

# CRISIS CONSUMPTION

## AN INSIGHTS SERIES INTO TV, SMARTPHONE & AUDIENCES

EDITION 2

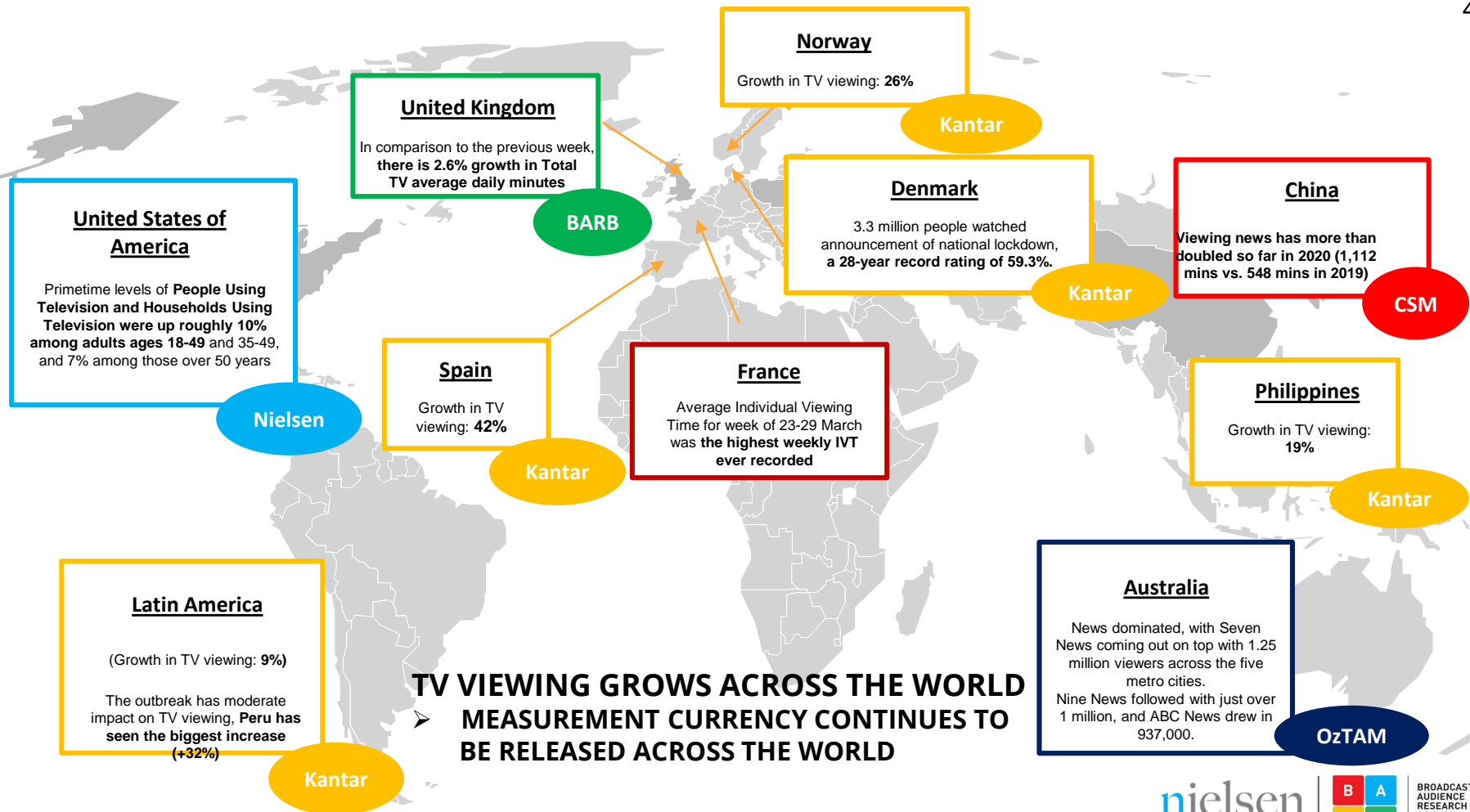
2nd APRIL 2020

# WELCOME TO OUR 2ND EDITION

## 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 2nd Edition in the Insights series.**
- We have looked at **Jan as the Pre Covid-19 period**, and compared it with weeks in from mid-March.

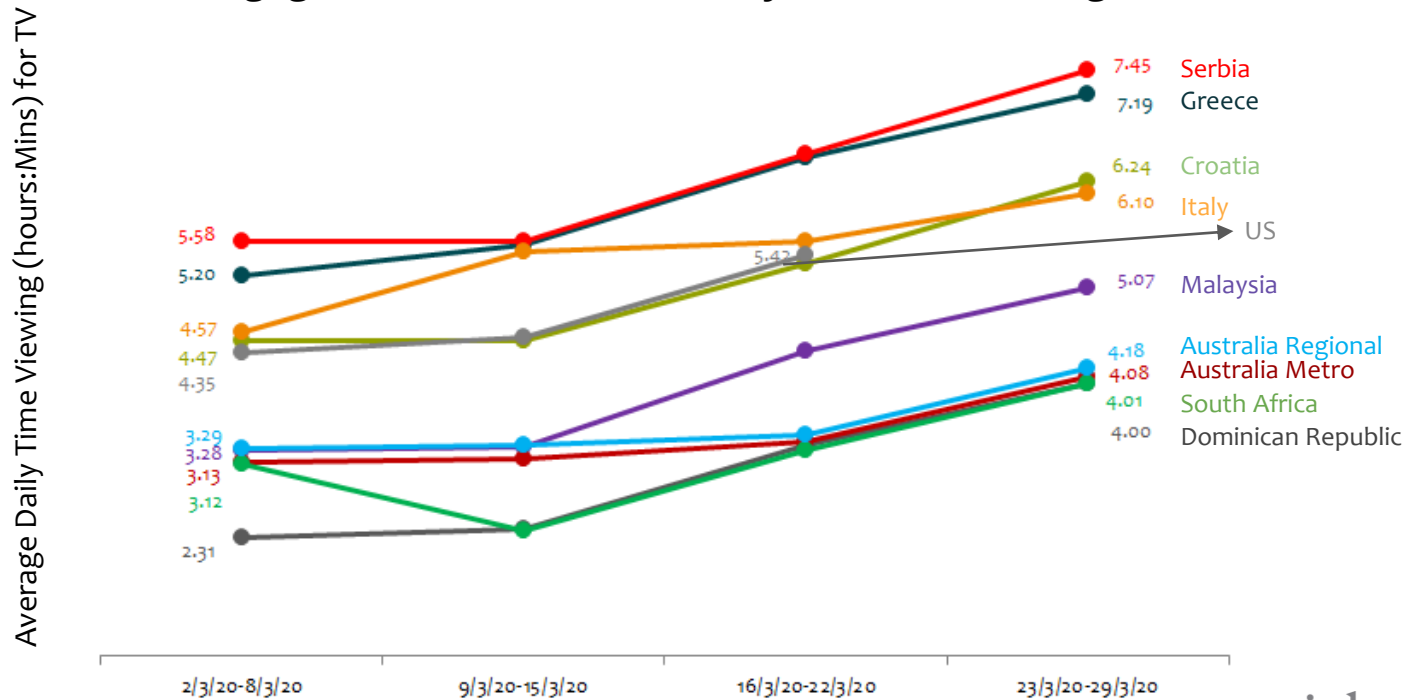
# GLOBAL TV VIEWING



# WHAT'S HAPPENING TO VIEWING AROUND THE WORLD ?

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

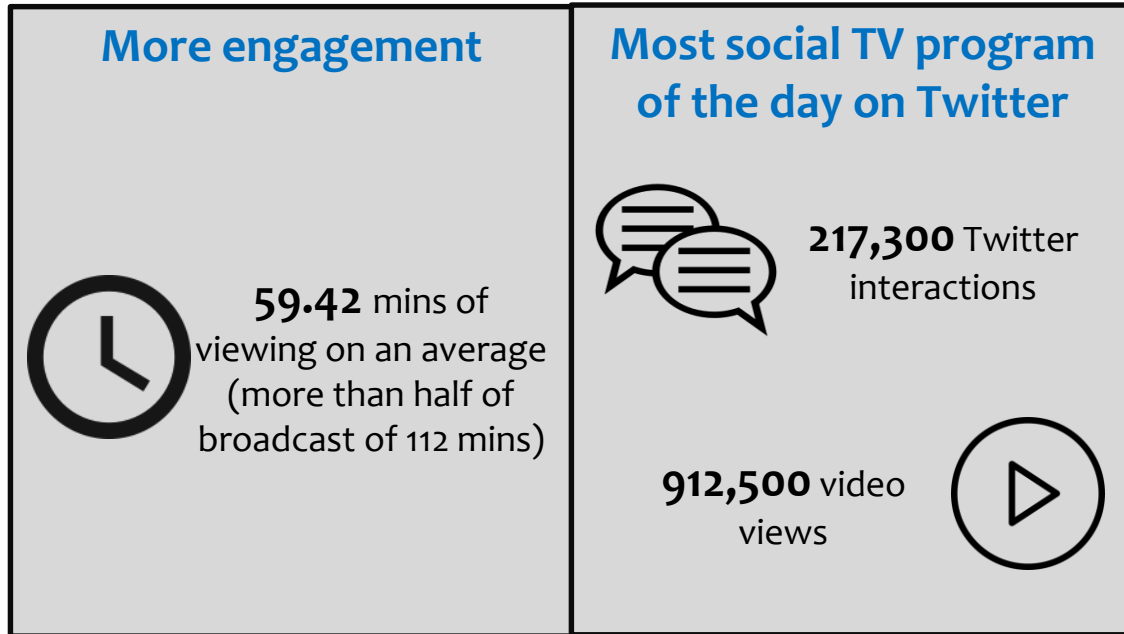
## TV Engagement Per Person for Key Countries during COVID-19



Source: Nielsen (Copyright 2020)

# INNOVATIVE METHOD TO **ENGAGE CORE SPORTS FAN** IN ABSENCE OF LIVE SPORTING EVENTS

ON SUNDAY, MARCH 22, **NASCAR** HELD THE FIRST EVER **ENASCAR IRACING PRO INVITATIONAL SERIES RACE**, PUTTING **ACTUAL NASCAR DRIVERS INTO SIMULATORS** FOR VIRTUAL COMPETITION THAT AIRED LIVE ON **FOX SPORTS 1**



# THE INDIA LANDSCAPE

# THE SCOPE OF OUR ANALYSIS



## Television Behavior



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

### Time Period:

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

### COVID Disruption:

*Week 1: 14th Mar'20 - 20th Mar'20*

*Week 2: 21st Mar'20 - 27th Mar'20*

**Frequency: Weekly**



## 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:

*Week 1: 16th Mar'20 - 22nd Mar'20*

*Week 2: 21st Mar'20 - 27th Mar'20\**

**Frequency: Weekly**

*Week 2 definition aligned with TV*



BROADCAST  
 AUDIENCE  
 RESEARCH  
 COUNCIL  
 INDIA



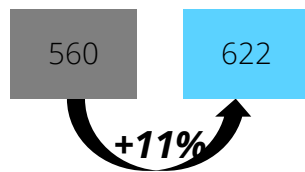
LET'S DEEP DIVE INTO TELEVISION BEHAVIOR

# HIGHEST EVER TV VIEWING AT 1.20 TRILLION MINUTES

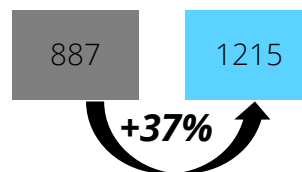
- AVERAGE DAILY VIEWERS GREW BY 62 Mn
- 622 Mn VIEWERS WATCHING TV DAILY FOR 4 Hr 40 MINUTES
- GROWTH ACROSS ALL PARAMETERS OF VIEWING



**Avg. Daily Reach in Mn**



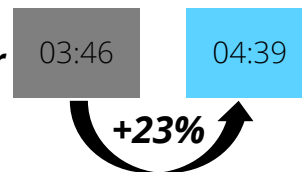
**Weekly Viewing Minutes in Bn**



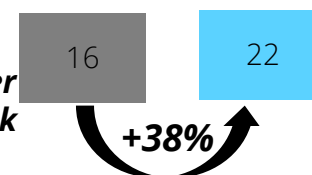
**Watch 7 days in a week**



**Daily ATS/Viewer (hh:mm)**



**Number of channels watched/per viewer/week**



**Pre COVID-19 (11 Jan to 31 Jan)**

**During COVID-19 (21 March to 27 March)**

nielsen



BROADCAST  
AUDIENCE  
RESEARCH  
COUNCIL  
INDIA

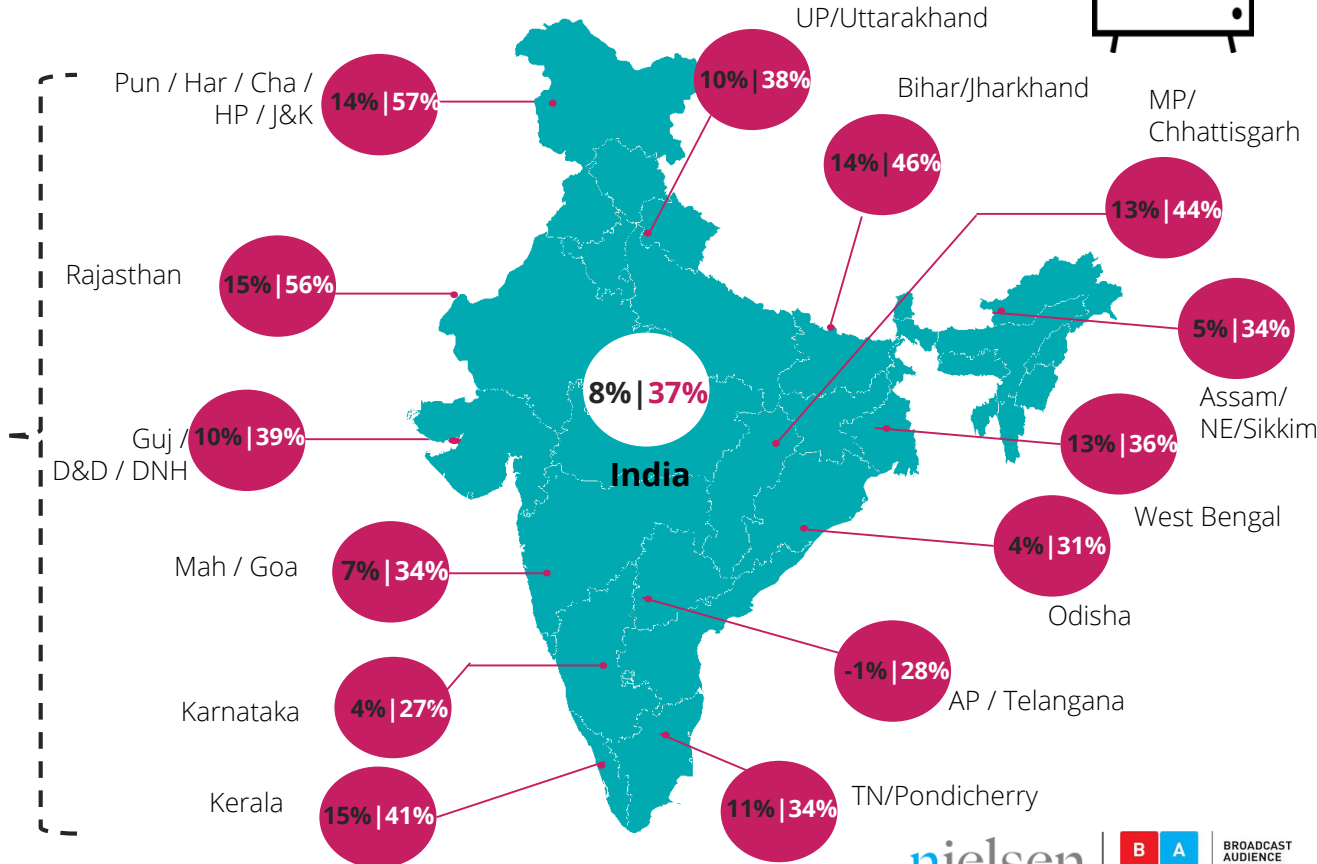


# TOTAL TV CONSUMPTION INCREASED BY 37% AT ALL INDIA

Viewership grew significantly post lockdown on Wed, Thu & Fri

Region	Growth in Viewership
India	37%
HSM	41%
South	31%

Weekday	Growth in Viewership
Wednesday	40%
Thursday	45%
Friday	41%



Data in black is growth in week 11 over pre covid-19 | Data in white is growth in week 12 over pre covid-19  
 Growth in Week 12 (week starting 21 March) data as compared to Week 2 to Week 4 (11 Jan to 31 Jan)

# BEING THE 1<sup>ST</sup> WEEK OF LOCKDOWN, MALE VIEWERSHIP RECORDED SIGNIFICANT GROWTH (LAST WEEK GROWTH: 8%)

➤ SIGNIFICANT GROWTH REGISTERED AMONG ALL DEMOGRAPHICS



Change in Viewing Minutes



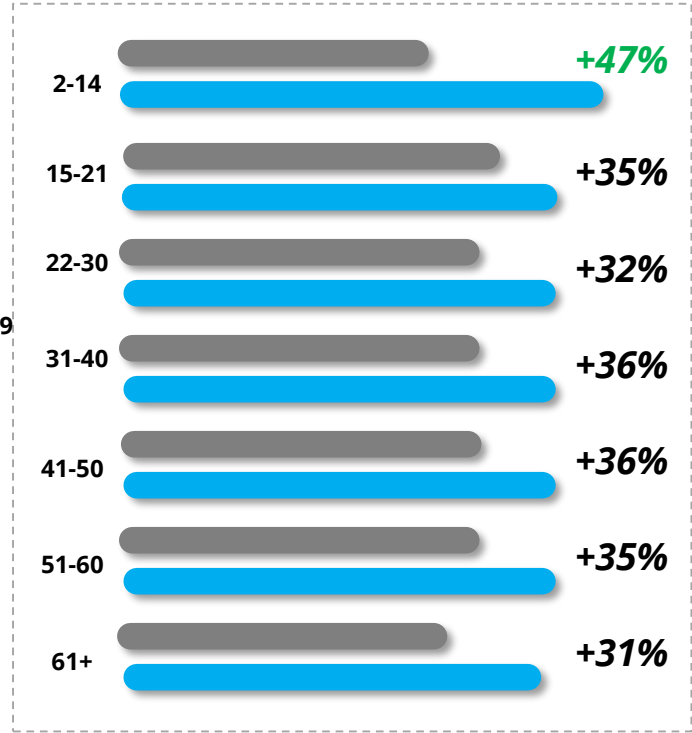
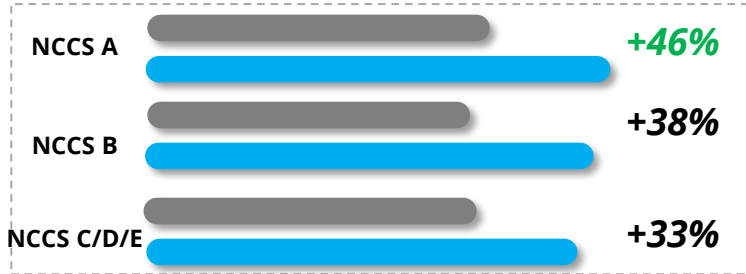
+41%



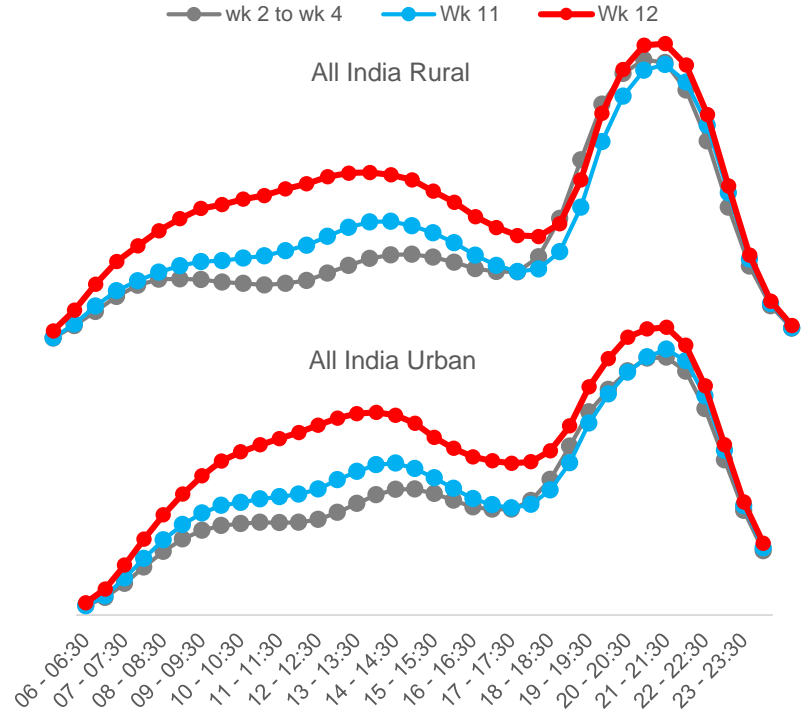
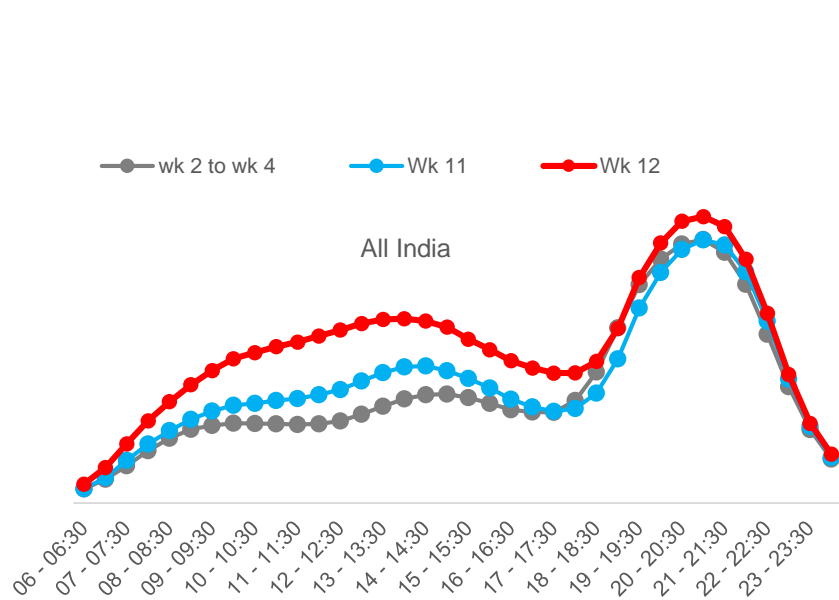
+33%



Pre COVID-19  
During COVID-19



# NON-PRIME TIME VIEWERSHIP HAS FURTHER INCREASED IN WEEK 12



# NON-PRIME TIME VIEWERSHIP SURGED BY MORE THAN 70% IN INDIA

➤ GROWTH IN HSM IS HIGHER THAN SOUTH

(PRE COVID-19 PERIOD HAD HIGH TV VIEWING DUE TO FESTIVALS :PONGAL & SANKRANT)

	All Day	Non-Prime Time	Prime Time
<b>India</b>	37%	71%	8%
<b>HSM</b>	41%	83%	9%
<b>South</b>	31%	54%	7%

**Growth in Week 12 (During COVID-19) data as compared to Week 2 to Week 4 (Pre COVID-19)**

HOWEVER, VIEWERSHIP GROWTH FOR SOUTH IS RELATIVELY HIGHER WHEN COMPARED TO RECENT NON-FESTIVE WEEKS

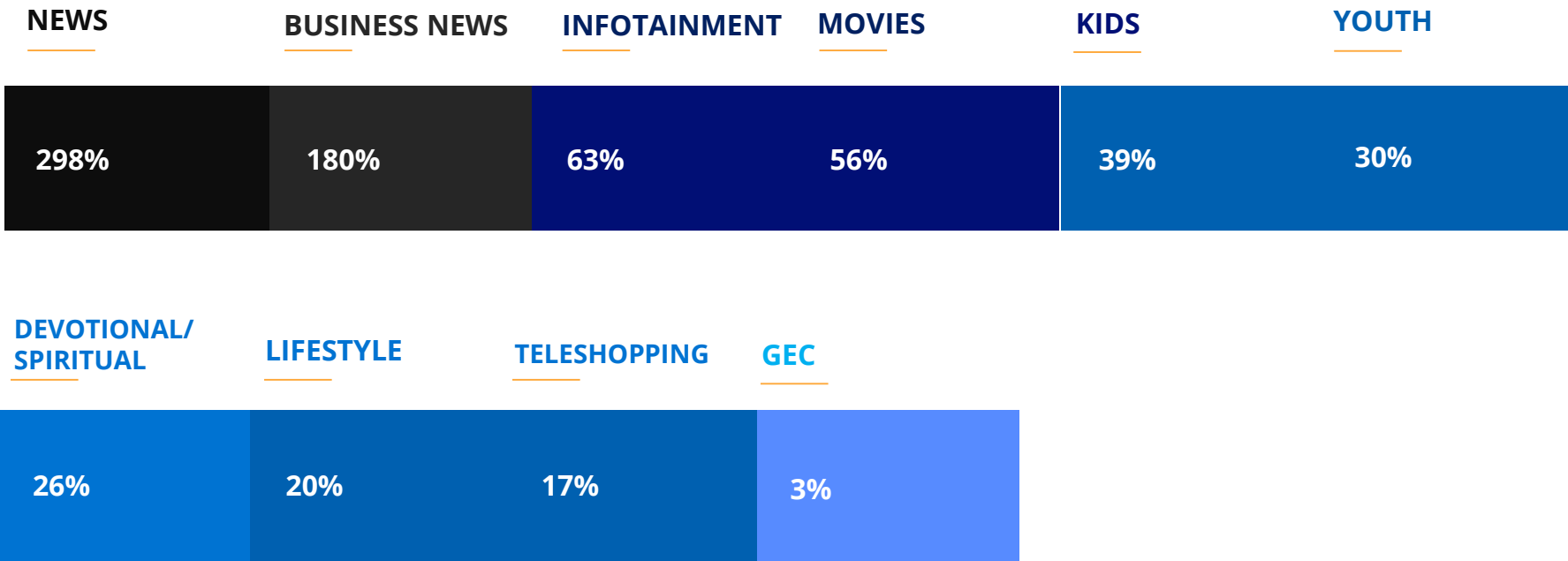
	All Day	Non-Prime Time	Prime Time
<b>India</b>	38%	65%	13%
<b>HSM</b>	39%	68%	13%
<b>South</b>	36%	60%	11%

**Growth in Week 12 (During COVID-19) data as compared to Week 7 to Week 10**



# NEWS & MOVIES CLOCKED AN ALL-TIME HIGH GROWTH

ACROSS LANGUAGES



TV Viewership Growth %

Growth in Week 12 (week starting 21 March) data as compared to Week 2 to Week 4 (11 Jan to 31 Jan )

## GEC GREW IN NON-PRIME TIME BY 32%

- MOVIES, NEWS AND KIDS GREW MUCH MORE THAN GEC, ACROSS DAYPARTS IN PRIME TIME,
- NEWS SAW A GROWTH OF MORE THAN 200%

### 06:00:00 - 18:00:00 (NPT)

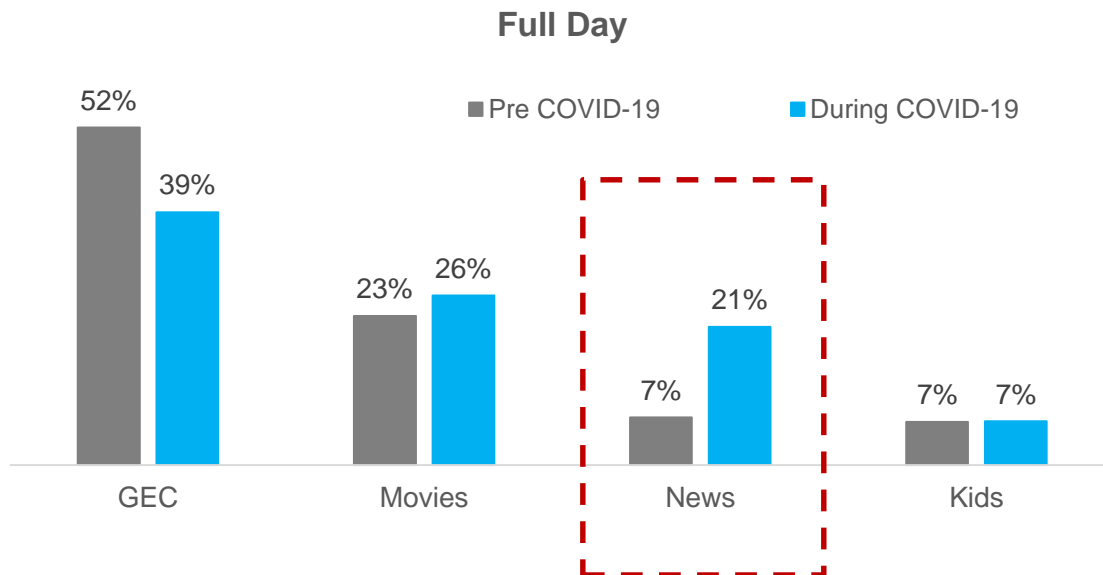
	India	HSM	South
<b>TOTAL</b>	<b>71%</b>	<b>83%</b>	<b>54%</b>
GEC	32%	35%	29%
Movies	108%	129%	66%
News	344%	385%	283%
Kids	58%	51%	70%

### 18:00:00 - 26:00:00 (PT)

	India	HSM	South
<b>TOTAL</b>	<b>9%</b>	<b>9%</b>	<b>8%</b>
GEC	-15%	-23%	-5%
Movies	12%	16%	1%
News	252%	260%	232%
Kids	1%	0%	2%

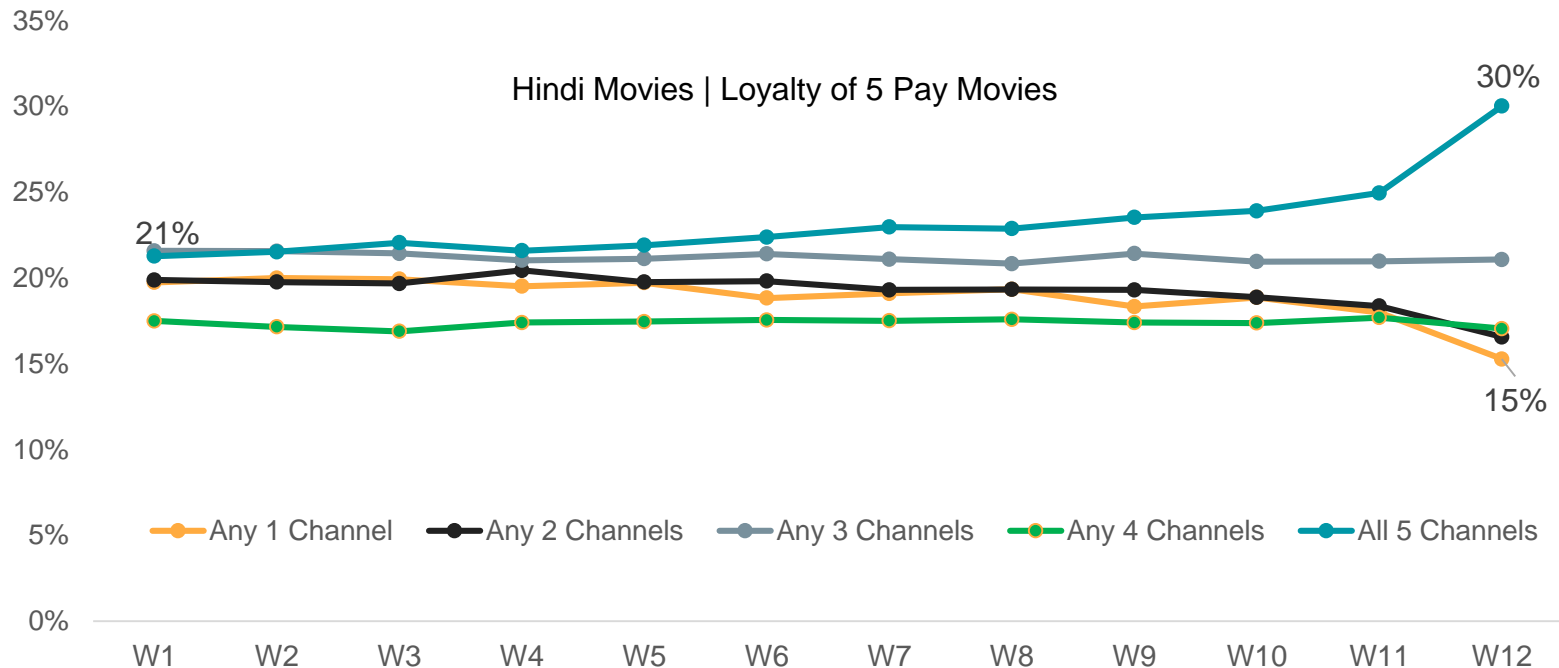


➤ **THE SHARE OF NEWS TO TOTAL TV GREW FROM 7% TO 21% AT ALL INDIA LEVEL IN BOTH NON-PRIME TIME AND PRIME TIME**



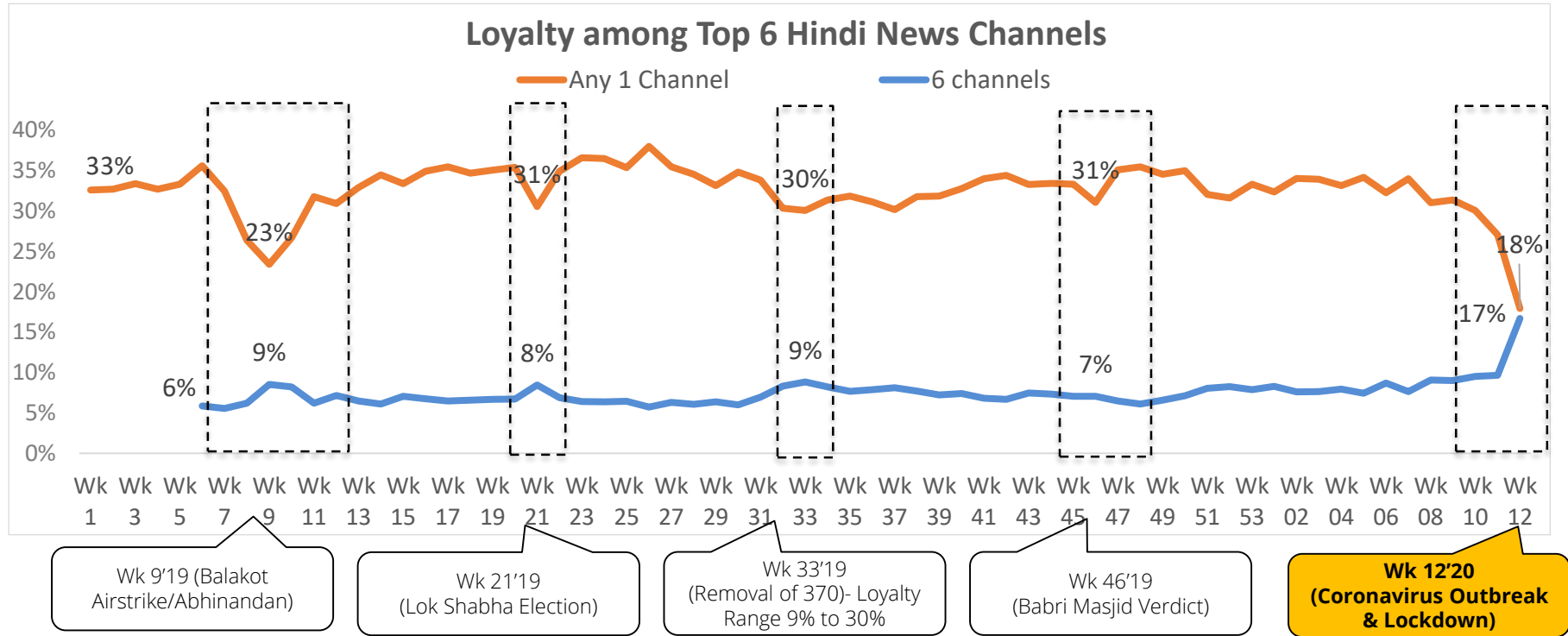
# MOVIES: % OF VIEWERS WATCHING ALL 5 CHANNELS HAS INCREASED TO 30% IN CURRENT WEEK WHICH IS HIGHEST EVER POST NTO PERIOD

- SIMILAR TREND SEEN ACROSS MOST OF THE LANGUAGE MOVIES
- VIEWERSHIP FOR HINDI MOVIES HAS SURPASSED HINDI GEC FOR THE 1<sup>ST</sup> TIME



# VIEWERS CHOSE TO 'SEARCH' FOR MORE NEWS THROUGH MULTIPLE CHANNELS DURING THE LOCKDOWN 19

➤ USUALLY 30% OF HINDI NEWS VIEWERS WATCH ONLY 1 CHANNEL. THIS DROPPED TO 18% IN WEEK 12

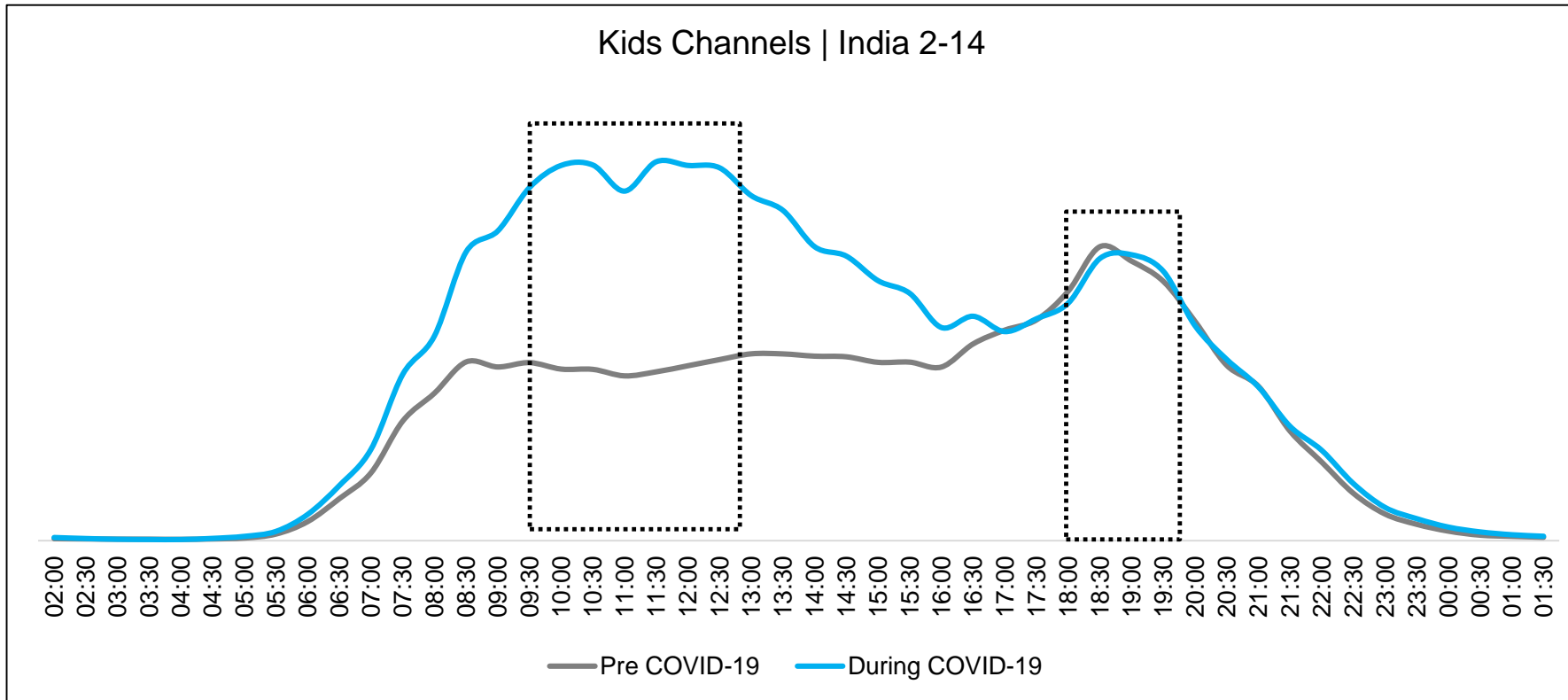


Note: Republic Bharat launched in Week 6 (2019)

HSM /15+/ Viewers loyalty of Top 6 Channels (Aaj Tak, India TV, Republic Bharat, Zee News, ABP News, News18 India)

# NON PRIME-TIME IS THE NEW PRIME-TIME FOR KIDS CHANNELS

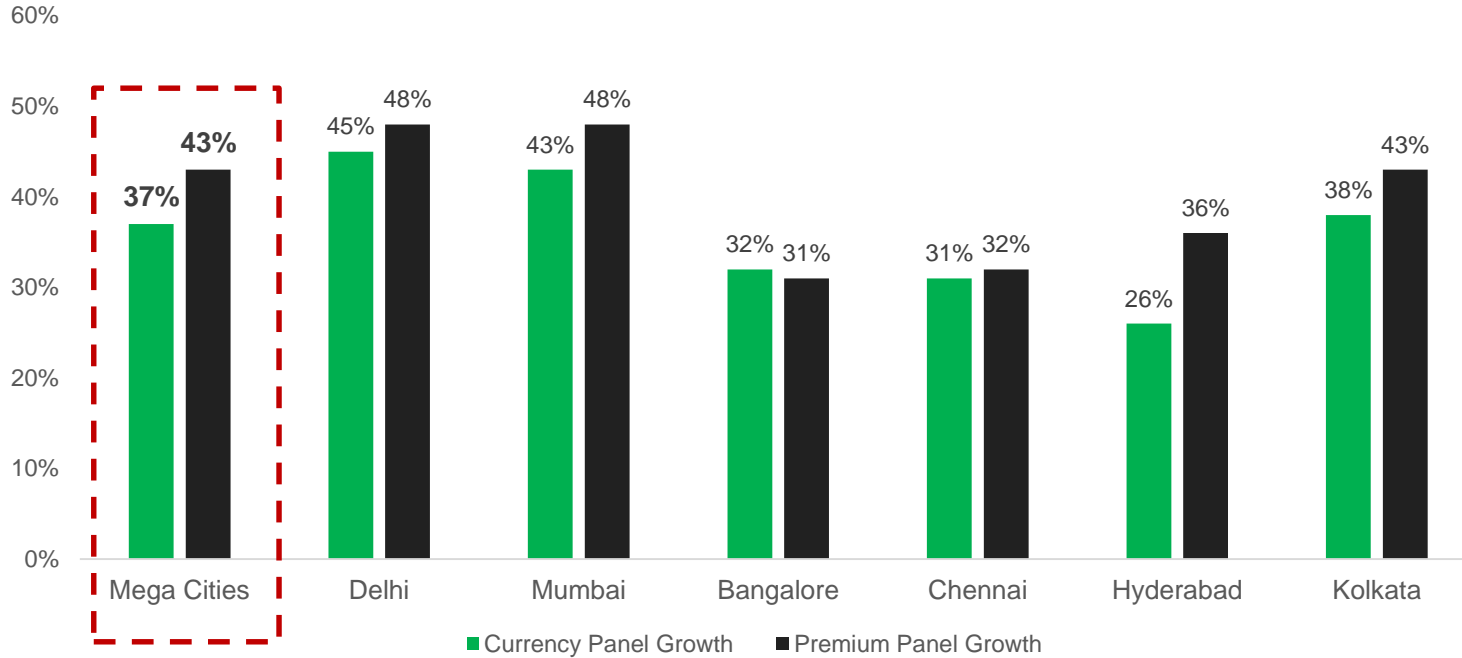
➤ MAXIMUM VIEWERSHIP RECORDED IN THE MORNING AROUND 1000-1200 IN WEEK12



Week 12 (week starting 21 March) data as compared to Week 2 to Week 4 (11 Jan to 31 Jan)  
India | 2-14 | Impressions (All Kids Channels including Regionals)

# EVEN PREMIUM AUDIENCES IN MEGACITIES REGISTERED A GROWTH IN VIEWERSHIP

➤ MEGACITIES GREW BY 37% IN CURRENCY PANEL & 43% IN PREMIUM PANEL

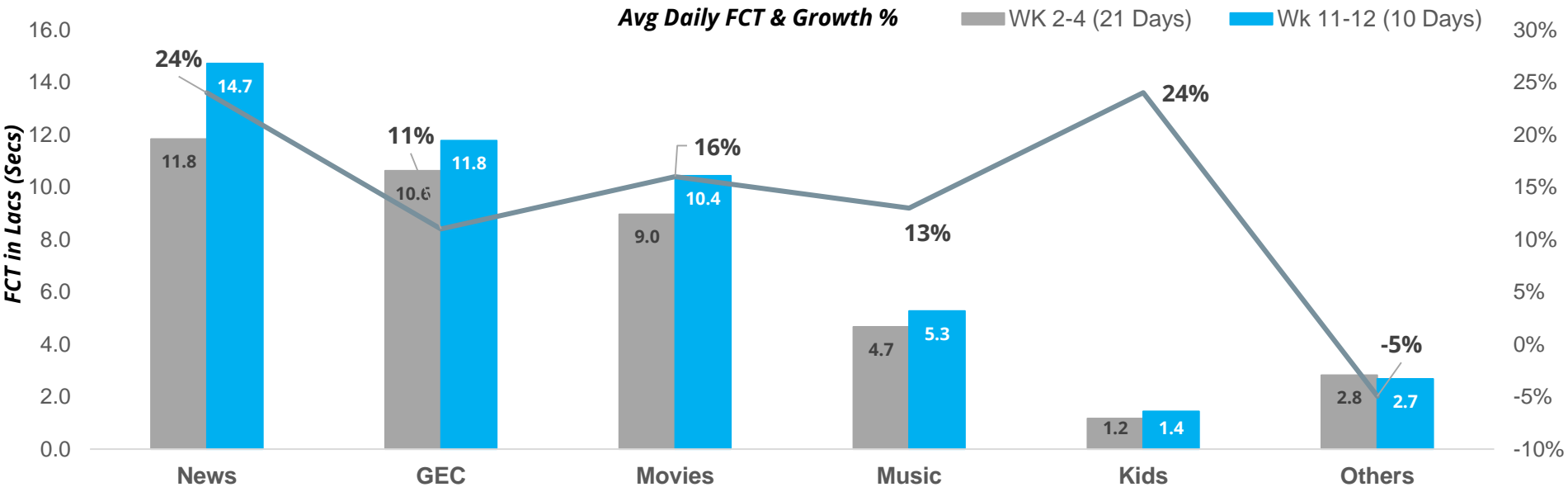


Data for Premium Panel Growth is from BARC's Premium Panel Households (6 Megacities 2+)  
Growth in Week 12 (week starting 21 March) data as compared to Week 2 to Week 4 (11 Jan to 31 Jan)

# Advertising Trends

# AD VOLUME: AVERAGE DAILY FCT IN WEEK 11-12 GREW BY 6 LACS SECONDS, A GROWTH OF 15%

➤ WEEK 11-12 SAW GROWTH ACROSS GENRES EXCEPT SPORTS AND YOUTH



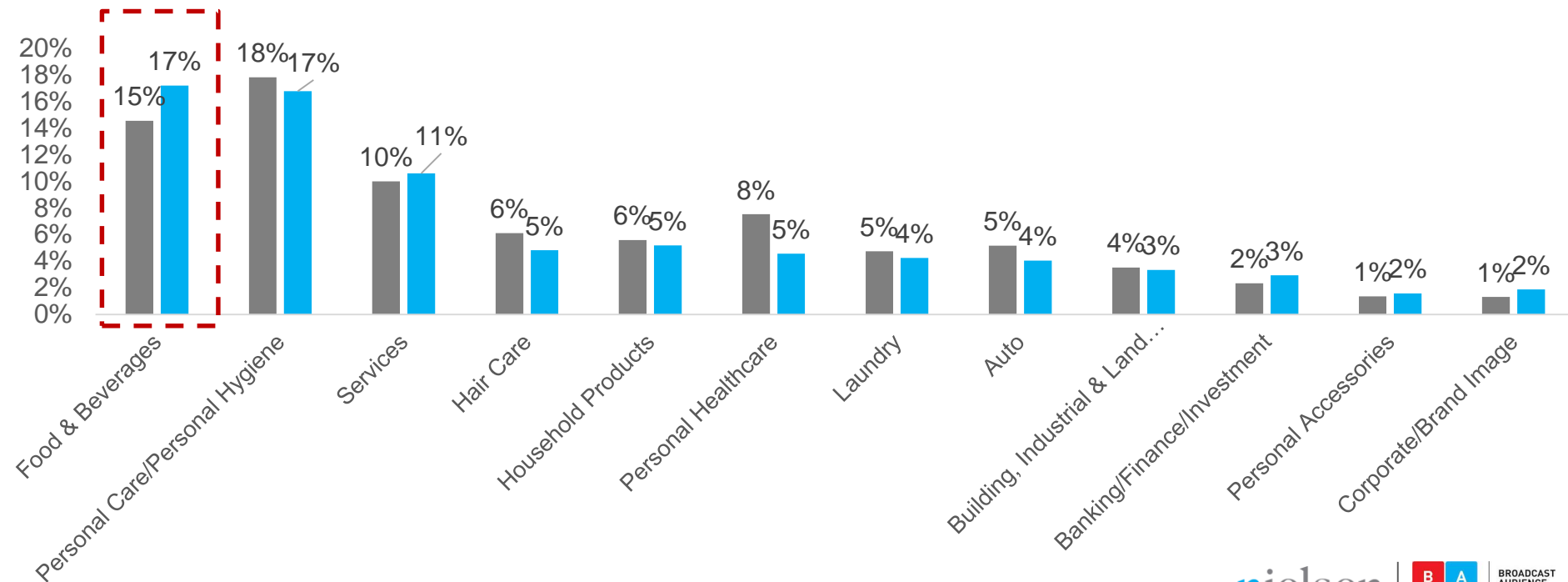
Pre COVID-19: Week 2-4 (11<sup>th</sup> Jan-31<sup>st</sup> Jan)  
 During COVID-19: Week 11-12 (14 March- 24 March)

# AD VOLUME: FOOD & BEVERAGES SEE THE HIGHEST INCREASE IN FCT SHARE% <sup>24</sup>

Sector-wise FCT Share%

■ Week 2-4

■ Week 11-12



Pre COVID-19: Week 2-4 (11<sup>th</sup> Jan-31<sup>st</sup> Jan)

During COVID-19: Week 11-12 (14 March- 24 March) TG: Universe|FCT|Market: India

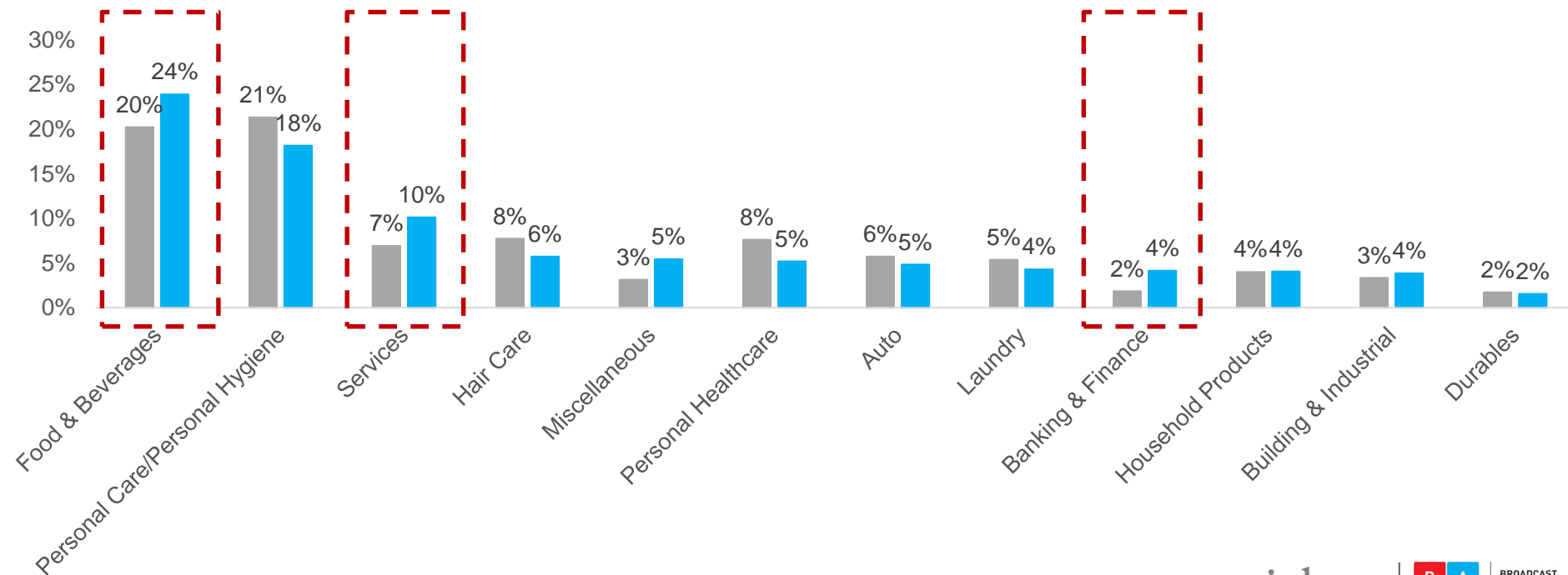


# AUDIENCES: FOOD & BEVERAGES, SERVICES & BANKING SECTORS SEE AN INCREASE IN SOV

Sector-wise SOV%

■ Pre COVID-19

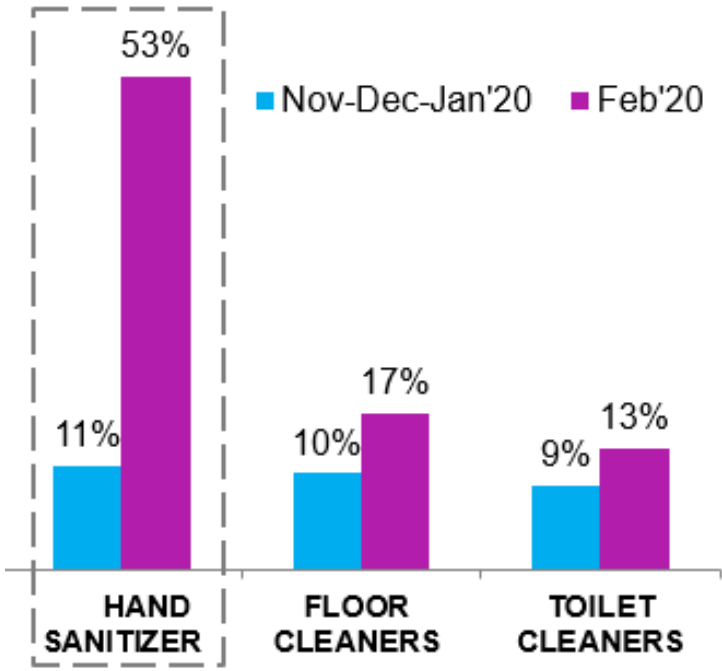
■ During COVID-19

Pre COVID-19: Week 2-4 (11<sup>th</sup> Jan-31<sup>st</sup> Jan)

During COVID-19: Week 11-12 (14 March- 24 March) TG: Universe | NGRP's | Market: India

# COVID-19 SCARE DROVE SIGNIFICANT GROWTH FOR HYGIENE CATEGORIES IN FEB

## HYGIENE CATEGORIES



Market: All India  
Value Growth over same period of last year  
Source: Nielsen RMS (Includes General trade and Modern Trade)

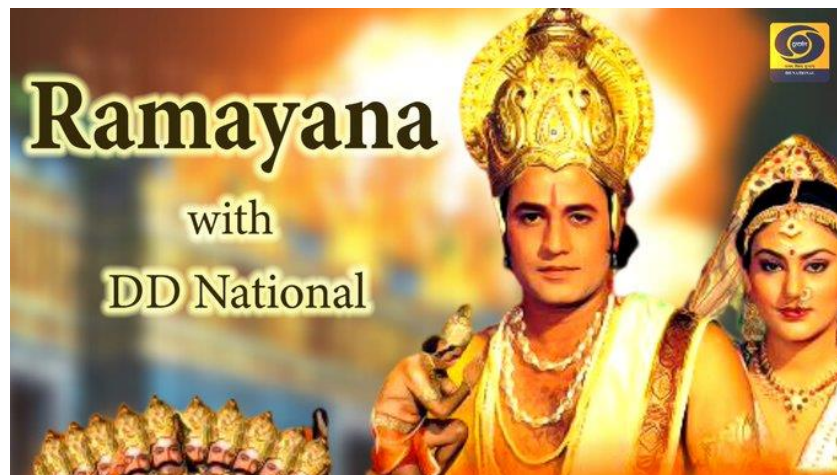
# RETURN OF THE CLASSIC: Exclusive Preview

# EVENING SLOT ON SUNDAY RECORDED ALL TIME HIGH NUMBERS BY ANY SHOW IN HINDI GEC SINCE 2015

- RAMAYANA WAS **ALL-TIME HIGH AMONG 'SERIALS'** IN HINDI GEC
- THE SHOW WAS **THE HIGHEST RATED** IN URBAN & MEGACITIES

## \*HSM | Week 13

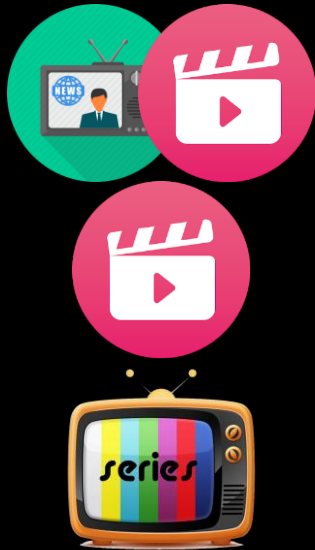
Week Day	Slot	Rat%	Viewers (Mn)
Saturday	Morning	3.4	34
Saturday	Evening	5.2	45
Sunday	Morning	4.7	40
Sunday	Evening	6.6	51



HSM / HSM Urban/ 2+/ Approx Slots of Ramayan

\*These viewership figures are based on preliminary audience estimate and subject to change in the final data release

# Lockdown period registered Many 'Firsts' in TV viewing history



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

**Hindi Movies** surpassed Hindi GEC In viewership

Highest viewership recorded in HSM for any show in **Hindi GEC** (Fiction/Non-Fiction)

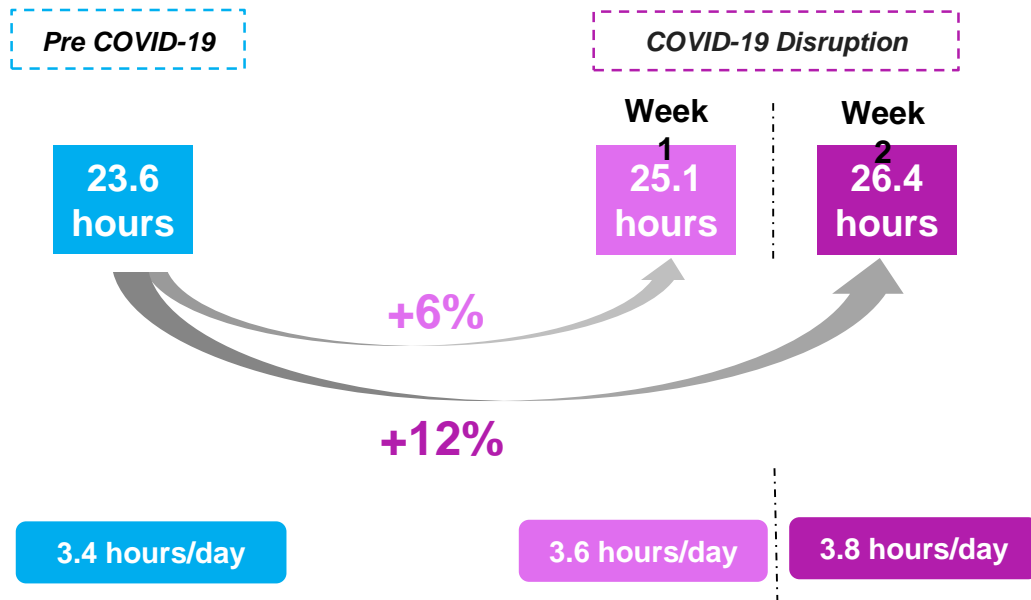
**SMARTPHONE IS A SAVIOUR IN THIS UNPRECEDENTED PERIOD**

**HOW HAS THE SMARTPHONE BEHAVIOUR EVOLVED IN WEEK 2 OF COVID-19 DISRUPTION?**

# THE TIME SPENT ON SMARTPHONE IN **WEEK 2** OF COVID DISRUPTION HAS INCREASED BY **ALMOST 3 HOURS/WEEK**



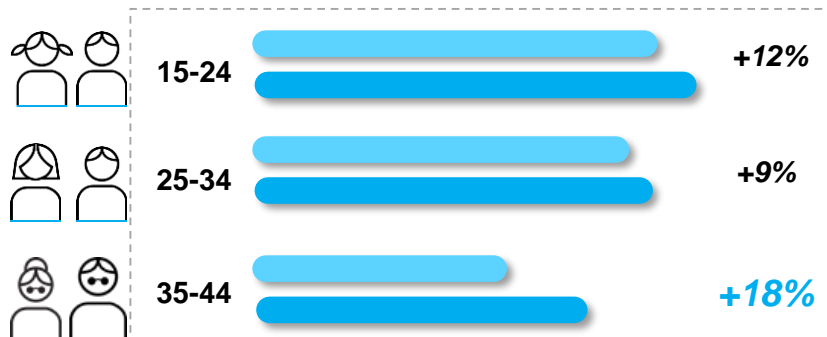
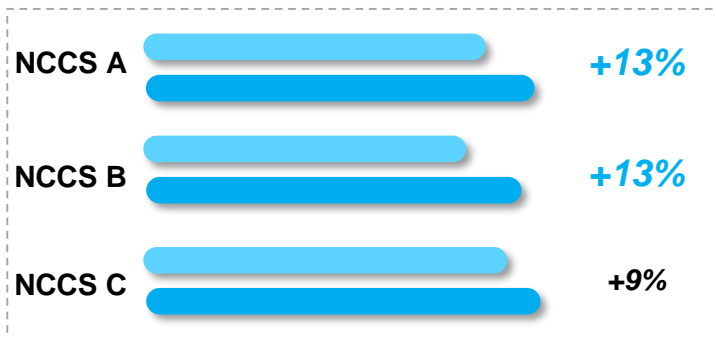
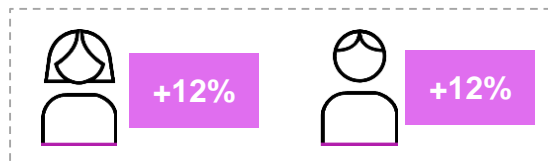
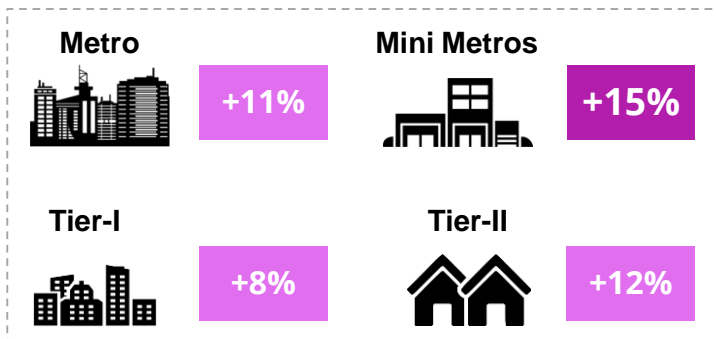
Time spent per user on smartphone in a week



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

# OLDER AGE GROUPS INCREASE BY 18%, MINI METROS BY 15%

## CHANGE IN TIME SPENT/USER/WEEK(Min)

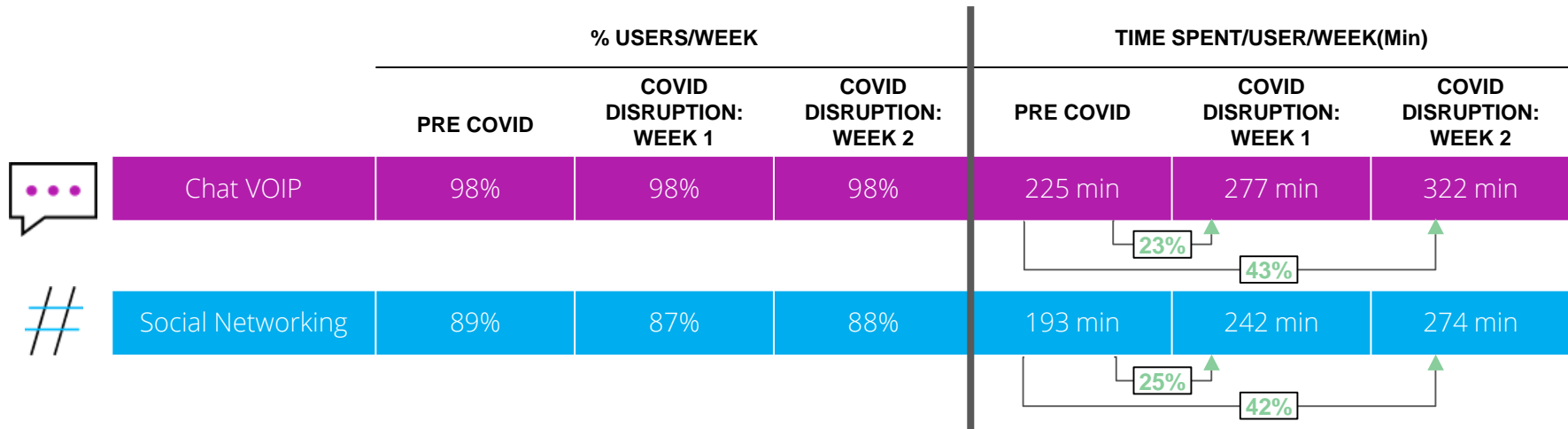


Based on Nielsen Smartphone Panel representing 1L+, NCCS ABC, 15-44 W2 COVID Disruption as compared to Pre COVID-19



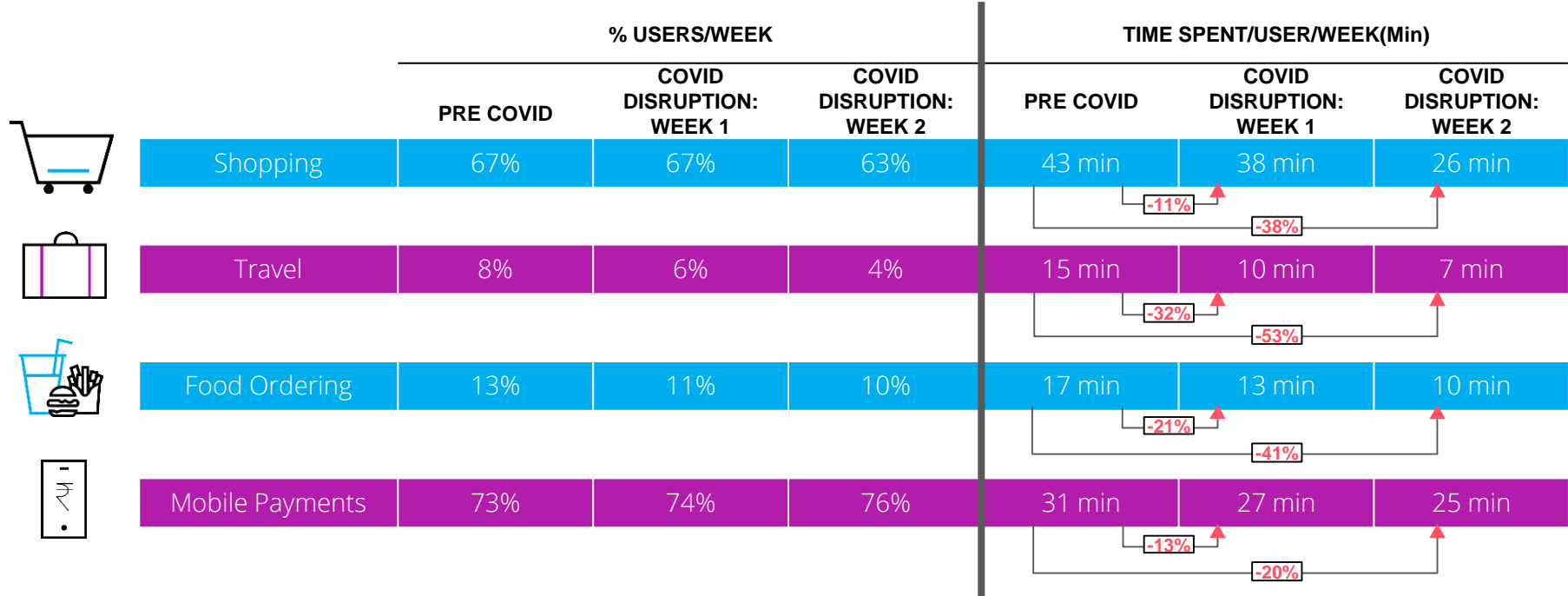
# SOCIAL DISTANCING LEADS TO A SPIKE IN VIRTUAL SOCIAL CONNECTIVITY

➤ CALL TIME HAS INCREASED **ONLY BY 5%** IN WEEK 2



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

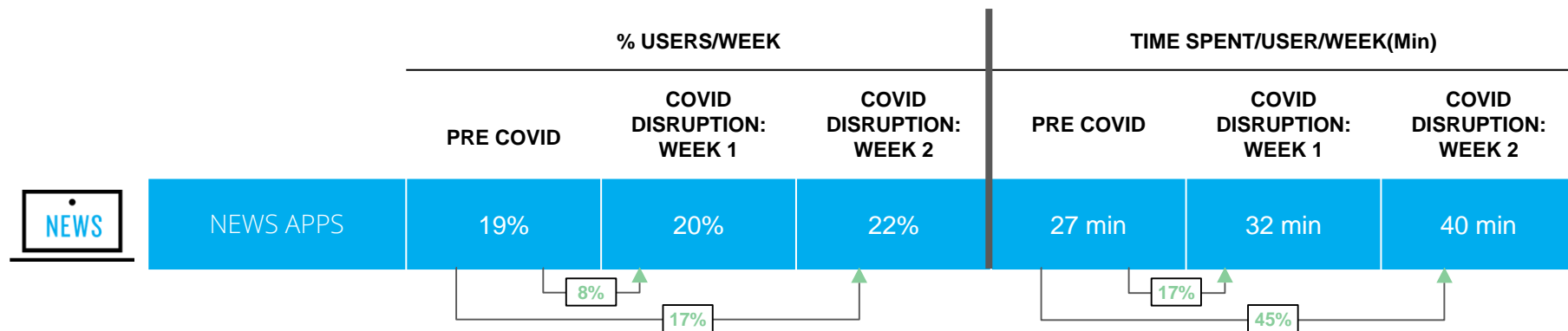
# COVID DISRUPTION HITS E-COMMERCE ACUTELY



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

# NEED TO BE BETTER INFORMED OR NEED TO TRACK EVENTS?

## CONSUMERS SPEND **45% MORE TIME ON NEWS APPS IN W2.**



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

# 1 IN 3 USERS ACCESSED NEWS IN W2 (NEWS WEB SITES ARE CONSIDERED ALONG WITH NEWS APPS)

➤ THE NEWS FRANCHISE ON SMARTPHONES GROWS BY 25%

News Apps + Websites

% Users/Week

34%

+25%

## TEXT NEWS

### News Apps

% USERS/WEEK

TIME SPENT/USER/  
WEEK(Min)

News

22%

+17%

40 mins

+45%

### News Websites

% USERS/WEEK

NUMBER OF VISITS/  
WEEK

News

17%

+47%

23

+42%

#### CHANGE IN TIME SPENT/USER/WEEK (Min)

News Aggregators	50%
Hindi	64%
English	31%
Regional	111%

#### CHANGE IN NUMBER OF VISITS/WEEK

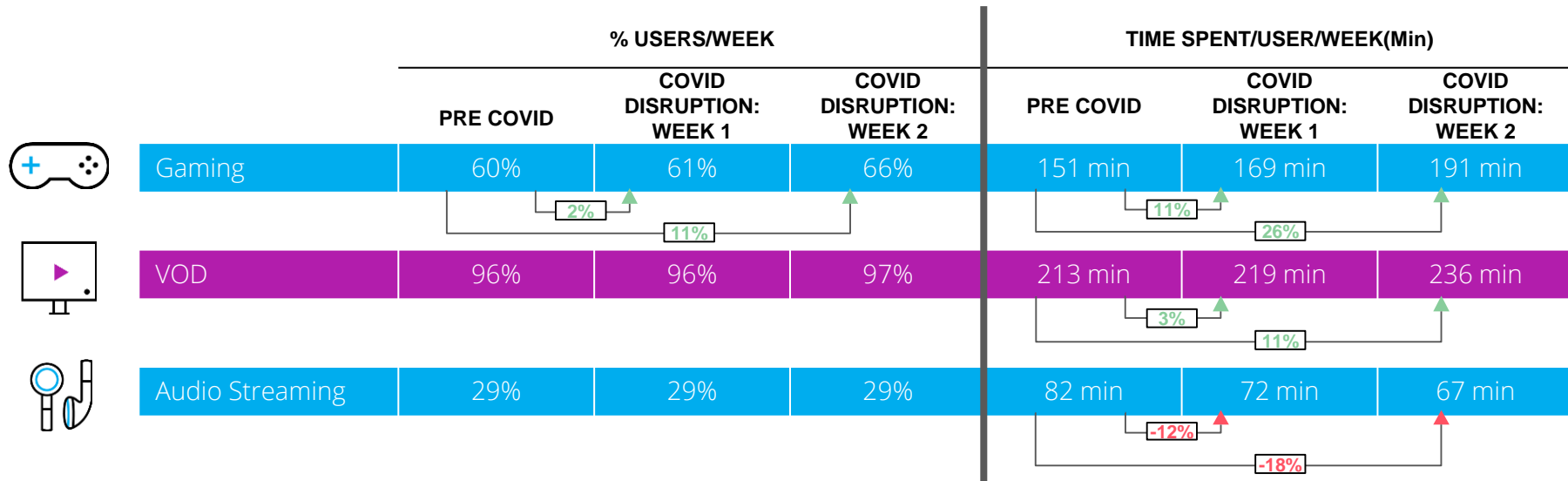
Hindi	+33%
English	+37%
Multi-Language	+16%

Based on Top 50 news websites

% Changes are on Wk 2 of COVID Lockdown versus Pre COVID Period

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

# ENTERTAINMENT GALORE, MORE IN THE FORM OF GAMING & VOD CONSUMPTION, TIME ON AUDIO STREAMING DROPS IN LAST 2 WEEKS



Audio Streaming Time Spent is based on KEY Music Streaming Apps  
Based on Nielsen Smartphone Panel representing 1L+, NCCS ABC, 15-44

# THE 15-24 YEARS OLD INCREASE THEIR GAMING TIME BY A THIRD !



## Gaming

% USERS/WEEK

66% **+11%**

TIME SPENT/USER/WEEK(Min)

191 mins **+26%**

*% Changes are on Wk 2 of COVID Lockdown versus Pre COVID Period*

	CHANGE IN TIME SPENT/USER/WEEK(Min)
15-24 years	<b>+34%</b>



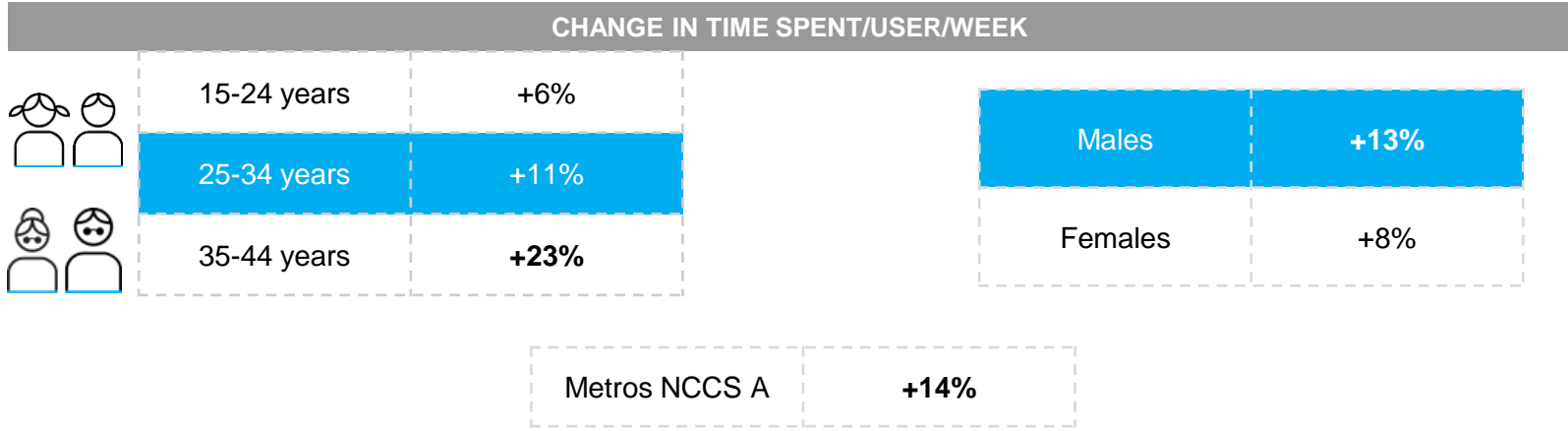
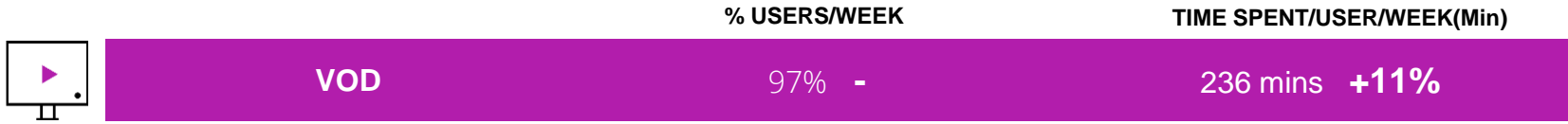
	CHANGE IN % USERS/WEEK	CHANGE IN TIME SPENT/USER/WEEK(Min)
Adventure	<b>+25%</b>	<b>+46%</b>
Racing	<b>+26%</b>	<b>+39%</b>
Action	<b>+19%</b>	<b>+30%</b>
Quiz	<b>+6%</b>	<b>+18%</b>
Puzzle	<b>+13%</b>	<b>+17%</b>
Card	<b>+44%</b>	<b>+13%</b>
Board	<b>+88%</b>	<b>+11%</b>

*Rummy Circle & Teen Patti among Card games, Temple Run in Adventure and Dr Driving in racing have emerged among Top 30 gaming apps only in the COVID disruption period*

This is based on smartphone gaming apps. Action: PUBG, Free Fire, Call of Duty etc || Board games: Ludo, Carrom etc || Puzzle games: Candy Crush, Homescapes, Gardenscapes etc || Adventure games include Subway Surfers, Temple Run etc. || Quiz: Winzo Gold, Qureka, etc || Racing: Hill Climb racing, Fun Race 3D, etc. || Card: Call Break, Teen Patti, Rummy Circle, etc.

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

# TIME ON VIDEO STREAMING APPS GROWS BY 11%

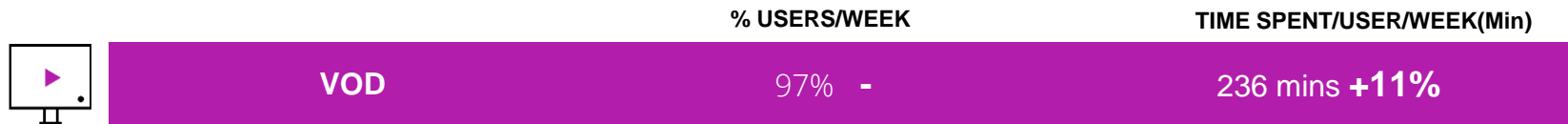


*% Changes are on Wk 2 of COVID Lockdown versus Pre COVID Period*

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

# STRONG GROWTH SEEN ACROSS ALL

## ➤ GROWTH IN ORIGINALS STANDS OUT



### CHANGE IN % USERS/WEEK

### CHANGE IN % TIME SPENT/USER/WEEK

***Below Table : YT Not included + only a limited set of OTT Apps are included currently.***

For OTT Apps	CHANGE IN % USERS/WEEK		CHANGE IN % TIME SPENT/USER/WEEK	
	Non-Original Series	-3%	Non-Original Series	+19%
	Movies	+33%	Movies	+37%
	Original Series	+121%	Original Series	+49%

***% Changes are on Wk 2 of COVID Lockdown versus Pre COVID Period***

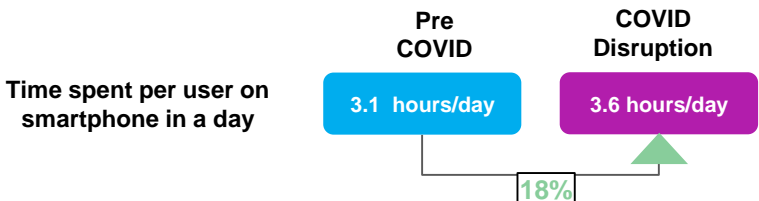
VOD= Video Streaming Platforms, including Youtube  
Based on Nielsen Smartphone Panel representing 1L+, NCCS ABC, 15-44  
COVID Disruption Data as compared to Pre COVID-19 Data



# A DAY IN THE LIFE OF A SMARTPHONE USER

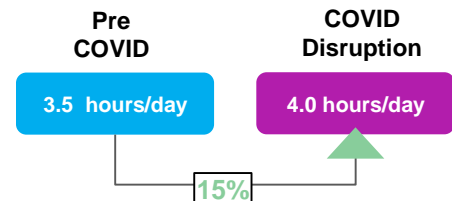
Which activity & what time span is showing a change ?

## TIER I RESIDING MALE - 35-44 YRS



Contribution to Total Increase in Time Spent	12am - 6 am	6am-12pm	12pm-6pm	6pm - 12am
Chat and VOIP	2%	1%	5%	3%
Games	10%	5%	2%	
Searching	7%			
Social Networking	9%	8%	11%	7%
Video Streaming		9%	8%	6%
News	4%	1%	2%	1%

## METRO RESIDING FEMALE - 15-24 YRS



Contribution to Total Increase in Time Spent	12am - 6 am	6am-12pm	12pm-6pm	6pm - 12am
Chat and VOIP	12%	11%	15%	12%
Games	3%	5%	4%	3%
Social Networking	7%	11%	7%	6%
Video Streaming		2%	2%	

COVID Disruption Data (21st Mar'20 - 27nd Mar'20) as compared to Pre COVID-19 Data (13th Jan'20 - 2nd Feb'20)

# SUMMARIZING THE KEY POINTS ON MEDIA CONSUMPTION IN WEEK 2 OF COVID LOCKDOWN

# SUMMARY

1. COVID Disruption in W2 continues to show a huge increase in TV viewership, smartphone usership & VOD consumption
2. The current week garnered the Highest ever Total TV Consumption
3. The re-telecast of RAMAYAN, garnered the **highest ever rating** for a Hindi GEC show **since 2015**
4. Growth in TV and Smartphone consumption is **across geographies, socio-economic classes and age groups**
5. **Non Primetime Viewership** sees a significant increase in TV
6. While **News and Movies** registered an **all time high growth** on TV, Digital consumption of **News** continues to show huge increase
7. **Chatting and Social networking** expectedly continue to show a significant increase in time spent
8. **Ecommerce** continues to suffer on account of difficulties in logistics management during the lockdown

# 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
- To focus on health, family, friends and being happy! 😊

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