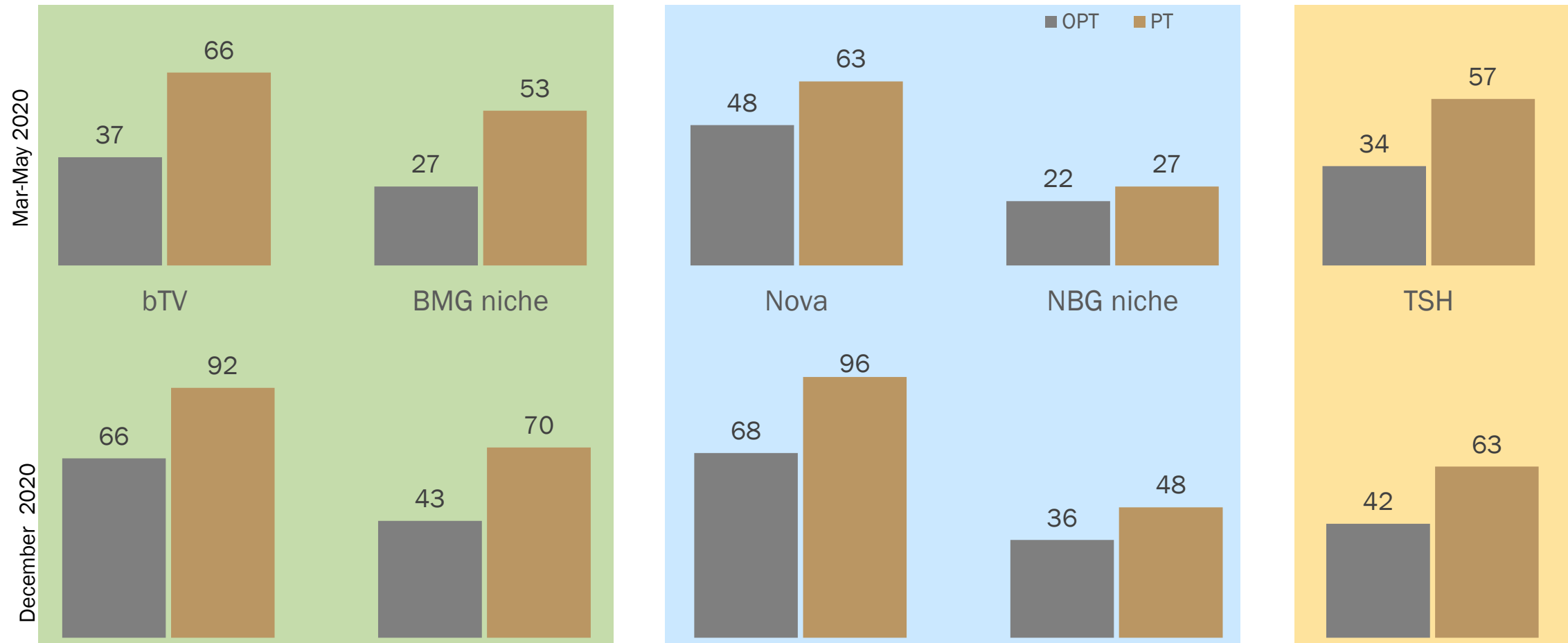


TOP ADVERTISERS



NOVA & BTV WERE CLOSE TO THE MAXIMUM INVENTORY IN DEC'20

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

TIKTOK'S EXPLOSIVE POPULARITY IN EUROPE



TikTok is drinking Snapchat's milkshake across the Atlantic

Our forecasts show TikTok's user base roughly doubling in 2020 in each of the eight major European markets we were able to independently assess.

Snapchat vs. TikTok User Growth in Select Countries in Europe, 2020 & 2021

% change

	2020		2021	
	Snapchat	TikTok	Snapchat	TikTok
France	8.4%	88.7%	5.1%	35.2%
Germany	16.3%	79.7%	4.1%	34.6%
Italy	6.3%	104.5%	4.0%	35.0%
Netherlands	0.6%	94.2%	2.0%	18.5%
Norway	4.0%	248.7%	2.0%	33.1%
Spain	3.2%	78.1%	2.9%	32.2%
Russia	16.0%	140.9%	10.0%	25.8%

Note: Internet users who access their TikTok or Snapchat account via any device at least once per month

Source: eMarketer, Oct 2020

TikTok in the new now

Between Russia, the UK, France, Germany, Italy, Spain, Norway, and the Netherlands, TikTok had approximately 64 million users by the end of 2020.

This is broadly in line with TikTok's own claim of 100 million European users, a figure that includes all the other smaller markets. Not surprisingly, this number vastly exceeds our pre-pandemic forecast for TikTok.



It is reasonable to assume that TikTok's success is at least partially coming at Snapchat's expense



The core audience for both platforms is made up of 13-to-24-year-olds, and when millions of young people in Europe suddenly found themselves searching for distraction in 2020, many unexpectedly discovered TikTok instead of Snapchat. For instance, in Russia, Snapchat grew by 77.8% in 2019 and reached 6.9 million people, but that growth declined to 16.0% in 2020. On the other hand, TikTok grew by 140.9% in Russia in 2020 and claimed well over 16 million users.

2021 tip: Consider using TikTok for marketing

Here are the top 4 TikTok business and marketing trends that you should be aware of:

1. **Memes** - Companies who can use memes effectively can boost their engagement and potentially even achieve viral status on their marketing campaigns.
2. **TikTok influencers** can help promote goods and services to their followers.
3. A **branded hashtag** challenge is when a company creates a hashtag and asks followers to submit videos that are related to that hashtag and that feature the hashtag.
4. **Duets** are another highly successful and unique TikTok marketing approach. Duets involves a brand creating a video and then letting TikTok users duet that video with a side-by-side video, with the two videos played simultaneously in a split-screen.

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	2 249 842	639 056	2 142 926	27 296 904	9 610 331	17 686 574	0:15:56	0:21:25	0:10:15	48,23%	22,24%	48,36%
2	novini.bg	1 980 501	205 618	1 955 796	27 962 172	3 579 394	24 382 778	1:54:07	1:56:32	1:04:03	42,46%	7,15%	44,14%
3	abv.bg	1 952 286	1 228 764	1 269 436	206 377 803	121 065 372	85 312 431	0:15:06	0:26:13	0:12:05	41,85%	42,75%	28,65%
4	olx.bg	1 943 192	639 757	1 878 256	307 297 585	44 168 300	263 129 284	1:32:55	1:03:19	1:14:17	41,66%	22,26%	42,39%
5	btvnovinite.bg	1 663 410	235 534	1 613 515	8 897 976	1 141 800	7 756 177	0:05:15	0:07:26	0:04:10	35,66%	8,20%	36,42%
6	dir.bg	1 601 680	356 730	1 446 924	37 819 097	16 962 272	20 856 826	0:24:04	0:53:01	0:14:50	34,33%	12,41%	32,66%
7	24chasa.bg	1 599 492	272 784	1 516 565	25 218 225	6 541 360	18 676 865	0:09:37	0:08:55	0:08:01	34,29%	9,49%	34,23%
8	blitz.bg	1 523 679	297 271	1 475 327	62 993 901	17 429 670	45 564 231	0:30:48	0:35:41	0:25:30	32,66%	10,34%	33,30%
9	framar.bg	1 430 104	355 494	1 288 036	9 151 708	1 980 896	7 170 812	0:09:54	0:08:46	0:08:04	30,66%	12,37%	29,07%
10	sportal.bg	1 423 351	227 293	1 399 336	51 958 495	9 556 518	42 401 977	0:36:51	1:17:40	0:19:38	30,51%	7,91%	31,58%
11	bazar.bg	1 409 346	429 426	1 265 022	81 360 511	26 353 095	55 007 415	0:15:16	0:20:33	0:12:36	30,21%	14,94%	28,55%
12	actualno.com	1 408 112	277 825	1 267 086	19 352 125	1 515 842	17 836 284	1:14:43	2:01:56	0:51:50	30,19%	9,67%	28,60%
13	fakti.bg	1 359 718	268 803	1 266 477	31 214 949	6 778 275	24 436 674	0:36:55	0:44:11	0:26:20	29,15%	9,35%	28,58%
14	dariknews.bg	1 358 933	295 908	1 238 518	11 315 616	2 680 061	8 635 555	0:17:57	0:22:37	0:11:15	29,13%	10,30%	27,95%
15	vesti.bg	1 301 237	445 459	1 148 930	17 683 612	6 253 413	11 430 199	0:24:24	0:19:48	0:22:59	27,89%	15,50%	25,93%
16	marica.bg	1 267 641	117 798	1 240 373	20 180 837	1 552 023	18 628 813	0:16:55	0:36:13	0:10:34	27,17%	4,10%	27,99%
17	dnes.bg	1 225 675	213 741	1 143 733	16 416 081	4 461 949	11 954 132	0:16:43	0:55:49	0:03:36	26,27%	7,44%	25,81%
18	vbox7.com	1 183 386	388 281	1 107 228	21 475 048	7 707 362	13 767 686	0:52:00	1:03:57	0:32:53	25,37%	13,51%	24,99%
19	gong.bg	1 074 138	247 602	998 578	33 511 669	8 642 874	24 868 794	0:10:41	0:15:16	0:08:45	23,03%	8,62%	22,54%
20	sportlive.bg	1 028 750	136 419	940 665	6 716 619	524 613	6 192 006	0:43:40	1:04:14	0:32:54	22,05%	4,75%	21,23%



THANK YOU!

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