

MAGNA

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STUCK AT HOME: MEDIA BEHAVIOR IN THE TIME OF CORONAVIRUS





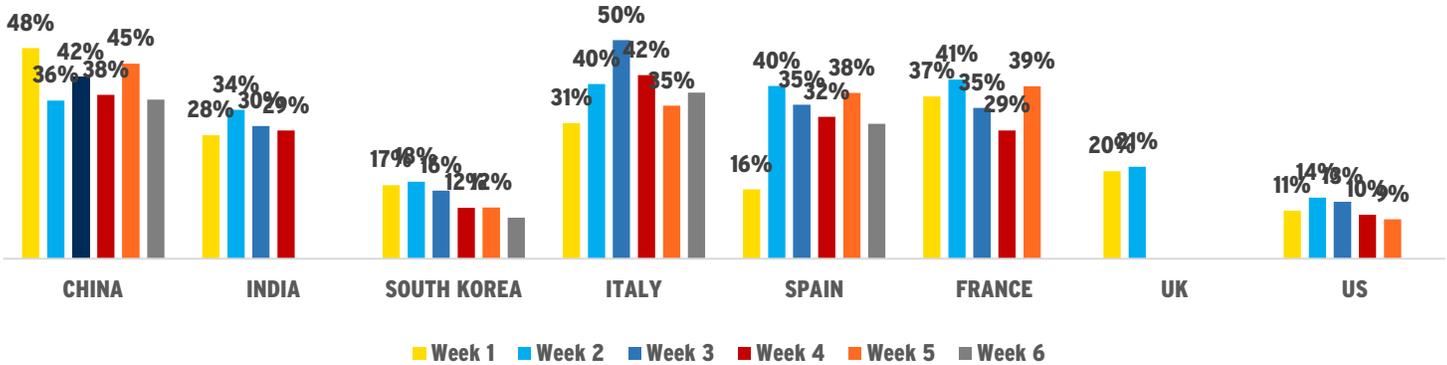
MEDIA BEHAVIOR IN THE TIME OF CORONAVIRUS

BY MICHELLE
BOVEE

| COUNTRY | KEY FINDINGS |
|----------------|--|
| CHINA | <ul style="list-style-type: none"> TV viewing was up almost 50% vs 2019 in the early stages of lockdown It is gradually coming back to normal as the economy is re-opening, but it was still up +15% vs 2019 (+20 min) in the last three weeks, three months after the beginning of the crisis |
| AUSTRALIA | <ul style="list-style-type: none"> Linear TV ratings beginning to normalize as Australians adjust to the new normal Average weekly reach for news programming expected to remain around 60% |
| INDIA | <ul style="list-style-type: none"> Since the start of the lockdown, linear TV viewership has consistently been around +30% higher than it was during the same time in 2019 The largest growth has been seen for A15-30 (+22%) and kids (+27%) |
| JAPAN | <ul style="list-style-type: none"> Average daytime TV ratings have seen the strongest increases (+11%), followed by all day (+6%) |
| ITALY | <ul style="list-style-type: none"> Linear TV viewing stabilizing at around 35-40% higher than normal 2019 levels Among kids TV consumption remains even higher, +70% compared to March-April 2019 |
| SPAIN | <ul style="list-style-type: none"> Average time spent with TV up +31% in the week of April 13 (compared to 2019) News programs continue to see the largest audience gains, while sports have plummeted |
| FRANCE | <ul style="list-style-type: none"> The French are spending, on average, 73 more minutes a day with TV compared to 2019 TV consumption has declined slightly following the peak in the first two weeks of the shutdown |
| UNITED KINGDOM | <ul style="list-style-type: none"> TV viewing up +21% the week of March 30 (vs. 2019), roughly in line with the previous week Daytime continues to see the most significant YoY increases, +36% |
| NETHERLANDS | <ul style="list-style-type: none"> Linear TV was up +20% the first week of the shutdown As of week 5 of lockdown (April 13), TV viewing is still up +18% YoY |
| CANADA | <ul style="list-style-type: none"> TV time spent was up +11% YoY in the first week of the shutdown News consumption peaked the week of March 16 and has now begun to decline, though still above pre-COVID levels |
| UNITED STATES | <ul style="list-style-type: none"> Viewing remains elevated from pre-COVID levels, but has begun to drop following the peak in late March AM/FM radio listenership remains fairly strong, despite the absence of daily commuters |

LINEAR TV CONSUMPTION IN THE TIME OF CORONAVIRUS - GLOBAL OVERVIEW

TV Viewing Trend since Lockdown ("week 1")
(change vs same week of 2019)

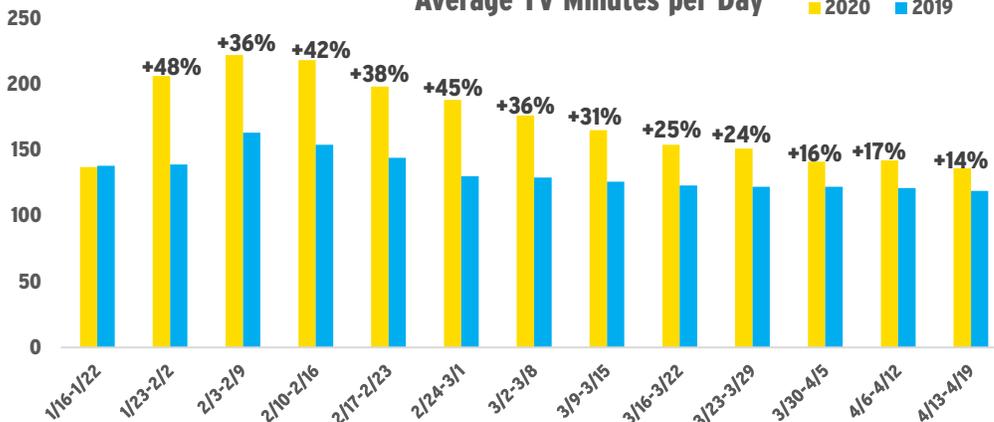


- After 5 to 6 weeks of lockdown and quarantine in Europe and Asia, TV viewing levels are still 20% to 40% above 2019 levels.
- Even in early pandemic markets (China, Italy) that are now gradually relaxing lockdown, media consumption remains significantly above 2019.
- In general, time spent with TV typically increases by 30-50% during the first few weeks following the stay at home order (compared to the same period in 2019), then begins to stabilize at a high level, well above pre-COVID time spent but below the peak seen in the first couple weeks. This happens as people adjust to the “new normal” and as they reach Coronavirus news fatigue.
- We see the same trend in several other markets that also initiated lockdowns relatively early, including Italy and Spain.
- See page 9 for detailed data table.

A P A C CHINA

- **Wuhan lockdown was lifted in early April, after nearly 3 months**
- **Restrictions are being relaxed in a gradual manner across the country, with some businesses re-opening while others will remain shut for some time**
- Average time spent watching linear TV has been slowly returning to 2019 levels as China re-opens. But TV viewing was still up approx. +15% above 2019 levels three months after the start of the crisis.
- Time spent increased by nearly 70 minutes, on average, between January 23 (start of Wuhan lockdown) and February 2, growth of +48% compared to the same time in 2019.
- By mid-March, average time spent dropped to around 150-160 minutes per day, still 25-30% higher than 2019 but below the peak of 200+ minutes in January and February.

Average TV Minutes per Day



- As more businesses re-open and more people return to work, we see TV time spent close to 2019 levels: around 140 minutes per day on average, compared to 120 in late March and early April 2019.
- Though TV consumption increased for all age groups, the strongest increases were seen among A18-34 (from a low base).
- Radio consumption remained relatively stable throughout the lockdown.

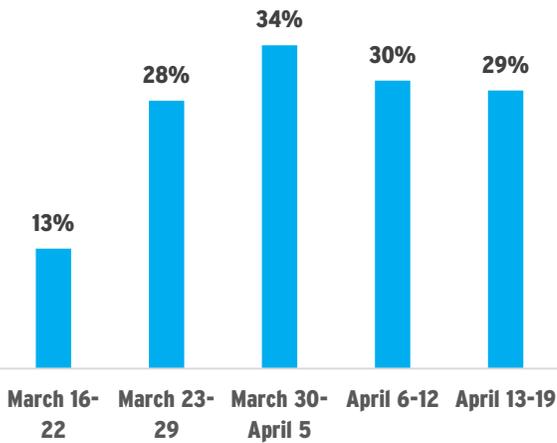
A P A C
AUSTRALIA



- **Social distancing rules and closure of non-essential services began on March 21**
- **In mid-March the Australian Football League announced that the season would be suspended until the end of May. National Rugby League matches have also been suspended**
- TV audiences spiked in the weeks after the stay at home order was announced, up +16% the week of March 23 and +13% the week of March 30 (vs. the same weeks in 2019).
- Linear TV ratings are expected to normalize in April as Australians adjust to working from home full time.
- Average weekly reach for news and current events programming peaked in week 1 at 63%, up from 51% in the first week of March.
- Reality television, movies, and infotainment/lifestyle programming have all also seen growth in average weekly reach, while sports viewing has declined.

A P A C
INDIA

YoY Change in TV Time Spent



- **Prime Minister Narendra Modi announced a national lockdown on March 24, though many states and territories had previously announced their own measures**
- **Schools, gyms, malls, and tourist destinations like the Taj Mahal have all closed**
- April-May 2019 was an eventful period in India, with the national elections (April 11 to May 19) and Indian Premier League (March 23 to May 12) drawing large TV audiences.
- Since the start of the lockdown in week 13 (March 23-29) linear TV viewing has consistently been around +30% higher than it was during the same week in 2019.
- The largest growth is reported on A15-30 (+22% in week 1) and kids (+27%).
- As of April 13, India was on week four of lockdown. Average TV viewership was still up +29% YoY for A2+; +30% for A15-50; +28% for A15-30; and +30% for kids.
- News channels have benefited from increased viewership, and OTT platforms are poised to grow. General content channels may suffer due to delays in shooting new shows.

A P A C
JAPAN



- **Prime Minister Shinzo Abe declared a national emergency on April 7, far later than most APAC neighbors**
- **Schools shut down and events were cancelled at the end of February**

- Online game and content companies have introduced special deals and launched new services. Hulu offered a special deal making many programs free through March 31, and Nintendo introduced a free "Go Battle League" encouraging in-home play.
- By early March, average daytime TV ratings had increased by around +11% since the beginning of the outbreak in January. All day ratings increased +6%, primetime +4%.
- News, information, and animation channels have all seen growth, while some drama and variety show programs have seen ratings declines.

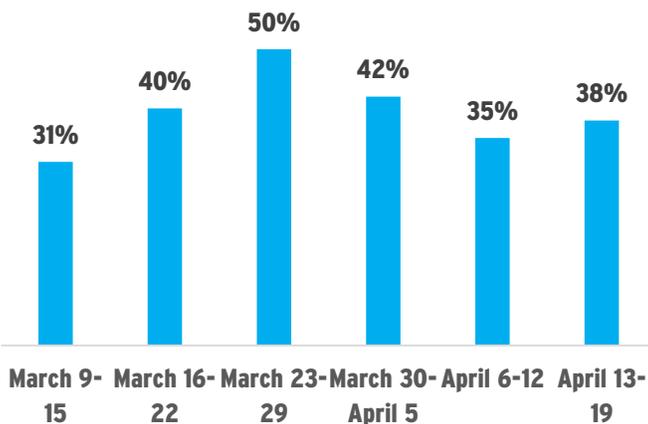
A P A C OTHER MARKETS



- In **Sri Lanka** the government shut down schools beginning on March 11, and work from home was implemented from March 18. On March 20 a nationwide curfew was imposed.
- Between March 10 and March 20 TV consumption increased by around 115 minutes. The average Sri Lankan is now spending around 200+ minutes per day watching TV, compared to 110 in normal times (Kantar).
- Average weekday ratings for kids grew by +68%, from a very low base.
- Stay at home orders were introduced in **Malaysia** starting March 18 and have now been extended through April 28.
- TV ratings have grown steadily since the stay at home order. Ratings were up +10% in the first week of the lockdown, followed by +25% and +22% in the second and third weeks (compared to the same weeks in 2019).
- News programs have seen especially strong growth YoY, +50% for March 2020 compared to March 2019.
- Average time spent increased 40 minutes between February and March 2020.

EMEA ITALY

YoY Change in TV Time Spent



- **Italy's COVID lockdown began on March 9, earlier than other European neighbors**
- **On April 10, the lockdown was extended until May 3, though some shops were allowed to re-open on April 14 (bookshops, children's clothing, stationery)**
- Television remains the go-to for news and entertainment during the quarantine. Linear TV viewing (all individuals) rose +31% in week 1 and continued to accelerate over the next few weeks.
- As the shutdown continued into the fourth week, consumption remains 35-40% greater than the same time in 2019.
- TV time spent has increased significantly among kids 4-14, due to the school closures. Average time spent among this demo increased +59% the first week of the lockdown and remains around +60% to +70% higher than 2019 levels.
- Young adults 18-34 are also watching significantly more television than usual, with time spent up +54% for the week of April 13 compared to the same week in 2019.

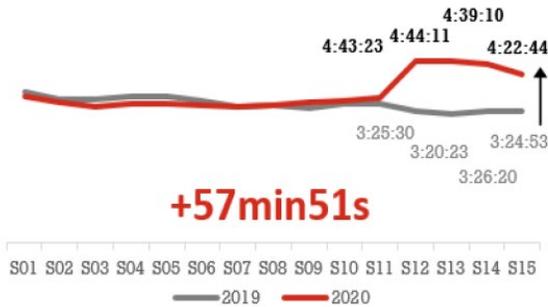
EMEA SPAIN



- **A nationwide State of Alarm was declared on March 13, lasting for 14 days**
- **All non-essential activity was prohibited starting March 28**
- **As of April 13, workers in certain sectors that cannot operate remotely (ex. construction) were allowed to return**
- Average time spent with linear TV across all audiences was up +16% the first week of the state of alarm (compared to the same week in 2019), and +40% in the second week of the lockdown.
- As in Italy, viewership remains at a high level compared to 2019, but has declined somewhat compared to the first few weeks of lockdown as people have fallen into a routine.
- As of April 13, average time spent is up +31% compared to 2019 levels for A4+, +37% for A18-49, and +9% for kids.
- Digital audiences have increased substantially since the start of the crisis and online news has become one of the leading media formats. People typically check the news online first thing in the morning, then consumption trails off throughout the day. Social media becomes more popular in the afternoon.

- **President Macron initiated a nation-wide lockdown on March 17**
- **The lockdown was initially planned for 15 days, but has since been extended through May 11**

Viewing time per individual
Total TV

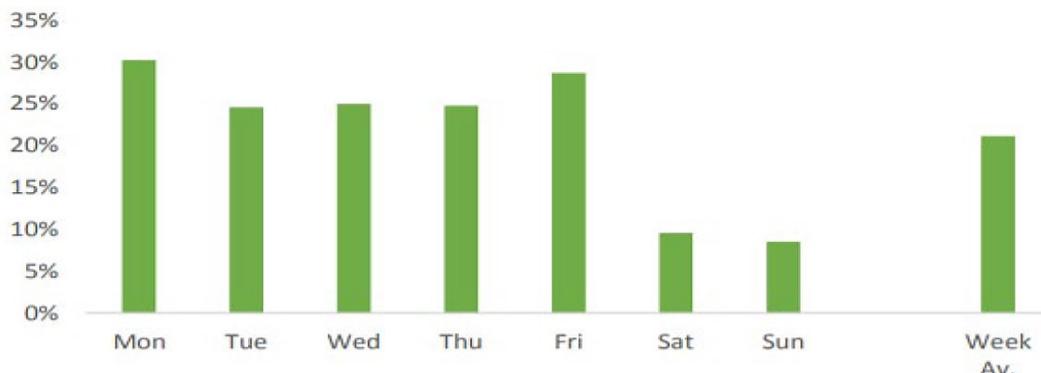


- Average TV viewing time has increased substantially over the four weeks of lockdown, with the French spending, on average, 73 more minutes per day watching TV than they did in the same period in 2019. Streaming services have also seen strong growth, though linear TV remains the primary source for entertainment and news.
- As we see across markets, TV consumption has declined slightly from the peak in the first couple weeks of the shutdown as people adjust to the new normal. Average time spent is now around 4 hours 22 minutes, almost an hour greater than the 2019 average but below the peak of 4 hours 44 minutes.
- Strong audience growth is seen across all age groups, with the most significant increases seen among younger demos—the same trend we see in many other markets.
- Audiences have grown +58% among A15-24 and +45% for A4-14, compared to +35% for A35-49 and +21% for A50+.
- Digital news sites saw an explosion of visitors in the first couple weeks of the lockdown (+111% in the first week). The number of daily visits is now beginning to decline, though still well above 2019.
- During the first week of the shutdown, online audio consumption rose +20% compared to a typical week.

- **Many businesses and schools closed between 13-20 March**
- **Prime Minister Boris Johnson was admitted to the hospital for COVID-19 symptoms on April 5**



- TV viewing YoY was up +21% the week of March 30, roughly in line with the previous week.
- Daytime viewing continues to see the most significant YoY increases, +36%.
- Typically, the largest YoY increases in viewing are seen on weekdays, while weekend viewing habits remain relatively unchanged. In the week of March 30, for example, TV consumption was up +30% on Monday (vs. 2019) compared to around +10% on Saturday and Sunday.
- Both linear and catch-up viewing have seen strong growth, with ITV Hub and Sky On Demand both reporting audience growth of over 30%.
- Demand for the latest news and information continues to drive up consumption of both digital and print news sources. Hearst reported an increase in unique users of +53% for the week of March 30 (vs. the same week in 2019), and The Times has seen unique views up +73 YoY.
- Podcast listening is also up (+7%), also driven mainly by news and information shows.



y-o-y change in viewing w/c30th March, all individuals, consolidated data

EMEA NETHERLANDS



- **The Netherlands lockdown began on March 16, slightly ahead of neighbors Belgium and Germany**
- **As of April 22, all social distancing measures have been extended until May 20**

- Linear TV consumption increased +20% in the first week of the shutdown, with the most significant growth seen among A20-34, +25%.
- As of week 5 of lockdown (April 13), TV time spent is still up +18% YoY, suggesting many people have fallen into a TV routine.
- News program viewing has increased +47% in prime time, +83% during the day (Netherlands Ad Alliance).
- Kids programming, films, and daytime programs have all also benefited from this increase in time spent at home.

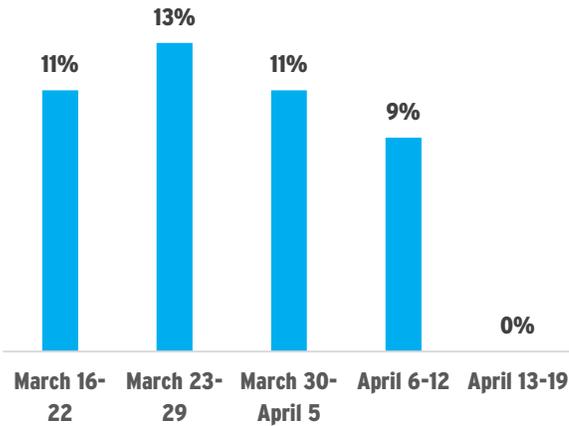
EMEA OTHER MARKETS



- **Most Other EMEA markets introduced lockdowns between March 15 and March 22**

- In **Belgium**, linear TV consumption remains well above 2019 levels in both the Dutch-speaking north and French-speaking south. Time spent is up +36% in the north and +26% in the south.
- Belgians are also spending more time with VOD, with Netflix consumption up +13 minutes in the north and +24 minutes in the south.
- Daily newspaper circulation is up by up to +15% for some publications, and the number of subscriptions has also increased following many years of decline.
- In **Greece** TV viewing was up +28% in March, with the strongest growth seen after the start of confinement on March 23. Among A15-64, TV ratings were up +35% the week of March 12 and +43% the week of the 23rd.
- Average viewing time in March reached nearly 6 hours a day, an increase of over an hour compared to March 2019.
- **Danes** are spending considerably more time in front of the TV, with daily minutes up more than +20% in March 2020 (vs. 2019). The Queen's address on March 17 drew a record 2.5 million viewers.
- Networks that offer more news programming, like DR and TV2, have drawn significantly more viewers, while some commercial networks that offer more entertainment programming have seen *declines* in ratings.
- Radio listening has decreased by -7% vs March 2019, since Danes are no longer commuting to and from work.
- **Sweden** is not under the same lockdown restrictions as the rest of Europe, and as such, viewing patterns remain largely unchanged YoY.
- In **Saudi Arabia**, the government began closing non-essential businesses and limiting social gatherings around March 14-15. TV consumption has increased from around 5 hours per day in January to 5 and a half hours by mid-March to over 6 hours by April (IPSOS).
- As expected, news channels have seen the most dramatic increases (+104% week 15 vs weeks 1-9), followed by general entertainment (+21%). Sports viewership is down -87% compared to earlier in the year.

YoY Change in TV Time Spent

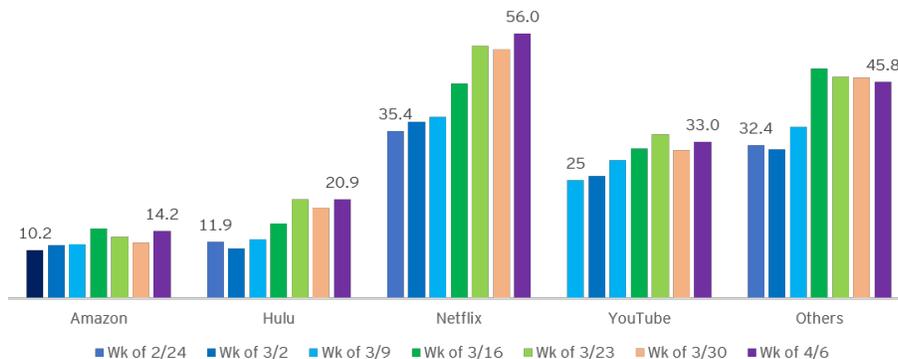


- **Stay at home measures were implemented on March 17**
- **As of April 15, Prime Minister Trudeau has warned against prematurely re-opening the country**
- Viewership increases have been relatively modest compared to other markets, with time spent up +11% YoY for the first week of lockdown, +13% in week two.
- Linear TV consumption has started to decline again following the peak in the week of March 23rd, and by week five of the shutdown (April 13) consumption patterns were roughly in line with 2019 levels.
- TV news network consumption peaked earlier, the week of March 16th, and is now declining, though still above pre-COVID levels.
- CBC News Network and CTV News Channel have both stabilized at around 15-17% reach, compared to 10% pre-COVID and over 20% at the peak.
- Radio consumption, on the other hand, has *decreased* considerably. Listenership is down around -40% compared to early March.
- YouTube watch time increased by +26% between early March and early April, with cooking, exercise, and educational content all seeing viewership growth of around +50%.



- **The United States government has not implemented a nation-wide lockdown, though most states introduced their own measures by late March or early April**
- **As of April 7, an estimated 95% of Americans were under stay-at-home orders**
- Overall, viewing remains elevated from pre-COVID levels earlier this year and when compared to the same time last year, but video usage across both linear and streaming has continued to see slight drops since peaking in late March.
- Daytime TV continues to see the most significant increases, while prime and late night are now seeing small declines compared to April 2019—though not the double-digit declines that were common pre-COVID.
- Late night programming is down YoY, with a -6% decline for the week of April 13 compared to the same week in 2019. Declines are driven mainly by broadcast, with the three major cable late night shows all up YoY.
- All four major SVOD providers continue to see increases week-over-week, and more than doubled their time spent YoY. YouTube viewing time, for example, increased by +6% between March 30 and April 6, and by +105% compared to 2019.
- According to Nielsen, AM/FM radio retained 96% of its reach in March (compared to February 2020). The majority (over 60%) of listening is still happening out of home as people tune in on their way to the grocery store, doctor's appointments, and other essential activities.

**Streaming Minutes - Billions
 People 2+**



APPENDIX TV CONSUMPTION TRENDS BY MARKET

YoY change in time spent, with “week 1” being the first week of the shutdown. Data is based on a broad demo (all people, unless otherwise indicated) and daypart (total day).

Across the markets surveyed by MAGNA, linear TV viewing increased by +26% in week 1, compared to the same week in 2019.

From there, consumption typically begins to decline slightly, though still well above pre-COVID levels (e.g. +20% to +40% in continental Europe).

| | First day of lockdown | Week 1 | Week 2 | Week 3 | Week 4 | Week 5 | Week 6 | Week 7 | Week 8 | Week 9 | Week 10 | Week 11 | Week 12 |
|------------------------|------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|---------|---------|
| AUSTRALIA | March 23 | 16% | 13% | 9% | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| BELGIUM (North) | March 18 | 35% | 36% | 24% | 14% | 36% | -- | -- | -- | -- | -- | -- | -- |
| BELGIUM (South) | March 19 | 19% | 25% | 25% | 10% | 26% | -- | -- | -- | -- | -- | -- | -- |
| CANADA (A25-54) | March 17 | 11% | 13% | 11% | 9% | 0% | -- | -- | -- | -- | -- | -- | -- |
| CHINA | January 23 | 48% | 36% | 42% | 38% | 45% | 36% | 31% | 25% | 24% | 16% | 17% | 14% |
| FRANCE | March 17 | 37% | 41% | 35% | 29% | 39% | -- | -- | -- | -- | -- | -- | -- |
| INDIA | March 24 | 13% | 28% | 34% | 30% | 29% | -- | -- | -- | -- | -- | -- | -- |
| ITALY | March 9 | 40% | 50% | 42% | 35% | 38% | -- | -- | -- | -- | -- | -- | -- |
| MALAYSIA | March 18 | 10% | 25% | 22% | | | | | | | | | |
| NETHERLANDS | March 16 | 20% | 22% | 17% | 4% | 18% | -- | -- | -- | -- | -- | -- | -- |
| RUSSIA | March 30 | 35% | 30% | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| SOUTH KOREA | February 24 | 17% | 18% | 16% | 12% | 12% | 9% | 10% | 16% | -- | -- | -- | -- |
| SPAIN | March 14 | 40% | 35% | 32% | 38% | 31% | -- | -- | -- | -- | -- | -- | -- |
| UNITED KINGDOM | March 24 | 20% | 21% | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| UNITED STATES | March 16 (many cities) | 11% | 14% | 13% | 10% | 9% | -- | -- | -- | -- | -- | -- | -- |

Sample reading: The first day of the lockdown in Australia was on March 23. Time spent with linear TV increased +16% the first week of the lockdown (March 23-29) compared to the same week in 2019. In the second week of the lockdown (March 30-April 5), TV consumption was up +13% compared to the same week in 2019.

