

MAGNA

FRIDAY, 3 APRIL 2020

STUCK AT HOME: MEDIA BEHAVIOR IN THE TIME OF CORONAVIRUS





MEDIA CONSUMPTION DURING THE CORONAVIRUS - GLOBAL INSIGHTS

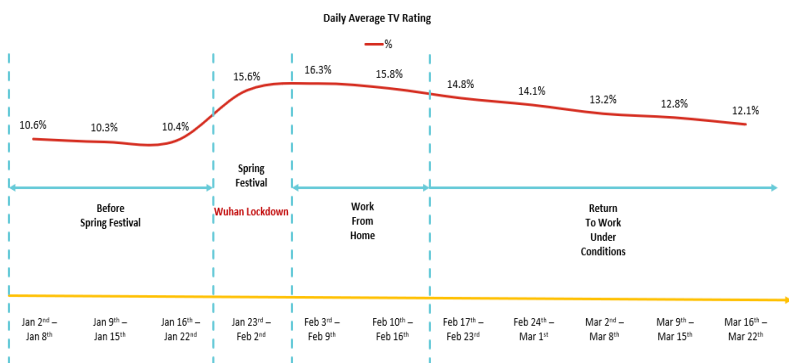
COUNTRY	KEY FINDINGS
CHINA	<ul style="list-style-type: none"> TV consumption peaked in early February. Ratings have since begun to normalize in March following the return to work.
INDIA	<ul style="list-style-type: none"> News viewership is up +18% in week 10 (March 7-13th). Kids viewing is up +11%.
SOUTH KOREA	<ul style="list-style-type: none"> Total TV ratings increased +10% in March vs 2019, with weekday prime up +10% and weekend prime up +8%. News programs have seen the largest ratings jumps.
ITALY	<ul style="list-style-type: none"> TV audiences have increased by +50% compared to March 2019. Online news users are up by over +100% for many of the most popular titles.
SPAIN	<ul style="list-style-type: none"> TV viewing is up +35% (all adults) since quarantine started on March 14th. 13-24 audiences up +165%. OTT viewing up +104% vs 2019.
FRANCE	<ul style="list-style-type: none"> TV consumption increased by +37% starting the week of March 9th. The 8pm news daypart gained 7 million viewers (30 million in March vs 23 in 2019).
GERMANY	<ul style="list-style-type: none"> Linear TV minutes per day have increased +26% among A14-29 compared to the previous month. News programs have seen the strongest audience growth (up to +160%), from a relatively low base.
UNITED KINGDOM	<ul style="list-style-type: none"> TV viewing up 20% YoY since the lockdown of March 24th. All demos have seen double-digit growth, including A16-34 (+16%) and A16-24 (+19%). Daytime viewing grows +29%.
CANADA	<ul style="list-style-type: none"> Daytime viewing is up +45% compared to the same time last year. Primetime viewing has declined due to lack of live sporting events. Radio consumption has seen steep declines (-23% in Toronto).
UNITED STATES	<ul style="list-style-type: none"> Streaming video consumption has increased by triple digits compared to March 2019 for several of the major SVOD services. On linear TV, news programs continue to see the largest audience gains.
UKRAINE	<ul style="list-style-type: none"> TV up +23% on the week of March 23rd. Ukrainians are spending 40 more minutes watching linear TV.

APAC CHINA



- **Lockdowns began across many major cities in January.**
- **Work from home implemented from early February.**
- **As of early March, some are now able to return to work, though under conditions (ex. limiting the number of customers in restaurants).**

- TV consumption peaked in early February, after the Wuhan lockdown and during the mandatory work from home period.
- Daily average TV ratings reached 16.3%, compared to around 10.5% in the weeks before the Spring Festival and 15.6% during the Festival.
- Ratings have since begun to normalize, following the return to work (under conditions).
- Average daily ratings have slowly fallen from 14.8% in late February to 12.1% in mid-March. In the near term, we expect daytime ratings will continue to drop, while primetime ratings will sustain.
- Digital consumption also peaked during the mandatory work from home period, with traffic boosted across all types of content. News, online gaming, social, and video, in particular, benefitted during this time.



- As media consumption slowly goes back to normal, news, social, and video are expected to remain the largest share of digital time spent.
- OOH suffered greatly during the lockdown. Now that people are beginning to return to work, OOH formats along major commuting lines (transportation, roadside billboards) are likely to recover first.

APAC INDIA



- **As of mid-March, all major cities in India have been placed under travel, work, and movement restrictions.**
- **Schools have shut down, and many companies have taken measures to allow their employees to work from home.**

- News shows have seen significant viewership growth from consumers looking for information about Coronavirus and the economy in general. Hindi News viewership is up +18% in week 10 (March 7-13th) compared to previous weeks.
- Kids programming has also benefitted, with viewership up +11%.
- Sports viewership, on the other hand, has declined dramatically, -53%. The popular Indian Premier League 2020 (cricket) and Premier League football tournaments have been postponed. Sports channels have been forced to fill time slots with old matches and telecasts.
- Cinemas across India have been shut down, and new releases of both Bollywood and Hollywood movies have been postponed. Additionally, all shoots for films, television, and digital series (including some Netflix and Disney projects) have been put on hold.
- We expect many channels will suffer due to the lack of new content, though general entertainment and movie channels may see some increases due to the cinema closures.
- Print consumption has so far remained relatively stable, though widespread lockdowns could lead to people cancelling their daily newspaper subscriptions and shifting entirely to digital.

CHANNEL	2020 W3-6	2020W10	CHANGE
KIDS	370	412	11%
HINDI GEC	963	980	2%
HINDI MOVIES	543	586	8%
HINDI NEWS	168	198	18%
SPORTS	203	95	-53%

All Base, Genre GRPS : BARC

A P A C
 **SOUTH KOREA**

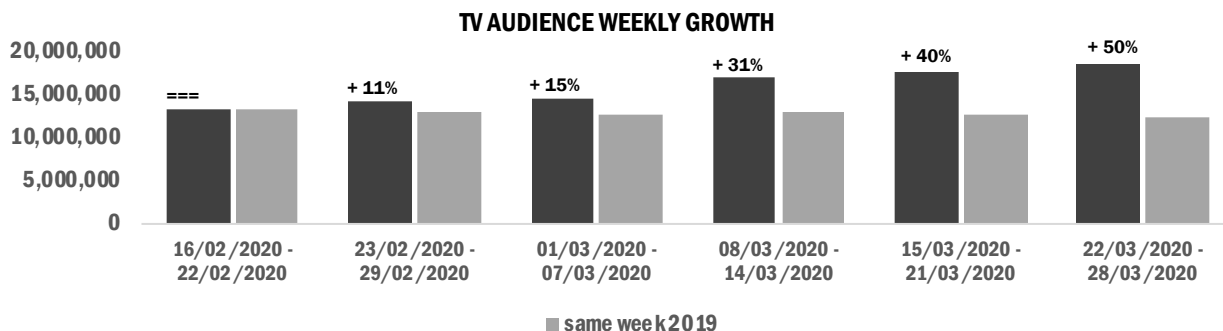


- **South Korea has not implemented a national lockdown, though there are restrictions on travel and some other activities.**
- **Residents of Daegu, the fourth-largest city and site of the largest outbreak, have been quarantined.**
- Total TV ratings increased +13% for the week of March 16th compared to the same period in 2019. Weekday prime time ratings were up by +10%, weekend by +8%.
- News programs have seen the biggest ratings jump, up +34% compared to the same time last year. Entertainment programs, but comparison, were up +13%, and drama and movies by +9%.
- Time spent on the top 100 apps also increased +34%, while time spent on the top 100 websites declined -13% – most likely due to people spending less time on their work computers.

E M E A
 **ITALY**



- **As of March 9th all of Italy was under quarantine.**
- **On March 11th the government prohibited nearly all commercial activity, and on March 21st all non-essential businesses closed.**
- **Videos of Italians singing on their balconies have gone viral, encouraging similar actions around the world.**
- TV consumption has grown steadily since the beginning of the quarantine: weekly TV audiences were up +11% in late February (when the first municipalities went under quarantine), +31% in early March, and +50% by the week of March 23rd (compared to the same weeks in 2019).
- All day ratings were up +30% in March, compared to previous months, and prime time ratings were up +20%.
- Kids audiences increased +40% as schools were closed throughout March.
- Online news consumption has increased significantly over the last couple of weeks, as we see in most markets. The number of unique daily users peaked in mid-March, when the government prohibited commercial activities, and has remained fairly high ever since.
- La Repubblica (leading news site) for example, saw the number of online users surge +130% in the week of March 9th (compared to the same week in 2019). Weekly users were up +115% the week of March 23rd. Other main titles, including Corriere Della Sera and TGCOM24 have seen similar triple-digit user growth.

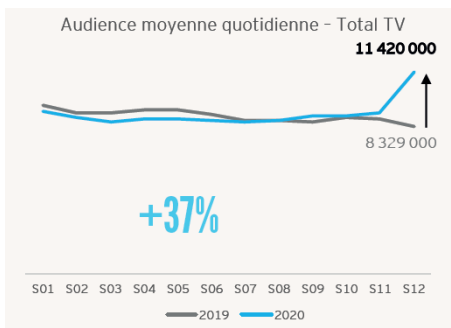


EMEA
SPAIN



- **The Spanish government announced a State of Alarm on March 14th, under which the entire country will remain at home.**
- **All cafes and restaurants are closed, along with cinemas, sporting events, museums, and local celebrations.**
- Television remains the primary source for entertainment and information following the March 14th state of alarm, which has confined the population to their homes through mid-April.
- Daily TV minutes peaked on March 14th, the day the state of alarm was announced, up +48% for all adults (vs. same day in 2019) and +66% for A13-24.
- Time spent with TV has remained high since the 14th, with daily minutes up more than +35% for all adults and around +60% for 13-24.
- OTT viewing is also up significantly, with average adult audiences double what they were at this same time last year (+104%) and 13-24 audiences up +165%.
- National channel La Sexta has seen the largest audience increases, up as much as +200% on some days. La 1 and Tele 5 have also seen growth of over 50%.
- All dayparts have benefitted from this increased consumption, but morning, afternoon, and evening have seen the most significant growth, while prime time has remained fairly stable relative to this time last year.
- In terms of content, news (+65%) and religious broadcasts (+80%) have seen the largest audience increases, while sports viewership has declined -50% due to the cancellation of most major sporting events.
- Digital news sites have also seen significant growth: page views up +57% and unique users +62% for one popular site; +35% increase in page views and +37% in unique users for another.

EMEA
FRANCE

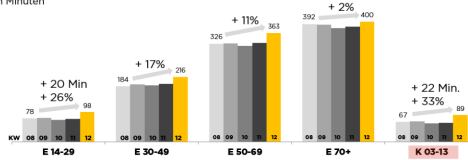


- **Government has ordered citizens to remain at home from March 17th – April 15th.**
- **Citizens who violate the lockdown can be fined or sentenced to community service.**
- TV consumption increased dramatically starting from the week of March 9th, with total daily viewing up +37% yoy (all individuals 4+) and average time spent up by almost an hour and 17 minutes compared to the same period in 2019.
- Younger viewers are making up a larger portion of the audience: people under 50 represented nearly 40% of TV viewers by mid-March, compared to 35% in previous weeks.
- Daily reach grew from 8.8 million in 2019 to more than 11.4 million in the last three weeks of March.
- All dayparts grow but 8pm news shows the largest boost: from 23 million in 2019 to 30 million viewers in March 2020.
- 24-hour news channels have also seen strong growth, as audiences seek the latest information on the outbreak and the government response.
- In the first two weeks of March, for the first time since the beginning of the year, audiences under 15 have surpassed 2019 levels (+52%). Younger audiences are watching around 45 minutes more per day than they did in the same time last year.

EMEA
GERMANY



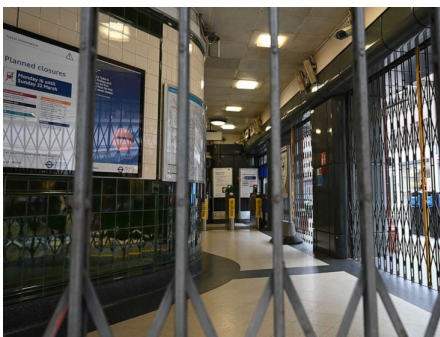
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Zeitraum seit Auftreten COVID-19 in D Mitte Februar 2020 (KW 08 - KW 12 2020)

- **The government introduced a national curfew starting March 22nd, and stated that individuals can only leave home for essential activities.**
- **All gatherings of more than two people have been forbidden for at least two weeks.**
- The largest increase in TV consumption comes from younger audiences, driven by school closures starting the week of March 16th. Children 3-13 are watching 22 minutes more TV a day (+33%).
- Minutes per day have increased +26% among A14-29, or 20 more minutes per day, and +17% for A30-49.
- News shows have been the primary beneficiary of increased viewing time, the same trend seen in many other markets. Today on ZDF, for example, has seen audience growth of +158% for A14-29 (from a low base), and +57% for A30-49.
- Online streaming services have mostly benefitted from increased consumption, with the exception of DAZN, an OTT sports streaming service. DAZN reports that daily subscription cancellations have increased +150% since mid-March.
- All social networks have seen increased use over the last few weeks, though Twitter has seen the largest gains: +68%.
- Cumulatively, traffic has increased around +22% across all social media from December 2019 to March 2020.
- Physical print sales have also increased, with around 15% of Germans reporting using a daily newspaper more frequently.

EMEA
UK

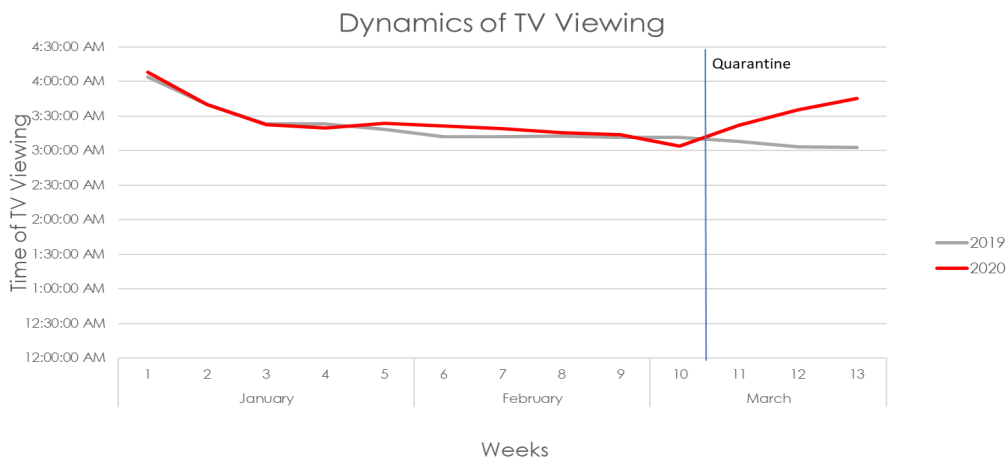


- **The UK went under lockdown on March 24th, behind much of the rest of Europe.**
- **The government estimates lockdown measures could be extended in some form through September.**
- TV audience growth has continued at pace since the lockdown announcement on March 23rd, with viewing up +20% YoY.
- All audiences have seen double-digit growth, including younger demos like A16-34 (+16%) and A16-24 (+19%). Viewing has increased across dayparts, with daytime (+29%) seeing the most significant audience growth.
- News shows have also seen significant audience growth, with Sky News up +109% (11M viewers). Sports, on the other hand, continues to suffer, as most matches have been postponed or cancelled.
- On demand viewing is also on the rise, with Sky and ITV Hub both reporting strong audience growth during this period. We expect this will continue to grow over the next month.
- Print consumption continues to increase following several years of declines, as consumers seek up-to-date information on the outbreak from trusted sources. Subscriptions and delivery services have increased, though the lack of commuter traffic means free titles like Metro are down significantly.
- Digital news consumption surged. The Guardian reports digital traffic growth of +50%, along with a +28% increase in attention time. In terms of magazines, Hearst reports growth in running (+24%), wellbeing (+42%), family (+72%), and homes and interiors (+29%), as well as higher than usual print subscription orders.
- Audio consumption also grows, despite the absence of morning commute time. With people working from home, digital listening has increased throughout the day. Global reports an increase in daily reach via connected devices of +15% and hours of listening +9%.

EMEA
UKRAINE



- **Ukraine is under national lockdown from March 17th until at least April 3rd. TV up +23% on the week of March 23rd.**
- **All mass events have been banned, and only groceries, household stores, pharmacies, banks, post offices, and gas stations continue to operate.**
- Time spent watching linear TV (A18-54, \$50K+) has increased consistently since mid-March. Viewing was up +8% the week of March 9th (vs. the same week in 2019), +18% the week of the 16th, and +23% the week of the 23rd .
- During the week of March 23rd, consumers spent, on average, around 40 more minutes watching linear TV than they did during the same period in 2019.
- Social networks have become the primary source of news for many people during this time. Facebook usage increased +14% (March 2020 vs March 2019), Instagram by +40%, and TikTok by +516% (from a low bae).



- Overall time spent on social media has increased by +3% (50 minutes) compared to February 2020.
- eCommerce has become more popular as consumers are stuck at home. Mobile apps OLX and Aliexpress usage has grown over +10%.

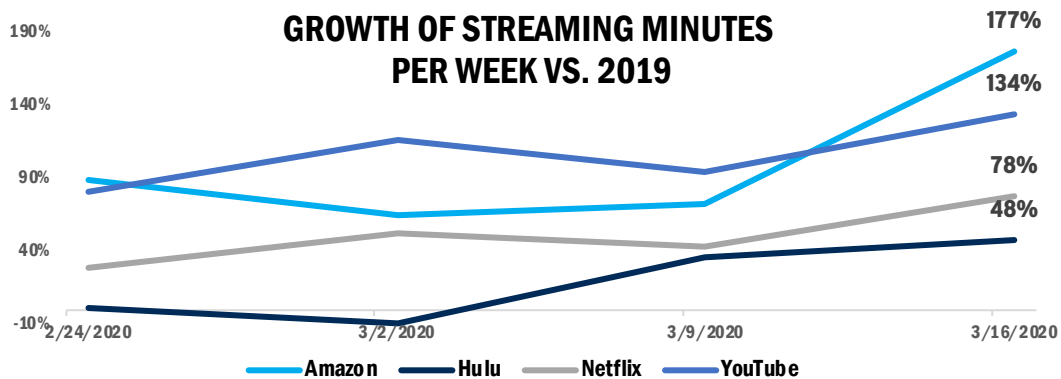
NA
CANADA



- **Canada is not under national lockdown. Several provinces, including Quebec and Ontario, have enacted their own measures.**
- **The government has enlisted several celebrities to appear in ads encouraging people to stay home.**
- Linear TV viewing (A25-54) increased +8% for the week of March 16th vs the same week last year, driven mainly by a +45% increase in daytime viewing.
- Primetime viewing was down marginally (-4% to -6%) due to the absence of sports programming vs 2019.
- News shows are seeing the biggest increases. Over half of Canadians report increasing their news consumption (TV and print/digital).
- Radio listenership, on the other hand, was down -23% in Toronto, due to the decline in drive time/in-car listening.
- Overall internet usage has increased, +10% visits and +14% time spent. News (+19%), business (+34%), and politics (+55%) sites have seen some of the biggest increases in web traffic.
- Social networking (+17%), instant messengers (+27%), and email (+14%) have also seen significant increases in traffic.



- **The United States government has not implemented a nation-wide lockdown, though most states have introduced their own policies.**
- **An estimated 86% of the population is under some form of lockdown as of April 1st.**
- As most of the US enters the third week of social distancing measures, viewing levels have started to stabilize and settle into a new normal.
- Streaming continues to increase in both prime time and late night: +77% during prime (compared to last year) and +83% in late night.
- All four major SVOD providers have seen growth from four weeks ago. Amazon saw the largest growth in March, with a +44% increase over February and a +177% increase over the same week last year. YouTube streaming time has also more than doubled compared to 2019 (+134%).
- Pandemic-related programming has risen to the top of the ranks. *Pandemic* increased +686% compared to four weeks ago, while *Containment* grew +1,554%.
- News networks continue to dominate on cable. CNN was up +275% among A18-49 during the week of March 23rd (vs. the same week last year), FOX News was up +119%, and MSNBC was up +104%.
- Entertainment networks like SYFY (+29%), Comedy Central (+24%), and TLC (+21%) have also seen significant year-over-year increases.
- Broadcast radio listenership, on the other hand, will likely continue to suffer, as most Americans are not commuting to work. Similarly, OOH will remain down as people stay indoors.



TV VIEWING TRENDS FROM THE WEEK OF LOCKDOWN (WEEK 1) (CHANGE VS SAME WEEK OF 2019)

