TV+SMARTPHONE CONSUMPTION REPORT DURING CRISIS

EDITION 3

9TH APRIL 2020

WELCOME

INDIA

- Covid-19 led disruption started affecting India hard since mid March.

- **BARC-Nielsen** have put together for the Industry as to what is the impact of the above on Television consumption & Smartphone Usage. **This is the 3rd Session in the Insights series.**

- We have looked at **Jan as the Pre Covid-19 period**, and compared it with weeks in from mid-March.

AGENDA

TV Consumption

1. Global TV Viewing
2. India Landscape
3. Viewing Trends – Return of the Classics
4. Advertising Trends
5. 9 min Phenomenon

Smartphone Consumption

1. Pulse of the Consumer
2. Deep dive into Smartphone Behaviour
3. Creatives’ Messaging during COVID times
4. Digital Advertising

COVID 19 IMPACT

GLOBAL LANDSCAPE

Sources:
Global Web Index
Visual Capitalist
BARB, Mediametrie, Nielsen, Ciaumed, Kantar, OzTAM, AGF, CSM Media Research

TV CONSUMPTION CONTINUES TO RISE GLOBALLY

United States of America

Total TV usage was up by **27%** (W13'20 vs W9'20)

United Kingdom

Total TV average daily minutes grew by **5.5%** in W13'20 w.r.t W12'10

Germany

German TV viewing duration grew from **76 minutes a month ago to 85 minutes** (February 13 to March 19, 2020; 14-29 years)

China

As of March 2020, **Chinese consumers spent about 150 minutes on average watching** TV every day, showing an **18 percent increase** compared to the average figure of the previous year

Bangladesh

TV viewership increased **35%** (W13'20 vs W11'20)

India

TV viewership grew by **43%** in W13'20 since January '20

Morocco

TV viewership increased by **50%** (W14'20 vs average of 1st 6 weeks of 2020)

France

TV viewership rose by **35%** (W13'20 vs W14'19)

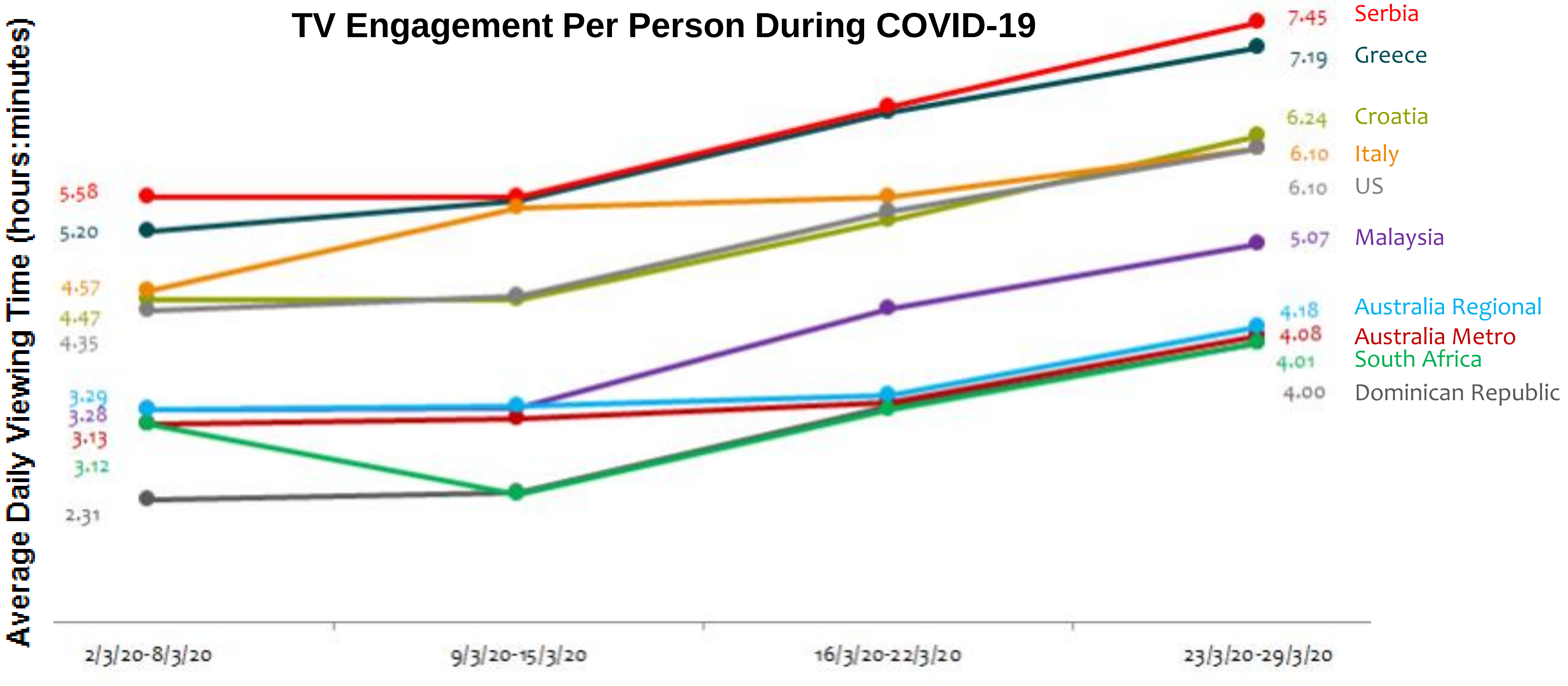
Sri Lanka

TV usage surged by **37%** during W12'20 w.r.t previous week

Australia

Total TV Viewing Week Commencing 29 March 2020: . Viewing across **daytime is up 38% and nighttime audiences are 20% higher** vs W8'20

BEING HOME BOUND IS LEADING TO INCREASE IN TV ENGAGEMENT ACROSS COUNTRIES GLOBALLY



Source: Nielsen, Ad Intel, Jan 2019-8 March 2019 vs the same period for 2020. TV advertising volume

YOUNGER AUDIENCES WATCH ONLINE WHILE GEN X AND BOOMERS WATCH TV: US & UK

% who say they've started consuming or are consuming more of the following since the outbreak	All %	U.S. %	UK %	Gen Z %	Millennials %	Gen X %	Boomers %
Broadcast TV	38	39	34	24	35	45	42
Online videos (e.g. YouTube / TikTok)	38	39	30	51	44	35	11
Online TV / streaming films	37	38	30	38	41	38	21
Online press	29	30	23	21	36	31	15
Music-streaming	28	30	18	28	35	27	12
Video games	24	25	21	31	31	19	10
Radio	22	23	18	17	26	23	15
Livestreams	22	24	12	17	30	21	9
Books / literature	19	20	17	18	20	21	13
Podcasts	13	13	8	11	20	10	4
Physical press	11	12	7	9	19	7	7
None of these	15	13	20	10	10	17	24

Source: *Global Web Index surveyed 4,000 internet users between the ages of 16-64 across the U.S & UK to find out how the COVID-19 outbreak has changed their media consumption*

Audience Definitions

Gen Z – 16-23 years
Gen Y – 24-37 years
Gen X – 38-56 years
Baby boomers – 57-64 years

THE SCOPE OF OUR ANALYSIS: INDIA

BROADCAST AUDIENCE RESEARCH COUNCIL INDIA

Television Behavior

Market Coverage
All India (Urban + Rural)
2+ years

Time Period:
Pre COVID-19: *11th Jan'20 - 31st Jan'20*

COVID Disruption:
Edition 1:14th Mar'20 - 20th Mar'20
Edition 2: 21st Mar'20 - 27th Mar'20
Edition 3: 28th Mar'20- 3rd Apr'20

Frequency: Weekly

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Smartphone Behaviour

Market Coverage
Urban 1 Lakh+,
NCCS ABC, 15-44 Years,
Android Smartphone Users
Passive Panel, 12000 user base
Aligned to Smartphone Universe

Time Period:
Pre COVID-19: *13th Jan'20 - 2nd Feb'20*

COVID Disruption:
Edition 1: 16th Mar'20 - 22nd Mar'20
*Edition 2: 21st Mar'20 - 27th Mar'20**
*Edition 3: 28th Mar'20- 3rd Apr'20**

Frequency: Weekly

Week 2 & 3 definition aligned with TV

TELEVISION: WEEK 12 REGISTERED MANY *'FIRSTS'*

Highest TV consumption ever in a week

News & Movies recorded an all-time high growth in viewership

Hindi Movies surpassed Hindi GEC In viewership

WEEK 13 HIGHLIGHTS

1. **Total TV** further grew by 4% over last week. Overall growth of 43% over Pre COVID-19

2. Return of the Classics made **DD National** the most watched channel across India

3. Week 13 growth is driven largely by **Movies** unlike Week 11 & 12 where growth was driven largely by News

4. **Sports** surged by 21% in Week 13 over last week on the back of telecast of classic India Cricket matches & WWE

5. Viewers in HSM tuning in to TV during early Morning & Late Night have grown during COVID period

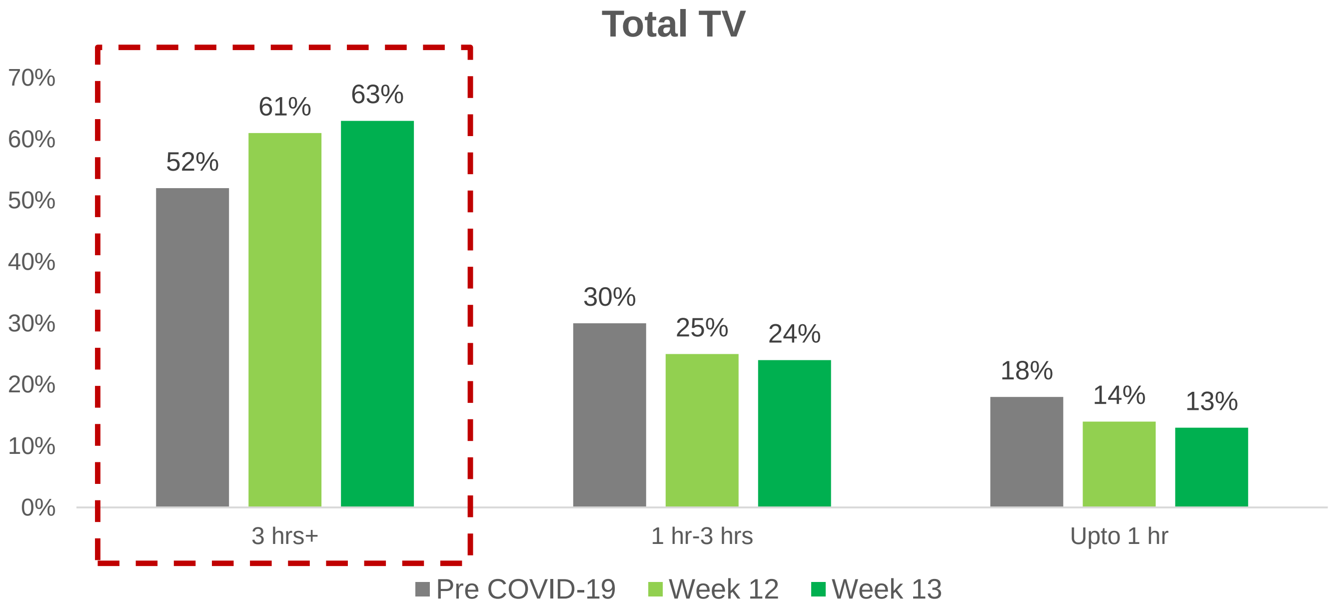
WEEK 13 FURTHER RECORDED A 43% GROWTH AT 1.27 TRILLION MINUTES

- A growth of 4% over week 12
- This week's growth is driven by ATS. Reach is stable
- Number of channels watched has gone up

	Pre COVID-19 (11 Jan to 31 Jan)	Week 12	Week 13	
Weekly Viewing Minutes in Bn	887	1215	1266	*+43%*
Watch 7 days in a week	32%	44%	47%	
Avg. Daily Reach in Mn	560	622	627	*+12%*
Daily ATS/Viewer (hh:mm)	03:46	04:39	04:48	*+28%*
Number of channels watched/per viewer/week	16	22	23	*+42%*

Week 13 (week starting 28 March) & Week 12 (week starting 21 March) data as compared to Pre COVID-19 i.e. Week 2 to Week 4 (11 Jan to 31 Jan)

VIEWERS WATCHING TELEVISION FOR MORE THAN 3 HOURS PER DAY HAS FURTHER INCREASED IN WK13



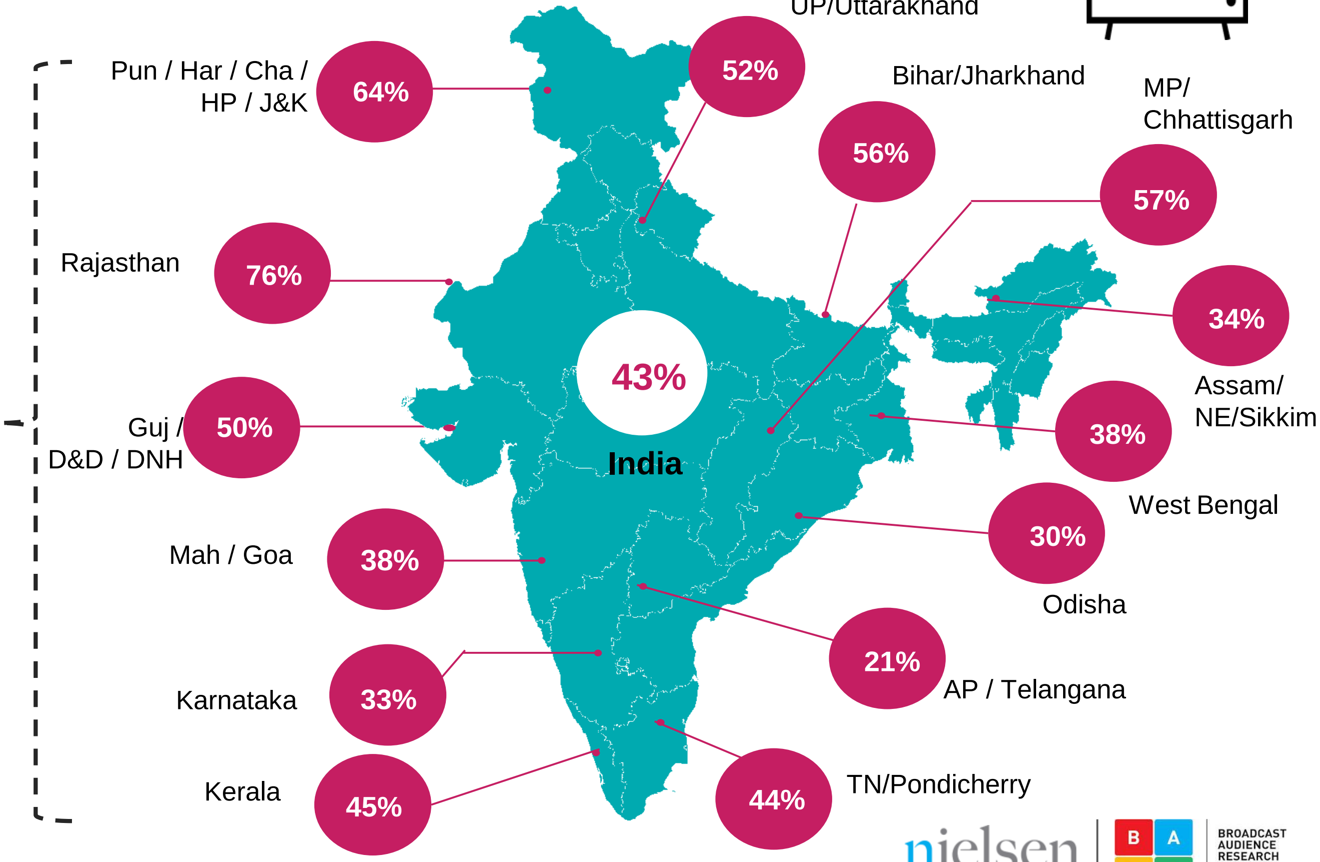
India / 2+ / Individual Analysis (Distribution)/Viewers by time spent per day (Avg)

Week 13 (week starting 28th March) & Week 12 (week starting 21 March) data as compared to Pre COVID-19 i.e.Week 2 to Week 4 (11 Jan to 31 Jan)

TOTAL TV CONSUMPTION INCREASED BY 43% AT ALL INDIA IN WEEK 13

Region	Growth in Week 13 over Pre COVID-19
India	43%
HSM	49%
South	33%

Region	Growth in Week 13 over Week 12
India	4%
HSM	6%
South	2%

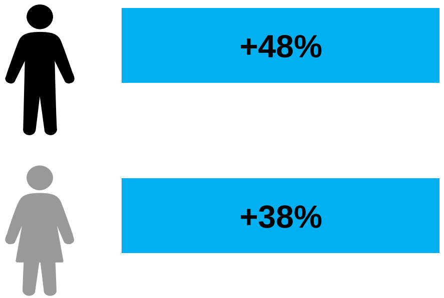


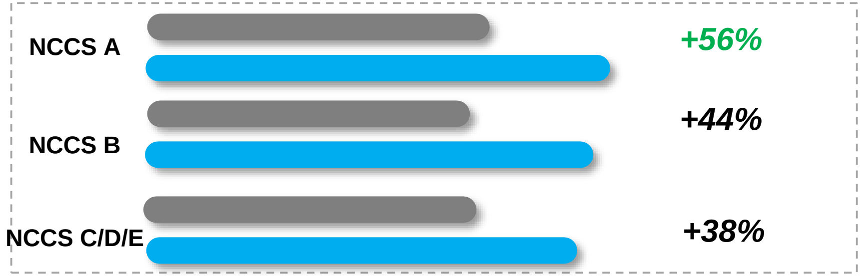
Week 13 (week starting 28th March) data as compared to Pre COVID-19 i.e.Week 2 to Week 4 (11 Jan to 31 Jan)

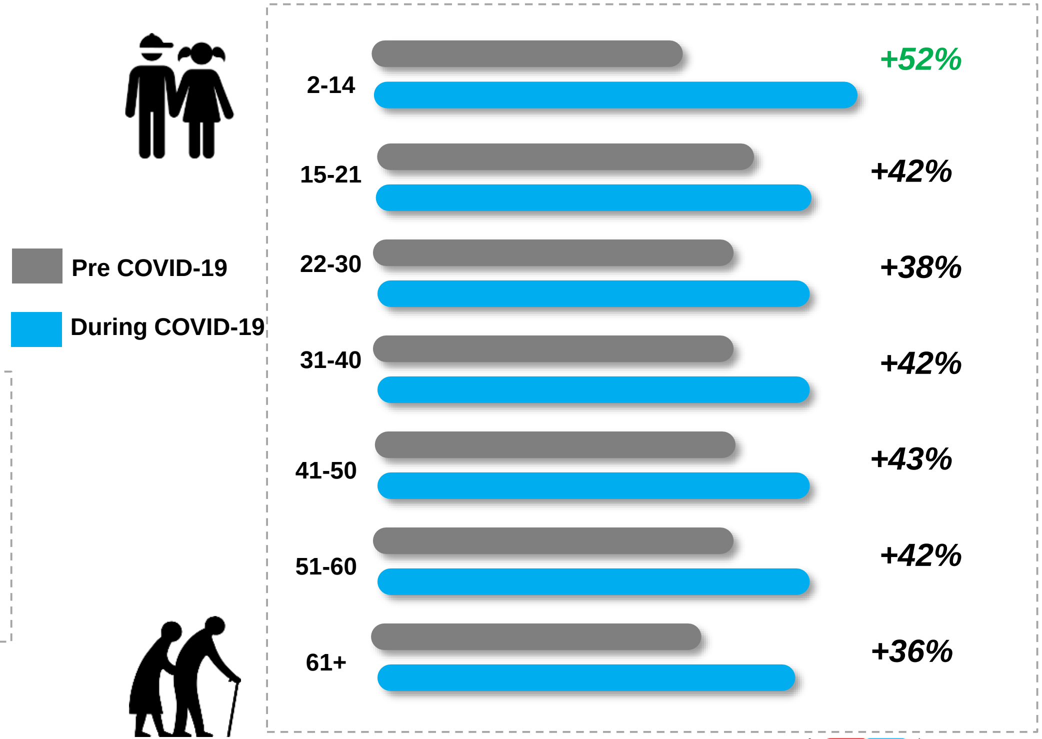
VIEWERSHIP OF MALE, YOUNG AND 'NCCS A' AUDIENCES CONTINUE TO GROW IN WEEK 13

- Growth registered among all demographics

Change in Viewing Minutes



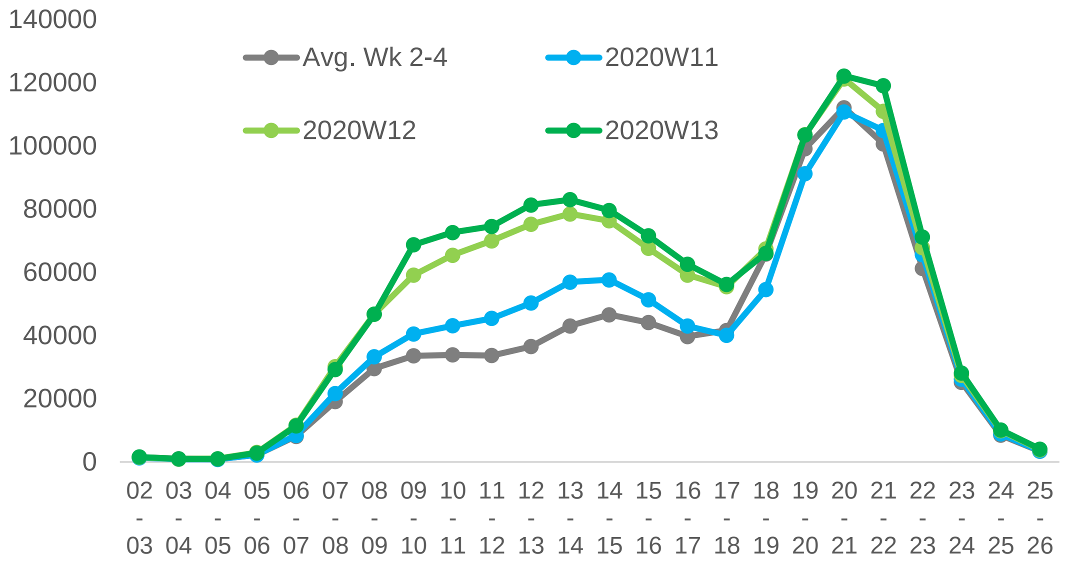




NON-PRIME IS STILL THE DRIVER FOR TV VIEWERSHIP GROWTH IN WEEK 13

	All Day	Non-Prime Time	Prime Time
India	43%	81%	11%
HSM	49%	97%	13%
South	33%	60%	6%

Growth in Week 13 (During COVID-19) data as compared to Week 2 to Week 4 (Pre COVID-19)

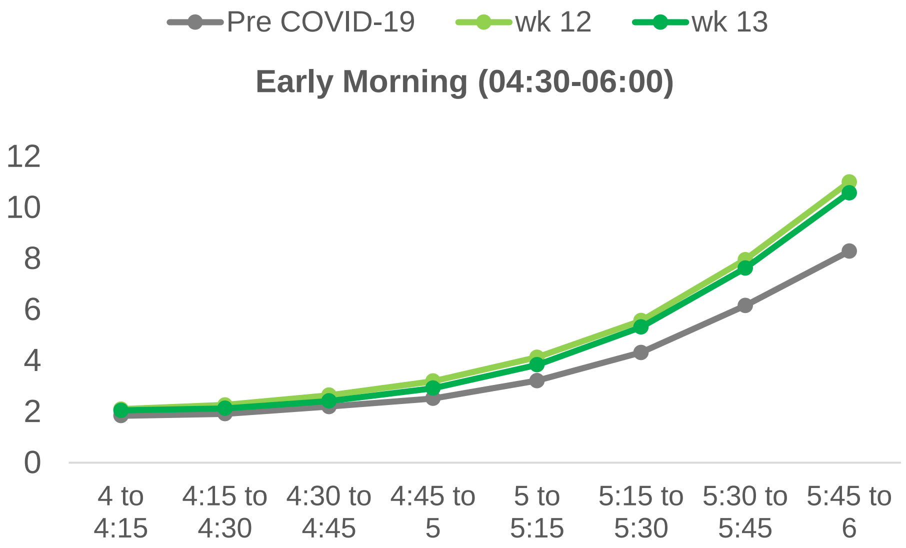


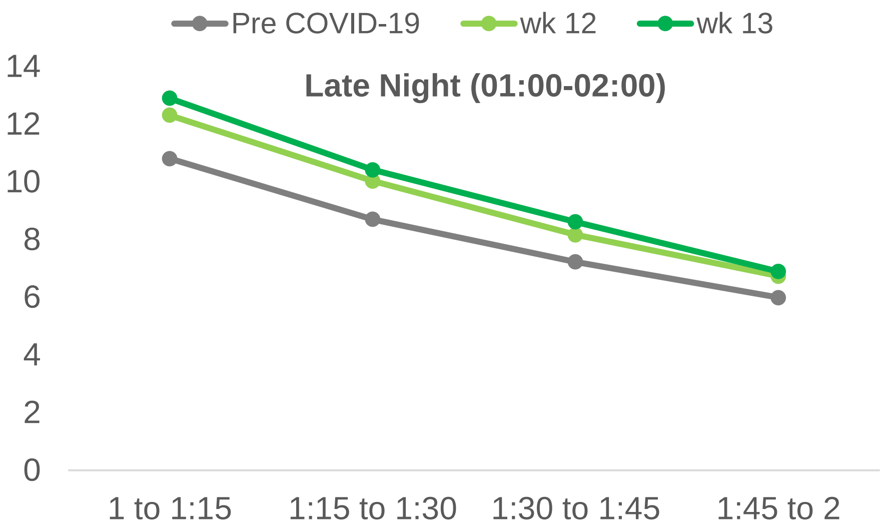
Viewing Minutes Mn, India, 2+,

Week 13 (week starting 28th March), Week 12 (week starting 21 March), Week 11 (week starting 14 March), Pre Covid i.e. Week 2 to Week 4 (11 Jan to 31 Jan)

LATE NIGHT AND EARLY MORNING VIEWING HAS GROWN

- Early Morning slot is driven by News consumption
- Late Night viewership is high on account of Movies and News
- South continues to follow the earlier norm of viewing time zones





15 Minutes Avg Impressions (Mn)

Week 13 (week starting 28th March), Week 12 (week starting 21 March), Pre COVID-19 is Week 2 to Week 4 (11 Jan to 31 Jan)

NEWS & MOVIES CLOCKED AN ALL–TIME HIGH GROWTH ACROSS LANGUAGES

- Movies has driven the growth in Total TV in week 13

NEWS	MOVIES	BUSINESS NEWS	INFOTAINMENT	KIDS	YOUTH
251%	77%	70%	57%	44%	42%

DEVOTIONAL/ SPIRITUAL	LIFESTYLE	TELESHOPPING	GEC
38%	32%	26%	9%

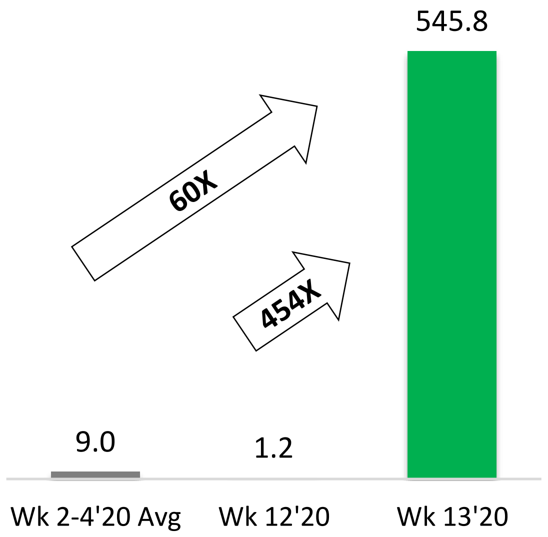
The analysis is based on Channel Genres

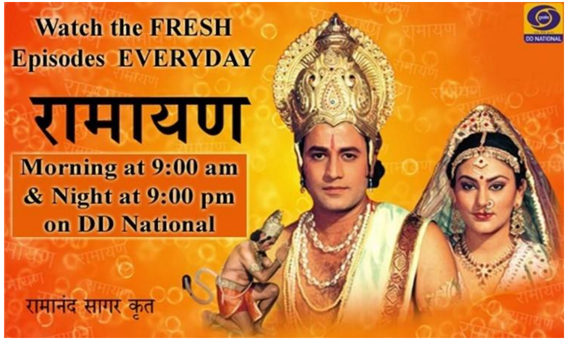
Growth in Week 13 (week starting 28 March) as compared to Pre COVID-19 i.e. Week 2 to Week 4 (11 Jan to 31 Jan)

RETURN OF THE CLASSICS

RETURN OF RAMAYAN, MAHABHARAT ON DD CHANNELS DRIVES TOTAL VIEWERSHIP

Ramayan on DD National
Everyday at 0900 & 2100 Hours

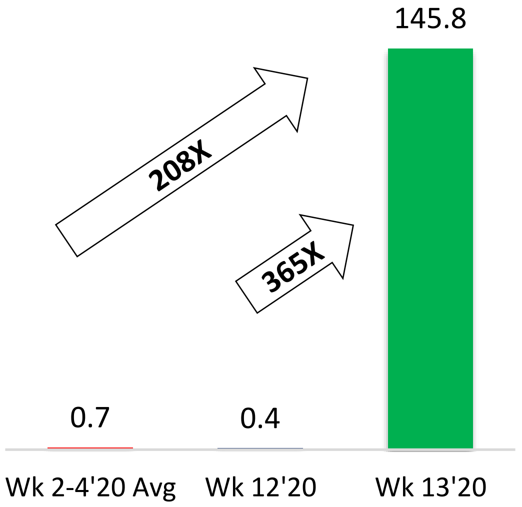




Original Telecast in 1987

Original Telecast in 1988

Mahabharat on DD Bharati
Everyday at 1200 & 1900 Hours



HSM/ 2+/ Impressons'Mn {Avg}
Week 13 (week starting 28th March), Week 12 (week starting 21 March), Pre COVID-19 is Week 2 to Week 4 (11 Jan to 31 Jan)

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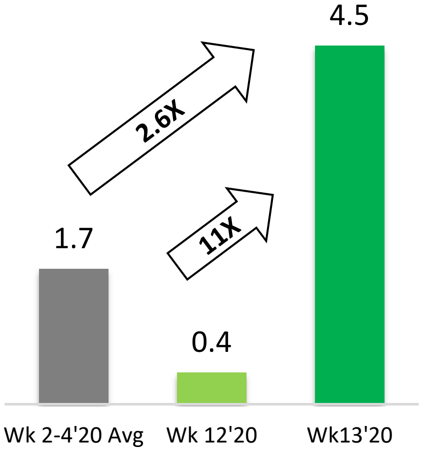
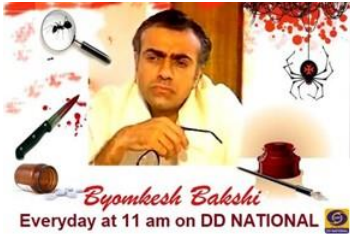
RETURN OF SHAKTIMAAN ON DD IMPROVES SLOT VIEWERSHIP 52 FOLDS IN WEEK 13 OVER LAST WEEK

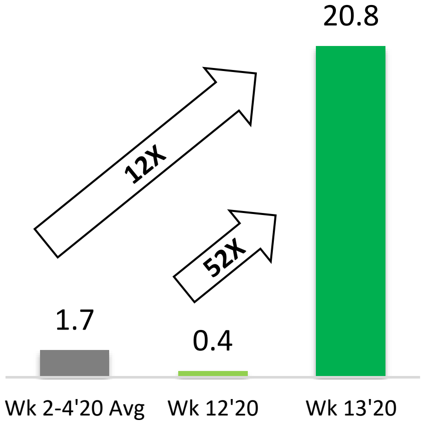
Byomkesh Bakshi on DD National
Everyday at 1100 Hours





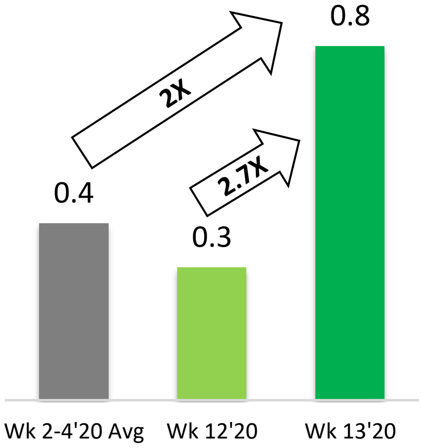
Original Telecast in 1993

Shaktimaan on DD National
From Wed at 2000 Hours



Original Telecast in 1997

Shrimaan Shrimati on DD National
From Wed at 1600 Hours

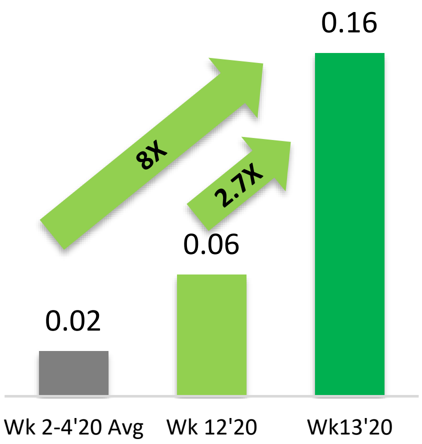


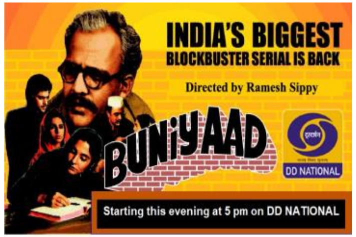
Original Telecast in 1994

HSM/ 2+/ Impressions'Mn {Avg}
Week 13 (week starting 28th March), Week 12 (week starting 21 March), Pre COVID-19 is Week 2 to Week 4 (11 Jan to 31 Jan)

RETURN OF BUNIYAAD, DEKH BHAI DEKH & CIRCUS IMPROVES VIEWERSHIP 8 FOLDS IN WEEK 13 OVER PRE COVID-19 PERIOD

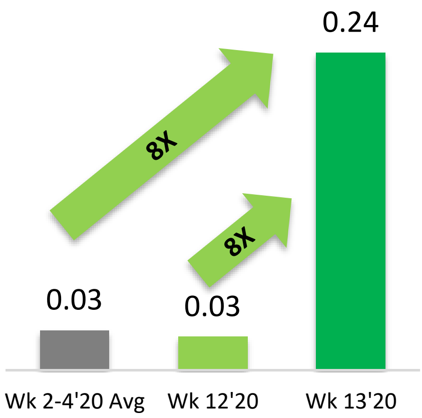
Buniyaad on DD National
From Wed at 1700 Hours





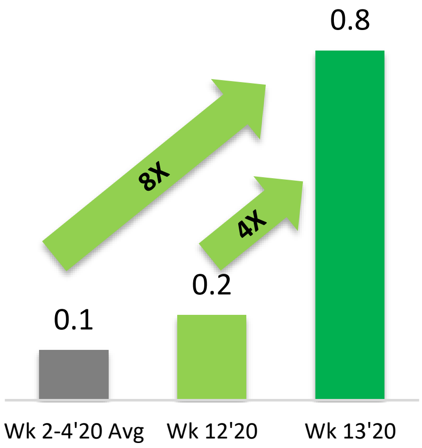
Original Telecast in 1986

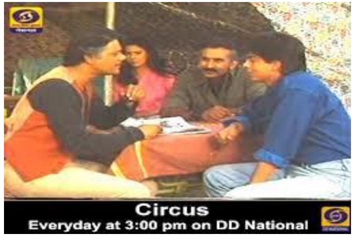
Dekh Bhai Dekh on DD National
From Thu at 1800 Hours



Original Telecast in 1993

Circus on DD National
Sat, Mon-Tue at 2000 Hrs; Thu-Fri at 1500 Hrs



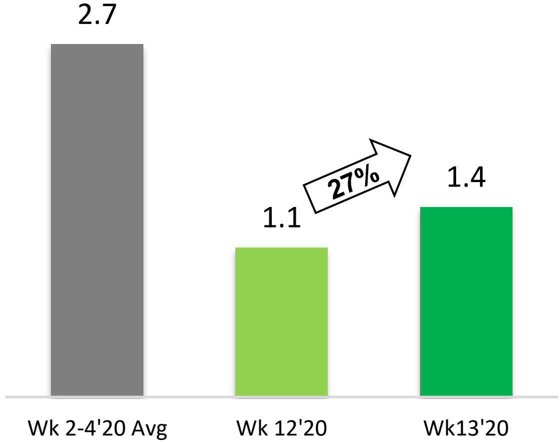


Original Telecast in 1989

HSM/ 2+/ Impressions'Mn {Avg}
Week 13 (week starting 28th March), Week 12 (week starting 21 March), Pre COVID-19 is Week 2 to Week 4 (11 Jan to 31 Jan)

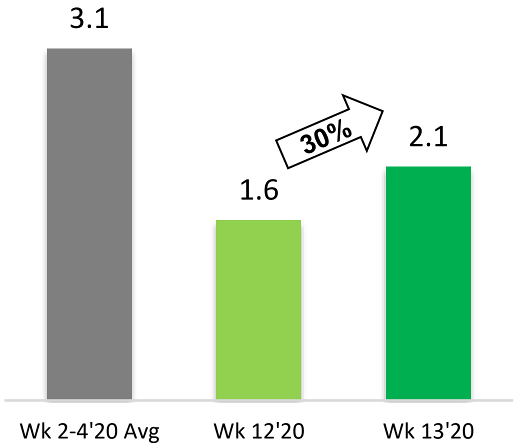
RETURN OF OLD CLASSICS ON PAY HINDI GECs IMPROVES VIEWERSHIP

Mahabharat on Star Plus
Mon-Fri at 1800 Hours



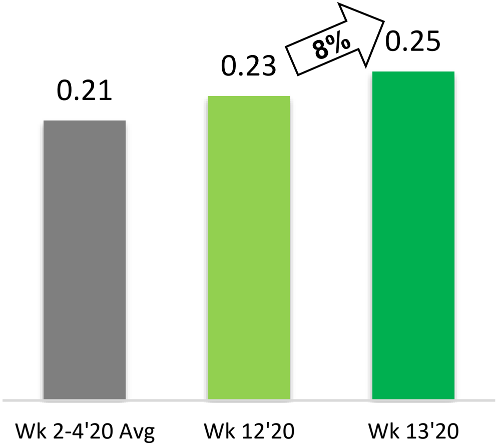
Original Telecast in 2013

Siya Ke Ram on Star Plus
Mon-Fri at 1900 Hours



Original Telecast in 2015

Ramayan on &TV
From Thu at 0800 Hours

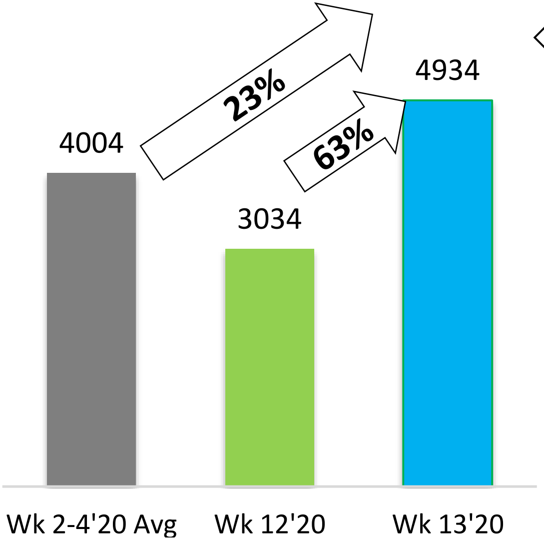


Original Telecast in 2012

HSM/ 2+/ Impressions'Mn {Avg}
Week 13 (week starting 28th March), Week 12 (week starting 21 March), Pre COVID-19 is Week 2 to Week 4 (11 Jan to 31 Jan)

EVEN IN SOUTH, RETURN OF OLD CLASSICS ON SUN TV IMPROVES VIEWERSHIP

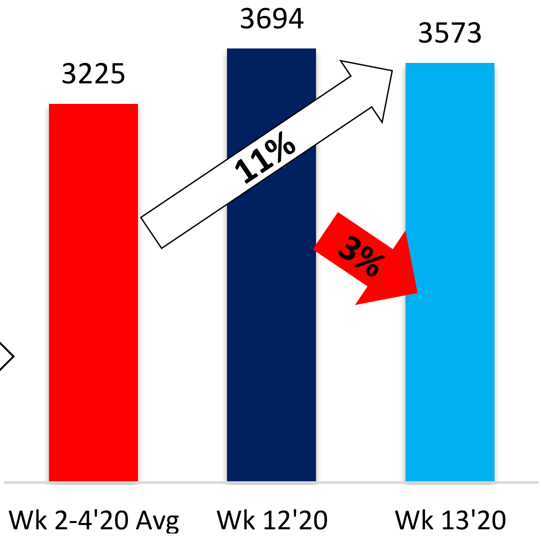
Metty Oli on Sun TV
Wed-Fri at 1300 to 1330 Hours



Original Telecast in 2002

Original Telecast in 2009

Thangham on Sun TV
Wed-Fri at 1500 to 1530 Hours



TN-Pondicherry/ 2+/ Impressions'000 {Avg}/ (Wed-Fri)
Week 13 (week starting 28th March), Week 12 (week starting 21 March), Pre COVID-19 is Week 2 to Week 4 (11 Jan to 31 Jan)

DD NATIONAL IS THE HIGHEST WATCHED CHANNEL IN INDIA IN WEEK 13

- Its viewership is higher than any other 'Genre' at HSM during Ramayan telecast in both the Timebands

Slot : Morning (0900-1030)				
Channel	**W2-4**	**W12**	**W13**	**G/D%**
Total TV	940	1,776	2,202	24%
Hindi GEC	203	292	840	187%
DD National	**3**	**1**	**580**	39006%
Rest Of Hindi GEC	200	291	259	-11%
Hindi Movies	146	346	320	-7%
Hindi News	85	306	277	-10%
Kids	112	200	185	-7%
Music & Youth	162	142	138	-3%
Marathi Channels	60	126	111	-12%
Bangla Channels	31	75	74	-1%
Punjabi Channels	32	49	45	-8%
Hindi Regional News	7	46	34	-26%
Oriya Channels	18	37	33	-12%
Assam Channels	7	18	19	6%

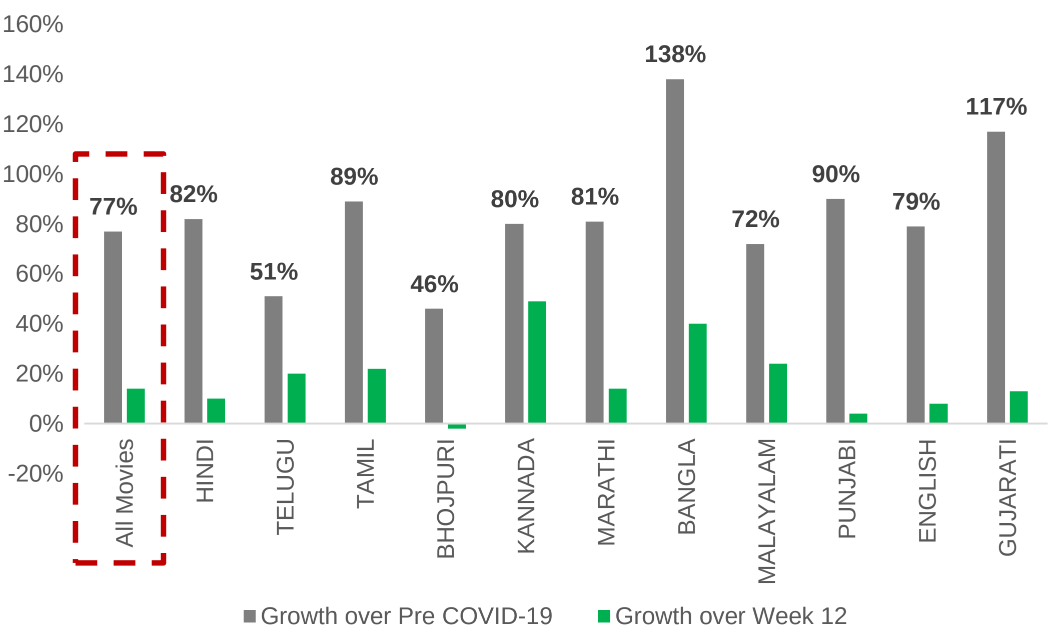
Slot : Evening (2100-2230)				
Channel	**W2-4**	**W12**	**W13**	**G/D%**
Total TV	2,943	3,316	3,719	12%
Hindi GEC	1,209	948	1,552	64%
DD National	**6**	**2**	**835**	45834%
Rest Of Hindi GEC	1,203	946	717	-24%
Hindi Movies	656	783	831	6%
Hindi News	150	516	399	-23%
Bangla Channels	212	241	224	-7%
Marathi Channels	239	260	209	-19%
Kids	83	88	84	-4%
Oriya Channels	73	79	67	-16%
Punjabi Channels	30	51	55	9%
Music & Youth	59	54	55	1%
Hindi Regional News	12	59	34	-42%
Assam Channels	13	21	21	2%

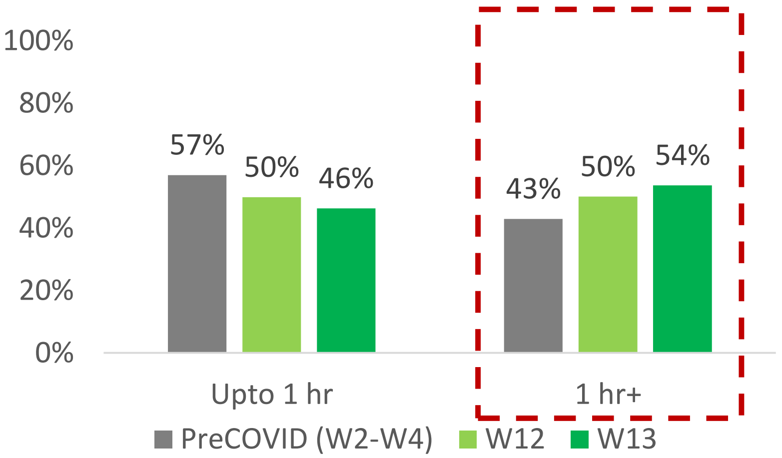
HSM/ 2+/ Sum of Impressions (Mn)

Growth in Week 13 (week starting 28th March) over Week 12 (week starting 21 March); Week 2 to Week 4 (11 Jan to 31 Jan)

MOVIES CLOCKED GROWTH ACROSS ALL LANGUAGES

- Total TV Growth in Week 13 over last week is driven by Movies
- Viewers spending more than 1 hour on Movie channels has also grown week-on-week





India 2+
Week 13 (week starting 28 March), Week 12 (Week starting 21 March), Pre COVID-19 i.e. Week 2 to Week 4 (11 Jan to 31 Jan)

VIEWERSHIP GROWTH IN TOP SOUTH GEC CHANNELS IS DRIVEN BY THE MOVIES AIRED

- Kannada is an exception due to low duration of movies aired

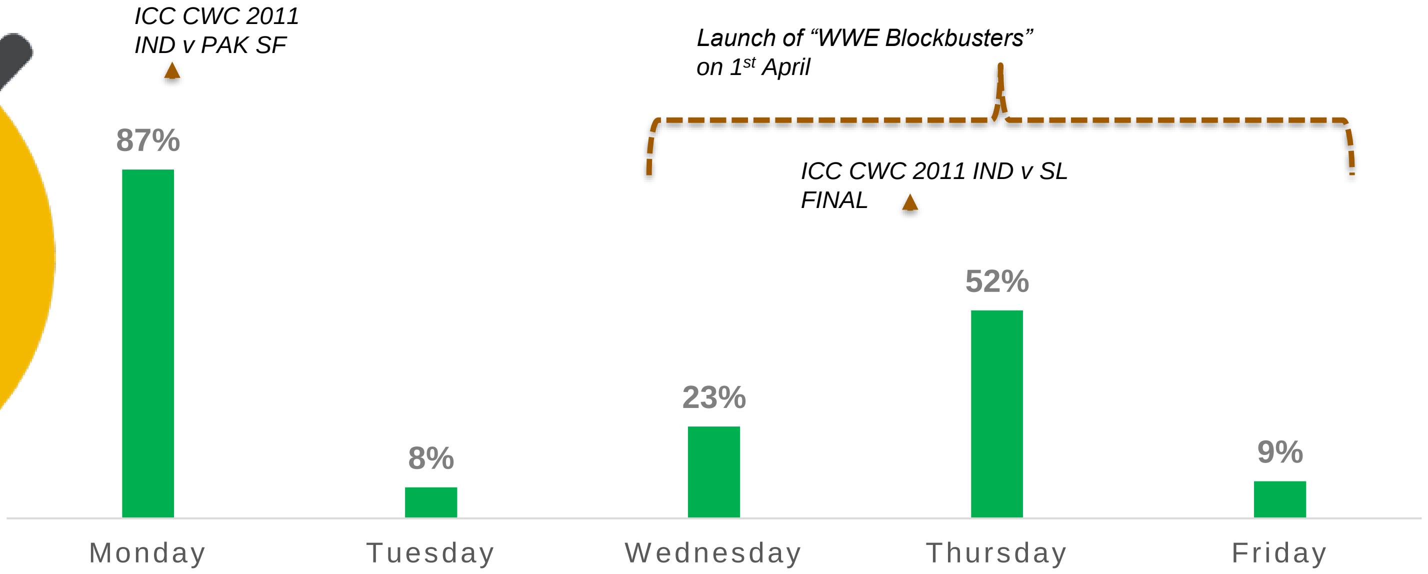
Viewership of Movies in Top GEC's in South

Channels	2020W12	2020W13	Viewership Growth	Duration Growth
Telugu Top 4 GECs	134	152	14%	20%
Kannada Top 5 GECs	53	45	-15%	-9%
Tamil Top 4 GECs	67	153	128%	45%
Malayalam Top 5 GECs	40	45	10%	0%

Sum of Impressions (Mn)
Data compared for week 12 & week 13

SPORTS GENRE GREW BY 21% IN WEEK 13 OVER WEEK 12 DESPITE THE ABSENCE OF MAJOR LIVE SPORTS

- Channels leveraged India’s classic World-Cup matches and WWE matches to boost viewership



India 2+/ Growth in Viewing Minutes

Growth in Week 13 (week starting 28th March) over Week 12 (week starting 21 March)

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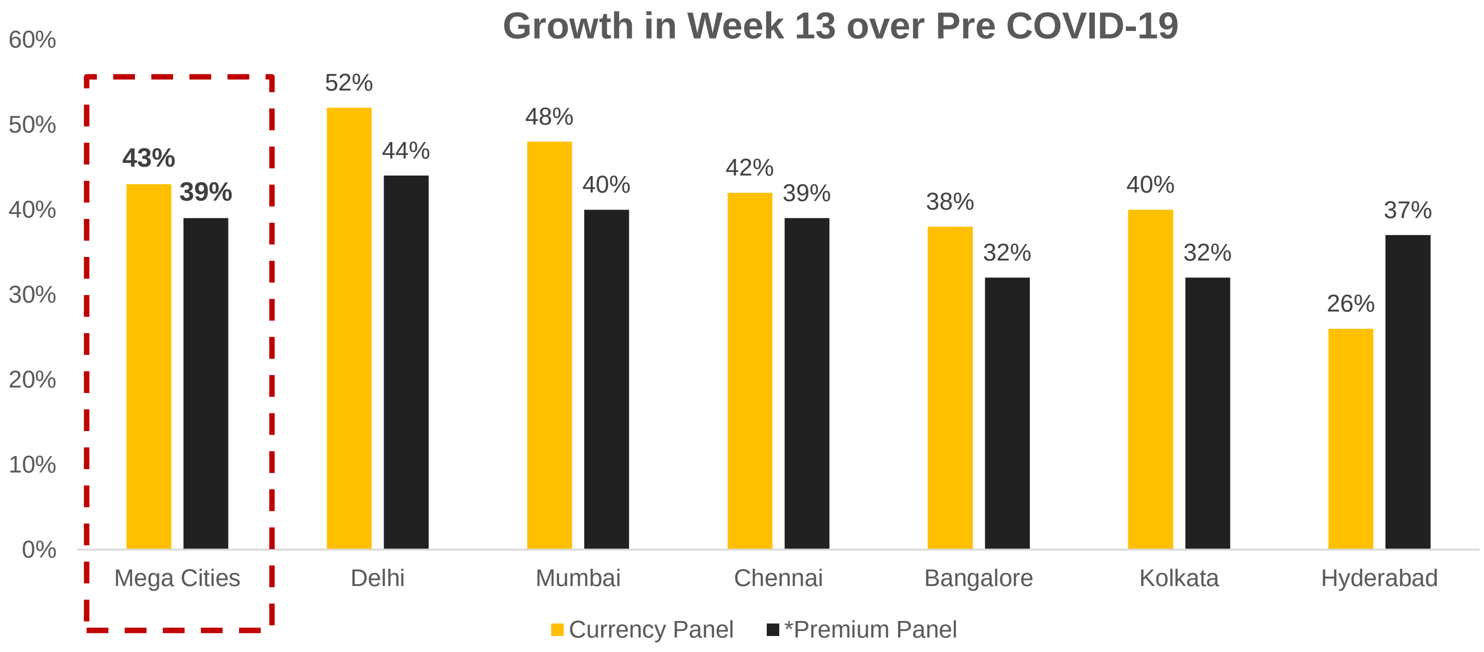
PREMIUM AUDIENCESS IN MEGACITIES CONTINUE TO REGISTER GROWTH IN VIEWERSHIP

- Megacities grew by 43% in Currency panel & 39% in Premium panel



*Data for Premium Panel Growth is from BARC's Product PrimaVU (measuring top 3% of Socio Economic Strata in 6 Megacities at 2+)

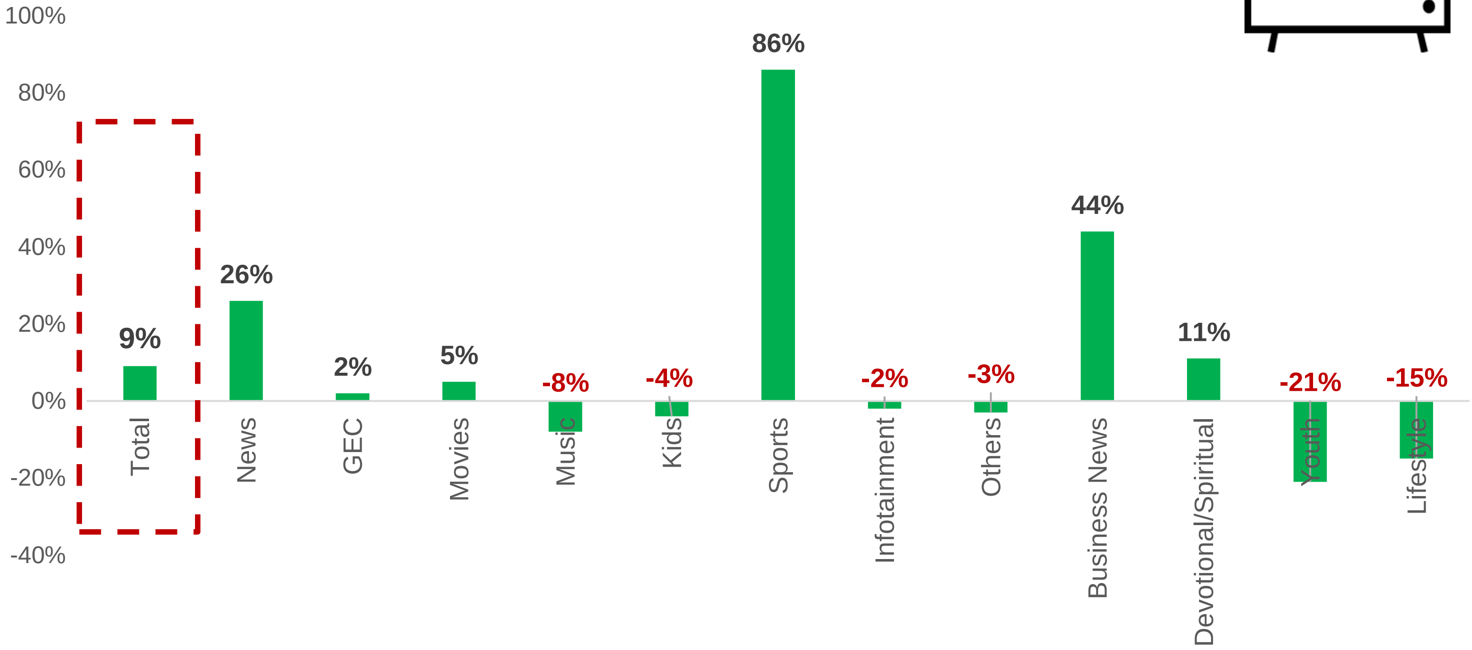
Growth in Week 13 (week starting 28 March) data as compared to Pre COVID-19 i.e. Week 2 to Week 4 (11 Jan to 31 Jan)

ADVERTISING VOLUME TRENDS

(FCT in Mn secs)

OVERALL FCT GREW BY 9%

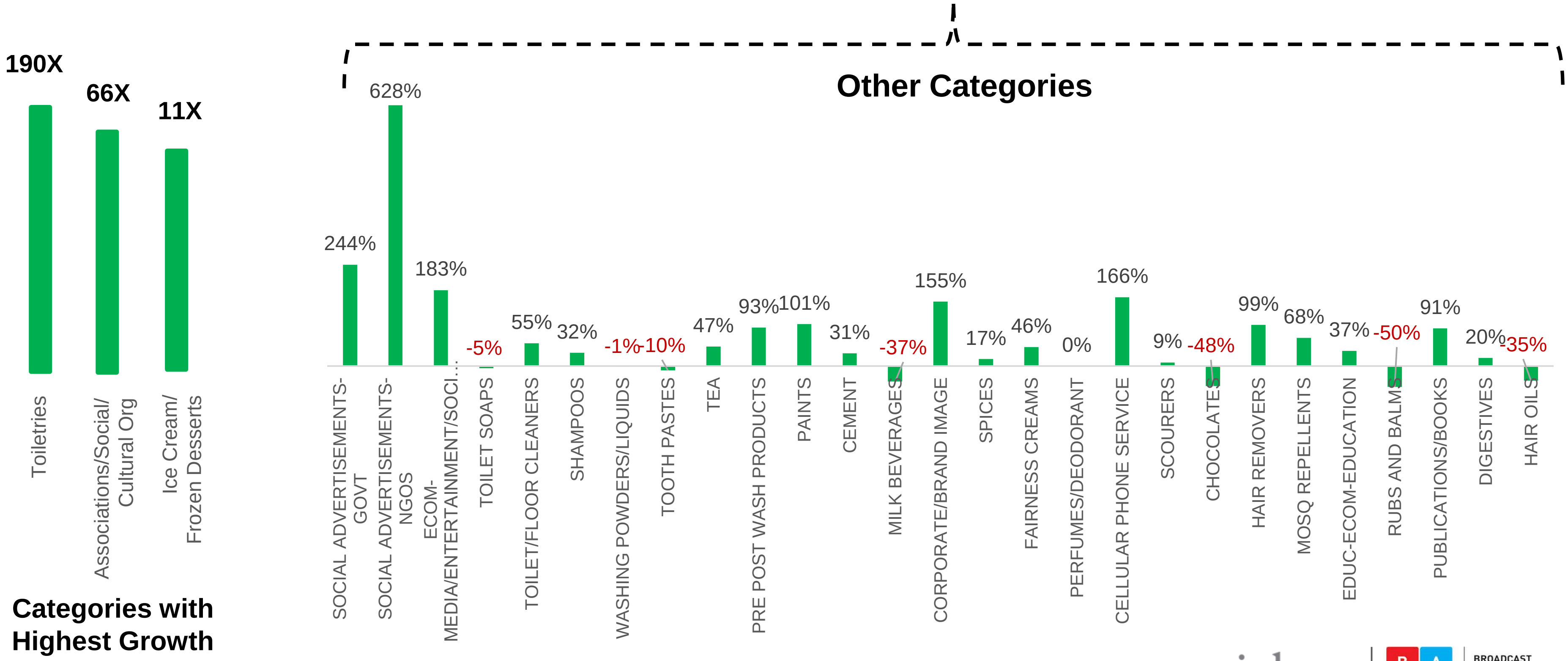
- Growth is observed across Genres
- Sports registers the highest growth in FCT in week 13



Growth in Week 13 (week starting 28th March) over Pre COVID-19 i.e Week 2 to Week 4 (11 Jan to 31 Jan); 4 days considered

FCT GREW ON THE BACK OF SOCIAL ADS

- Many Top categories continue to grow
- Some of the top brands in week 13 are Dettol and Lifebuoy Toilet soaps, Harpic, Lizol, Hotstar VIP, etc.



Growth in Week 13 (week starting 28th March) over Pre COVID-19 i.e Week 2 to Week 4 (11 Jan to 31 Jan); 4 days considered

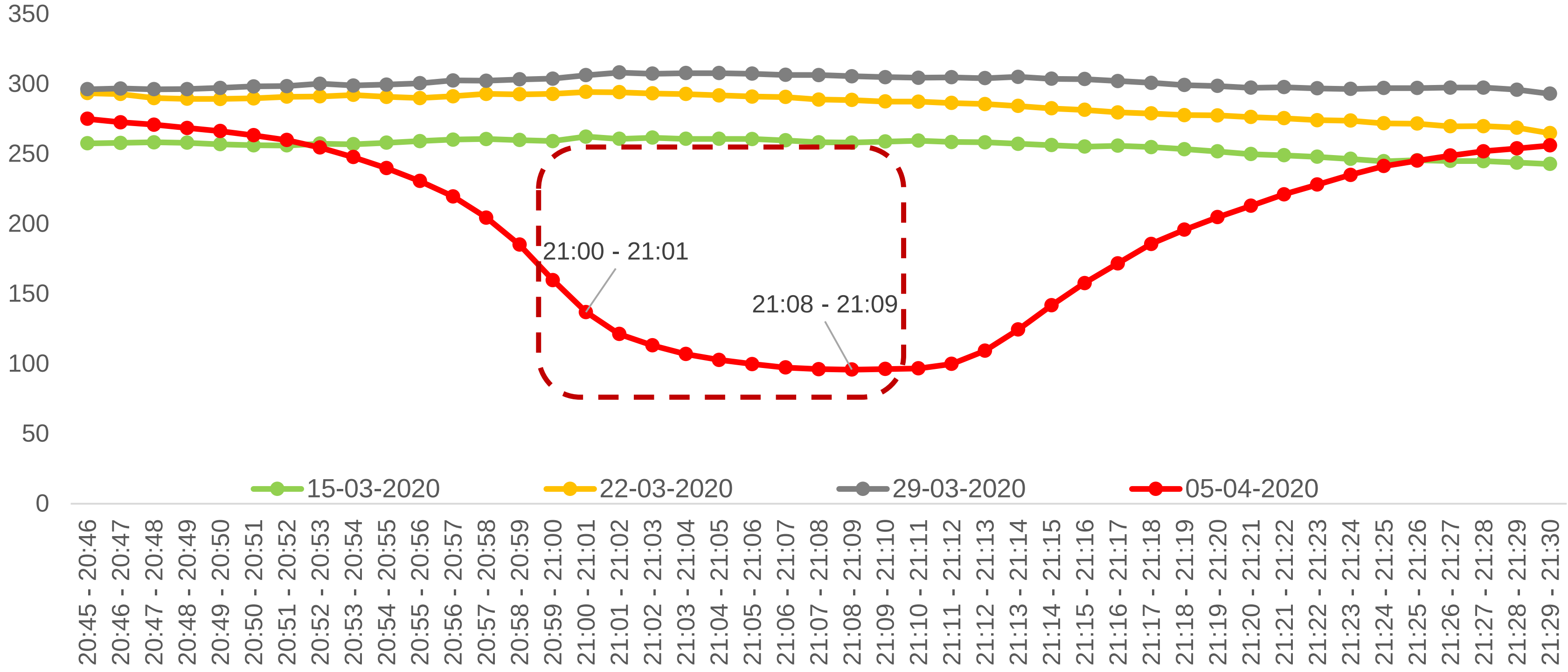
EXCLUSIVE PREVIEW

PM's 11 MINS VIDEO MESSAGE ON #9PM9MINS GARNERED 1 BN VIEWING MINUTES

PM's Address to the Nation	Date	Channels	Duration (Approx. in mins)	No. of People who viewed the telecast (in Mn.)	Viewing Minutes (Mn)
Demonetization	8th Nov 2016	114	60	56.9	842.4
Article 370	8th Aug 2019	163	41	65.0	934.8
COVID-19 (1st Address) / Janta Curfew	19th Mar 2020	192	30	82.5	1275.3
COVID-19 (2nd Address) / 21 days' Lockdown	24th Mar 2020	201	30	196.5	3862.9
COVID-19 (3rd Address) / Video message	3rd Apr 2020	199	11	119.0	1024.5

IMPACT OF #9PM9MINS: VIEWERSHIP IN THESE 9 MINUTES WAS THE LOWEST EVER SINCE 2015

- TV Viewership dropped by 60% during these 9 minutes as compared to previous weeks
- The decline started by 08:53 PM and came back to current trends only after 09:30PM



Minute on Minute Impressions (Mn)

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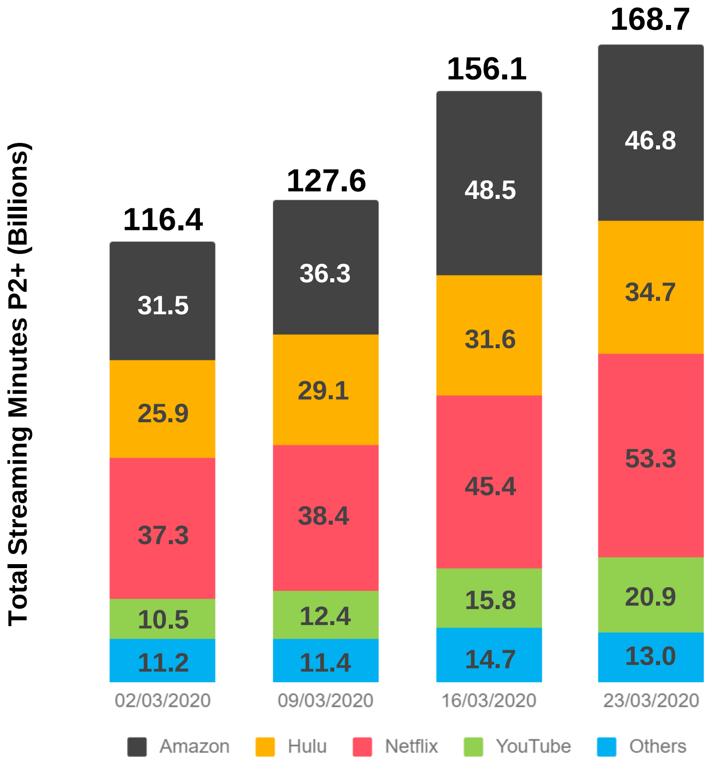
These viewership figures are based on data collected. Please note that the data is not final

A PEEK ON DIGITAL CONSUMPTION FROM THE MORE EVOLVED MARKETS

STREAMING IN THE US



Source: Nielsen, Custom Streaming Meter Report, Sum of Daily Streaming Minutes (Weighted), P2+,Total Day, Others calculated as the difference between total streaming and the sum of the major 4 digital publishers. Only on connected TVs, mobile viewing and streaming via set top boxes not included

NEWS CONSUMPTION IN AUSTRALIA

The average audience of the top ten news websites in Australia has grown by more than half (54%) versus the prior 4 weeks

7 of the top 10 online news sites attracted **more than 5 million people in the week of March 16 - March 22**

Unique Audience	16/03/20 - 22/03/20	Week on Week % change	Average Time Spent
ABC News Websites	9,812,349	30%	19:56
news.com.au	6,830,621	12%	19:46
7NEWS	6,685,615	24%	3:59
The Guardian	5,873,263	27%	9:52
smh.com.au	5,736,938	27%	10:50
nine.com.au	5,656,752	8%	14:27
Daily Mail Australia	5,260,511	7%	9:17
The Age	2,682,610	42%	15:22
Australian Community Media Network	2,473,866	37%	3:16
THE AUSTRALIAN	2,075,477	37%	9:42

Source: Nielsen Digital Content Ratings Australia

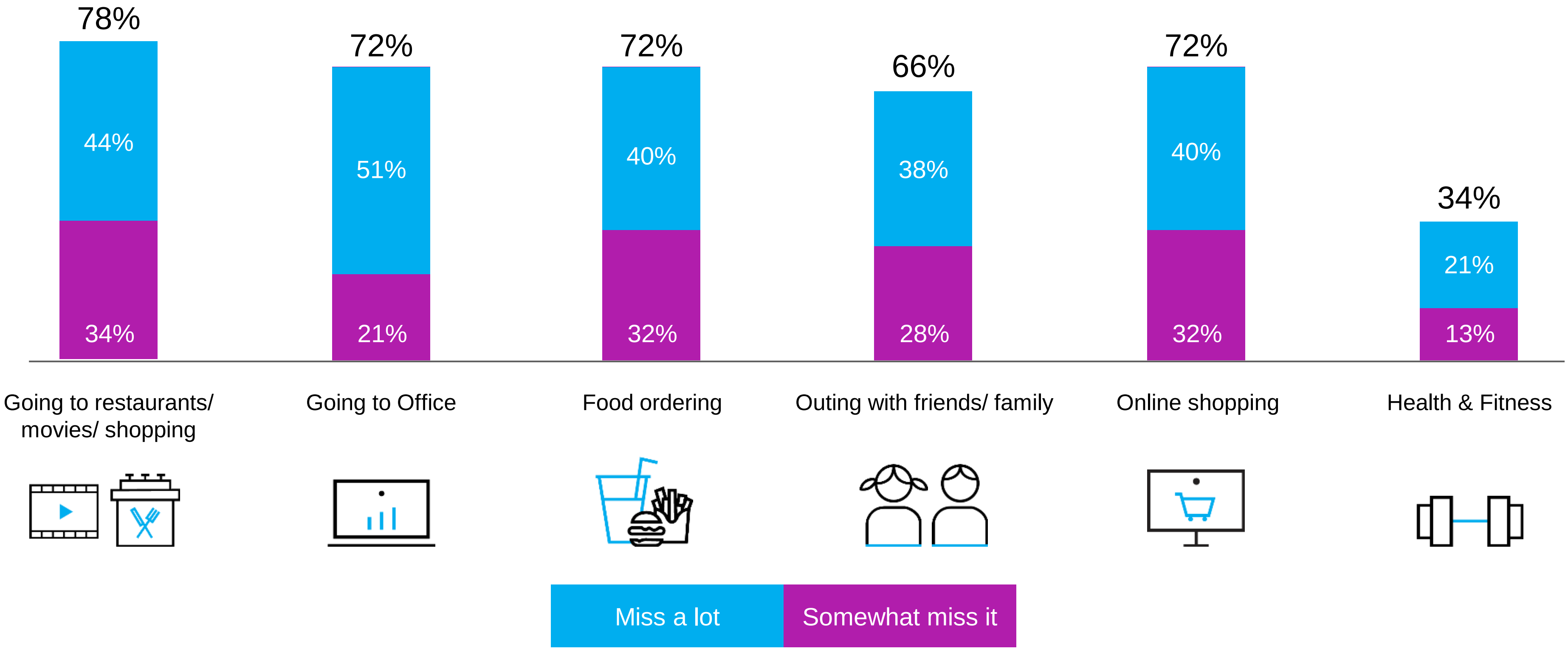
THE INDIA STORY ON SMARTPHONES

FIRST, A PULSE OF CONSUMER

Based on an online survey conducted Last week among 1000 consumers in India spread across top 6 cities belonging to the age group of 15-45 yrs across NCCS A & B

PANGS OF SOCIAL DISTANCING

(Missing me-time indulgences and the rest-of-society?)



Base: Those who have done these activities in the last one month

Q. On a scale of 1 to 5 how much do you miss the below activities in this Covid-19 lockdown period?

Source: Online survey conducted by Nielsen Media,in India spread across top 6 cities, age group of 15-45 yrs, NCCS A & B

BROADCAST AUDIENCE RESEARCH COUNCIL INDIA

LOCKDOWN EVOKES POLARIZED EMOTIONS

Not at all Happy	34%	44%	Very Happy
Very Anxious	42%	34%	Not at all Anxious
Very Scared	33%	36%	Not at all Scared
Very Frustrated	47%	36%	Not at all Frustrated
Not at Peace	41%	39%	Very Peaceful

Base: All Respondents (1000)
Q. With the current situation of Covid-19 Lockdown in India, please describe your overall feeling towards it, on a scale of 1 to 5 across the scale.

Source: Online survey conducted by Nielsen Media, in India spread across top 6 cities, age group of 15-45 yrs, NCCS A & B

DEEP DIVE INTO SMARTPHONE BEHAVIOUR

SMARTPHONE USAGE INCHING TOWARDS ~4 HOURS/DAY - A 12.5% INCREASE

	Pre COVID-19	*COVID-19 Disruption* Week 2	*COVID-19 Disruption* Week 3
Time spent per user on smartphone in a week	23 hrs 36 mins	26 hrs 24 mins	26 hrs 36 mins
Change vs Pre COVID-19		+11.8%	+12.5%
Daily time spent per user	3 hrs 24 mins		3 hrs 48 mins

Based on Nielsen Smartphone Panel representing 1L+, NCCS ABC, 15-44

COVID Disruption Data as compared to Pre COVID-19 Data

AFTER A STAGGERING GROWTH, SOCIAL CONNECTIVITY SEEN TO STABILIZE IN WEEK 3 AS PEOPLE GET USED TO THE NEW NORMAL

	% USERS/WEEK			TIME SPENT/USER/WEEK(Min)		
	PRE COVID	COVID DISRUPTION: WEEK 2	COVID DISRUPTION: WEEK 3	PRE COVID	COVID DISRUPTION: WEEK 2	COVID DISRUPTION: WEEK 3
Chat VOIP	98%	98%	98%	3 hrs 45 mins	5 hrs 22 mins	5 hrs 17 mins
					43%	41%
Social Networking	89%	88%	88%	3 hrs 13 mins	4 hrs 34 mins	4 hrs 39 mins
					42%	44%

Based on Nielsen Smartphone Panel representing 1L+, NCCS ABC, 15-44

COVID Disruption Data as compared to Pre COVID-19 Data

MOBILE PAYMENTS SEEN TO GAIN TRACTION WITH PEOPLE NEEDING THESE APPS FOR PAYMENTS IN LIEU OF CASH TRANSACTIONS!

% USERS/WEEK

	PRE COVID	COVID DISRUPTION: WEEK 2	COVID DISRUPTION: WEEK 3	
Shopping	67%	63%	58%	-14%
Travel	8%	4%	2%	-70%
Food Ordering	13%	10%	8%	-42%
Mobile Payments	73%	76%	77%	4%

Based on Nielsen Smartphone Panel representing 1L+, NCCS ABC, 15-44

COVID Disruption Data as compared to Pre COVID-19 Data

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B A R C BROADCAST AUDIENCE RESEARCH COUNCIL INDIA

VIRTUAL EDUCATION & VIRTUAL DRIVES GAINED IMPORTANCE IN TIMES OF LOCKDOWN

	% USERS/WEEK			TIME SPENT/USER/WEEK(Min)		
	PRE COVID	COVID DISRUPTION: WEEK 2	COVID DISRUPTION: WEEK 3	PRE COVID	COVID DISRUPTION: WEEK 2	COVID DISRUPTION: WEEK 3
Education	13%	14%	14%	24 mins	24 mins	31 mins
Change (Pre COVID to Week 3)		7%			30%	
Virtual Drives	40%	44%	48%	10 mins	9 mins	10 mins
Change (Pre COVID to Week 3)		20%				

Education - For metros, the change in **users/week is +16%** and **time spent is +50%,** Increase driven by **35-44** (Users/week +13%, Time spent +96%)

Based on Nielsen Smartphone Panel representing 1L+, NCCS ABC, 15-44

COVID Disruption Data as compared to Pre COVID-19 Data

THE SURGE IN TIME SPENT ON NEWS STAYS IN WEEK 3

	% USERS/WEEK	
Total News	34%	+22%

	% USERS/WEEK		TIME SPENT/USER/WEEK(Min)	
News Apps	21%	+15%	39 mins	+41%

CHANGE IN TIME SPENT/USER/WEEK (Min)

News Aggregators	39%
Hindi	101%
English	36%
Regional	141%

	% USERS/WEEK		NUMBER OF VISITS/ WEEK	
News Websites	16%	+42%	21	+34%

CHANGE IN NUMBER OF VISITS/WEEK

Hindi	+31%
English	+28%
Multi-Language	+9%

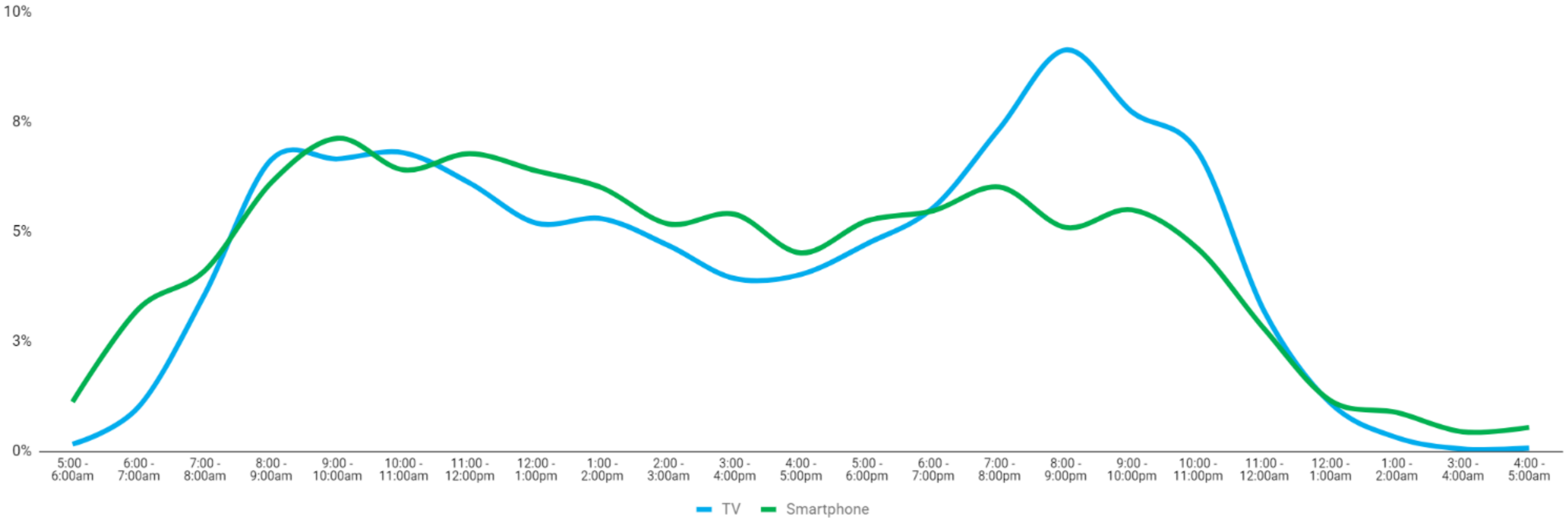
News Websites based on Top 50 news websites

Based on Nielsen Smartphone Panel representing 1L+, NCCS ABC, 15-44
COVID Disruption W3 as compared to Pre COVID-19 Data

NEWS CONSUMED ACROSS TV & SMARTPHONE UNTIL NOON, WHILE AUDIENCES RESORT TO TV FOR THEIR PRIME TIME CATCH UP!

(Possible indicator of audiences meshing between media much more to consume news over the the day ?)

Hourly Share of Consumption of News (on Television, On Smartphone) - COVID DISRUPTION WEEK 3



Nielsen Smartphone Panel TG: 1 L+ Urban,NCCS ABC,15-44 years
BARC Television Panel TG: India Urban, NCCS ABC,15-40 years

ON SMARTPHONES - 4 HOURS A WEEK ON VOD IS THE NEW NORMAL GAMING CONTINUES TO ADD MORE USERS

	% USERS/WEEK			TIME SPENT/USER/WEEK(Min)		
	PRE COVID	COVID DISRUPTION: WEEK 2	COVID DISRUPTION: WEEK 3	PRE COVID	COVID DISRUPTION: WEEK 2	COVID DISRUPTION: WEEK 3
Gaming	60%	66%	68%	2 hrs 31 mins	3 hrs 11 mins	3 hrs 38 mins
		11%	15%		26%	44%
VOD	96%	97%	97%	3 hrs 33 mins	3 hrs 56 mins	3 hrs 59 mins
					11%	12%

Based on Nielsen Smartphone Panel representing 1L+, NCCS ABC, 15-44

COVID Disruption Data as compared to Pre COVID-19 Data

MOVIES & ORIGINAL SERIES ARE FUELING THE GROWTH FOR OTT CONSUMPTION

	% USERS/WEEK		TIME SPENT/USER/WEEK(Min)	
VOD	97%	-	3 hrs 59 mins	+12%

CHANGE IN % USERS/WEEK

CHANGE IN TIME SPENT/USER/WEEK

Below Table : YT Not included, OTT Apps included below are : Amazon Prime, Hotstar, MX Player online, Netflix, Voot, Zee5

Non-Original Series	-21%
Movies	**+56%**
Original Series	**+123%**
Sports	-98%

Non-Original Series	-17%
Movies	**+52%**
Original Series	**+32%**
Sports	-83%

VOD= Video Streaming Platforms, including Youtube

Based on Nielsen Smartphone Panel representing 1L+, NCCS ABC, 15-44

COVID Disruption Data as compared to Pre COVID-19 Data

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WHILE REPERTOIRE OF OTT APPS REMAINS STABLE, 61% OF MULTI-APP USERS HAVE SHOWN A CHANGE IN THEIR TOP PREFERRED APP IN WEEK 3!

MOVEMENT IN NUMBER OF *OTT APPS* PRE VS COVID DISRUPTION

	PRE COVID-19	COVID DISRUPTION WEEK 3
Average OTT Apps Accessed	1.5	1.6
Users with 1 app	61%	61%
Users with 2 apps	28%	26%
Users with 3 apps	8%	8%
Users with 4+ apps	3%	5%

OTT = Video Streaming Platforms, excluding Youtube

61% of these users have seen a change in their most preferred OTT app

Based on Nielsen Smartphone Panel representing 1L+, NCCS ABC, 15-44

COVID Disruption Data as compared to Pre COVID-19 Data

BOOM TIME FOR GAMING!

	% USERS/WEEK		TIME SPENT/USER/WEEK(Min)	
Gaming	68%	+15%	3 hrs 38 mins	+44%
15-24 years		+14%		+47%

MOVEMENT IN NUMBER OF GAMING APPS PRE VS COVID DISRUPTION

15-24 years

	PRE COVID-19	COVID DISRUPTION WEEK 3
Average Gaming Apps Accessed	2.4	2.7
Users with 1 app	42%	34%
Users with 2 apps	26%	25%
Users with 3 or more apps	33%	**40%**

Based on Nielsen Smartphone Panel representing 1L+, NCCS ABC, 15-44

COVID Disruption Data as compared to Pre COVID-19 Data

WHILE ACTION GAMES CONTINUE TO ENJOY HIGH ENGAGEMENT, SOCIAL GAMING APPS SEEN TO GAIN POPULARITY IN THE COVID TIMES

Top Gaming Apps ranked in order of %users/week

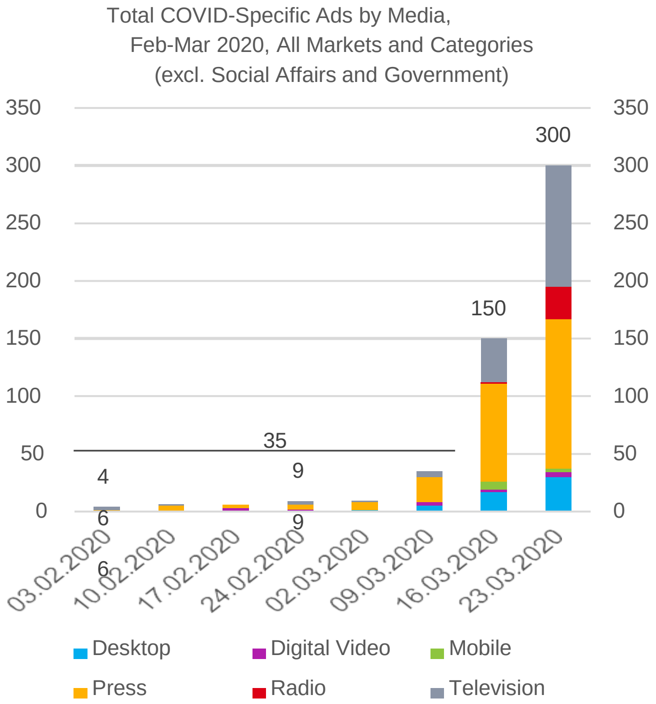
	1	2	3	4	5	6	7	8
COVID DISRUPTION WEEK 3	Ludo King	PubG	Free Fire	Candy Crush	Carrom Pool	PubG Lite	Gold Quiz	Subway Surfers
PRE COVID-19	PubG	Free Fire	Candy Crush	Dream11	Ludo King	Gold Quiz	PubG Lite	Carrom Pool

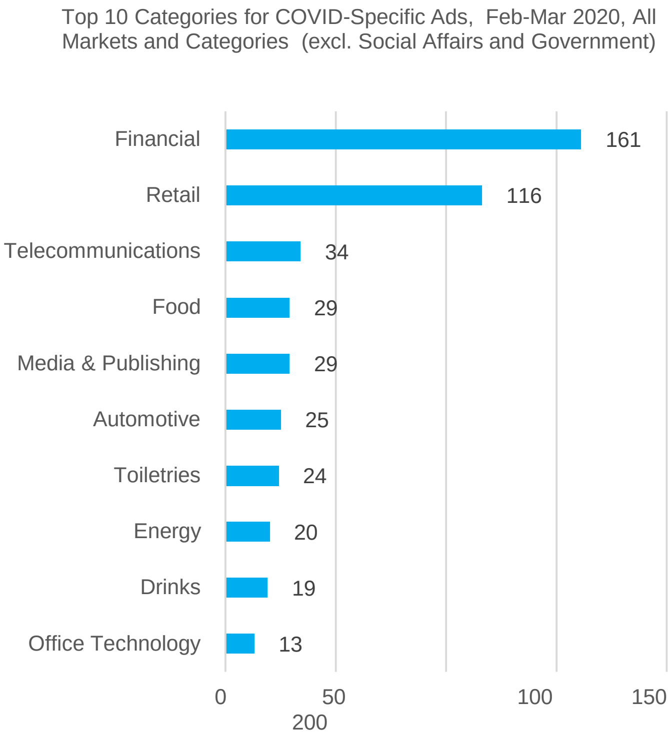
Based on Nielsen Smartphone Panel representing 1L+, NCCS ABC, 15-44

COVID Disruption Data as compared to Pre COVID-19 Data

CREATIVES' MESSAGING DURING COVID TIMES - FROM AROUND THE WORLD

CREATIVE SPECIFICALLY REFERENCING COVID-19 IS ON THE RISE ACROSS MULTIPLE SECTORS





Source: Nielsen Ad Intel
Data collated via a mixture of keyword monitoring (ads containing "COVID", "COVID19", "COVID-19", "coronavirus" or "corona virus") and manual tagging. Countries like UK, Italy, US, Spain, Australia, Germany, Austria, Switzerland, France etc. included.

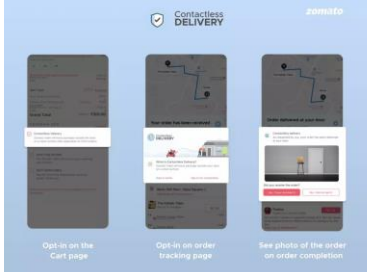
BRANDS ARE PLAYING THEIR PART TO REINFORCE AND SUPPORT SOCIAL DISTANCING

Ad Messages and Logo Changes

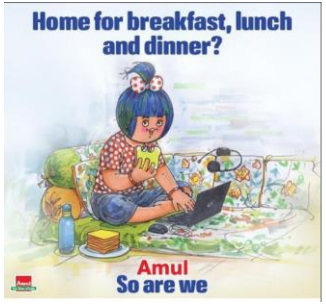
Godrej Protekt, India

Audi, Global

Lifebuoy, India



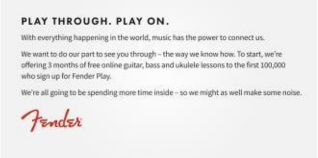
Zomato contactless delivery, India



Amul, India

Mumbai Police

Helping Consumers in Difficult Times



Fender – free guitar lessons

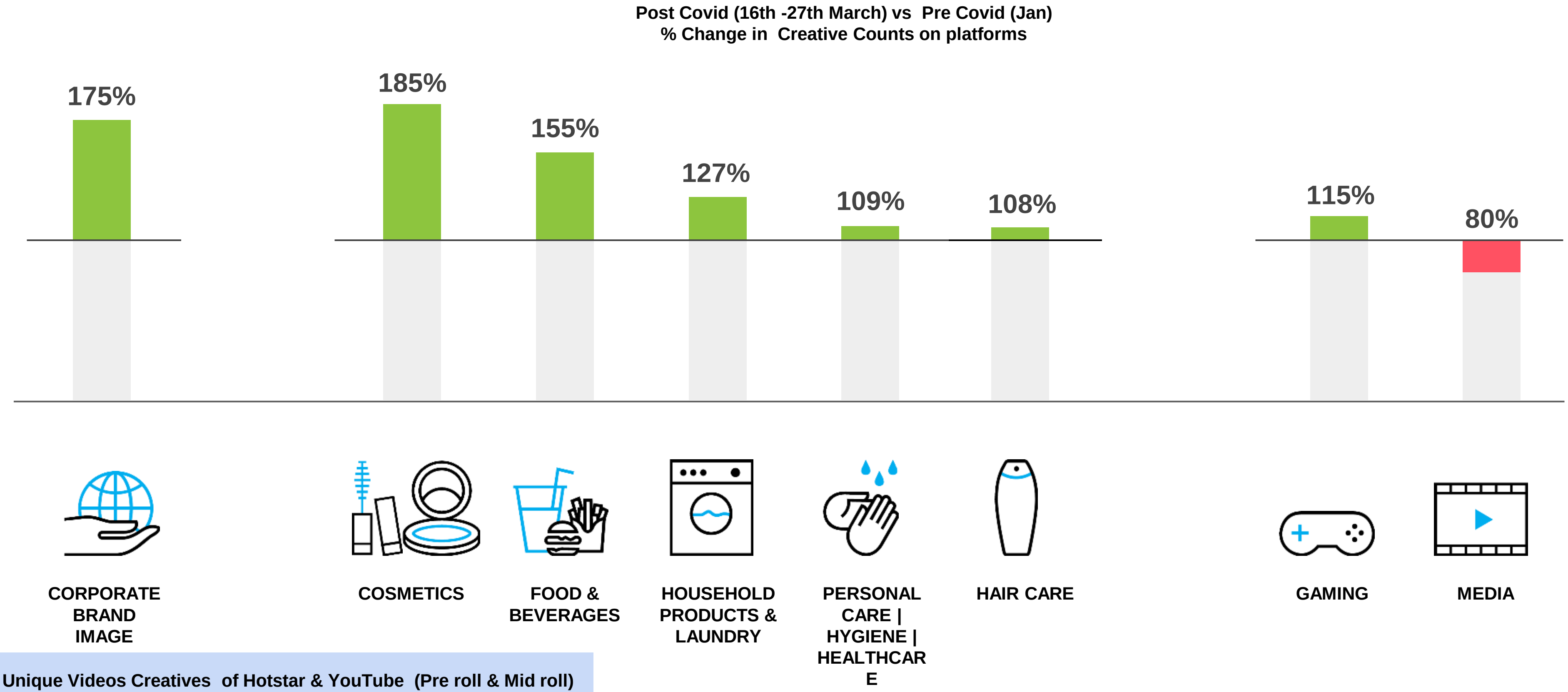
Minecraft – in-game lessons

Barclays – digital coding for children

Standalone – free at-home music-making pack

A BIT ON DIGITAL ADVERTISING

DIGITAL VIDEO: NO DROP IN CREATIVE COUNTS IN COVID TIMES FOR 11 OUT OF 19 CATEGORIES



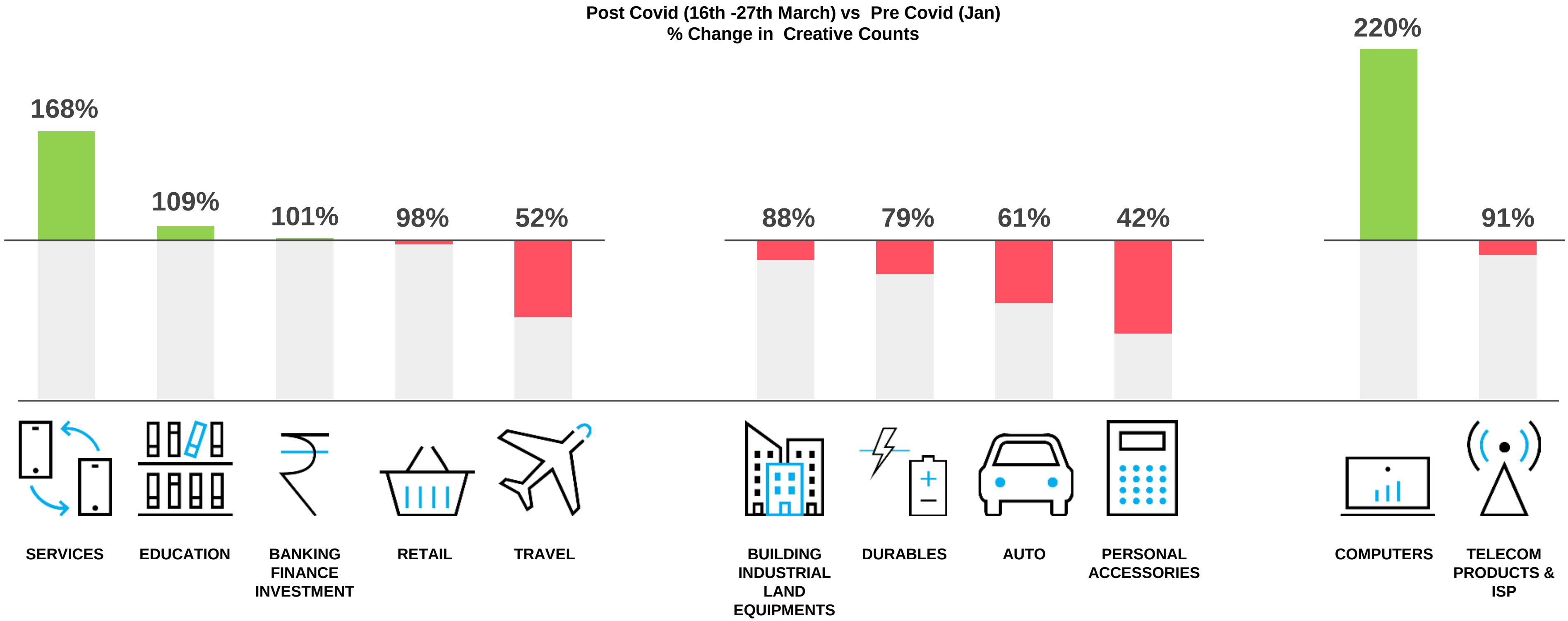
Unique Videos Creatives of Hotstar & YouTube (Pre roll & Mid roll)

***For Media** Sector - creative counts saw a drop in the Post COVID period primarily due to lack of Advertising for Sporting events & new Movie launches*

** : Current capability of Ad Scanning covers Video Ads, Above Data covers YT/ HS largely

Based on Nielsen Smartphone Panel representing 1L+, NCCS ABC, 15-44

DIGITAL VIDEO: DROP IN RETAIL,TRAVEL,AUTO



Unique Videos Creatives of Hotstar & YouTube (Pre roll & Mid roll)

For Services *Sector - it includes Digital Payment, Doc appointment, Web Hosting, etc),*
** : Current capability of Ad Scanning covers Video Ads, Above Data covers YT/ HS largely
Based on Nielsen Smartphone Panel representing 1L+, NCCS ABC, 15-44

THE SCALE OF DIGITAL CAMPAIGNS HAS A ROOM TO GROW FOR MOST SECTORS THE PUBLISHER SET IS FAIRLY LIMITED FOR MOST

*Based on over 1500 Digital campaigns measured using Digital Ad Ratings over **Last 6 months***

	Avg. Impression/ campaign (millions)	*Avg. No. of publishers/ campaign*
CPG	30	3
Entertainment	**153**	**7**
Technology & Electronics	36	3
Consumer & Financial Services	26	3
Automotive	**148**	**6**
Telecommunications	8	2
Travel & Tourism	8	2

Source: Nielsen Digital Ad Ratings

SUMMARIZING THE KEY POINTS FROM TODAY'S SERIES

SUMMARY

1. Indian Consumer sentiment **divided** on various emotions of **feeling Happy, Anxious, Frustrated, Scared and Peaceful** – **missing out on me-time indulgences and office time**
2. India follows the global trend in showing continued increase in TV and Smartphone consumption
3. The growth in TV consumption this week driven by the **Movies Genre(77% growth) -** Significant increase in Time spent on watching **Movies** on the Smartphone
4. Return of the Classics makes **DD National** the most watched channel this week
5. While the return of the **Old Classics** improves viewership on **DD National** and **Pay GEC Channels,** Smartphone viewers increase consumptions on **Original Series**
6. **Social Connectivity stabilizing** as people get used to **the new normal** while the surge in time spent on Digital News consumption stays
7. **On Digital Advertising,** no drop in the count of creatives for 11 out of 19 categories – drop seen in Retail, Travel and Auto
8. Scope for advertisers in most sectors to increase their footprint across more digital publishers

NOW IS A GOOD TIME

- For advertisers to promote brands and services, of those which have current / soon enough offtake, as consumers are deeply engaged with TV and with Ads on TV
- For TV channels to promote its channels and shows as there is a higher index of sampling so conversion may be enabled
- For Digital services to promote their services to create new enduring habits, as consumers are open to new experiences
- Relooking at the scale of Digital Campaigns
- To focus on health, family, friends and being happy! 😊

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