

MEDIA LANDSCAPE 2025

BULGARIA



GENERAL INSIGHTS

In 2025, the media market in Bulgaria stayed stable, with **TV and digital advertising remaining key channels for brands**. Advertisers continued to use a mix of media to make their campaigns more visible and relevant for different audiences. **TV kept its position as the most cost-effective option**, offering the lowest cost per thousand impressions (CPT), even as digital became more important.

Digital advertising kept growing, mainly because of the rise in online shopping, **faster digitalization of businesses**, and the increased use of mobile devices. Advertisers focused on performance-based channels like social media and search, where results are easier to track and measure.

Radio continued to grow as well, helped by better audience data and the popularity of audio content. New investments in online radio and streaming platforms, along with the rising interest in podcasts, made radio more attractive to advertisers, especially for mobile and urban audiences.

Print media continued to decline in its paper form but remained active online. Many **publishers focused on digital formats**, using multimedia content and search optimization to stay relevant and reach new readers.

The cinema industry had a strong comeback. In 2025, ticket sales stayed high. New movie releases, better cinema experiences, and more interest in local films helped bring people back to the theaters. Despite streaming platforms, people still enjoy going to the movies together.

Overall, the media market in Bulgaria showed flexibility, creativity, and the ability to adapt to change. As audience habits and technology keep evolving, everyone in the industry—from media to advertisers—needs to stay up to date and ready to adjust.

SOCIODEMOGRAPHIC & ECONOMIC FACTS

Total Population

6,42mln

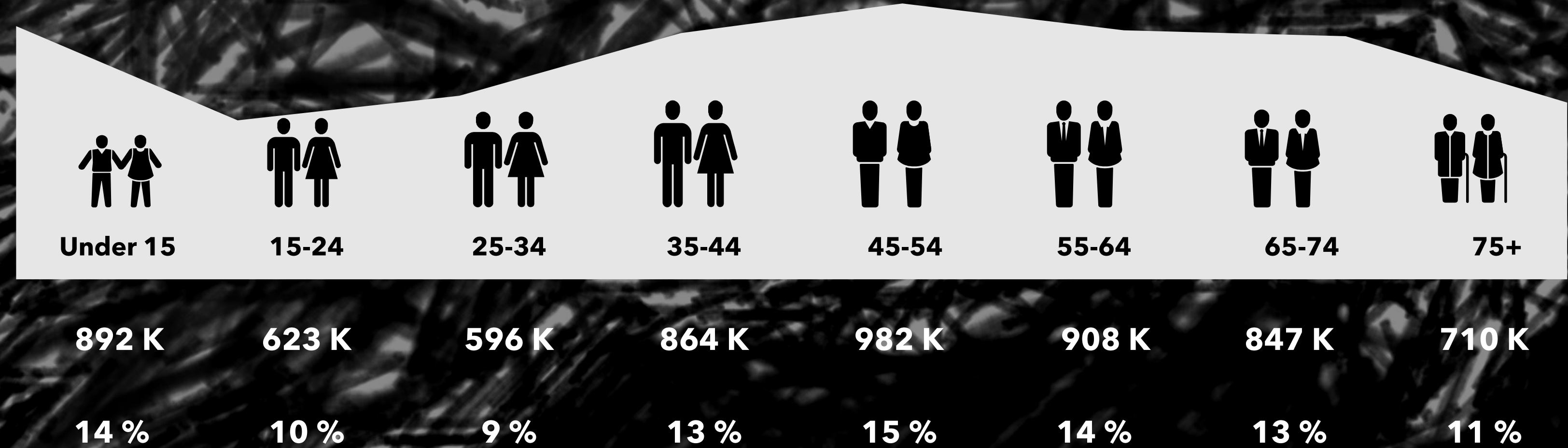
* 2025

Gross domestic product

€116 bln

* 2025

Population age structure 2025*
absolute and in %



per capita

€ 18 062

* 2025

Source: GDP- national level - 2025 - <https://www.nsi.bg/en/press-release/gross-domestic-product-gdp-national-level-8782>

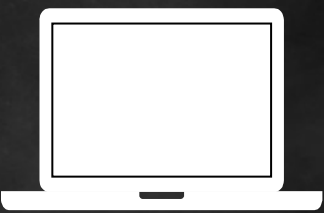
ADVERTISERS' MOST PREFERRED MEDIA CHANNELS ARE TV AND DIGITAL MEDIA

Net Media Mix € Total Advertising Market
In % and million €, est. 2025*



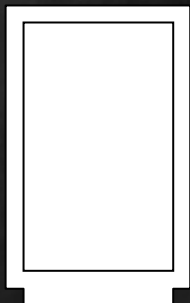
TV

189.4 €
50.8 %



ONLINE

140 €
37.7 %



OOH

26 €
7%



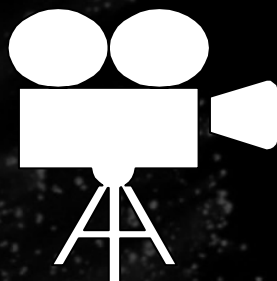
RADIO

14 €
3.6%



PRINT

3 €
0.8%

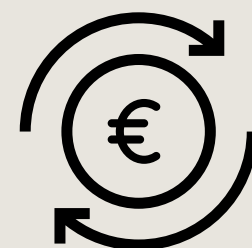


CINEMA

0.7 €
0.2%

Source: BACA est. 2025*

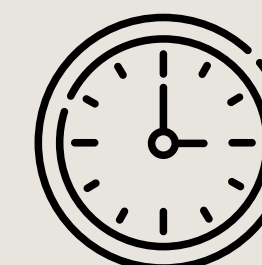
TV Highlights



Gross TV spending increased by **26,3%** compared to last year



TV clutter decreased by **8.2%** to **22 279** ad spots aired per day (avg.).



Average time spent watching TV **5:09** hours/day.

Source: GARB 2025

Top 10 industries account for 96% TV ad market share.

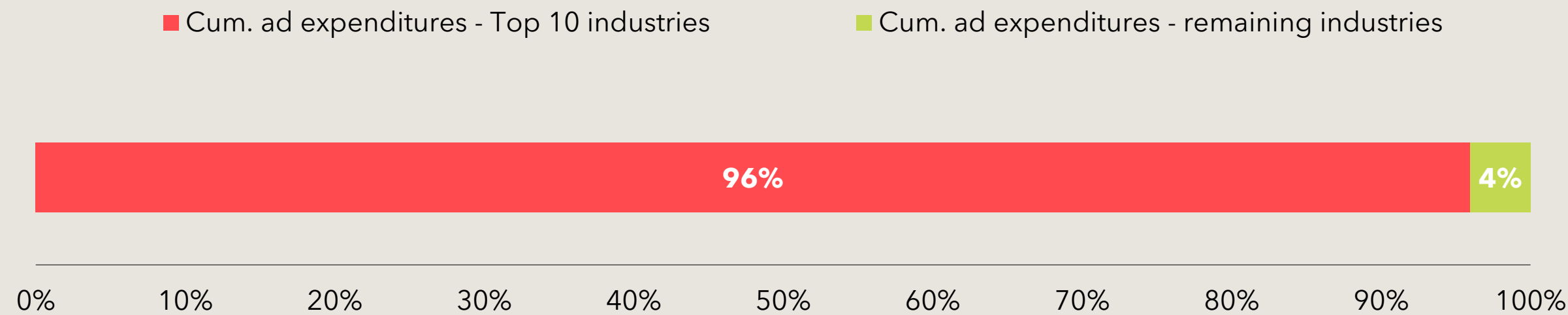
Top 10 industries TV
in million € and in % of total ad investments

	Pharmaceuticals	953.8	33.4%
	Retail & Online Stores	552.6	19.4%
	Food	339.4	11.9%
	Cosmetics	313.8	11.0%
	Drinks	191.5	6.7%
	Household Chemistry	137.9	4.8%
	Telecommunications	105.5	3.7%
	Household Appliances	47.8	1.7%
	Motoring	47.4	1.7%
	Finance	46.7	1.6%

Total Gross TV ad investments 2025:

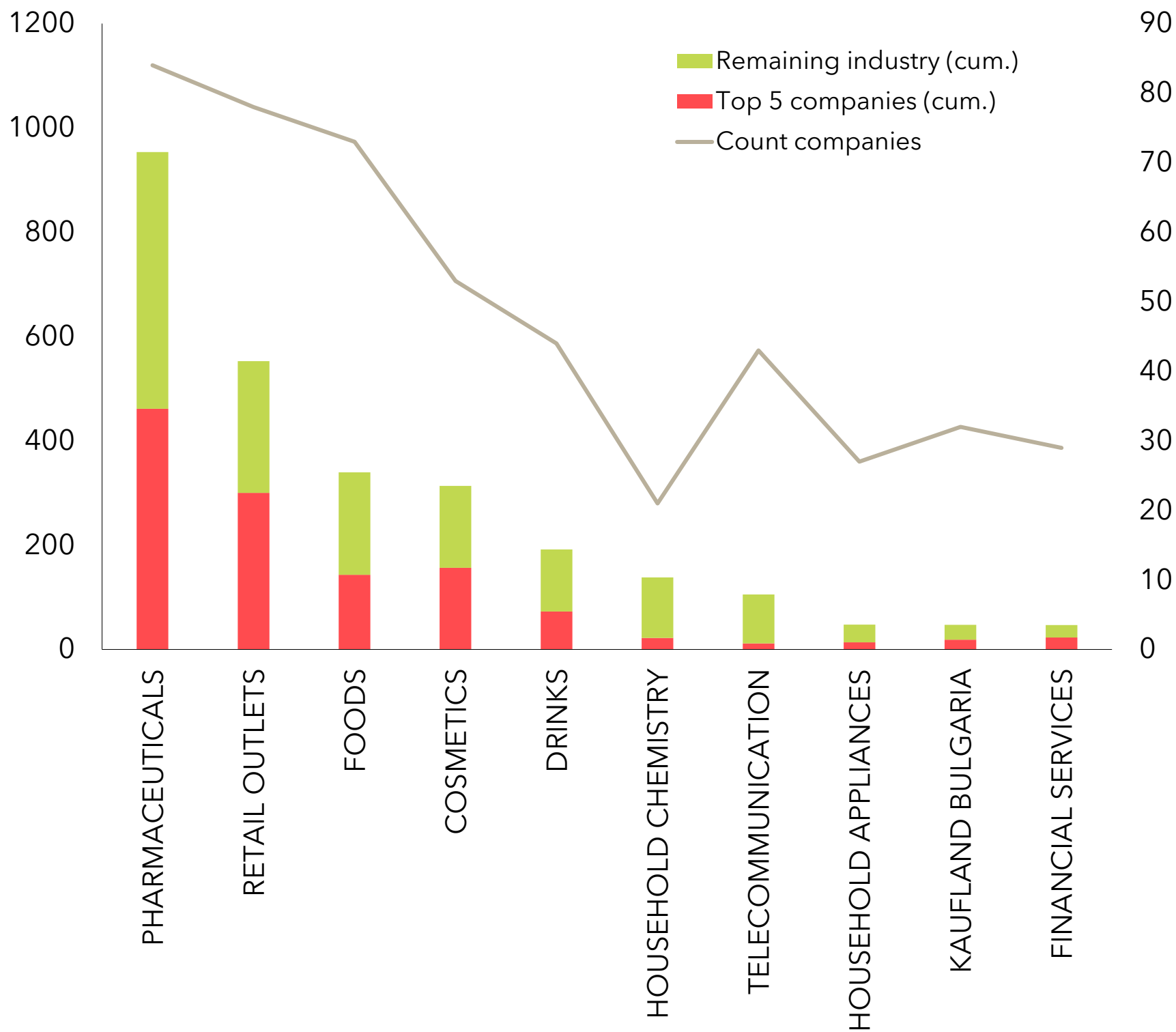
2 852 mil €

Competition share - top 10 industries
in % , 2025



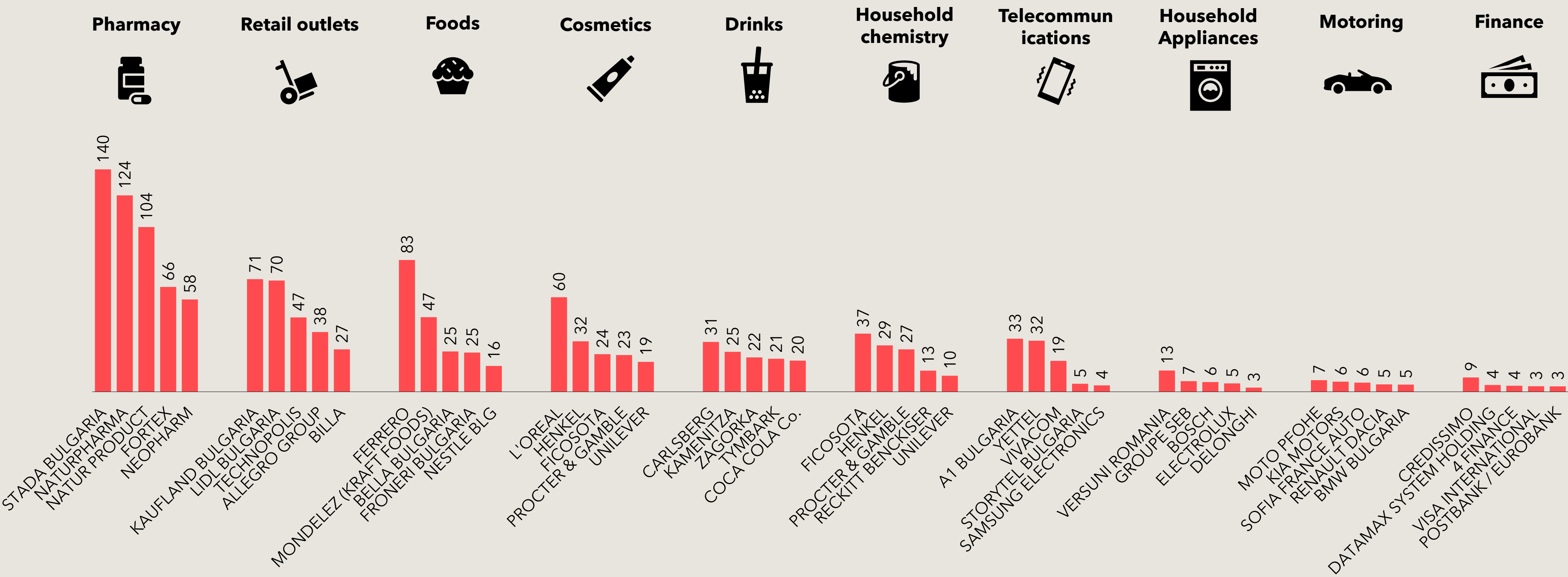
Source: GARB 2025

Competition Share - Top 5 Companies
in million € / company count, 2025



Top TV advertisers in different categories for 2025

Top 5 TV Advertisers of Top 10 Industries
in million €, 2025

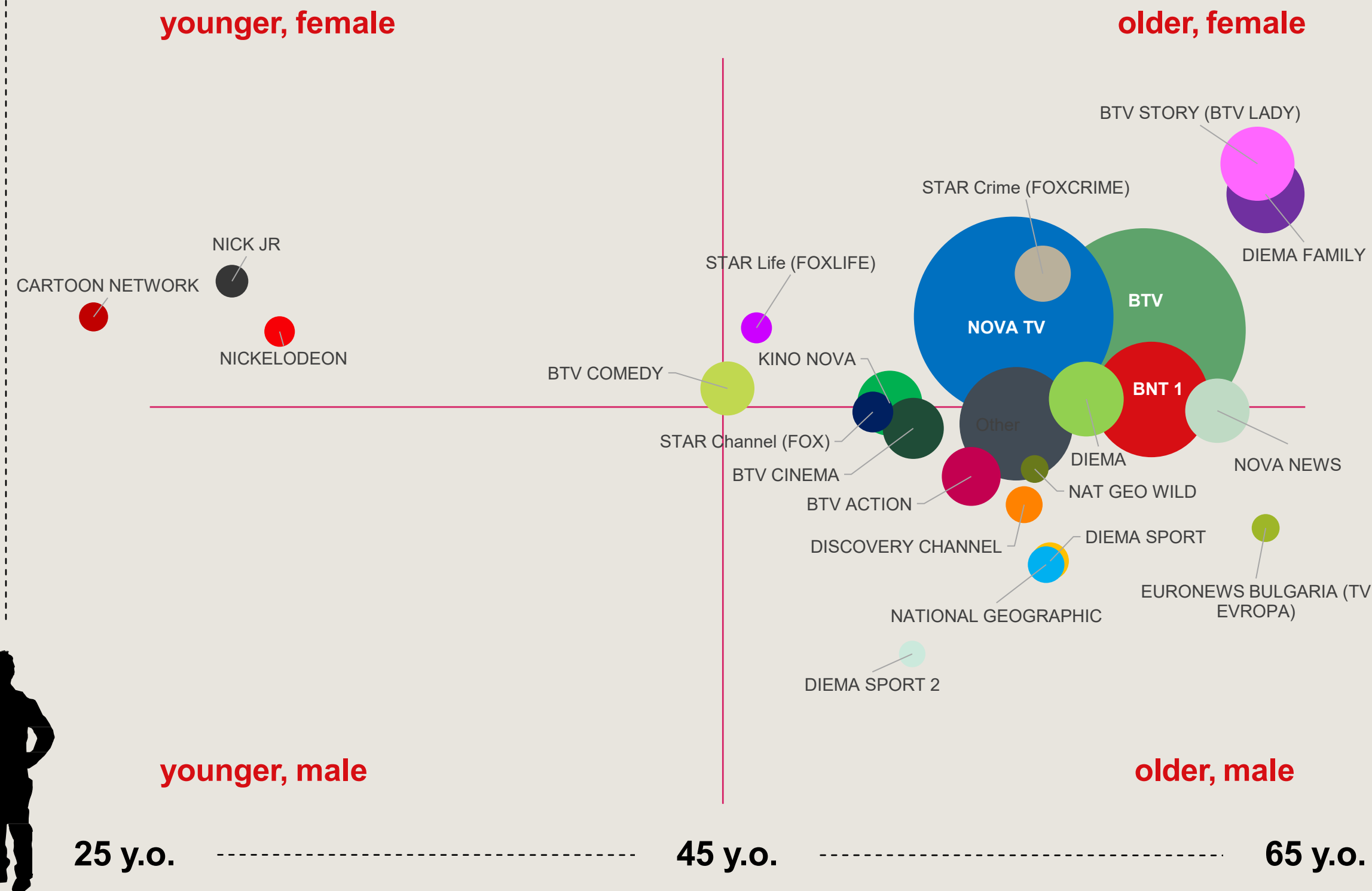


Source: GARB 2025

TV Channels Profile (Age/Gender) for 2025



Age and Gender Profile of Top 25 TV Channels
in %, 2025

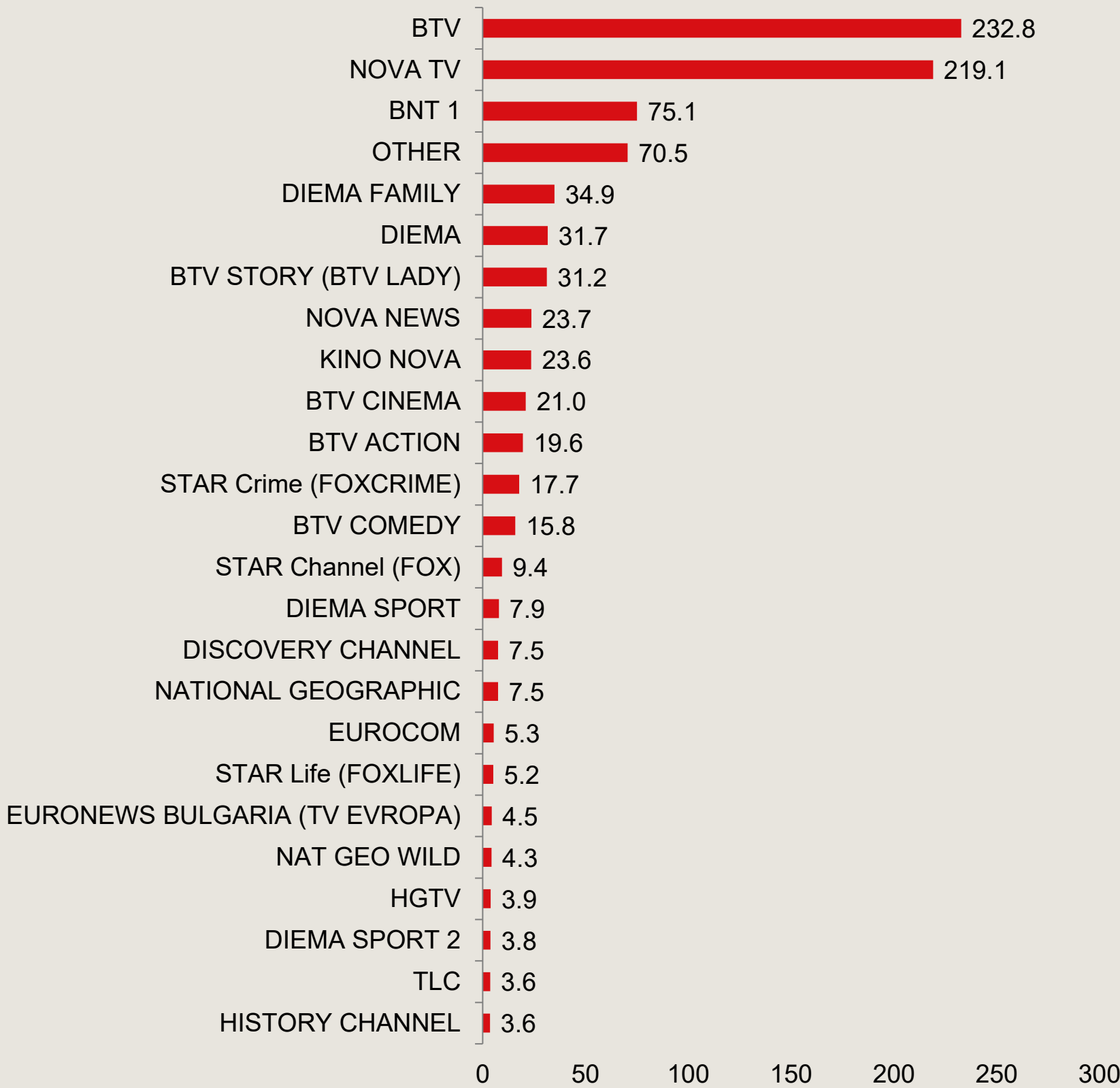


Source: GARB 2025

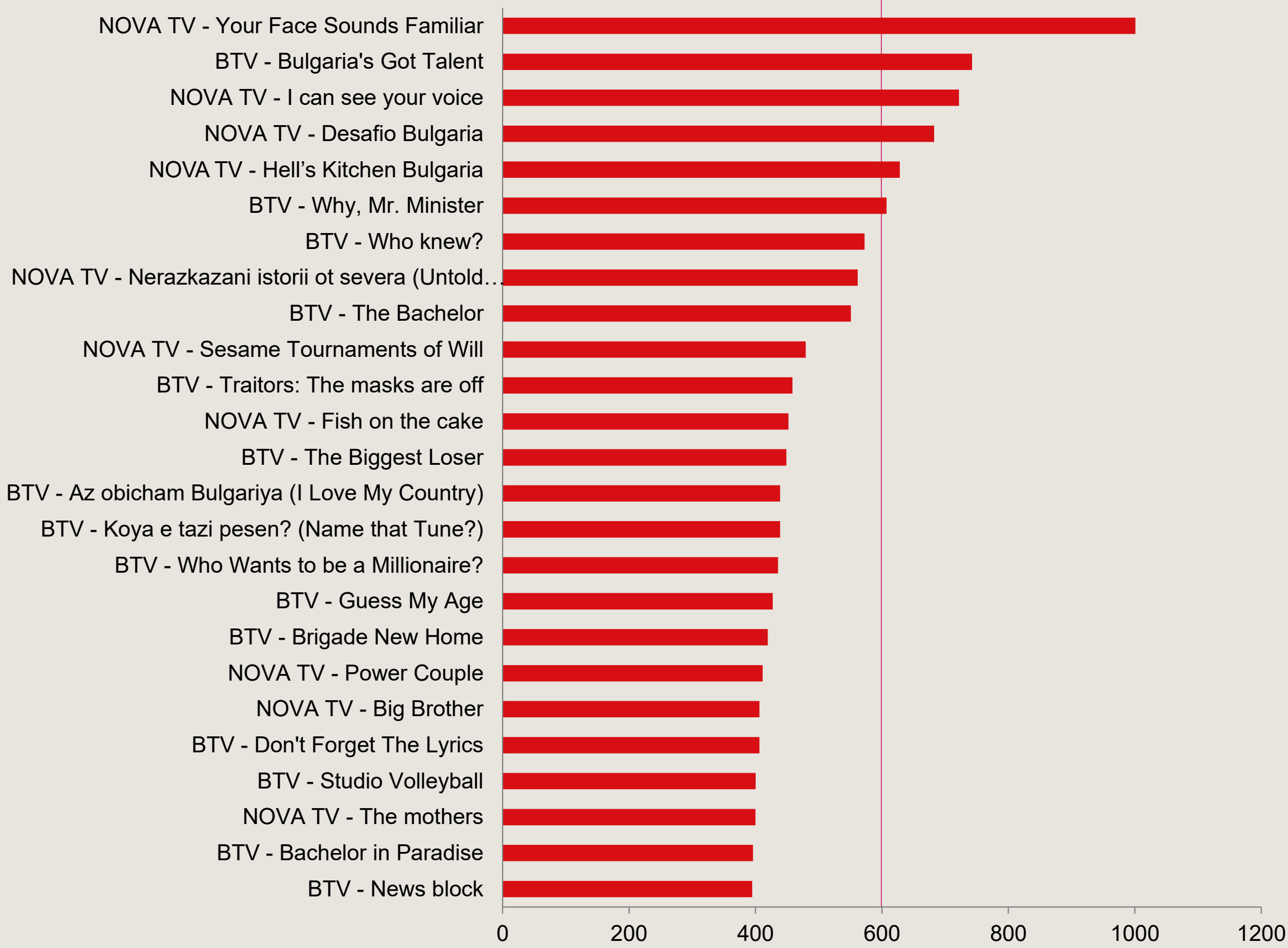
TV audience in Bulgaria is **clustered around major channels like NOVA TV, bTV, and STAR Channel**, which attract viewers with **medium to high age index (55-60)** and **balanced gender split (around 50-60% female)**. Smaller channels and niche platforms serve more segmented audiences, while outliers on the left suggest channels with a **younger or more male-skewed** profile.

TOP TV Channels RTGs for 2025

Top 25 Channels AVG Daily Ratings - Adults 18+
in '000 viewers



Top 25 TV Formats - Adults 18+
in '000 viewers



Source: GARB 2025

ONLINE ADVERTISED CATEGORIES FOR 2025

TOTAL 2025	29 881 335	1 674	1 983	7 949
Categories	Ads Count	Advertisers	Brands	Campaigns
RETAIL AND ONLINE STORES	4 918 909	315	327	2 489
MEDIA AND MEDIA PRODUCTS, ADVERTISING, PR	4 203 137	70	115	560
CULTURE. EDUCATION. PUBLISHING. EVENTS	3 989 623	187	205	596
SPORTS. GAMES. LEISURE ACTIVITIES	3 468 000	49	51	349
PHARMACY, MEDICAL SERVICES AND PRODUCTS	1 689 956	131	230	427
FINANCIAL SERVICES	1 632 784	82	91	453
DRINKS	1 536 837	60	99	224
TELECOMMUNICAITONS	1 353 874	11	12	186
TRANSPORT. AUTOMOBILISM. FUELS	1 343 357	102	115	627
OTHER	1 288 807	56	56	180
COSMETICS AND PERSONAL HYGIENE	744 744	56	76	207
TOURISM	710 170	104	109	390
FOODSTUFFS	676 337	64	90	203
INSURANCE AND SOCIAL SECURITY	557 628	29	29	84
CONSTRUCTION AND REPAIRS, HOME FURNISHINGS	489 002	129	135	300
IT. HARDWARE. SOFTWARE. OFFICE EQUIPMENT	367 085	51	51	120
INDUSTRY. PRODUCTION MEANS. AGRICULTURE	353 268	67	75	201
INSTITUTIONS. ORGANIZATIONS. PUBLIC CAMPAIGNS	235 179	32	33	58
WHITE GOODS. BROWN GOODS. ELECTRIC APPLIANCES	198 435	44	45	165
HOUSEHOLD CHEMICALS	96 561	15	16	79
FASHION	20 166	7	7	18
TOBACCO PRODUCTS	3 945	3	4	8
HOUSEHOLD GOODS. CHILDREN'S PRODUCTS	3 531	10	12	25

Retail outlets



Hobby. Fashion. Sport



Drinks



Pharmacy



Finance

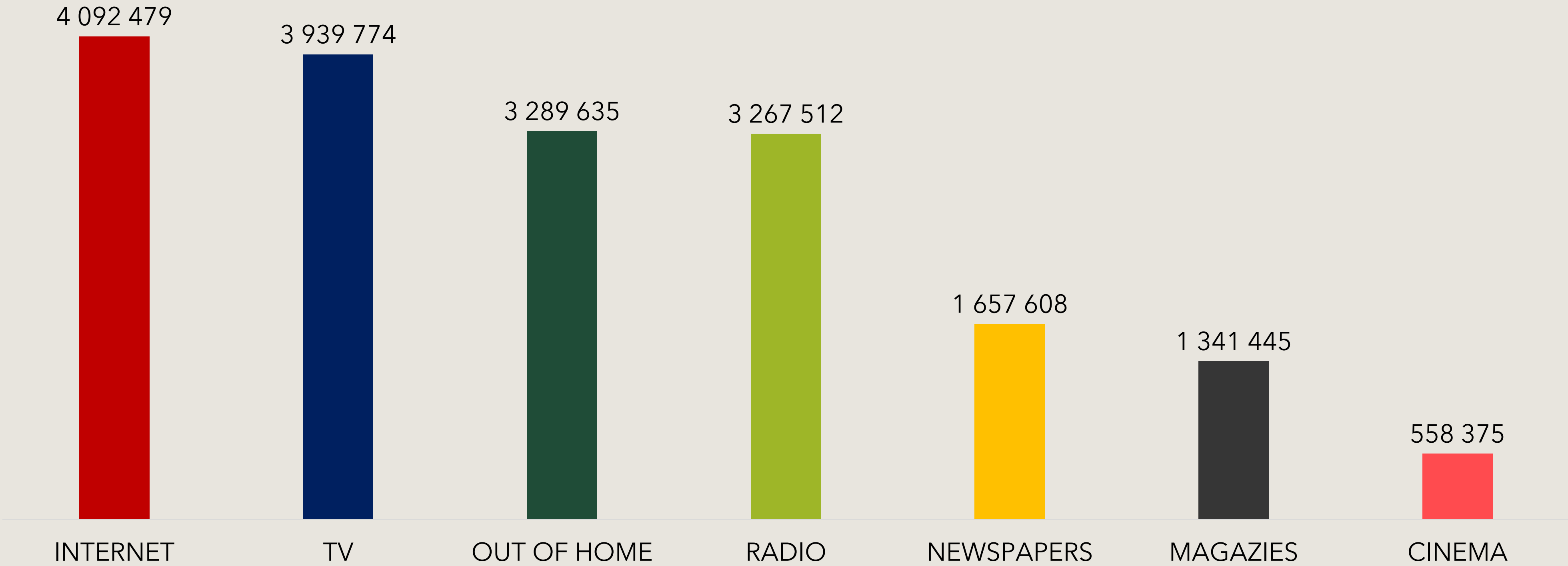


Telecommunications



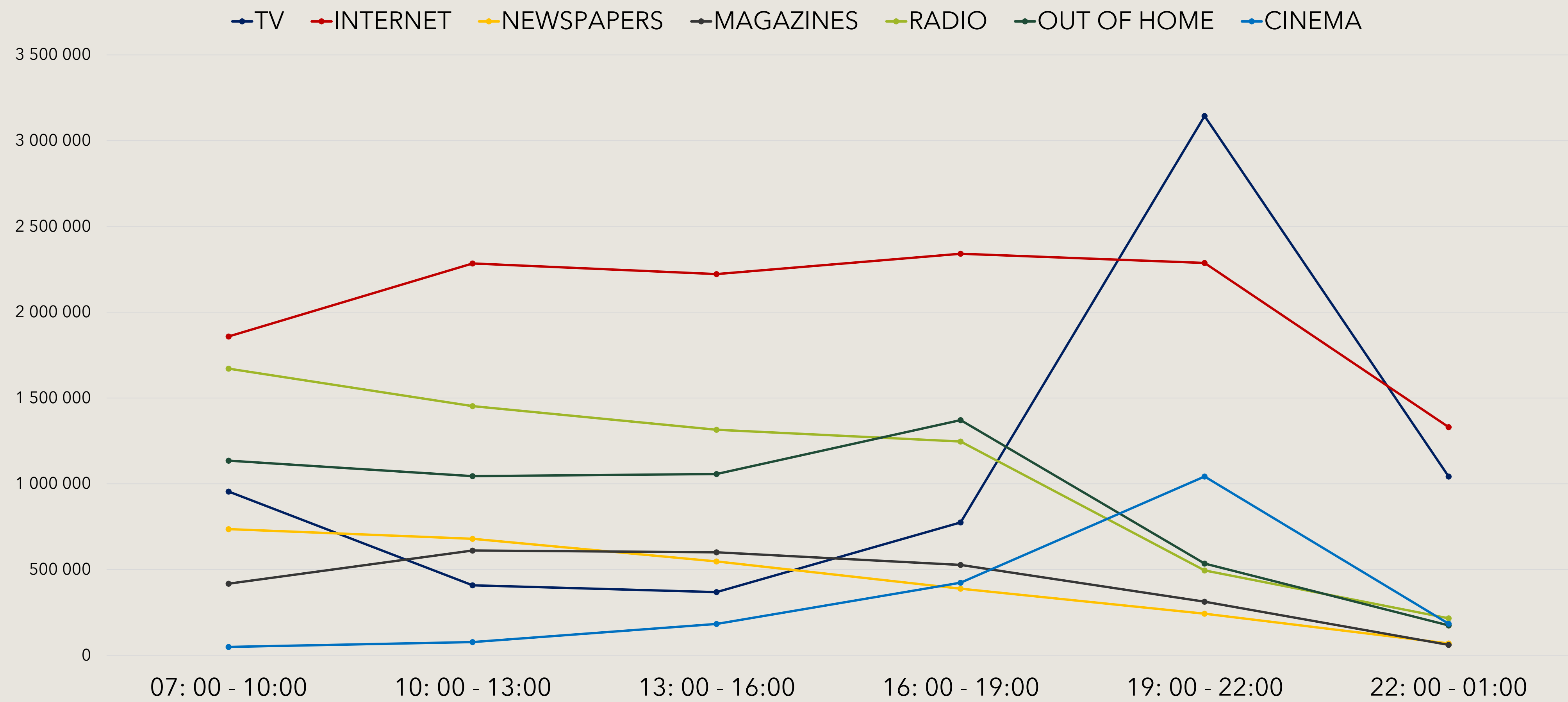
Source: Bannermonitoring.com, 2025

TV & ONLINE MEDIA GENERATE HIGHEST REACH FOR SHORTEST TIME
(Weekly Reach)



Source: Media-Research-Hub.com, March - December 2025

MEDIA USAGE BY TIME SLOTS

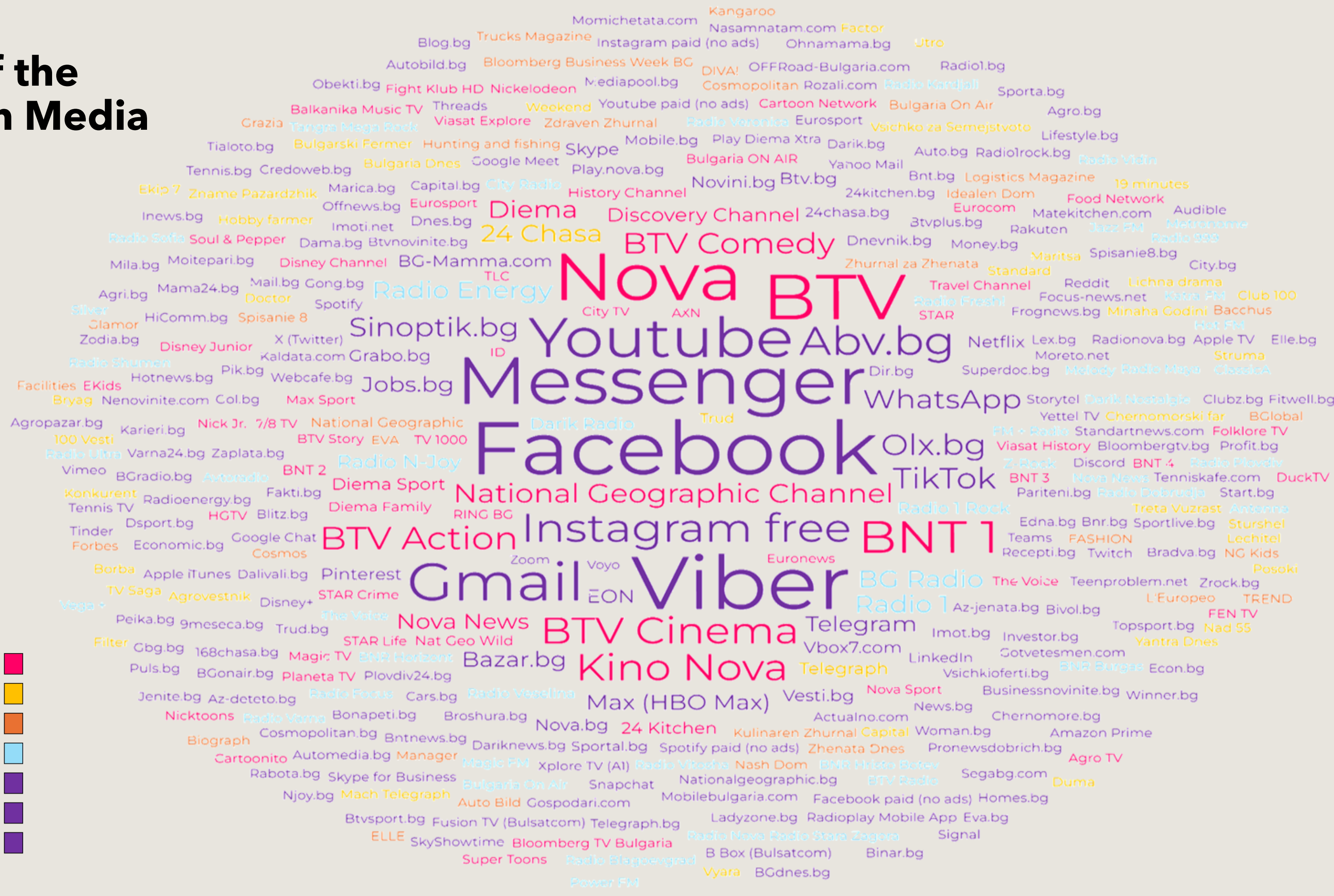


Source: Media-Research-Hub.com, March - December 2025

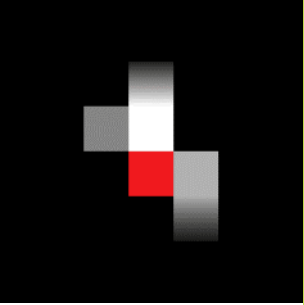


Fingerprint of the Highest Reach Media

- TV CHANNELS
- NEWSPAPERS
- MAGAZINES
- RADIO STATIONS
- WEBSITES
- STREAMING SERVICES
- SOCIAL AND COMM. PLATFORMS

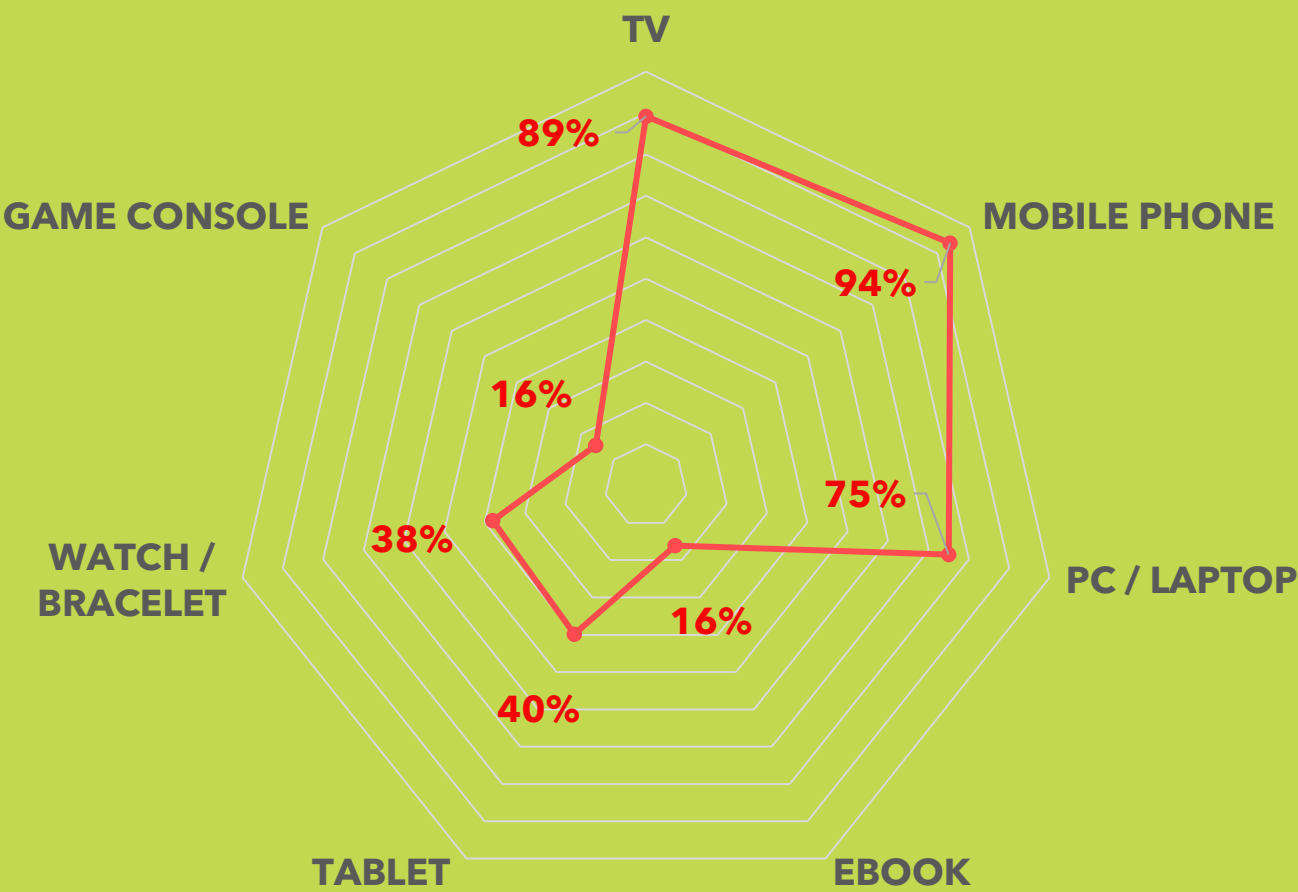


Source: Media-Research-Hub.com, March - December 2025

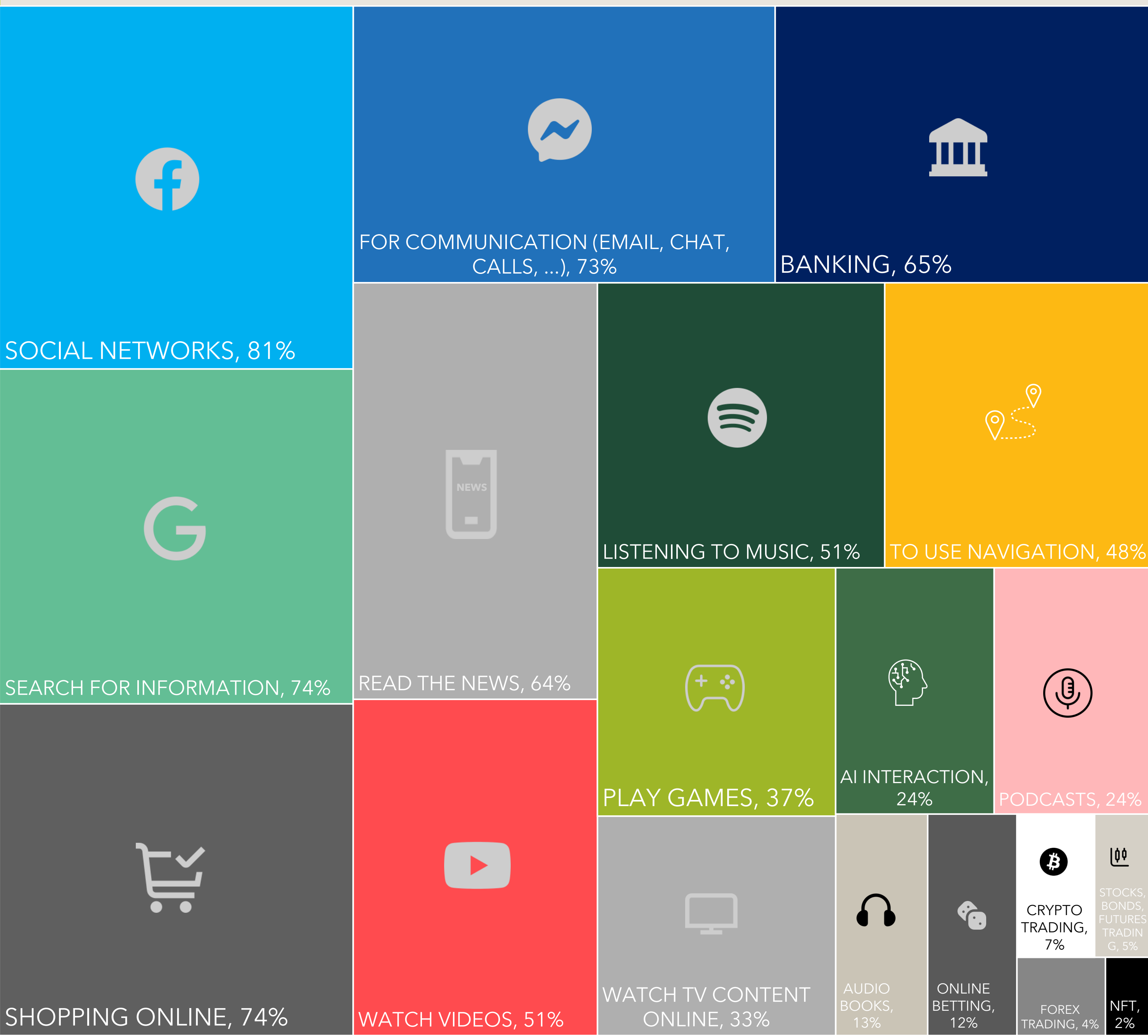


INTERNET IS
ESSENTIAL FOR
VARIOUS ACTIVITIES:

DEVICES
OWNED/USED:



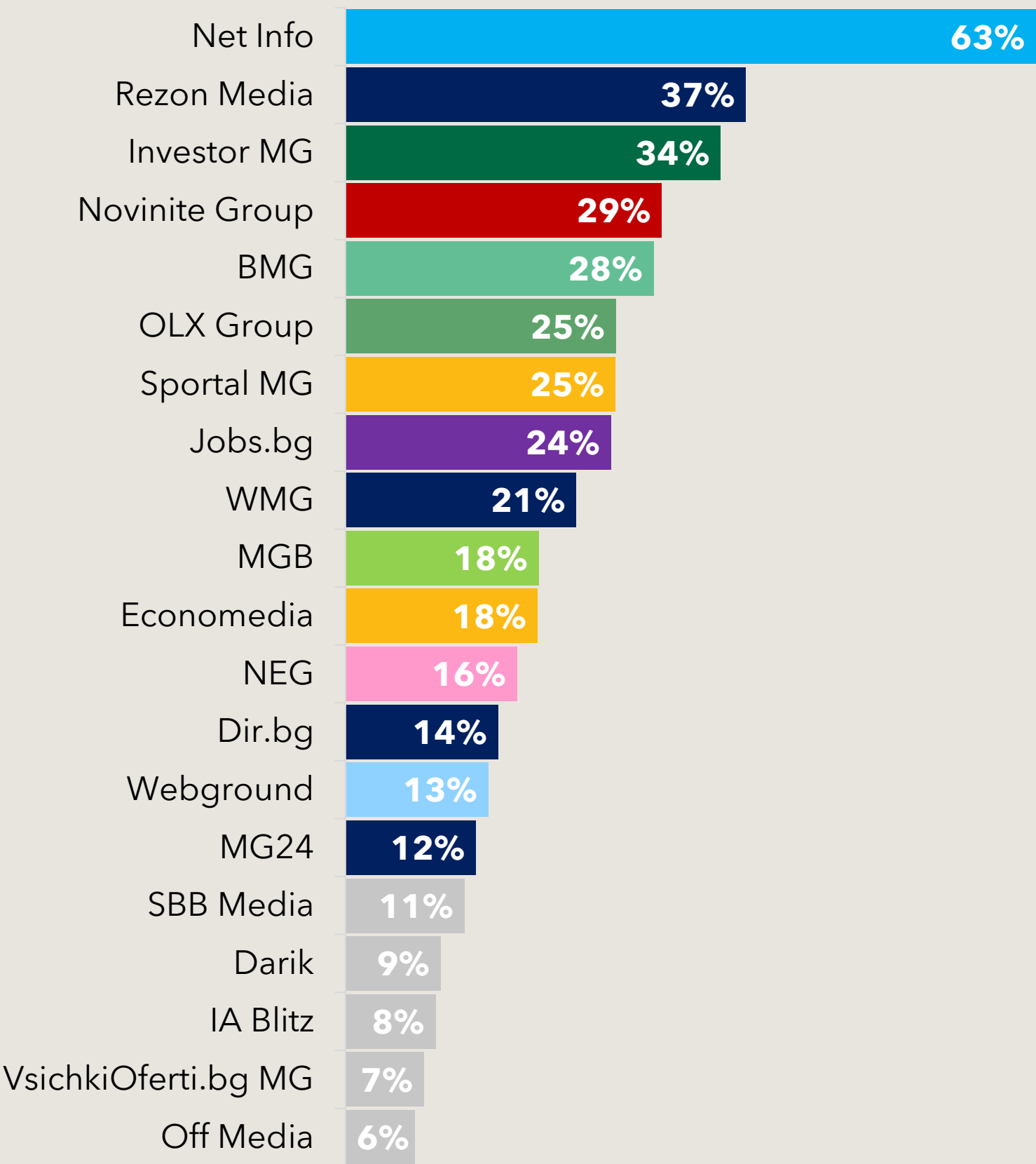
Source: Media-Research-Hub.com, March - December 2025



Net Info are the BIGGEST Online Media Group in Bulgaria

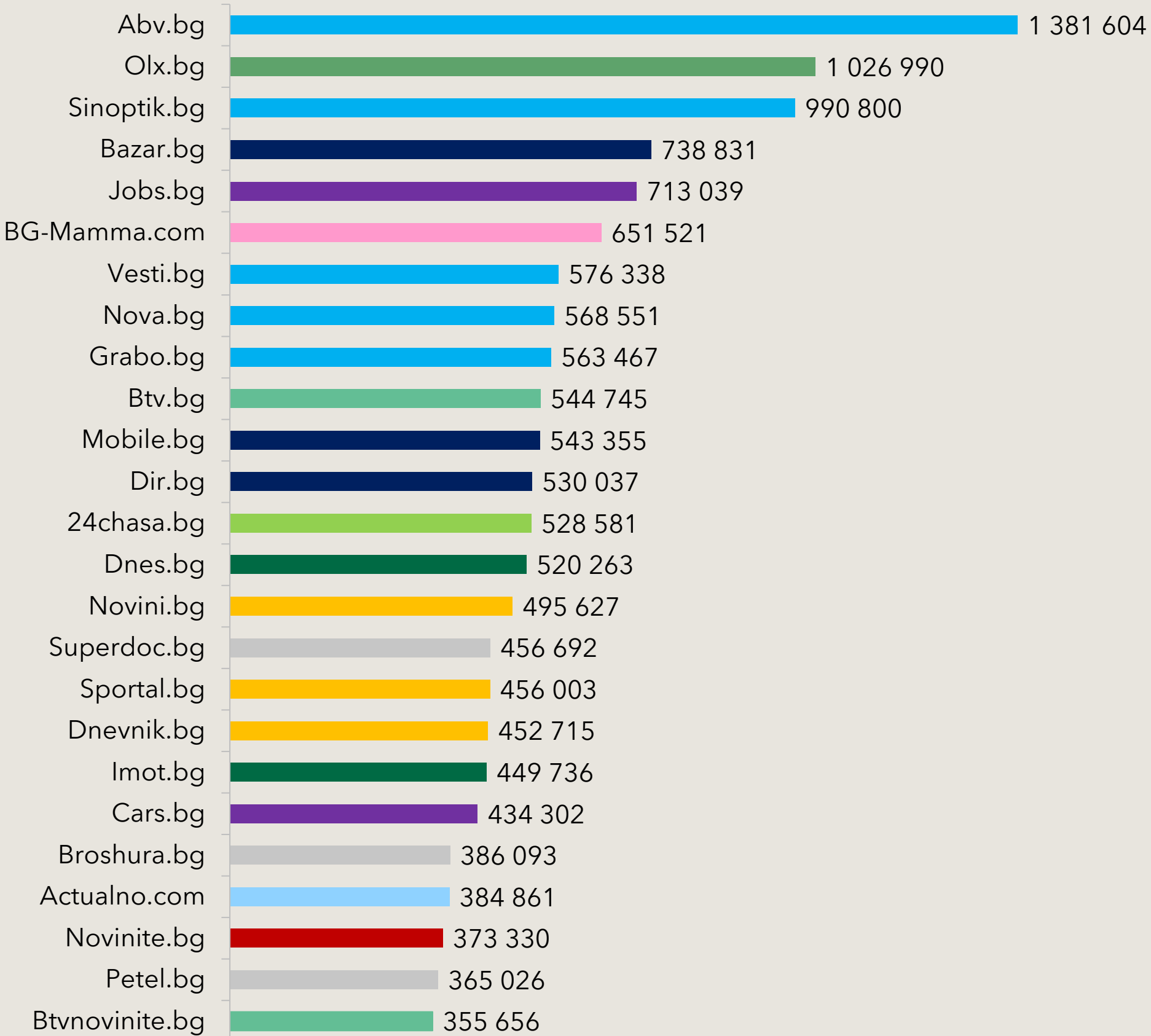
Top BG Media Groups

Weekly Users, All 16-74



Top 25 BG Websites

Weekly Users, All 16-74

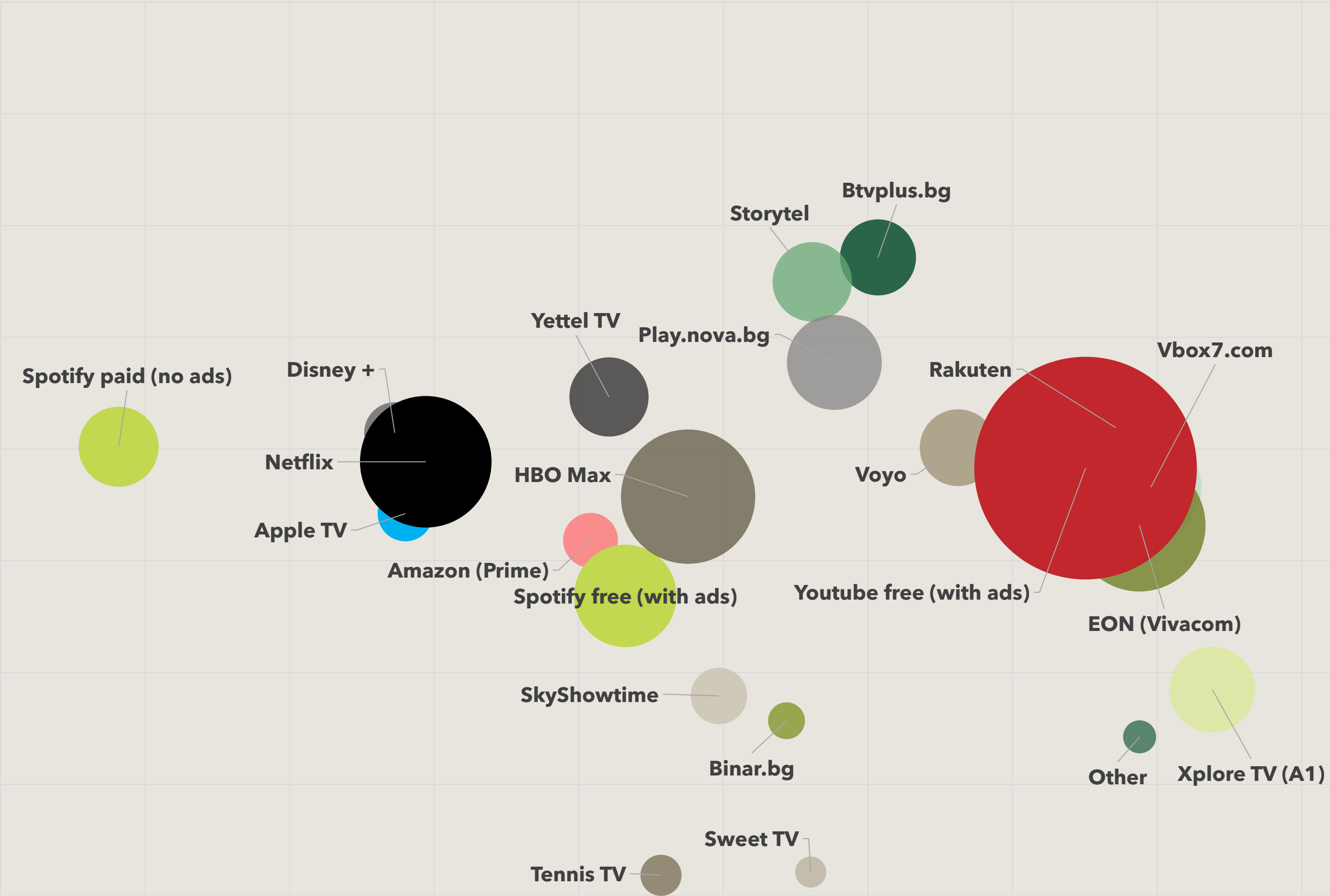


Source: Media-Research-Hub.com, March 2025 – December 2025

Streaming Platforms in Bulgaria

younger, female

older, female

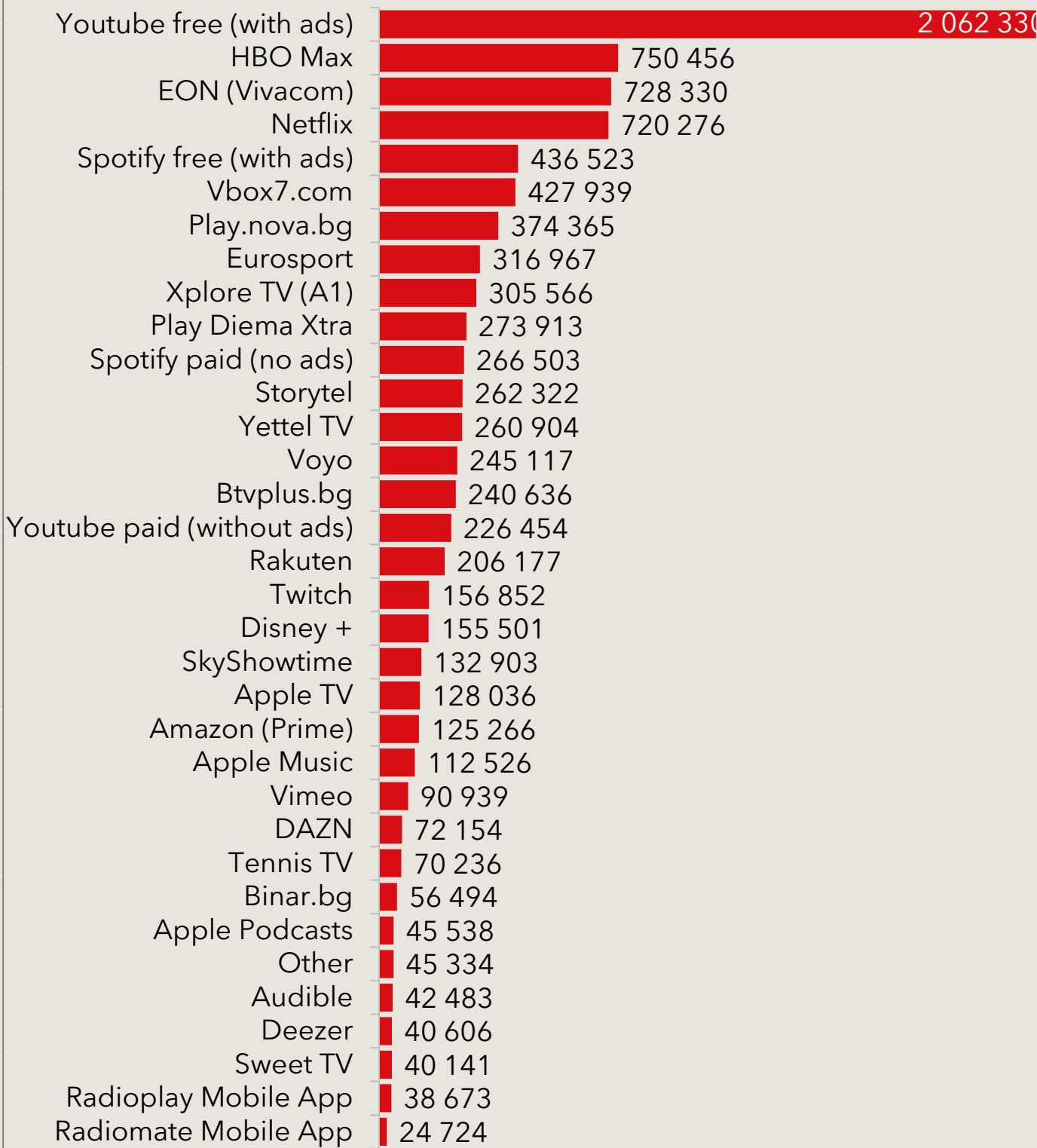


younger, male

older, male

Top 25 Streaming Platforms

Weekly Users, All 16-74

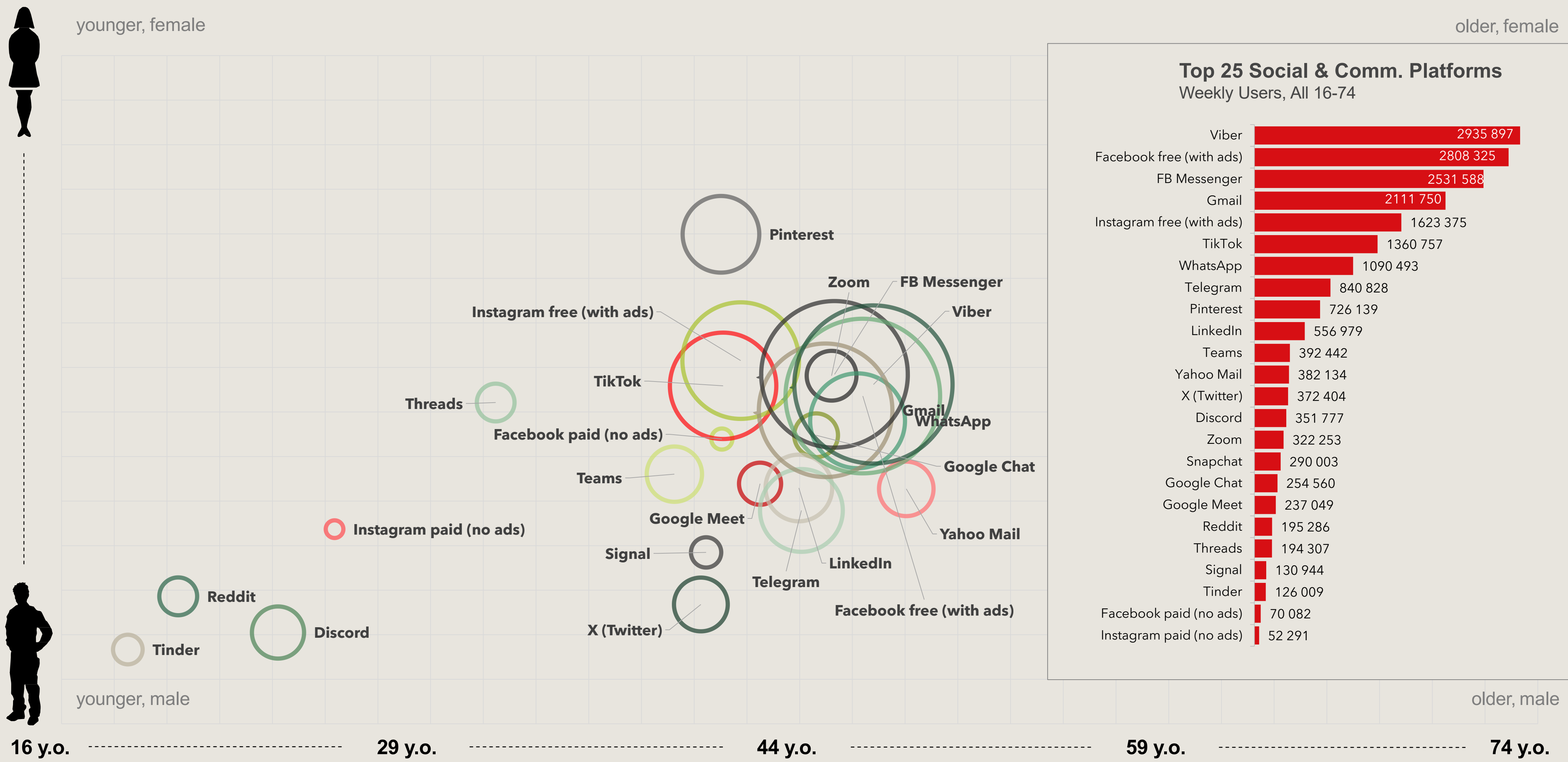


Source: Media-Research-Hub.com, March 2025 - December 2025

Social Media and Communication Platforms in Bulgaria

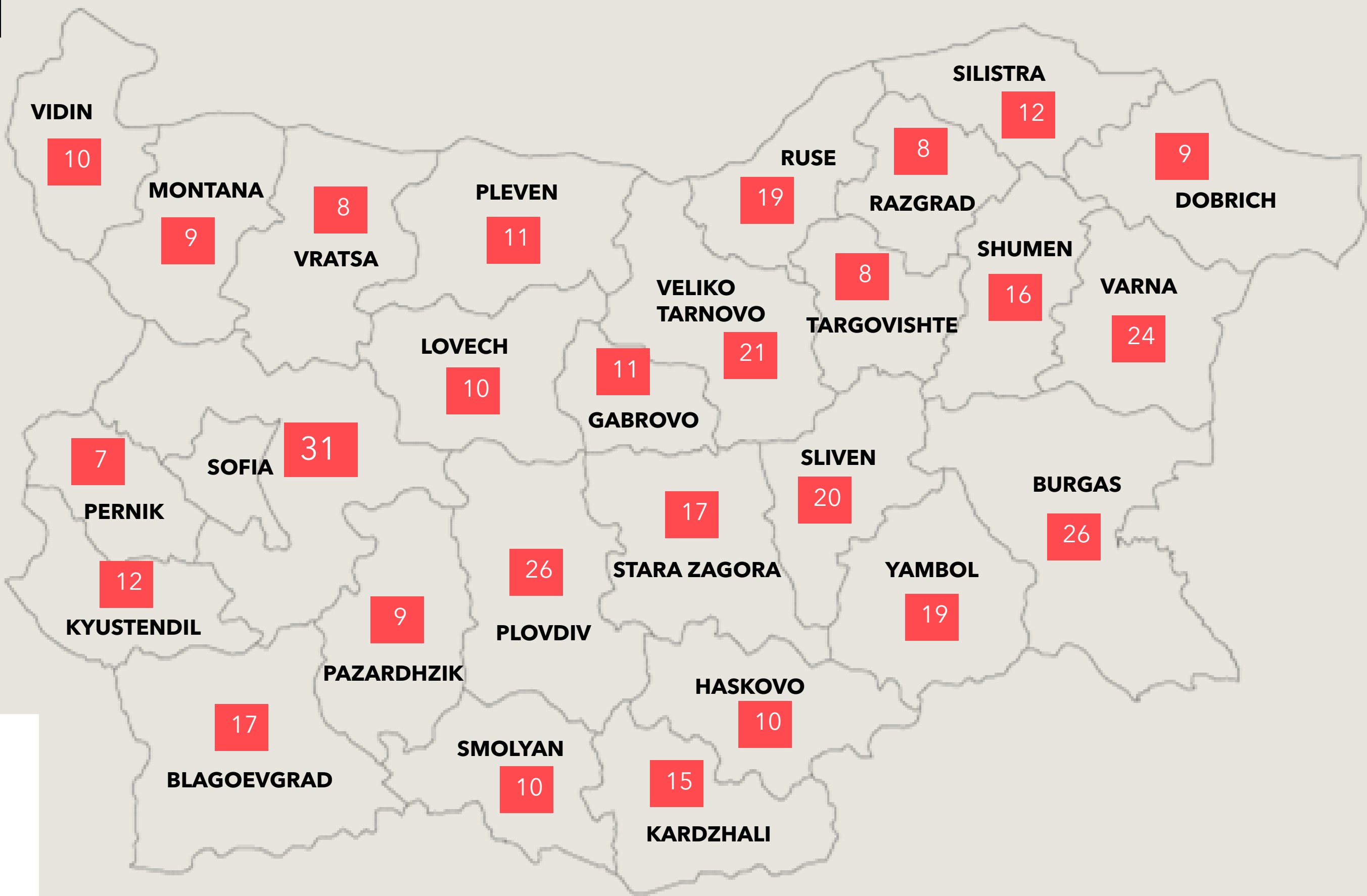
MEDIA OVERVIEW BULGARIA | 2025

JULY 26



Source: Media-Research-Hub.com, March 2025 - December 2025

Radio offers both national coverage communication and well-targeted local campaigns



€12M+

Billings

Available Radio Stations per District Town

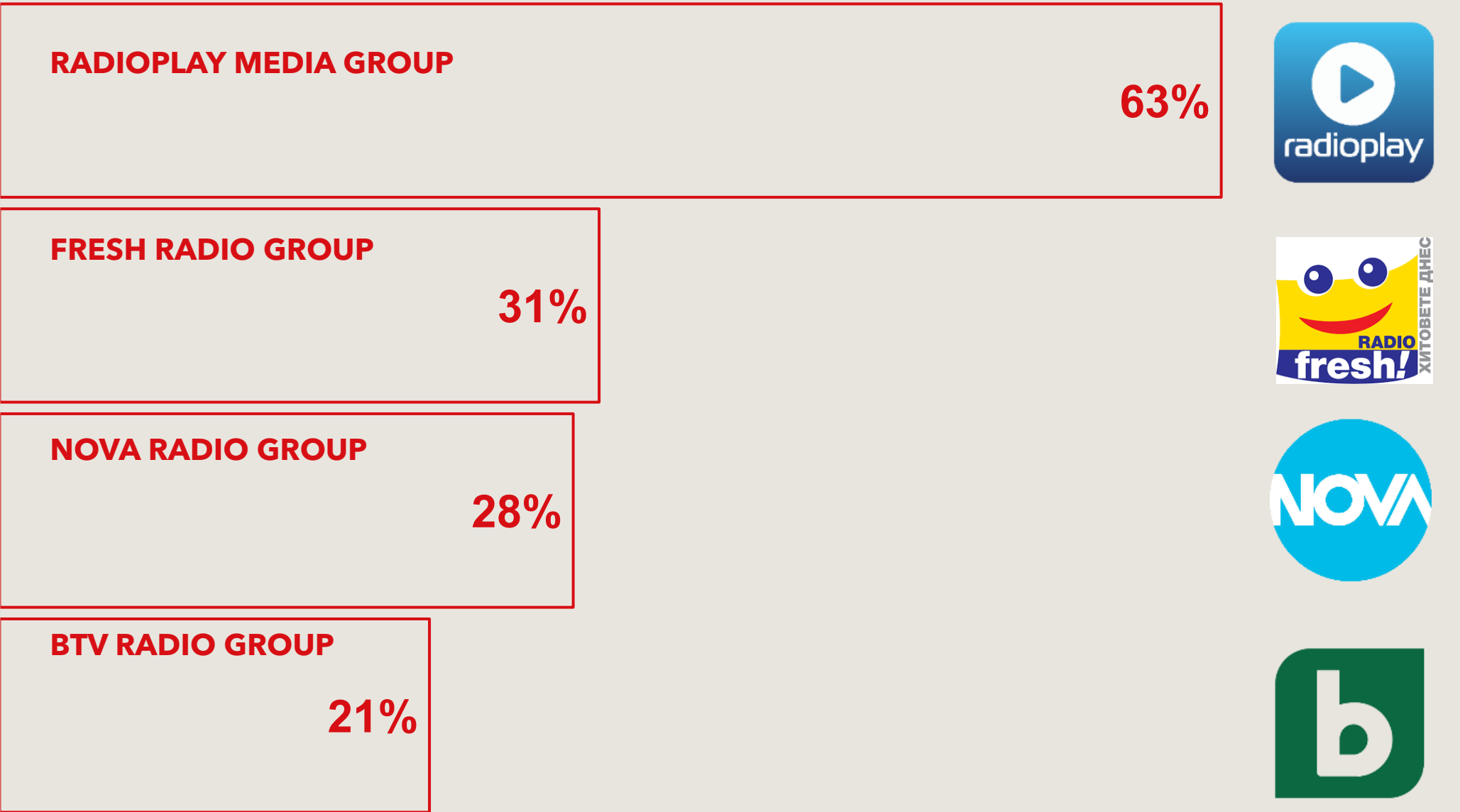
in number of stations

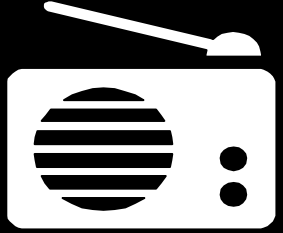
• Stations from nearby districts that can still be heard are not included

Source: predavatel.com

The radio market is very fragmented with genre and coverage being key for audience share

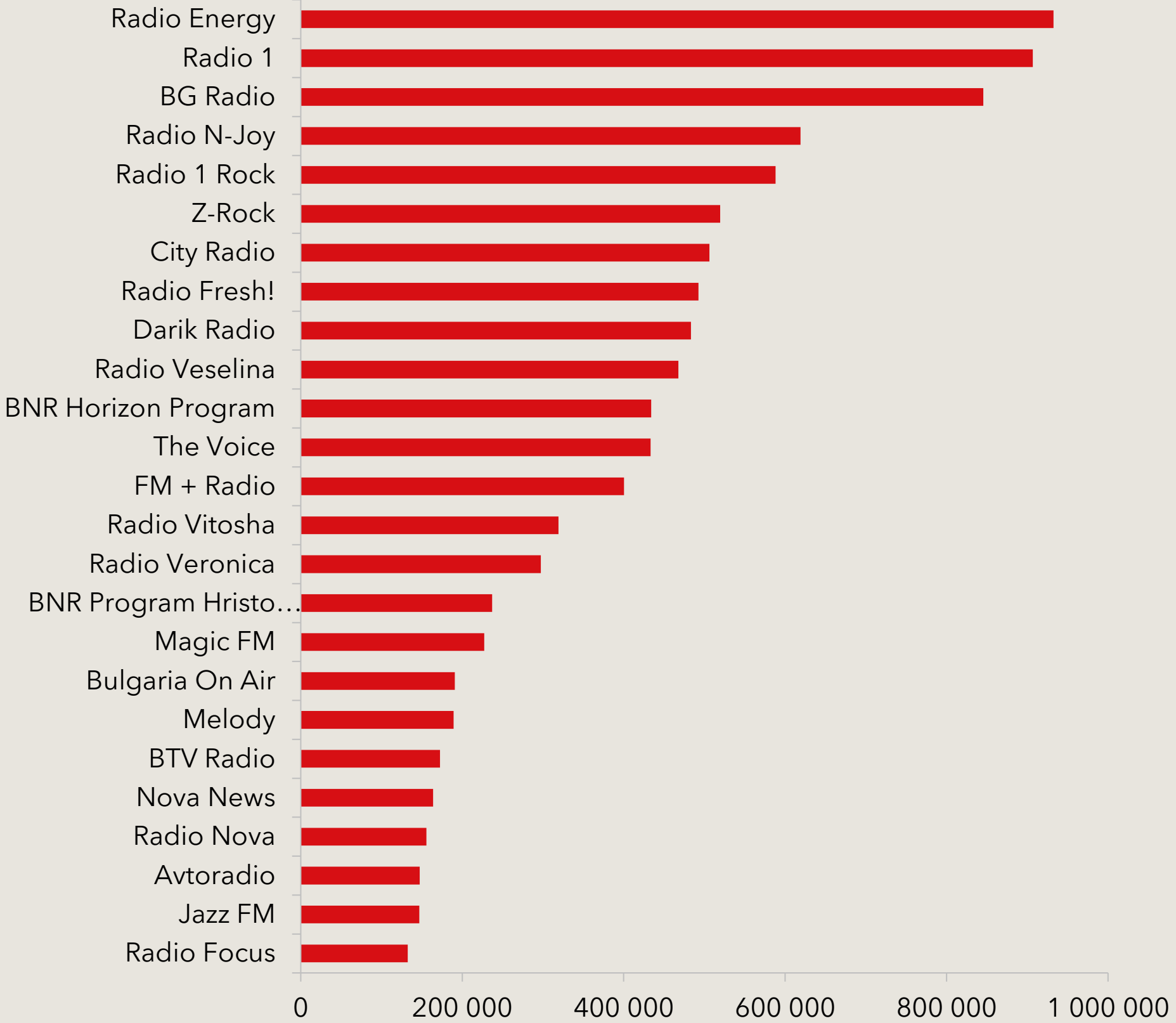
Weekly Reach of the Main Radio Groups
in % A 16-74





of stations: **53**

Top 25 Radio Stations Weekly Reach
in number of people A 16-74

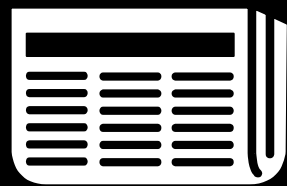
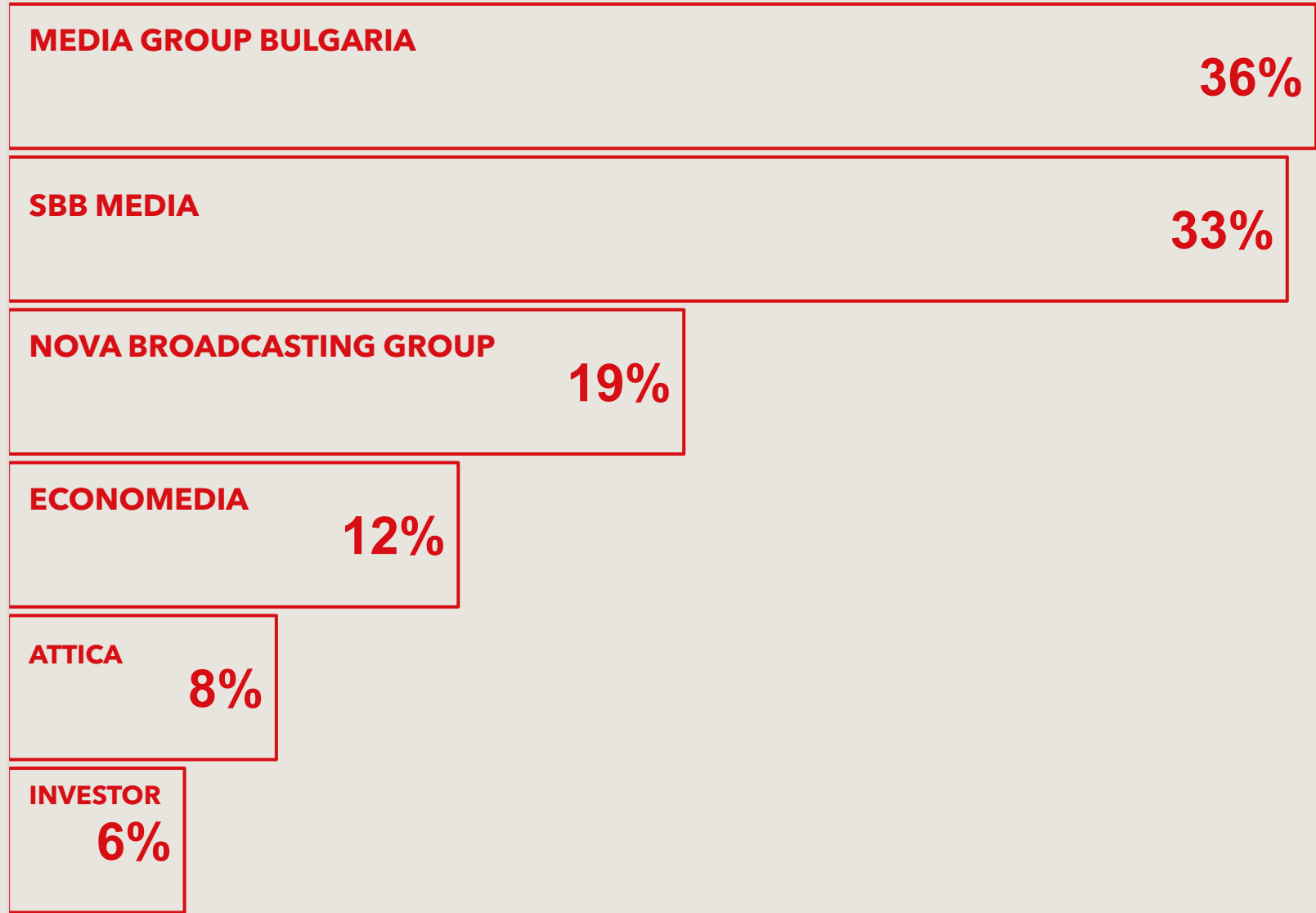


Source: Media-Research-Hub.com, March 2025 - December 2025

Print media reaches additional audience online

Overview - Largest Publishers and Titles

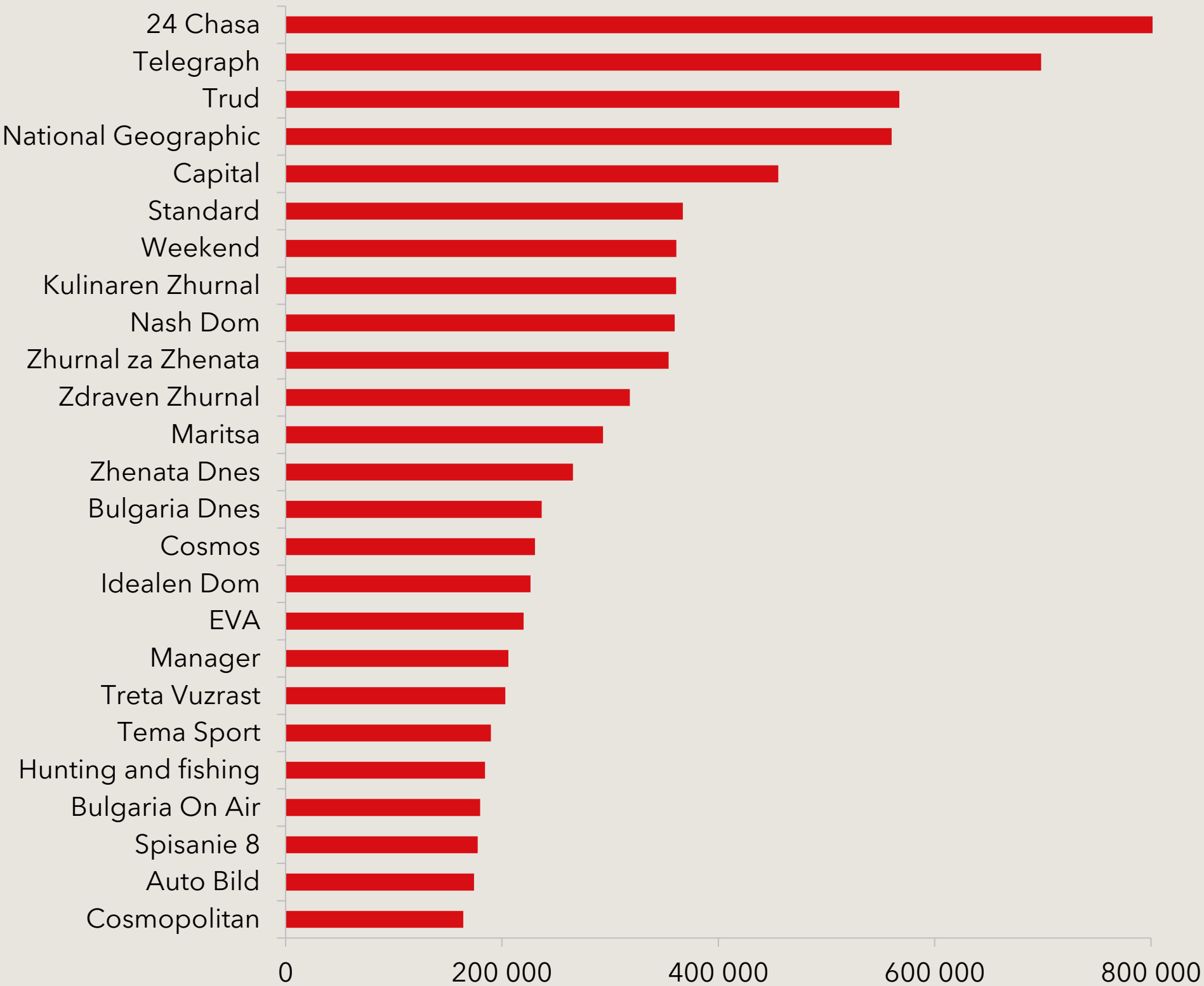
Weekly Reach in % A 16-74



of print titles: 74

Top 25 Print Titles by Weekly Reach

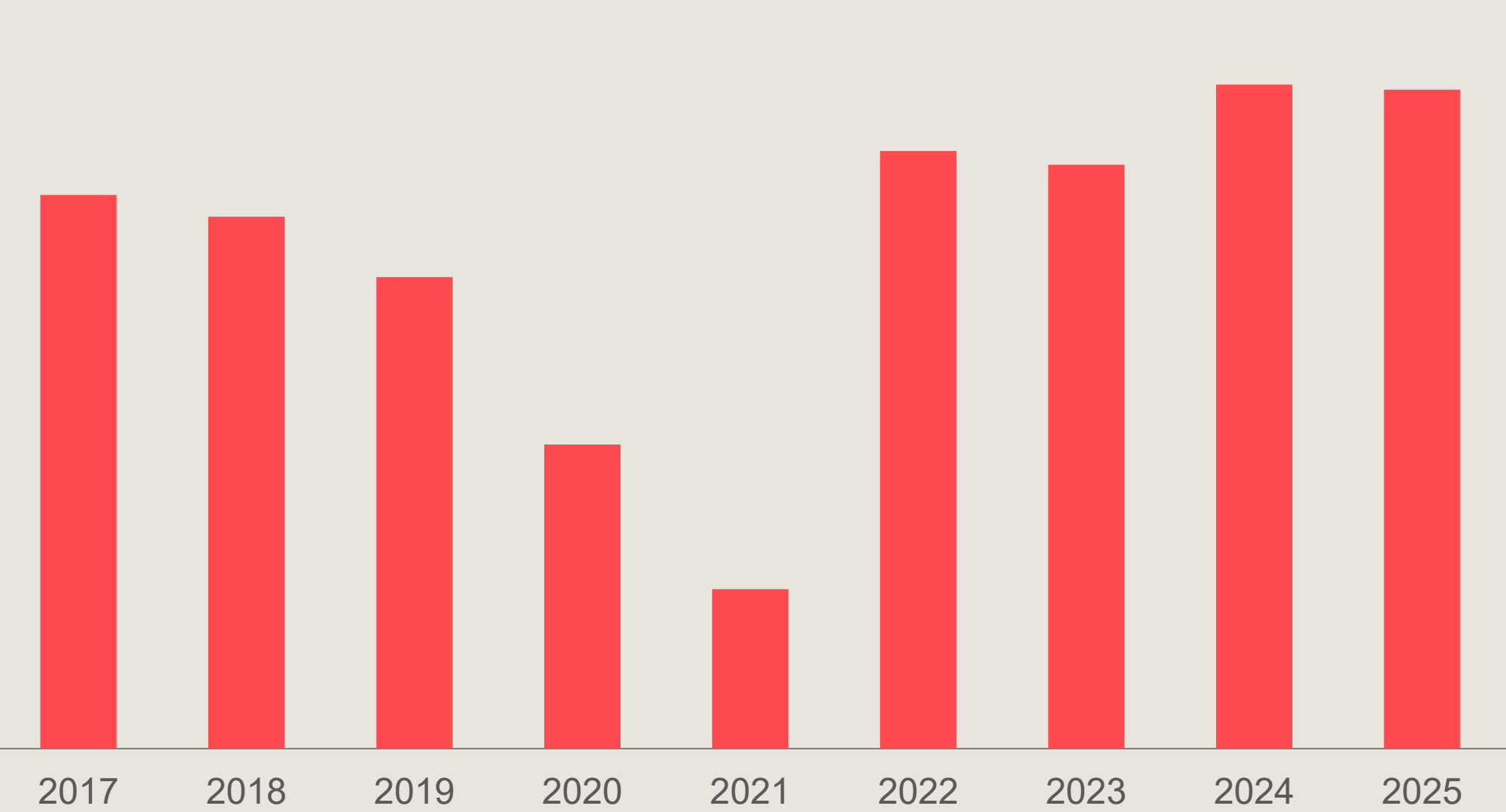
in number of people A 16-74

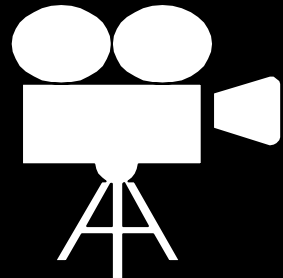


Source: Media-Research-Hub.com, March 2025 - December 2025

Cinema VISITS grow confidently back towards pre-pandemic levels

Cinema Audience by years
In '000 tickets sold

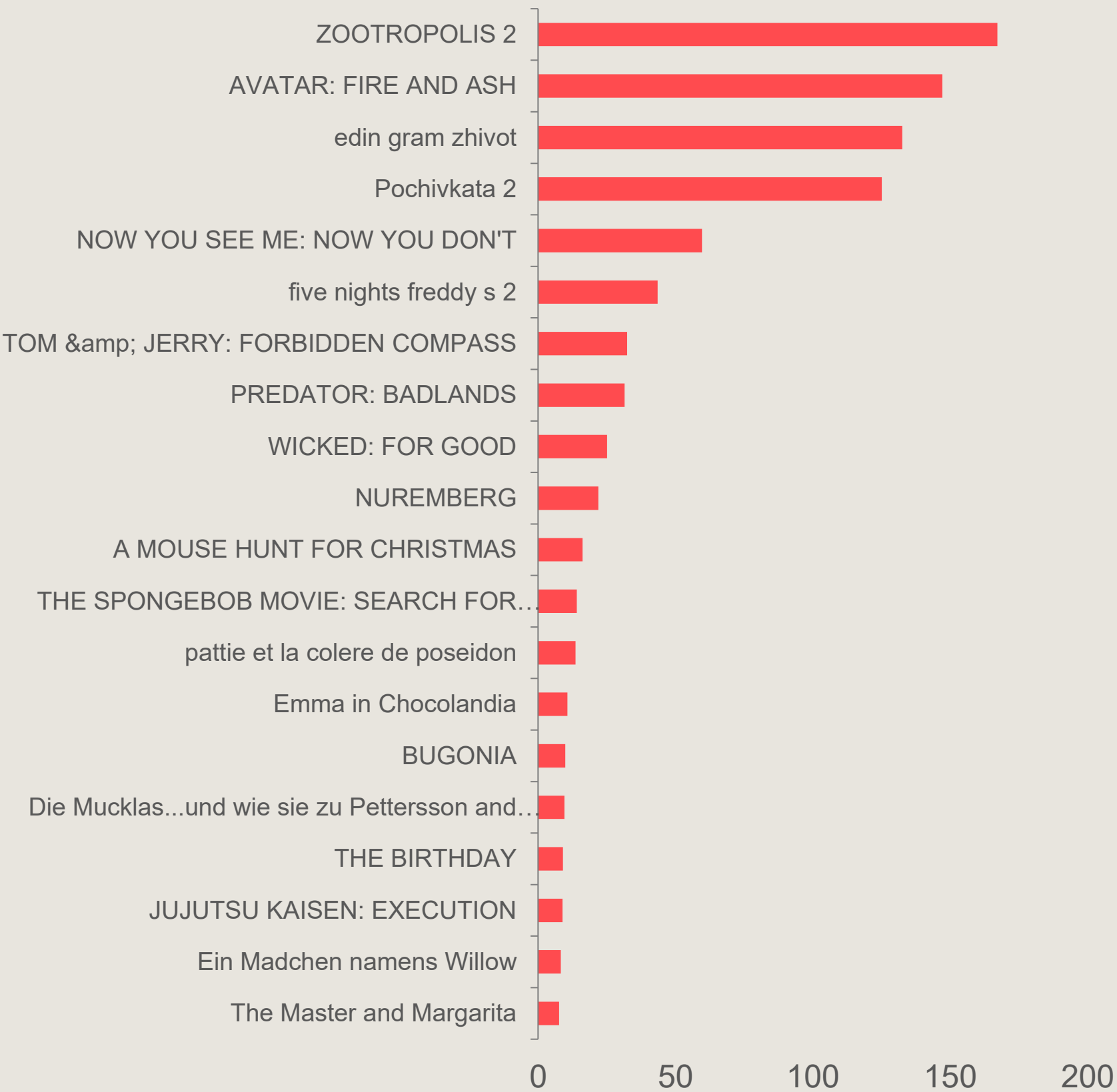


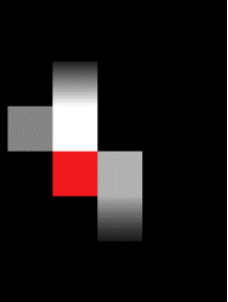


of cinema halls: **160+**

Source: New Age Media 2016-2025

TOP 20 cinema movies 2025
Admissions





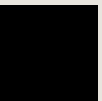
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