



TV & DIGITAL REPORT

AUGUST 2020





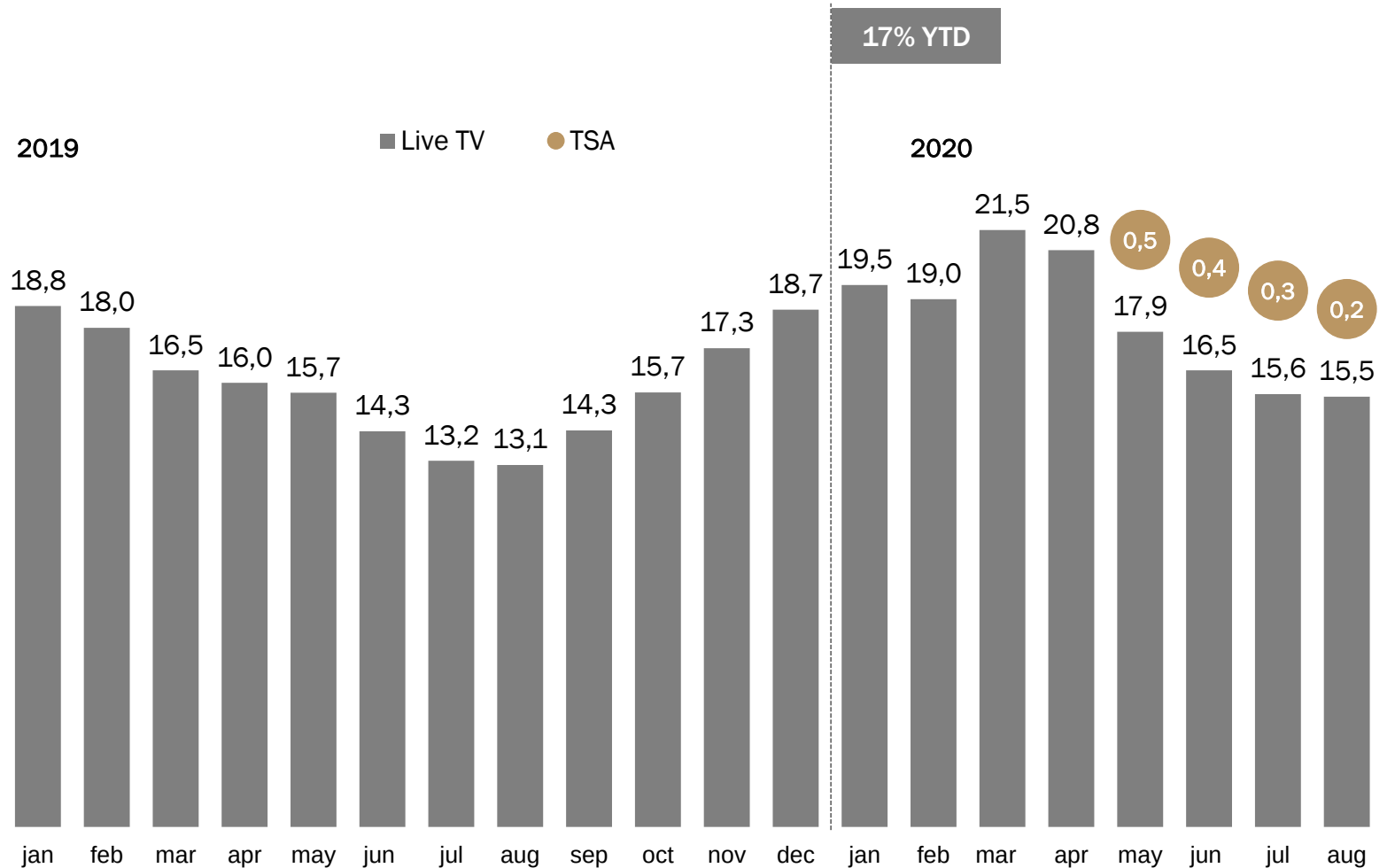
TV REPORT

FOCUSED ON SUNDAY PT MOVIES

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

AUGUST REGEISTERED THE LOWEST VIEWRSHIP IN 2020, KEEPING POSITIVE TREND YoY

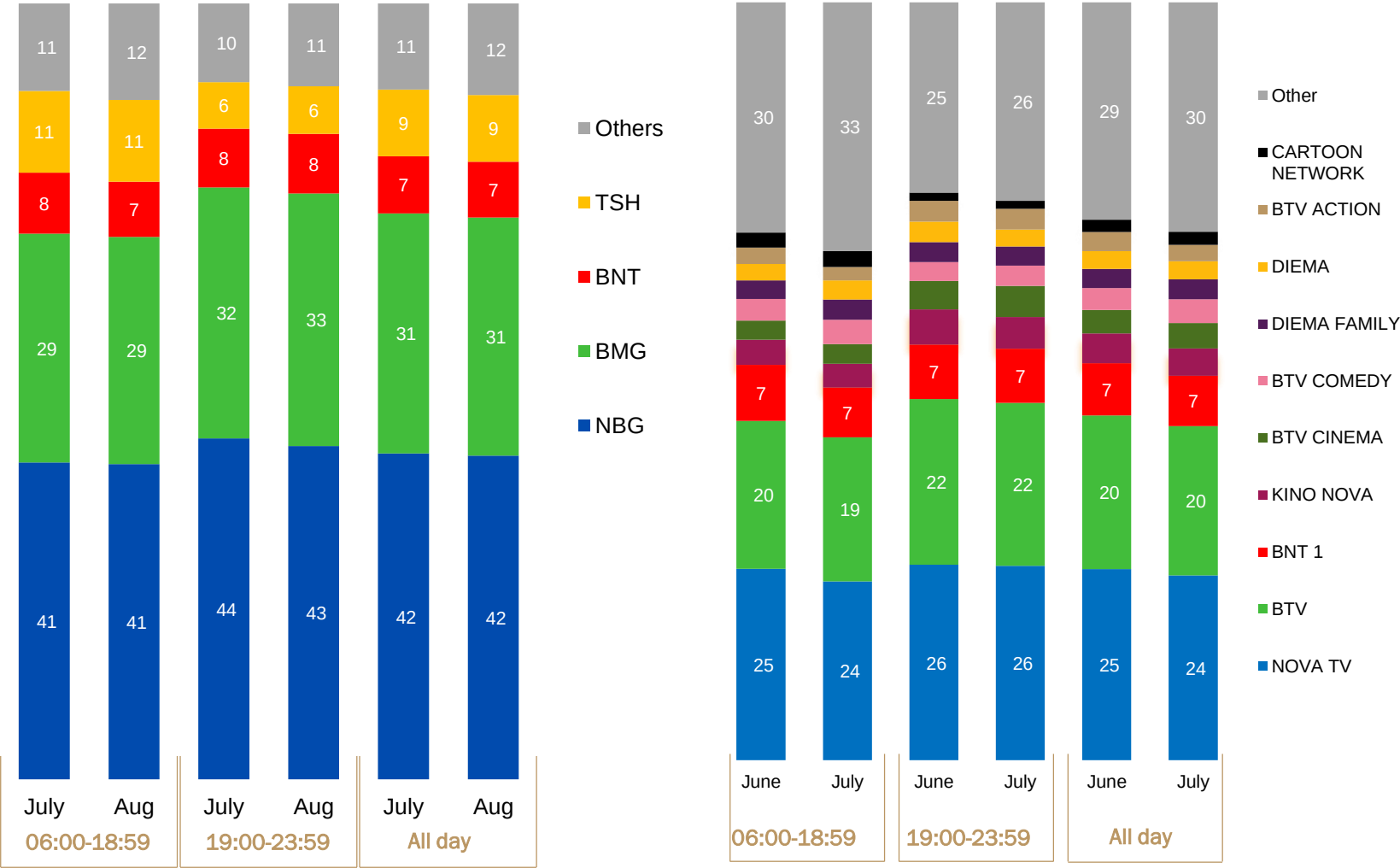
On YTD base however live
audience increased by 17%.



BOTH MAJOR TV GROUPS REMAINED STABLE IN AUGUST

Nova sustained leadership on channel basis.

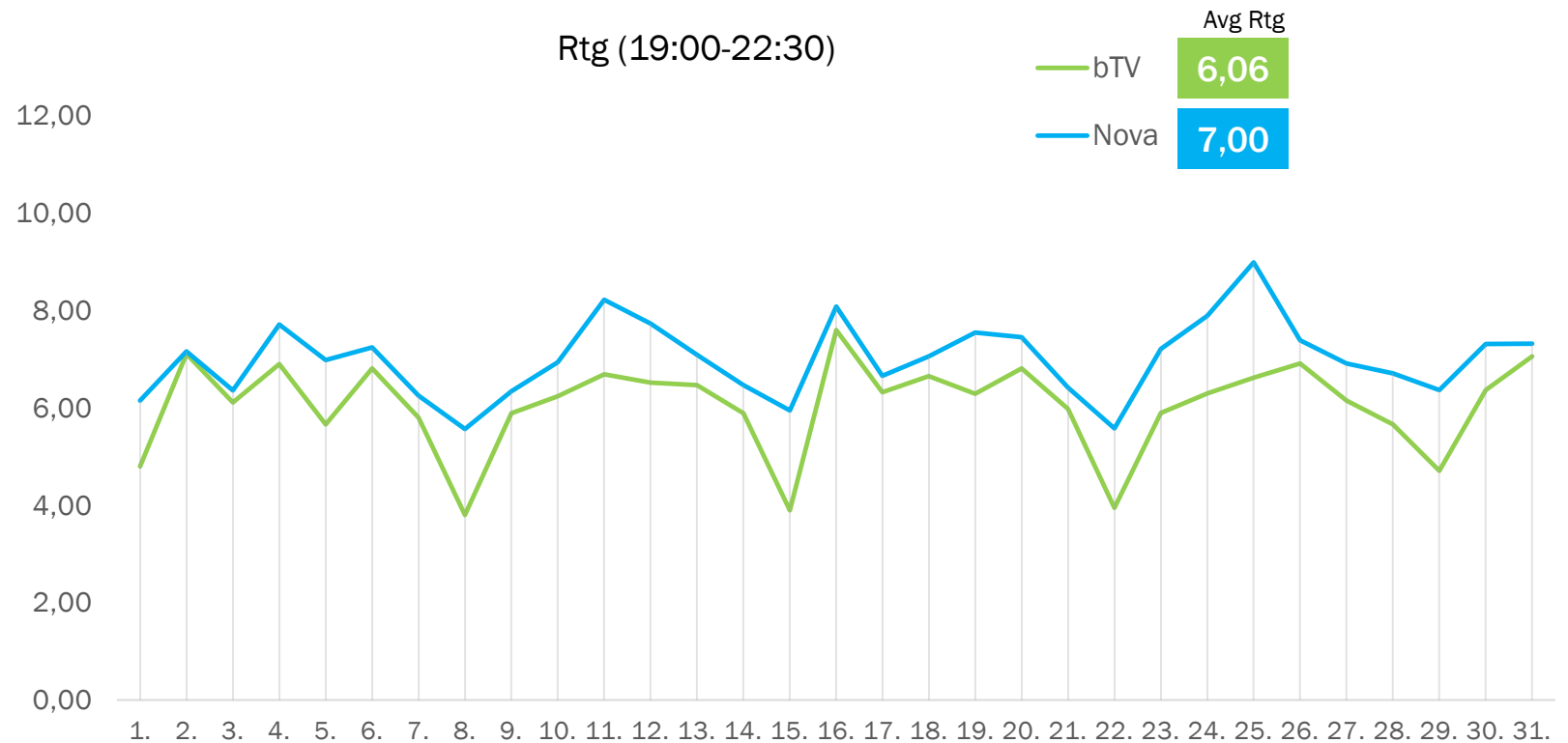
Cartoon Network replaced Channel 3 in top 10.



Source: GARB, A18-49

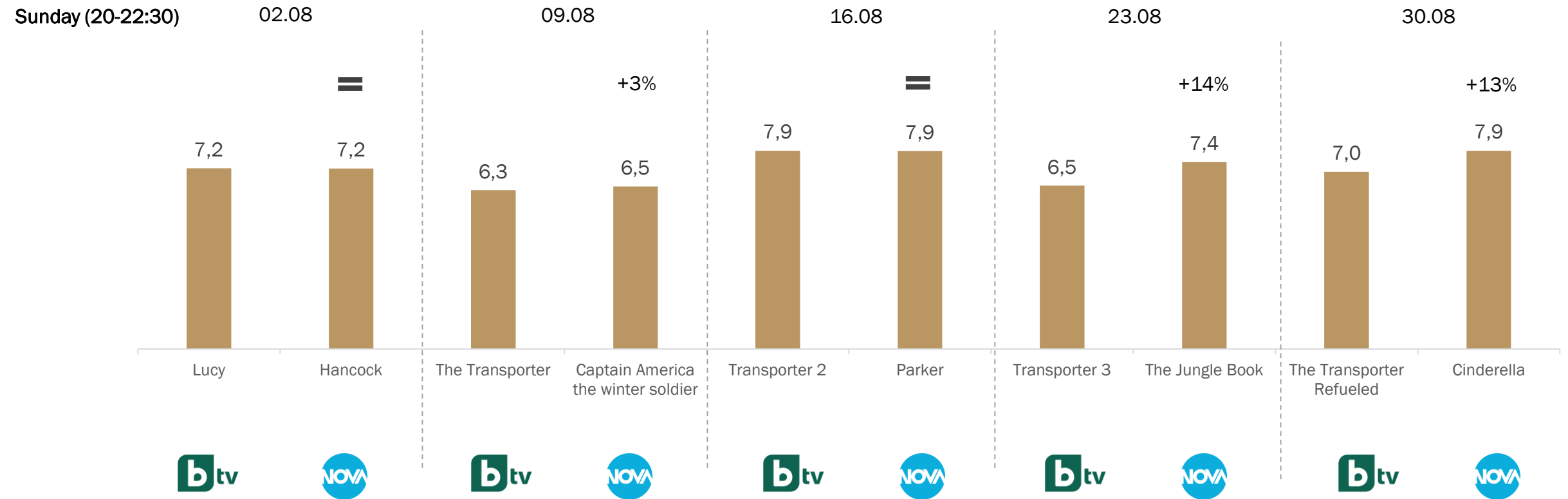
NOVA DOMINATED CENTRAL PT HOURS

16% higher audience
attracted by Nova vs bTV



BTV REGISTERED COMPETITIVE AUDIENCE WITH ITS SUNDAY PT MOVIES FOR THREE CONSECUTIVE WEEKS

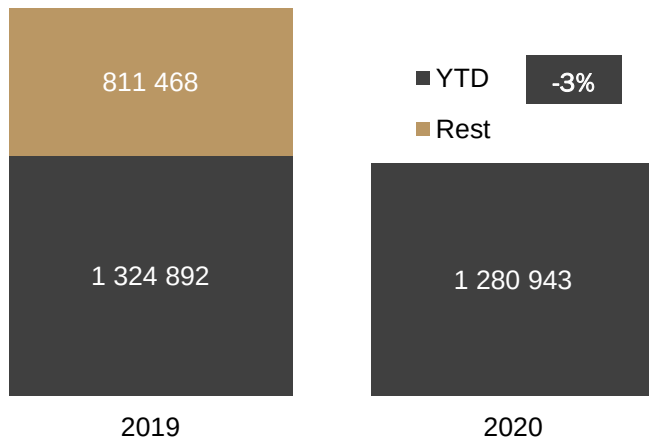
At the end of August Nova regained stable dominance



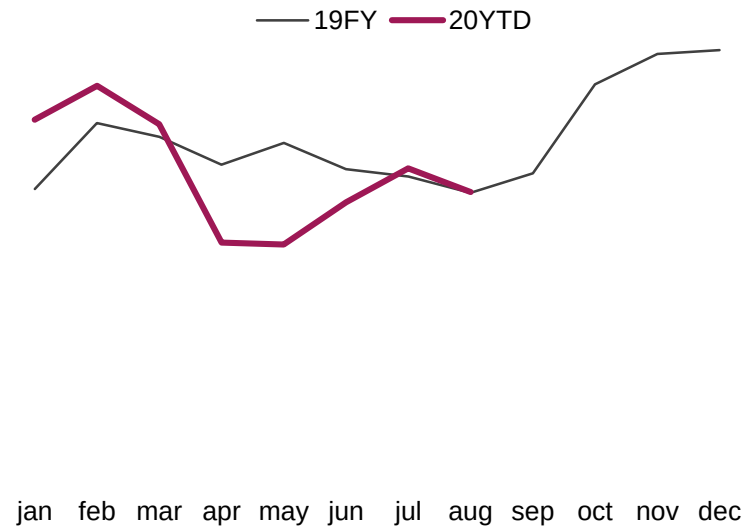
TRP30 IN AUGUST REPLICATED LAST YEAR'S RESULTS

P&G sustained leadership. Top 3 remained the same as last month.
Top 10 consists of 5 pharma players, 3 retailers and 2 FMCG.

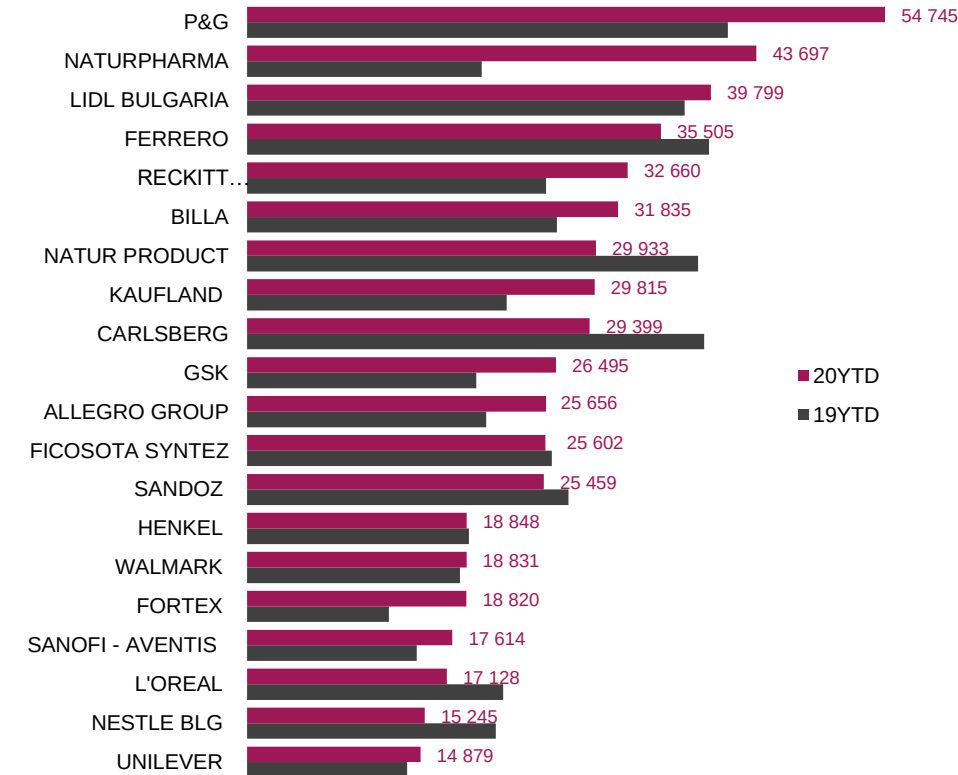
TOTAL TRP30



SEASONALITY

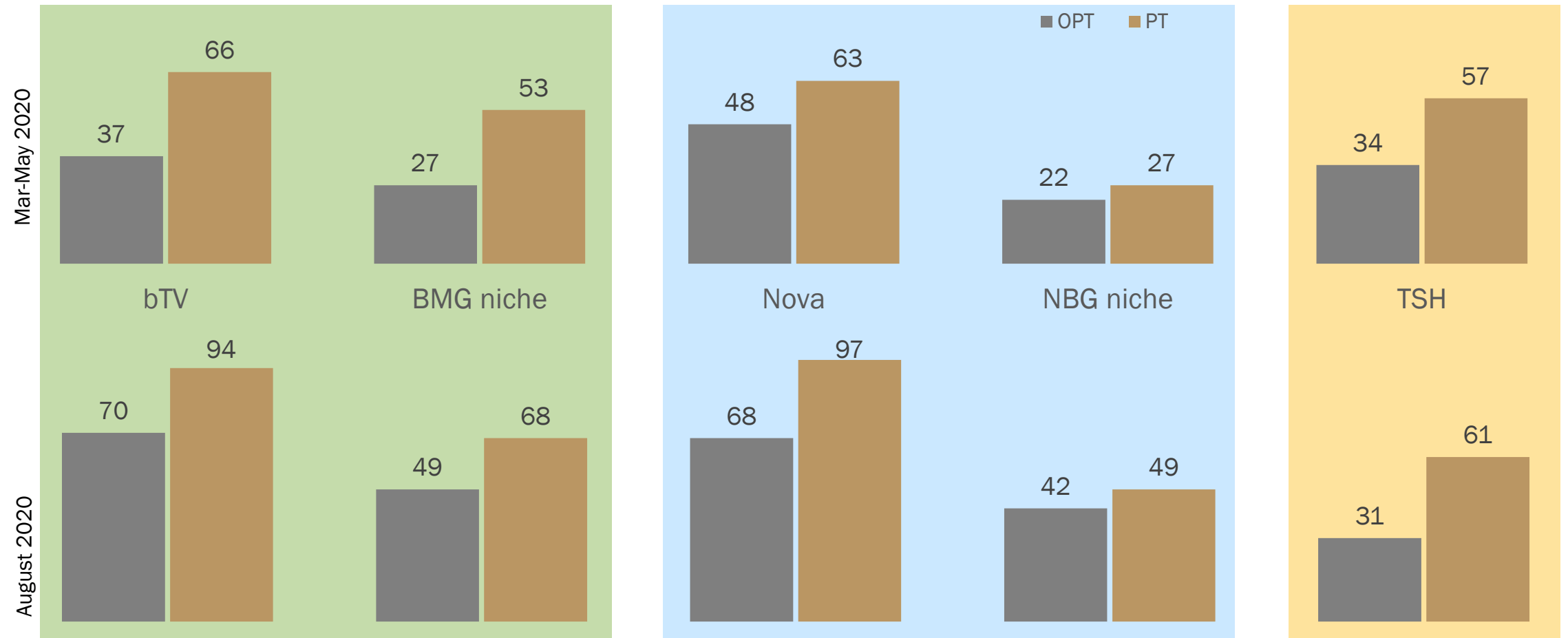


TOP ADVERTISERS



BTV & NOVA SUSTAINED 90%+ PT INVENTORY FULFILMENT

All TV groups keep higher fulfilment compared to the lockdown period



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



DIGITAL REPORT

FOCUSED ON GROWING E-COMMERCE WITH
LIVESTREAMING





INFLUENCER ECONOMY



SOCIAL PLATFORMS WITH
E-COMMERCE CAPABILITY



SOCIAL DISTANCING

SOCIAL DISTANCING AND SOCIAL SHOPPING

Livestreaming for e-commerce presents an elegant solution to the issues that have arisen due to the global pandemic. It effectively closes the distance between the brand and the buyer and addresses the challenges of marketing to consumers whose buying habits and demands have evolved dramatically in pace with the digital revolution.

SHOULD YOU INVEST IN A CELEBRITY AN INFLUENCER OR FEATURE ONE OF YOUR OWN?



INFLUENCER

- Can leverage their enormous and devoted fan base, some that rival that of celebrities
- More relatable for the general audience



PROS



CONS

- Engaging influencers can be expensive
- Fake followers; ROI might not be as expected
- Many influencers have their own stores, so they are incentivized to promote their own brands, potentially putting them in competition with their sponsors



CELEBRITY

- Star quality has the potential to draw more attention
- Celebrities can own and create the content and then share it with their huge follower base

- Can be expensive to work with
- Unpredictable sales conversion



MANAGEMENT EXECUTIVES

- They are experts in company offerings, and will be able to answer consumer questions in detail and effectively highlight product features

- As they might not be broadcast professionals, it can be hard to maintain stage presence and be engaging on screen

CASE STUDY: NIO

Nio's ES6 SUV was launched by founder and CEO William Li via a sponsored appearance on TV personality Wang Han's livestream. The 40-minute introduction and demonstration drew 20 million viewers, over 5 000 test drive sign ups, and 230 car order deposits worth USD 18 million.

William Li



5000 Test drives



CASE STUDY: XIAOMI

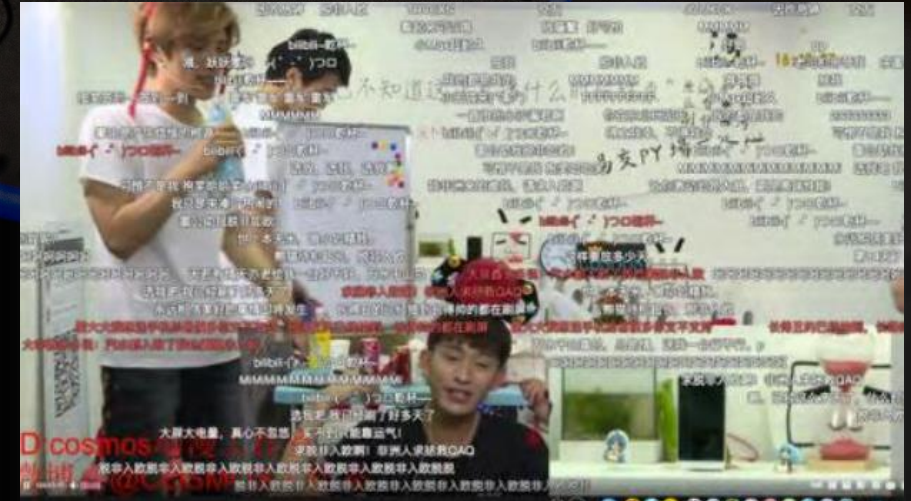
The Chinese mobile phone maker collaborated with video platform Bilibili for a 72-hour long live-streamed launch event for its Mi 105G phone. The event pulled in around 12 million viewers and 2.6 million comments on the platform's trademark “bullet chat” format, which shows user comments across the screen in real-time.

72
hours

12
million
viewers

2.6
million
comments

The “bullet chat”



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	novini.bg	1 929 040	223 463	1 899 650	23 211 904	3 870 616	19 341 287	0:10:50	0:23:38	0:08:13	41,35%	7,78%	42,87%
2	nova.bg	1 867 871	387 067	1 808 768	18 769 047	4 542 527	14 226 520	0:09:12	0:12:52	0:06:45	40,04%	13,47%	40,82%
3	olx.bg	1 810 399	599 778	1 741 908	228 015 376	37 010 028	191 005 349	1:20:36	0:53:55	1:05:12	38,81%	20,87%	39,31%
4	abv.bg	1 713 464	1 108 871	1 096 832	173 046 065	104 193 083	68 852 982	1:53:59	1:48:45	1:08:07	36,73%	38,58%	24,75%
5	btvnovinite.bg	1 637 088	257 151	1 578 098	9 630 277	1 461 649	8 168 628	0:04:53	0:07:57	0:03:47	35,09%	8,95%	35,62%
6	24chasa.bg	1 607 090	309 718	1 516 753	26 737 153	6 711 438	20 025 715	0:24:13	0:46:15	0:16:13	34,45%	10,78%	34,23%
7	blitz.bg	1 513 792	277 605	1 474 636	71 292 524	20 326 461	50 966 064	1:07:39	1:52:57	0:48:11	32,45%	9,66%	33,28%
8	fakti.bg	1 435 161	276 580	1 336 666	30 465 916	6 726 731	23 739 185	0:28:23	0:37:12	0:22:47	30,76%	9,62%	30,17%
9	dariknews.bg	1 435 007	300 962	1 325 874	13 465 760	2 745 305	10 720 454	0:07:54	0:08:35	0:06:37	30,76%	10,47%	29,92%
10	dir.bg	1 336 468	307 983	1 181 165	38 308 681	18 110 015	20 198 666	0:36:44	1:17:49	0:21:16	28,65%	10,72%	26,66%
11	framar.bg	1 315 786	315 764	1 186 311	7 549 495	1 743 286	5 806 209	0:07:32	0:08:32	0:06:06	28,21%	10,99%	26,77%
12	bazar.bg	1 298 308	392 217	1 116 550	67 405 845	21 015 310	46 390 536	0:33:29	0:40:11	0:24:49	27,83%	13,65%	25,20%
13	marica.bg	1 191 324	109 376	1 162 352	18 559 199	1 466 068	17 093 131	0:20:05	0:16:53	0:19:00	25,54%	3,81%	26,23%
14	vesti.bg	1 183 558	481 807	959 365	19 735 032	7 935 971	11 799 060	0:18:22	0:21:25	0:11:54	25,37%	16,76%	21,65%
15	actualno.com	1 141 123	182 828	1 033 324	10 737 846	1 372 321	9 365 525	0:09:24	0:24:49	0:06:00	24,46%	6,36%	23,32%
16	dnes.bg	1 127 667	207 011	1 050 236	15 995 516	4 659 761	11 335 755	0:15:25	0:33:48	0:09:53	24,17%	7,20%	23,70%
17	sinoptik.bg	1 091 460	268 061	1 013 797	37 003 809	5 424 344	31 579 465	0:13:45	0:09:47	0:12:13	23,40%	9,33%	22,88%
18	mobile.bg	1 083 762	282 147	982 159	199 076 410	34 444 241	164 632 169	1:11:17	1:19:04	0:55:57	23,23%	9,82%	22,17%
19	dnevnik.bg	1 033 946	208 198	981 217	16 318 884	4 783 014	11 535 870	0:22:29	0:40:19	0:15:08	22,16%	7,24%	22,15%
20	-bnr.bg	955 663	200 305	860 490	5 268 646	2 558 423	2 710 223	0:15:22	0:59:54	0:03:07	20,49%	6,97%	19,42%



THANK YOU!

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