



TV & DIGITAL REPORT

JUNE 2020





TV REPORT

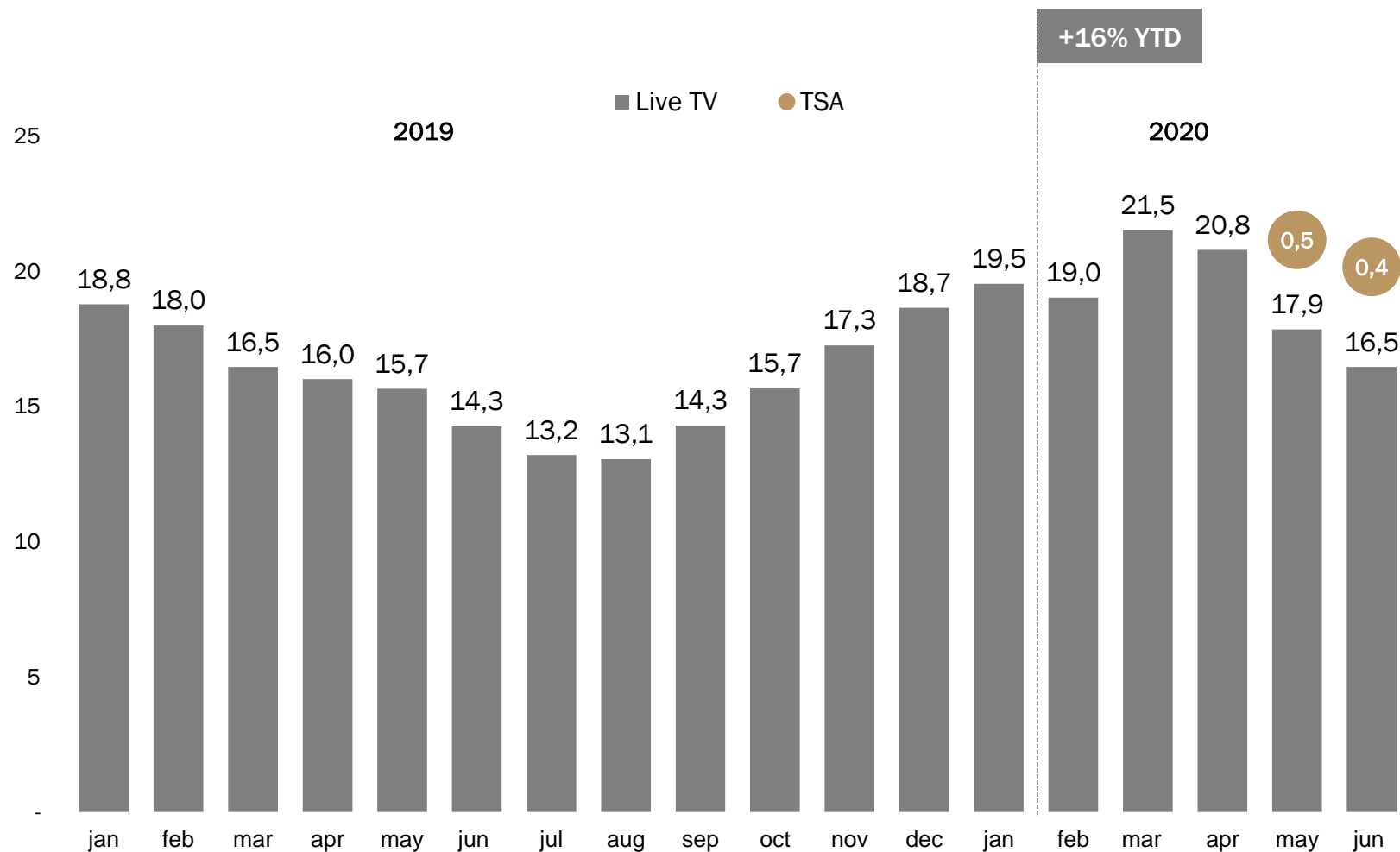
FOCUSED ON BTV'S LATE PT

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

THIRD MONTH OF DECLINE IN TV VIEWERSHIP REFLECTING TYPICAL TV SEASONALITY PATTERN

On YTD base however the overall TV rating is 16% higher on YTD driven by the COVID19 crisis

Jun'20 alone registered 15% higher audience than Jun'19

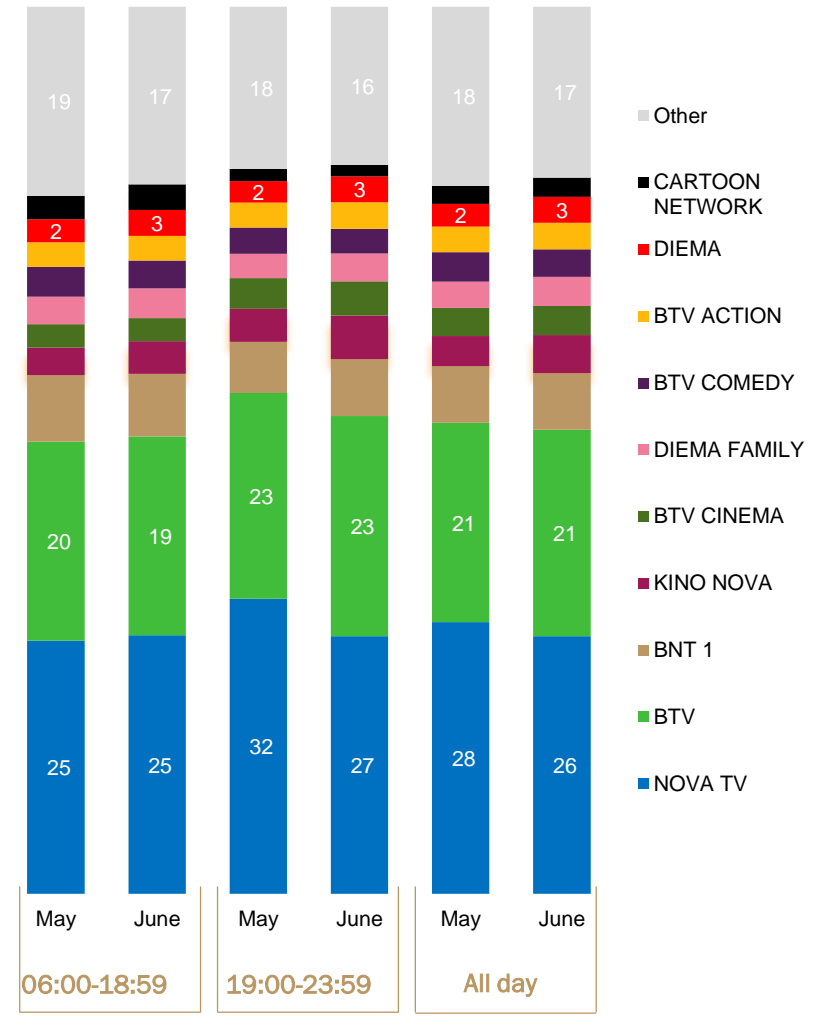
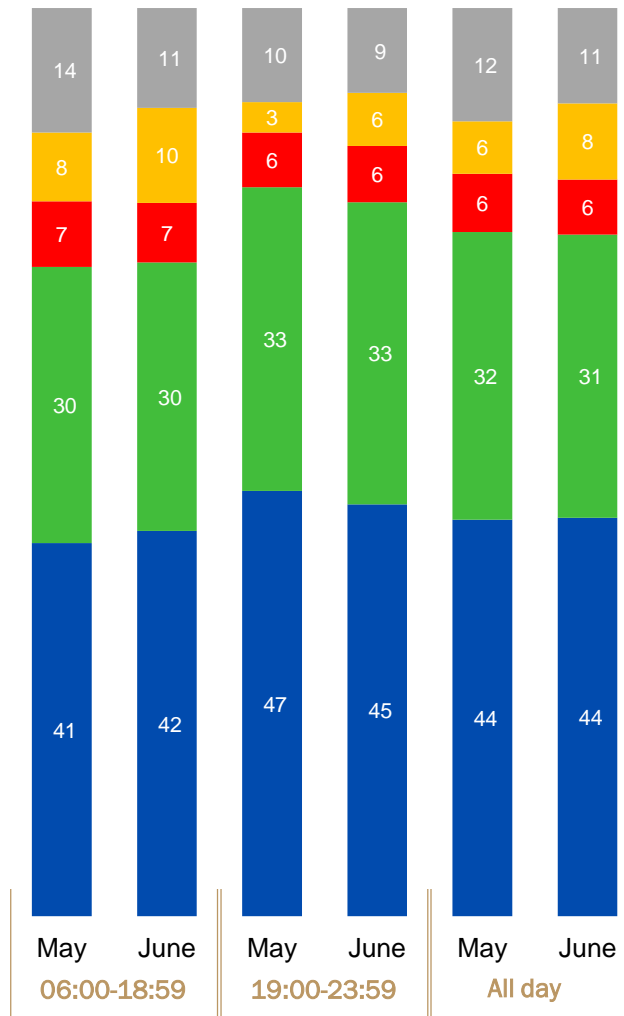


Source: GARB, A18-49

NBG & NOVA SUSTAINED LEADERSHIP IN EACH TIME SLOT

NBG declined PT audience by 2pp, while the main channel Nova declined PT even further – by 4 pp.

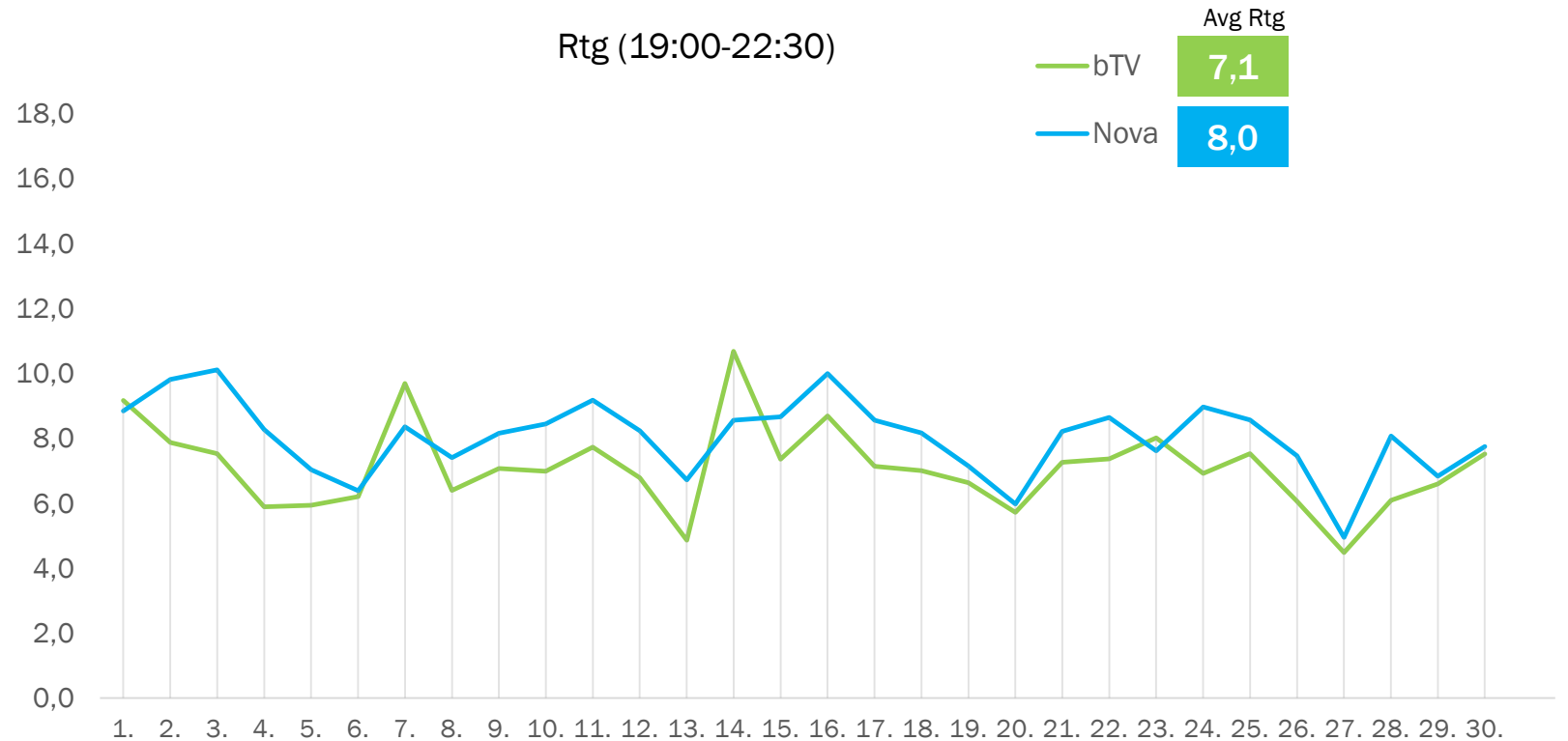
BMG and bTV kept stable PT performance.



Source: GARB, A18-49

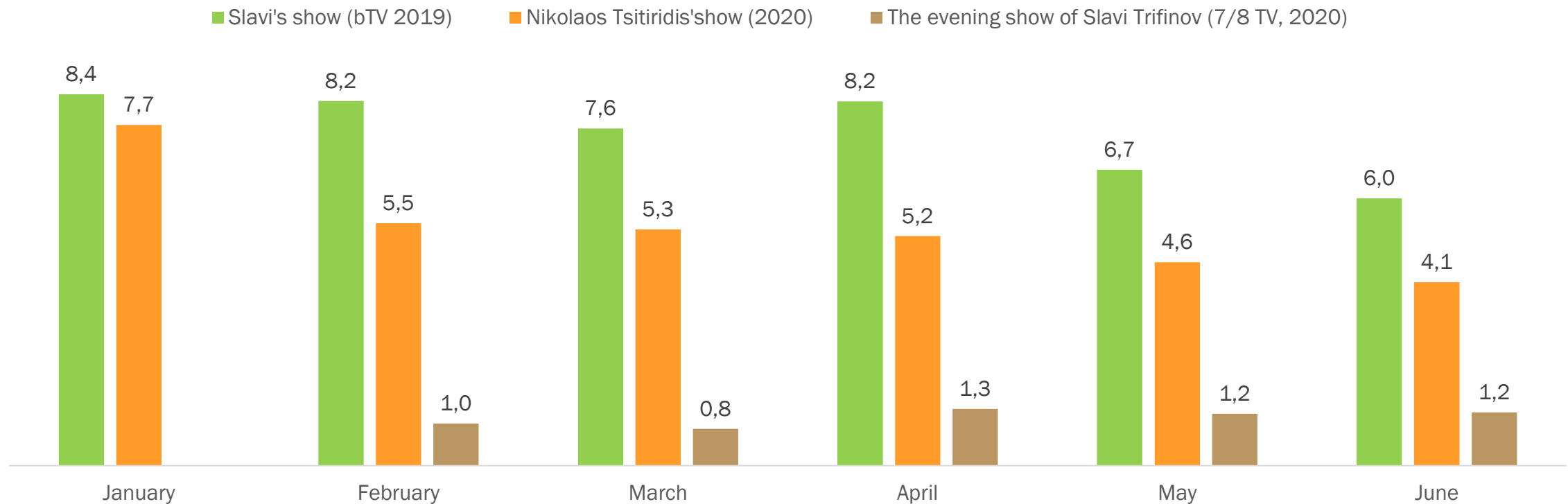
BTV COULD BARELY COMPETE WITH NOVA DURING THE CENTRAL PT

Nova outperformed bTV overall by 13%



BTV COULD NOT SUSTAIN LAST YEAR'S LATE PT AUDIENCE TSITIRIDIS'SHOW HAD BETWEEN 2-3 PP SMALLER RATINGS THAN SLAVY SHOW AIRED ON bTV IN 2019

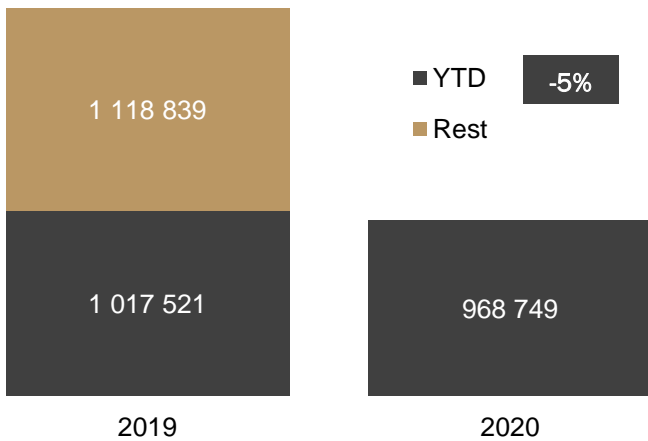
The new show of Trifonov aired on 7/8 niche channel keeps quite stable but incomparably lower viewership



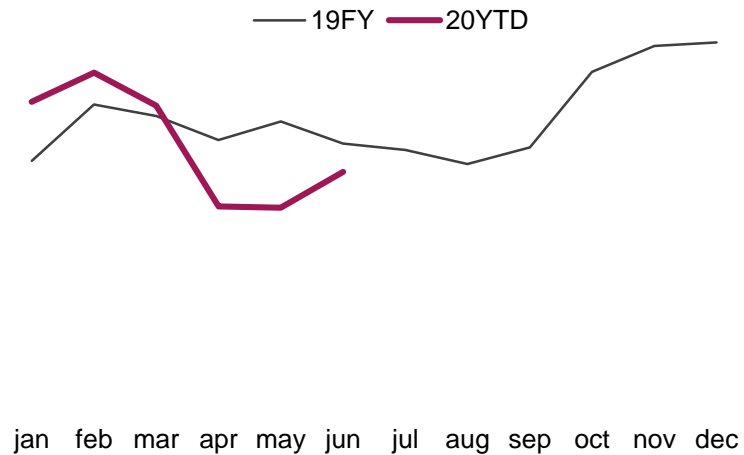
TRP30 STILL KEEPS LOWER FIGURES ON YTD BASE DUE TO THE LOWER DEMAND DURING THE LOCKDOWN

P&G sustained leadership. Ferrero lost the 2nd place to Naturpharma and it is the only advertiser in top 8 with declining eq. TRP level

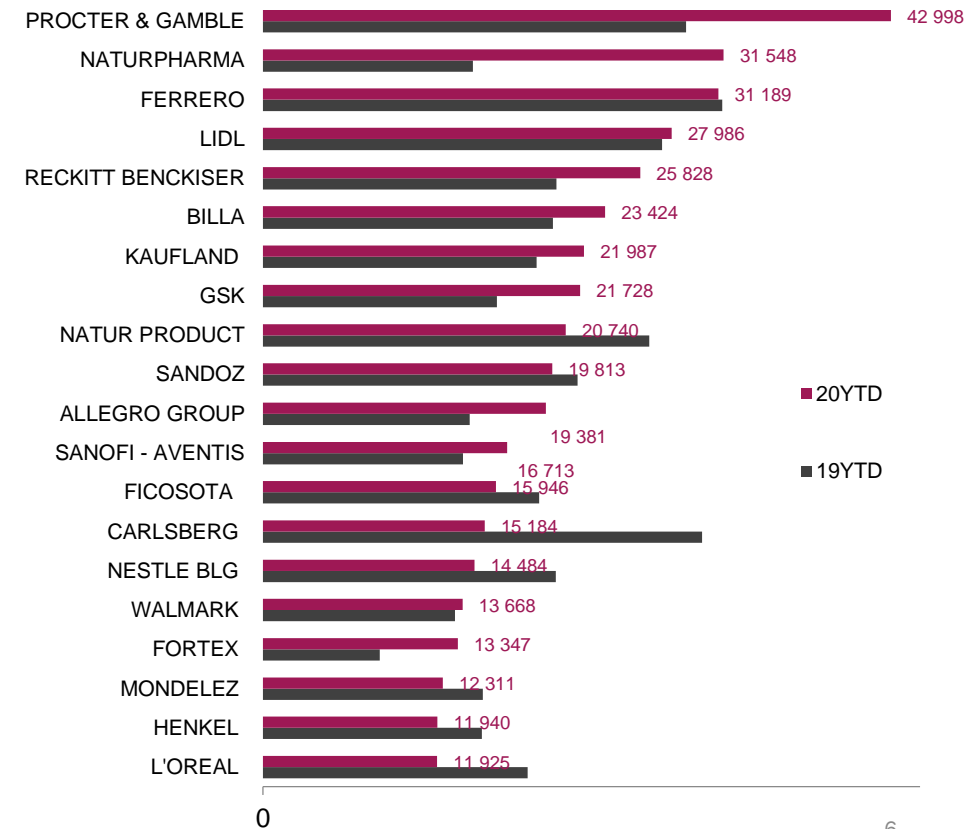
TOTAL TRP30



SEASONALITY



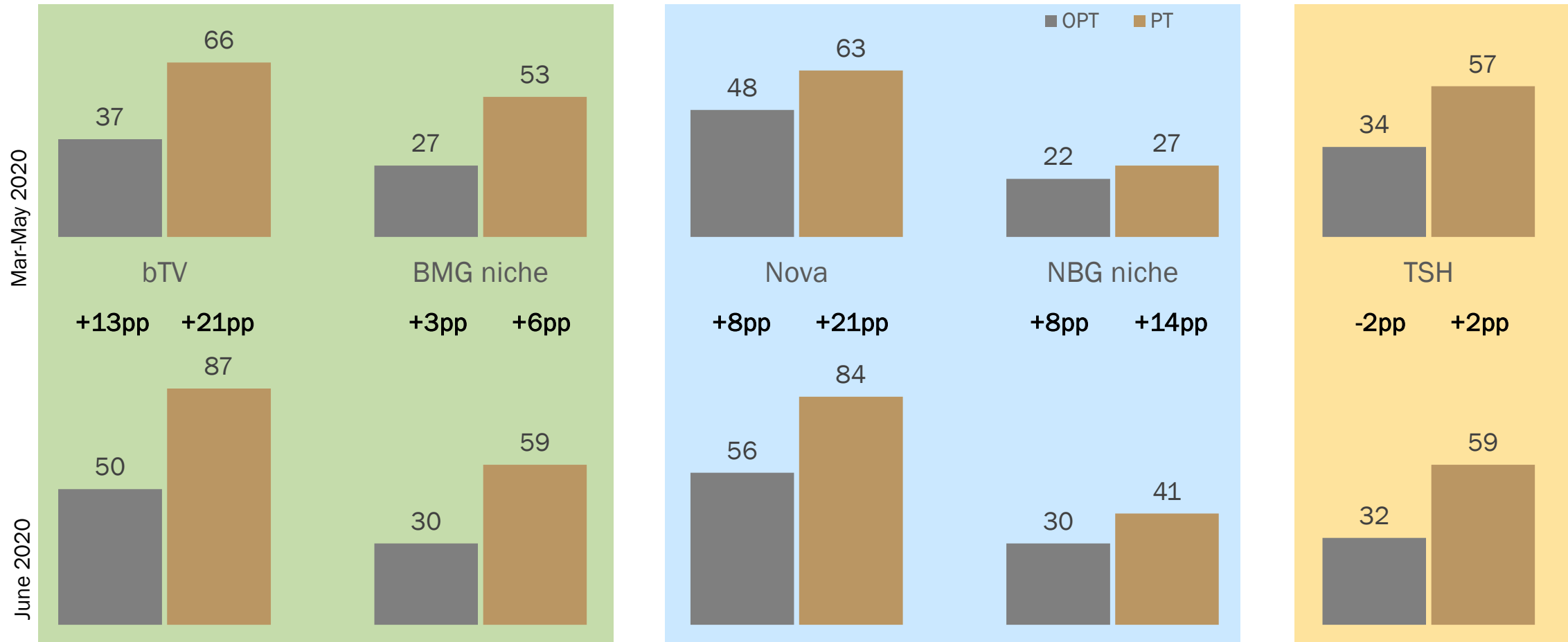
TOP ADVERTISERS



IN JUNE THE MAIN TV GROUPS STARTED TO RECOVER FROM THE COVID19 CRISIS IN TERMS OF INVENTORY

bTV & Nova are approaching 90% PT fulfillment

TSH seems to be less affected in terms of demand during the Lockdown



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



DIGITAL REPORT

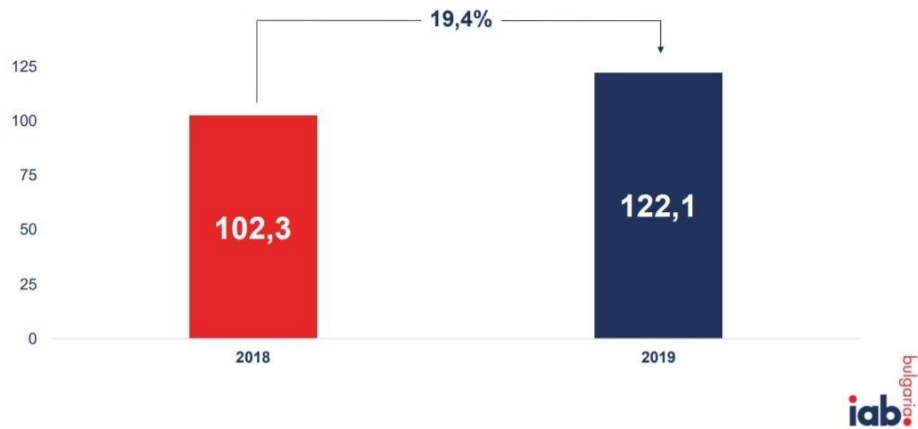
FOCUSED ON DIGITAL AD INVESTMENTS IN
BULGARIA



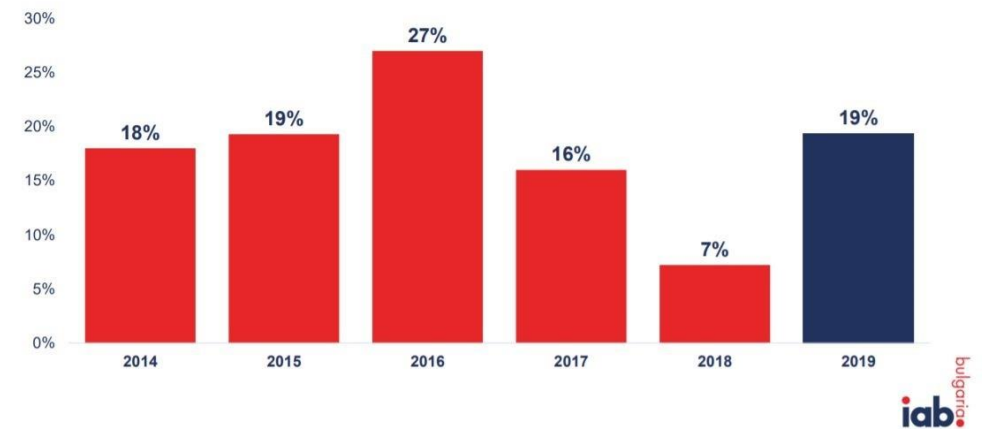
19% INCREASE IN INVESTMENTS IN DIGITAL ADVERTISING



19,4% GROWTH IN THE NET MARKET VOLUME
(2018 vs. 2019 million BGN)



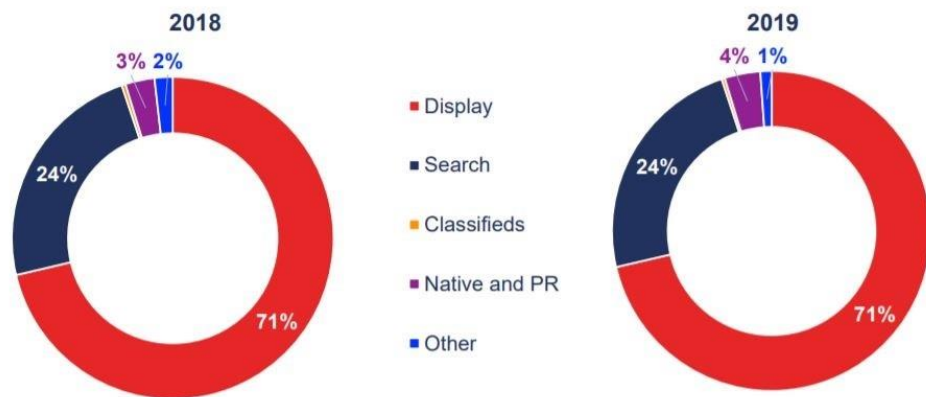
GROWTH OF THE NET VOLUME OF DIGITAL ADVERTISING IN BULGARIA



DISPLAY & SEARCH REMAINED KEY GROWTH DRIVERS



SHARE OF THE MAIN CATEGORIES IN THE DIGITAL ADVERTISING MARKET IN BULGARIA



The structure of the market is unchanged in terms of the weight of the main categories of advertising.

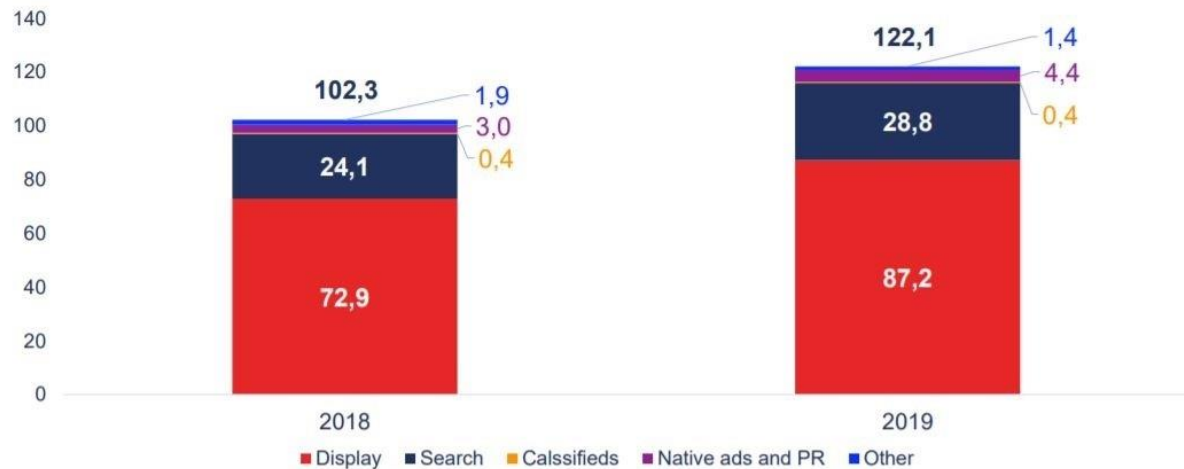
The largest share is in the display advertising, which accounts for 71% of the investments (87.2 million BGN). The category grew by 19.4% compared to 2018, when it amounted to almost 73 million BGN.

In second place in terms of weight is Search, which has a 24% share. As a category, the Search in Bulgaria is represented entirely by the investments in the Google search engine. They amounted to 28.8 million BGN and increased by 19.6% compared to the previous year. For comparison - "IAB Europe" reports a 43% average share of demand for the European market, but with a slight downward trend in recent years.

GROWING DISPLAY ADVERTISING



VOLUME OF THE SEPARATE CATEGORIES
(2018 vs. 2019, milion BGN)

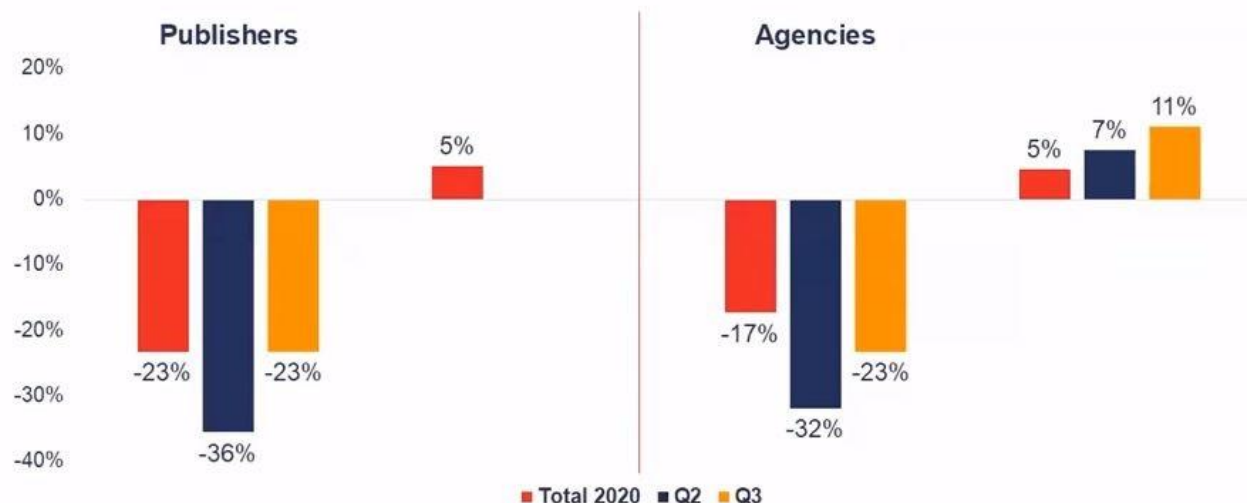


In addition to the classic banners, the category "Display Advertising" also includes video advertising and social networks. The video has been growing steadily around the world over the past few years. In 2019, its volume in Bulgaria is BGN 33.3 million, or 33% more than the BGN 24.8 million spent in 2018. The display grows by 12% if we look at it without the video ad included, which shows its growing weight. As a share, it represents 38% of the total display - an increase of 4 percentage points compared to the previous year.

COVID19 WILL AFFECT DIGITAL AD INVESTMENTS IN 2020

adex Expectations for the digital ad revenues

Powered by SUPERHOSTING.BG



Annual growth in investment in online advertising is likely to be halted in 2020. The coronavirus pandemic and the ensuing crisis have led to significant cuts in advertisers' marketing budgets. Most of the participants in the IAB Bulgaria survey predict a significant decline in investment in digital advertising. The average expected decline on an annual basis from publishers is 23% and from agencies - 17%. However, among both groups, although small in number, there are optimistic companies that expect 5% annual investment growth.

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	abv.bg	1 862 445	1 269 739	1 171 577	208 763 103	131 518 688	77 244 416	2:12:28	2:05:55	1:14:07	39,92%	44,18%	26,44%
2	nova.bg	1 827 584	452 941	1 730 424	18 996 706	5 221 743	13 774 963	0:10:02	0:13:27	0:07:05	39,18%	15,76%	39,05%
3	olx.bg	1 815 447	640 927	1 747 143	234 397 790	43 569 514	190 828 277	1:25:32	1:02:08	1:06:05	38,92%	22,30%	39,43%
4	btvnovinite.bg	1 716 565	320 446	1 646 754	10 920 960	1 646 764	9 274 196	0:05:19	0:06:40	0:04:15	36,80%	11,15%	37,17%
5	24chasa.bg	1 703 925	391 530	1 600 188	27 107 499	7 768 861	19 338 638	0:24:28	0:45:24	0:14:57	36,53%	13,62%	36,11%
6	novini.bg	1 672 090	227 517	1 634 712	21 832 944	4 293 144	17 539 801	0:12:39	0:26:24	0:09:16	35,84%	7,92%	36,89%
7	blitz.bg	1 590 941	327 583	1 550 020	75 313 494	22 766 280	52 547 214	1:07:22	1:48:18	0:46:15	34,10%	11,40%	34,98%
8	dariknews.bg	1 434 272	391 246	1 301 773	13 438 329	3 266 908	10 171 421	0:08:11	0:08:23	0:06:30	30,75%	13,61%	29,38%
9	dir.bg	1 391 443	367 767	1 226 629	39 002 816	19 389 697	19 613 119	0:36:56	1:13:50	0:19:45	29,83%	12,80%	27,68%
10	framar.bg	1 316 785	370 704	1 161 490	7 585 997	1 982 624	5 603 374	0:07:43	0:08:29	0:06:02	28,23%	12,90%	26,21%
11	sinoptik.bg	1 204 196	358 314	1 093 798	46 849 329	7 402 550	39 446 779	0:16:14	0:10:48	0:14:19	25,81%	12,47%	24,69%
12	vesti.bg	1 193 460	551 483	946 161	20 359 329	9 673 726	10 685 602	0:19:54	0:23:47	0:11:14	25,58%	19,19%	21,35%
13	dnevnik.bg	1 143 594	270 676	1 071 233	14 482 747	4 607 737	9 875 010	0:17:24	0:29:34	0:11:06	24,51%	9,42%	24,18%
14	marica.bg	1 129 528	113 665	1 105 109	14 947 840	1 686 683	13 261 157	0:16:34	0:18:57	0:14:59	24,21%	3,95%	24,94%
15	profit.bg	1 123 178	167 194	999 166	3 728 289	730 585	2 997 703	0:01:32	0:02:43	0:01:16	24,08%	5,82%	22,55%
16	actualno.com	1 112 535	224 371	968 132	10 125 995	1 413 192	8 712 803	0:08:03	0:21:07	0:04:21	23,85%	7,81%	21,85%
17	dnes.bg	1 076 123	232 962	968 744	14 917 734	4 924 729	9 993 005	0:15:44	0:33:07	0:09:31	23,07%	8,11%	21,86%
18	news.bg	1 015 532	211 137	896 436	8 580 797	2 124 928	6 455 869	0:09:03	0:14:42	0:06:47	21,77%	7,35%	20,23%
19	vbox7.com	1 015 474	389 366	919 046	19 499 242	7 376 715	12 122 527	0:48:50	0:55:03	0:30:38	21,77%	13,55%	20,74%
20	mediapool.bg	990 870	215 936	905 383	6 438 767	1 813 221	4 625 546	0:06:53	0:12:27	0:04:34	21,24%	7,51%	20,43%



THANK YOU!

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