



TV & DIGITAL REPORT

MAY 2020





TV REPORT

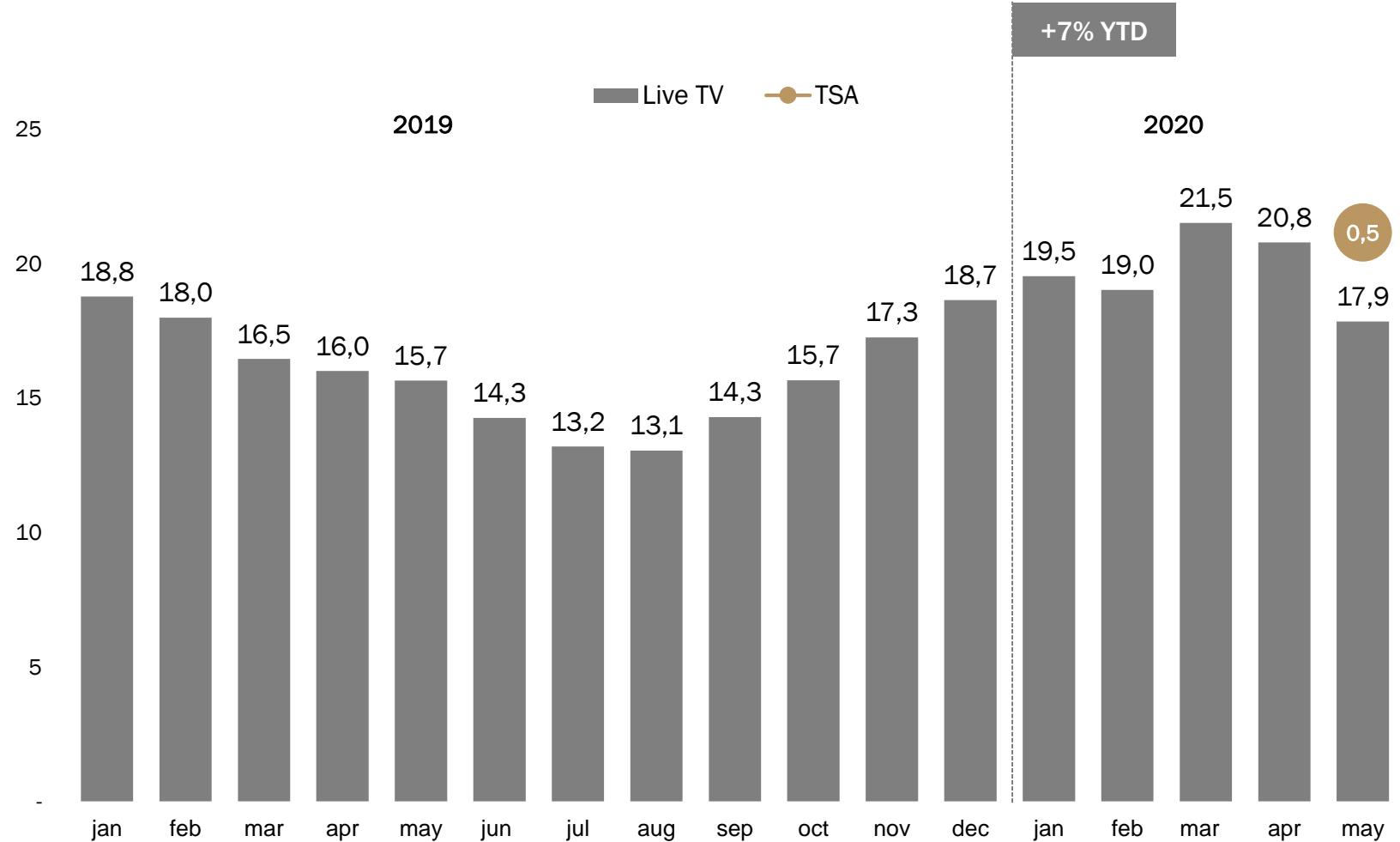
FOCUSED ON GARB OVERTAKING

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

RECORDS OF HIGH VIEWERSHIP IN MARCH AND APRIL DUE TO THE LOCKDOWN

Then in May the overall PUT started to decline, but still is 14% higher vs May'19.

GARB started to report the time shifted audience since May.

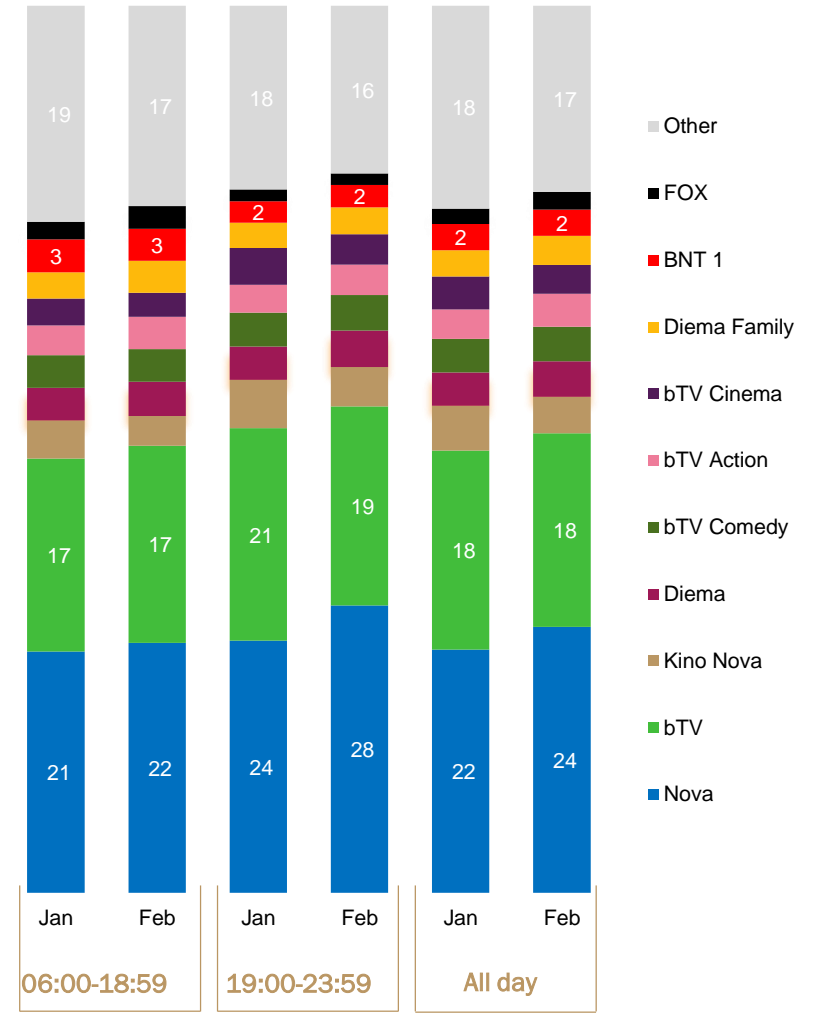
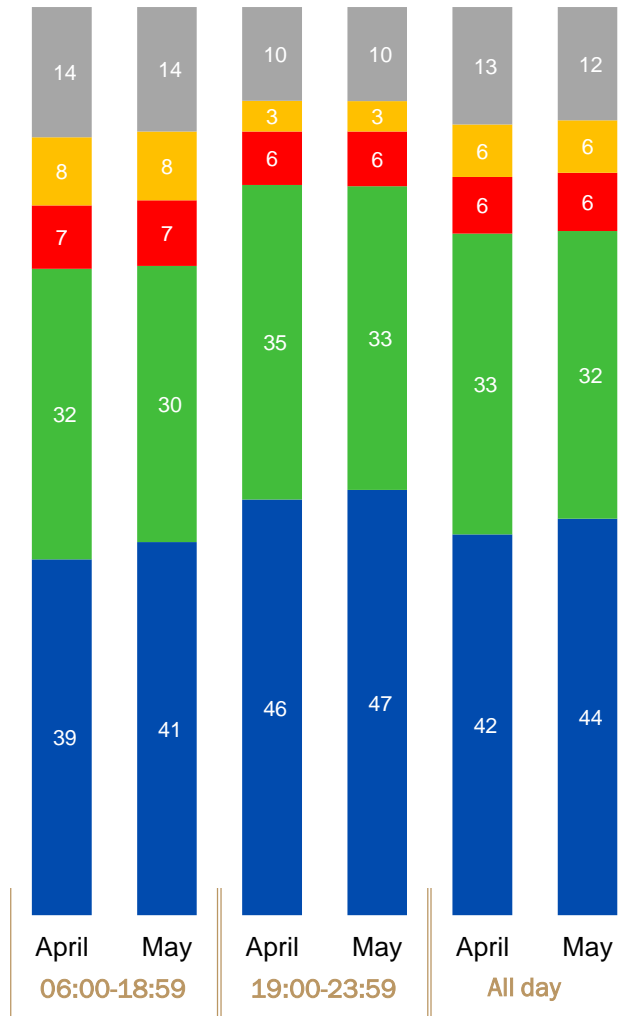


Source: GARB, A18-49

NBG REMAINED THE LEADING TV GROUP IN MAY

It increased share in every observed time slot.

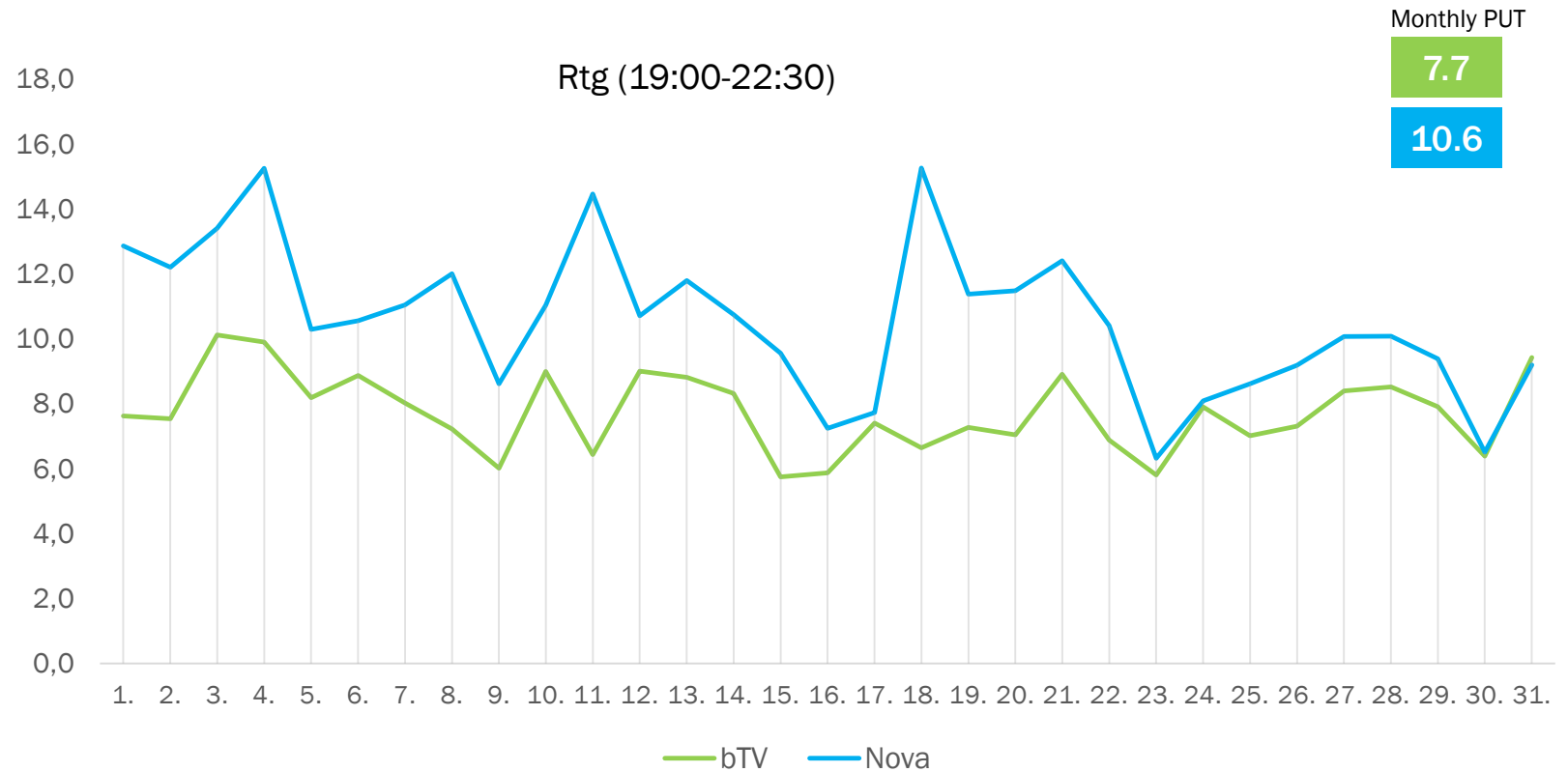
The same trend is valid on channel basis as Nova sustained leadership with nearly 10pp higher PT audience.



Source: GARB, A18-49

NOVA WON EARLY PT AUDIENCE IN MAY

bTV competed more or less successfully only on Sundays with the last episodes of The Voice of Bulgaria.



NOVA GRADUALLY OUTPERFORMED BTV AS THE TOP CHANNEL

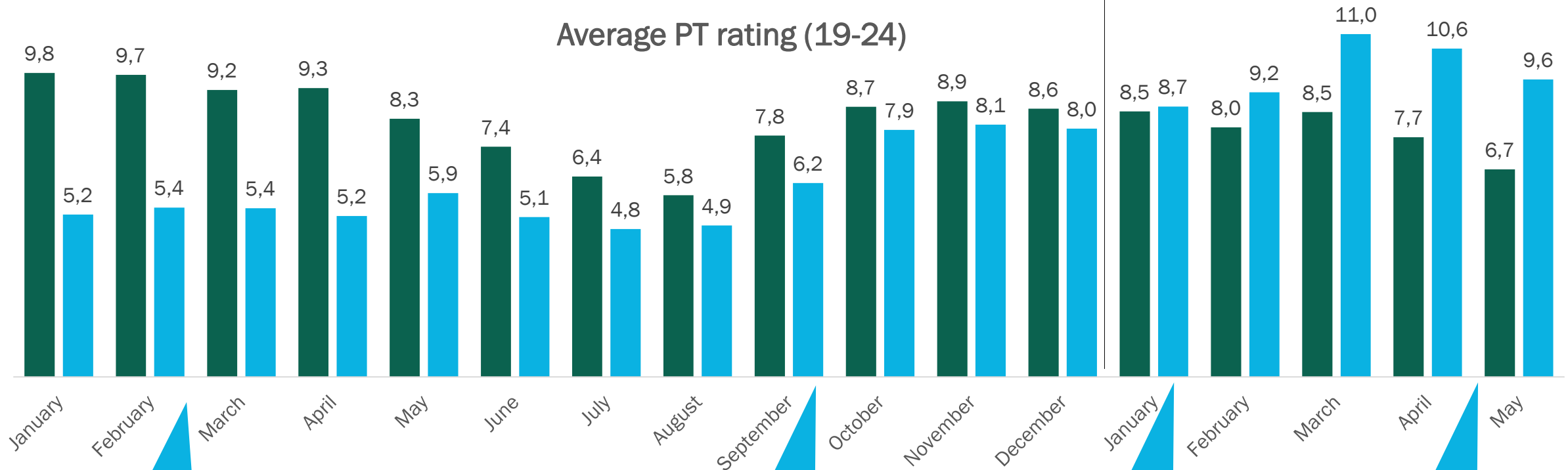
At the end of this process, GARB became the single market currency



2019

2020

Average PT rating (19-24)



Advance media group acquired NBG

Ratings started to increase

Leadership achieved

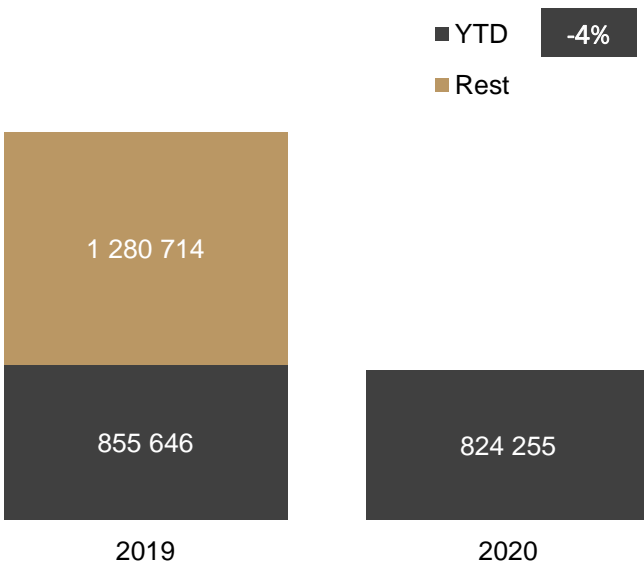
Singe market currency - GARB

Source: GARB, A18-49

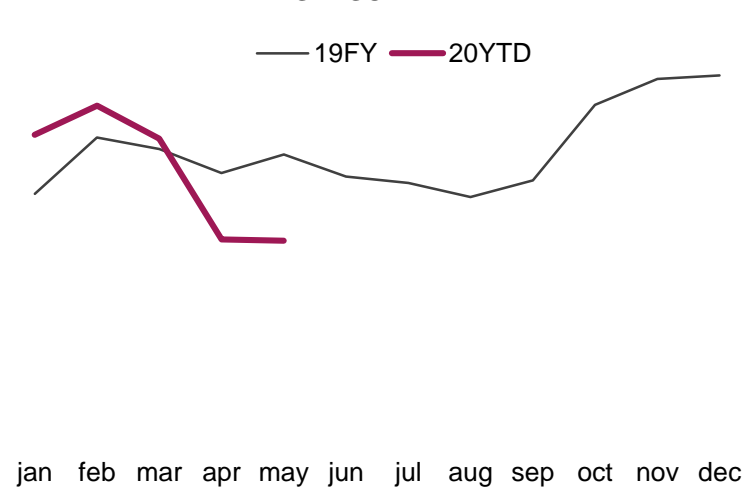
TRP30 DELIVERY DECLINED DUE TO THE REDUCED DEMAND DURING THE LOCKDOWN

P&G is the top advertiser followed by Ferrero and NaturPharma
Top 6 players increased TV activities

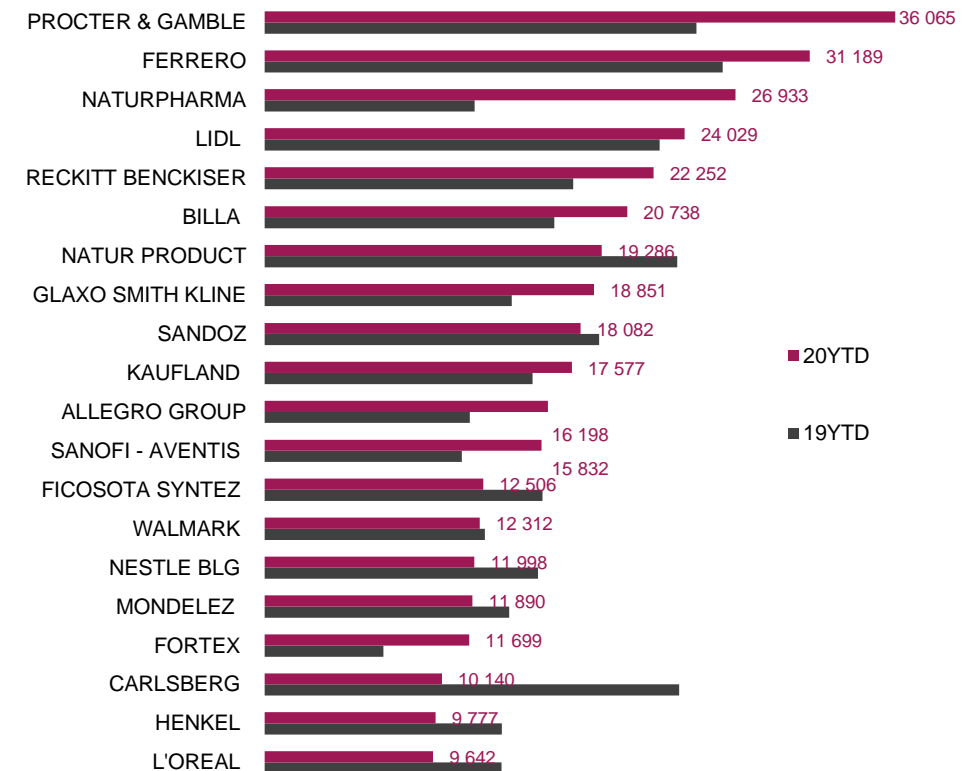
TOTAL TRP30



SEASONALITY



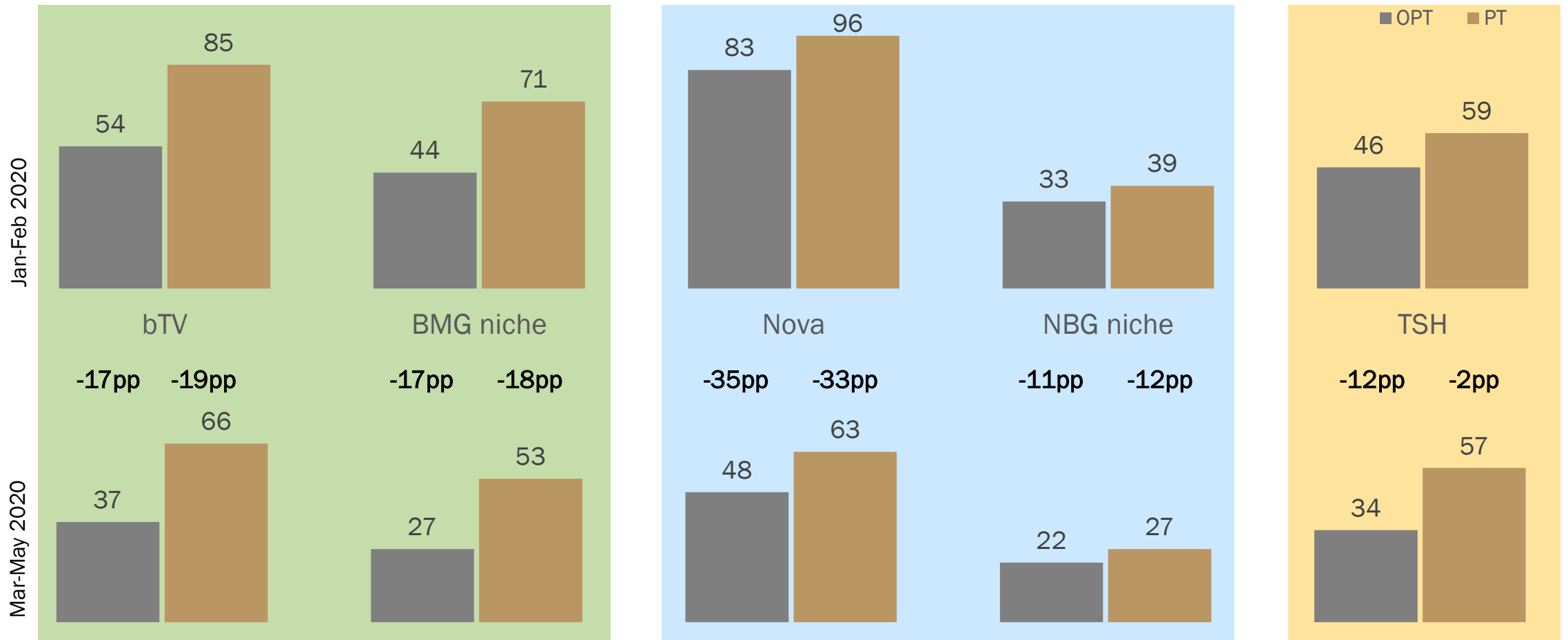
TOP ADVERTISERS



Source: GARB, A18-49

COVID19 CAUSED LOWER INVENTORY FULFILLMENT AS A RESULT OF LACKING DEMAND

The more filled channel inventory was before the crisis, the higher the decrease it experienced during the lockdown





DIGITAL REPORT

FOCUSED ON GAMEFLUENSERS



GLOBALDATA PREDICTS THAT THE GAMING INDUSTRY WILL BE WORTH \$300 BILLION BY 2025

Brands want a slice of that multibillion cake

Apple Arcade launched in September 2019, upping standards and accessibility for mobile gaming, and Google is also attempting to change the way games are accessed with the launch of Stadia in November 2019.

As the gaming universe diversifies and the uptick in users continues, brands are turning to gaming influencers to engage with this growing audience.



THE BIGGER THE BRAND, THE HARDER THE GAME



Fortnite megastar Tyler Blevins, better known as Ninja, entered a multiyear partnership with Adidas.

Nike signed a deal to become the official and exclusive apparel and footwear partner for League of Legends Pro League players.

Louis Vuitton has also been spotting in-game brand opportunities. The luxury brand partnered with Riot Games and is offering two unique “prestige skins” for League of Legends champions.

WHY ITS INTERESTING?

Gaming is shaping up to become the next frontier for brand activations—and esports stars are becoming the newest class of celebrities.



“Brands have historically been cautious when approaching gaming as it’s somewhat unknown. However, the scale at which talent is building audience—particularly mobile gamers—simply can’t be ignored now,” says Charlie Baillie, cofounder of esports media company Ampverse.

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	3 135 676	1 267 497	2 773 268	250 904 139	130 639 857	120 264 282	1:26:20	2:05:52	0:40:05	67,22%	44,10%	62,59%
2	olx.bg	1 968 558	681 434	1 897 446	259 031 881	48 122 394	210 909 487	1:29:31	1:05:23	1:09:23	42,20%	23,71%	42,82%
3	24chasa.bg	1 858 896	403 430	1 765 335	28 567 513	7 620 966	20 946 548	0:23:25	0:44:20	0:14:31	39,85%	14,04%	39,84%
4	novini.bg	1 818 411	220 591	1 787 319	22 366 336	4 265 870	18 100 466	0:11:54	0:27:55	0:08:40	38,98%	7,68%	40,34%
5	nova.bg	1 797 814	526 183	1 693 490	21 875 534	6 937 283	14 938 251	0:12:58	0:16:23	0:08:41	38,54%	18,31%	38,22%
6	btvnovinite.bg	1 762 202	324 178	1 704 572	11 873 404	1 677 803	10 195 602	0:05:40	0:06:39	0:04:36	37,78%	11,28%	38,47%
7	blitz.bg	1 659 582	356 115	1 606 640	83 995 342	23 005 730	60 989 612	1:13:51	1:45:31	0:52:54	35,58%	12,39%	36,26%
8	fakti.bg	1 595 093	343 355	1 495 854	29 126 339	6 530 692	22 595 647	0:25:04	0:30:37	0:19:42	34,19%	11,95%	33,76%
9	dariknews.bg	1 497 422	382 881	1 365 716	13 531 276	3 079 036	10 452 240	0:08:07	0:08:17	0:06:34	32,10%	13,32%	30,82%
10	bazar.bg	1 421 886	448 589	1 200 195	76 412 499	24 388 298	52 024 201	0:36:16	0:43:55	0:26:33	30,48%	15,61%	27,09%
11	dir.bg	1 393 833	404 264	1 218 574	40 091 985	19 126 311	20 965 674	0:38:40	1:08:08	0:21:38	29,88%	14,07%	27,50%
12	marica.bg	1 362 957	153 185	1 330 264	19 579 457	1 787 726	17 791 732	0:18:30	0:15:07	0:17:13	29,22%	5,33%	30,02%
13	framar.bg	1 356 053	389 392	1 170 163	7 652 535	1 996 330	5 656 205	0:07:41	0:08:21	0:06:08	29,07%	13,55%	26,41%
14	actualno.com	1 239 089	241 500	1 118 274	9 236 212	1 418 255	7 817 958	0:08:30	0:20:28	0:05:00	26,56%	8,40%	25,24%
15	vesti.bg	1 203 547	571 254	1 002 595	21 219 319	9 886 719	11 332 600	0:21:07	0:24:20	0:11:29	25,80%	19,88%	22,63%
16	profit.bg	1 158 496	127 541	1 069 088	4 084 938	555 813	3 529 125	0:01:47	0:03:23	0:01:31	24,83%	4,44%	24,13%
17	sinoptik.bg	1 140 879	346 268	1 028 229	48 029 082	7 428 986	40 600 097	0:17:59	0:11:39	0:16:02	24,46%	12,05%	23,21%
18	dnevnik.bg	1 137 477	285 806	1 041 405	13 461 032	4 461 491	8 999 541	0:15:49	0:26:36	0:09:59	24,38%	9,94%	23,50%
19	vbox7.com	1 049 718	391 573	939 156	20 586 298	7 741 978	12 844 319	0:46:55	0:55:37	0:29:15	22,50%	13,62%	21,20%
20	offnews.bg	1 038 105	247 990	880 121	11 610 439	7 585 723	4 024 716	0:18:10	1:04:07	0:03:22	22,25%	8,63%	19,86%



THANK YOU!

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