

# COVID-19 IMPACT

## WHAT'S HAPPENING IN THE TV & SMARTPHONE LANDSCAPE

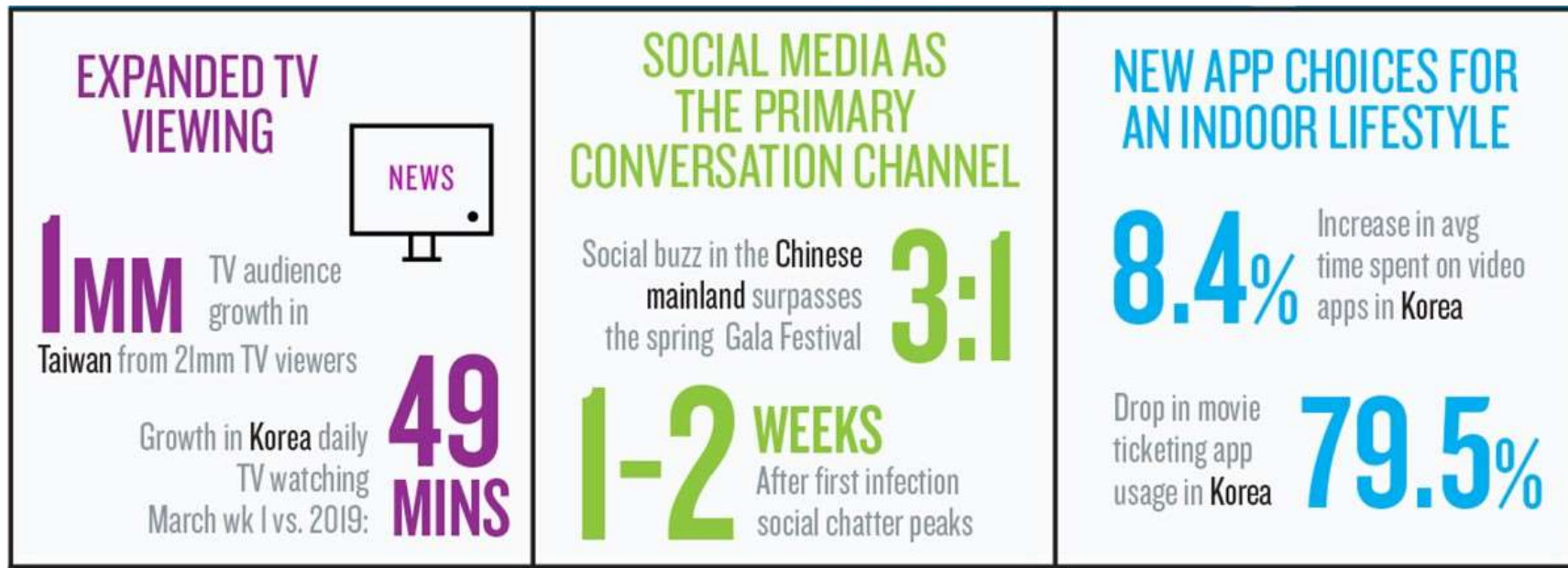
27th MARCH 2020

# THE SCENARIO

## INDIA

- Covid-19 led disruption started affecting India hard since last week.
- **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 1st of the series.
- We have looked at Jan as the Pre Covid-19 period, and compared it with recent week.

# WHAT DID WE SEE IN THE NORTH ASIAN MARKETS, WHICH WERE HIT BY COVID-19 BEFORE INDIA?



Source: Nielsen (Copyright 2020)

# COVID 19 IMPACT

# THE INDIA LANDSCAPE

# THE SCOPE OF OUR ANALYSIS

## Television Behavior

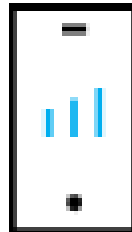


**Market Coverage**  
All India (Urban + Rural)  
2+ years

**Time Period:**  
Pre COVID-19: 11th Jan'20 - 31st Jan'20  
COVID Disruption: 14th Mar'20 - 20th Mar'20  
Frequency: Weekly  
(Week defined as: Saturday – Friday)



BROADCAST  
AUDIENCE  
RESEARCH  
COUNCIL  
INDIA



## 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: 16th Mar'20 - 22nd Mar'20  
Frequency: Weekly  
(Week defined as: Monday – Sunday)



nielsen



BROADCAST  
AUDIENCE  
RESEARCH  
COUNCIL  
INDIA

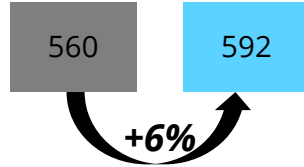
# LET'S DEEP DIVE INTO TELEVISION BEHAVIOR

# AVERAGE DAILY VIEWERS GREW BY 32 Mn, EACH OF 592 Mn VIEWERS WATCHING TV DAILY FOR 3 Hr 51 MINUTES <sup>7</sup>

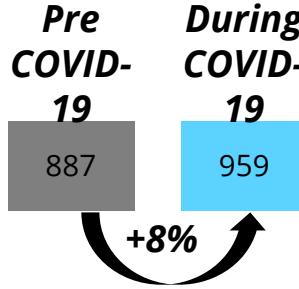
Viewing time for Television increased by over 70 billion minutes in India



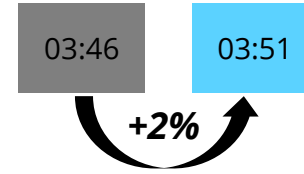
**Avg. Daily Reach in Mn**



**Weekly Viewing Minutes in Bn**



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



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

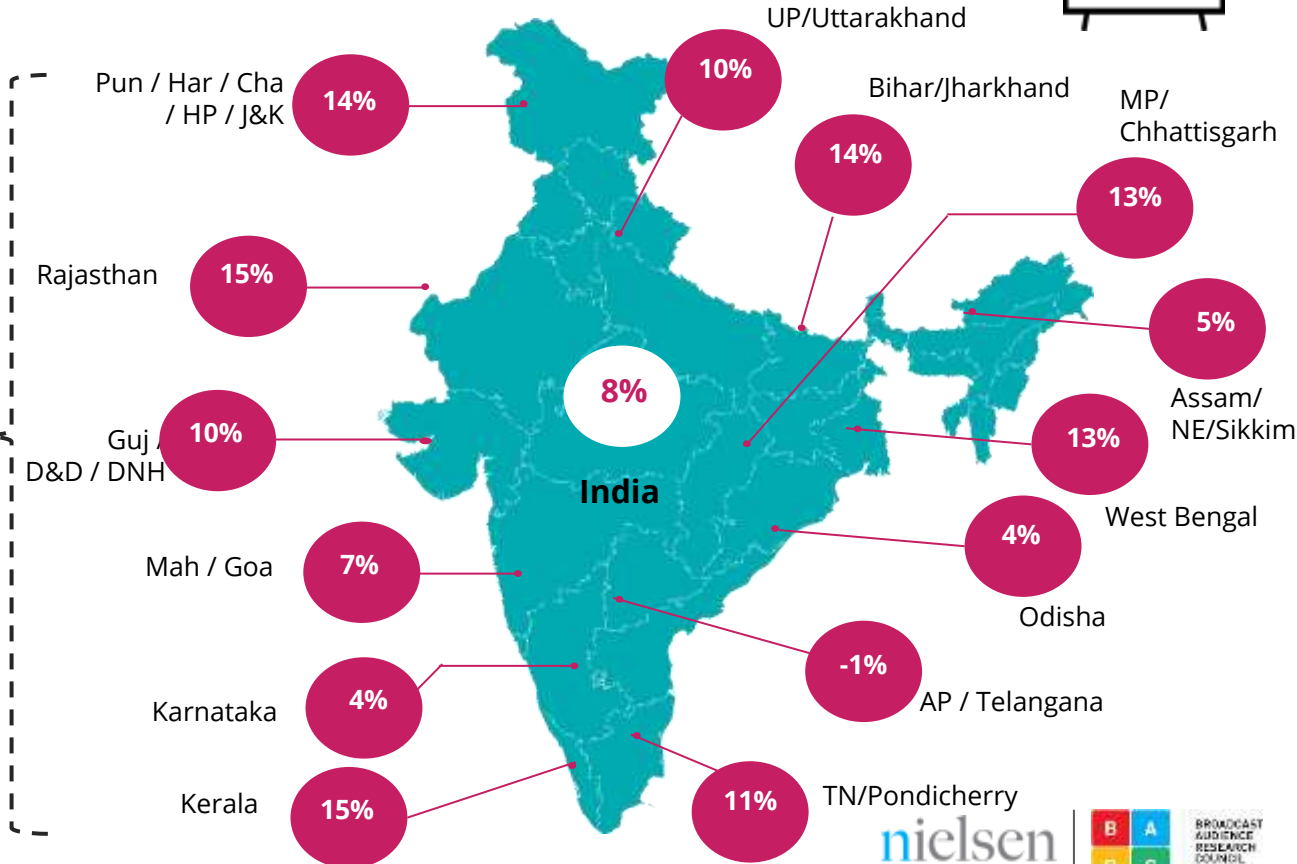
**During COVID-19 (14 March to 20 March)**

# TOTAL TV CONSUMPTION INCREASED BY 8% AT ALL INDIA

HSM growth was higher than South  
 HSM driven by Reach where as South is driven by both ATS and Reach



Region	Viewing Minutes
India	8%
HSM	10%
South	5%



Growth in Week 11 (week starting 14 March) data as compared to Week 2 to Week 4 (11 Jan to 31 Jan)





# HINDI CONSUMPTION INCREASED BY 7% AT ALL INDIA

News, Kids & Movies increased across all languages

Viewing Minutes Growth	Total	GEC	Movies	News	Kids	Music
Total	8%	1%	14%	57%	33%	0%
<b>HINDI</b>	<b>7%</b>	<b>3%</b>	<b>13%</b>	<b>62%</b>	<b>-</b>	<b>-6%</b>
MALAYALAM	15%	7%	12%	75%	13%	32%
TAMIL	7%	1%	19%	84%	75%	12%
KANNADA	0%	-6%	7%	47%	63%	2%
TELUGU	-1%	-4%	3%	21%	19%	-2%
BANGLA	13%	6%	25%	75%	-5%	16%
MARATHI	11%	-7%	21%	101%	-	-14%
ENGLISH	-19%	21%	29%	39%	-	47%
BHOJPURI	17%	3%	23%	-	-	-34%
ORIYA	6%	-1%	-	78%	-	2%
PUNJABI	36%	52%	26%	16%	-	37%
GUJARATI	49%	10%	66%	61%	-	-
ASSAMESE	9%	27%	-	-3%	-	25%
URDU	30%	36%	-	10%	-	-
Multi language feed	30%	-	-	-	33%	-

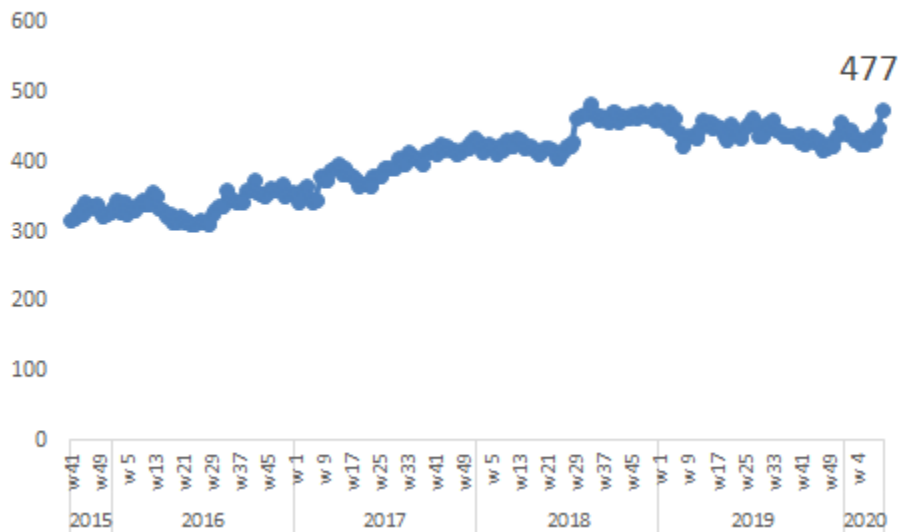


Growth in Week 11 (week starting 14 March) data as compared to Week 2 to Week 4 (11 Jan to 31 Jan)

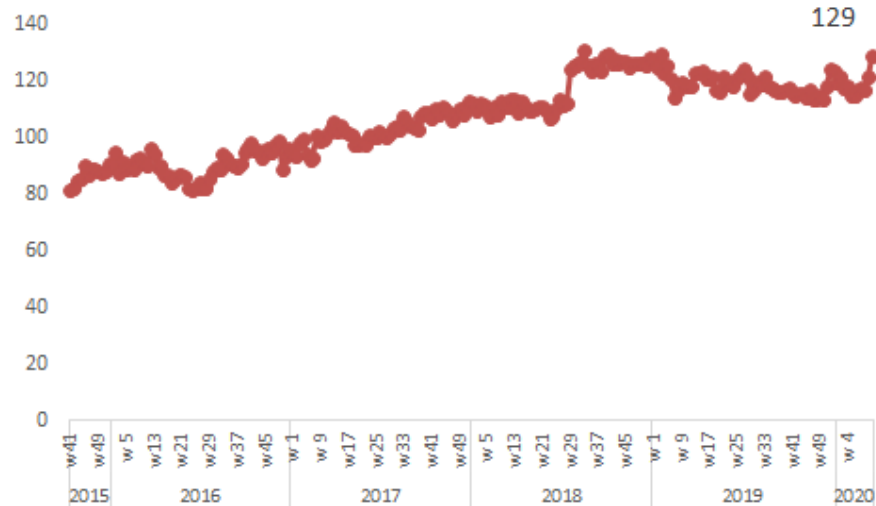
# IN URBAN INDIA THE VIEWERSHIP IN WEEK 11 IS THE SECOND HIGHEST SINCE 2015

In 6 Mega Cities it is the 4 highest week since 2015

### India Urban



### Megacities



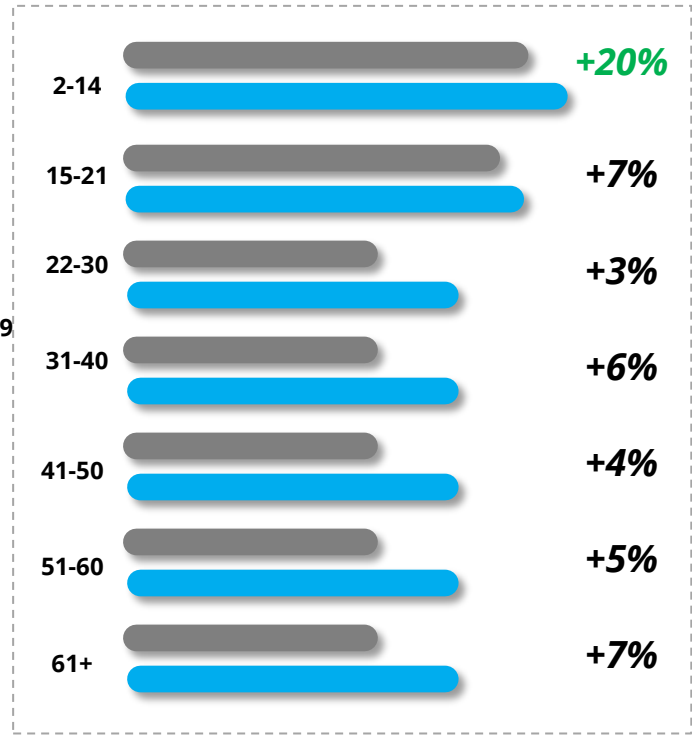
# YOUNGER DEMOGRAPHICS & NCCS A SHOW ABOVE AVERAGE TV VIEWERSHIP



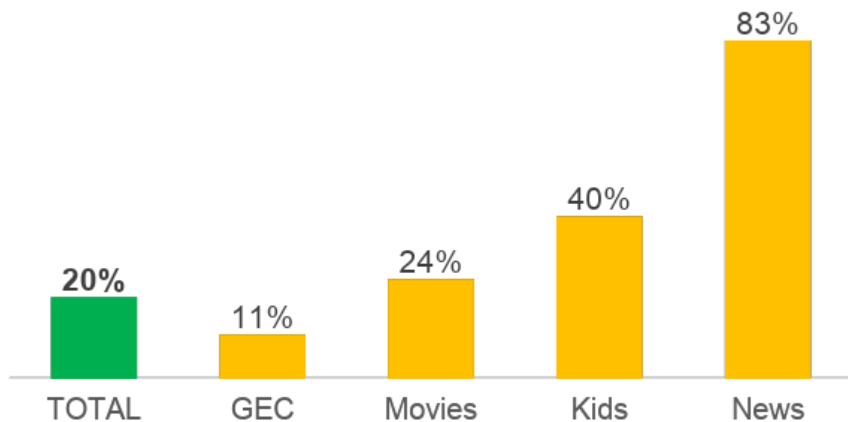
Growth in 2-14 is reflected in the kids genre growing



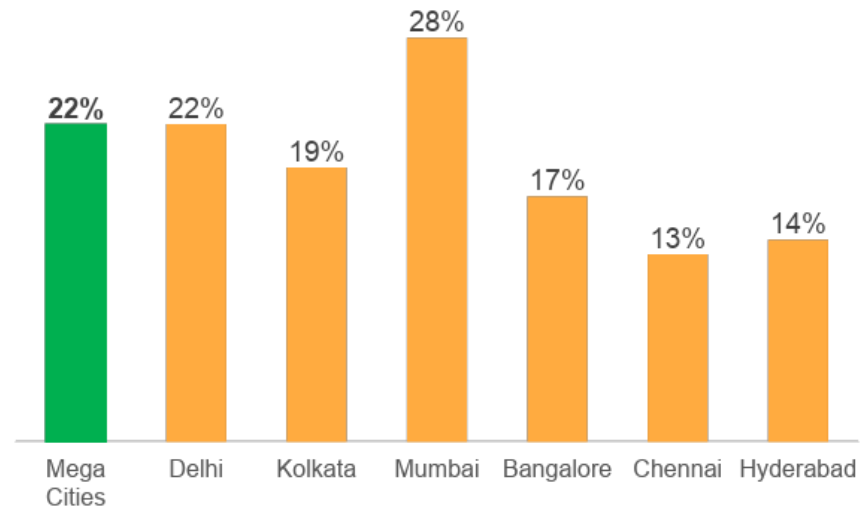
Pre COVID-19  
During COVID-19



## What are Kids watching? Apart from Kids content, 2-14 age group consuming News and Movies



## Even Premium Audiences reported a growth in TV consumption



Data from BARC's Premium Panel Households (6 Megacities 2+)



# GENRE & LANGUAGE WISE GROWTH

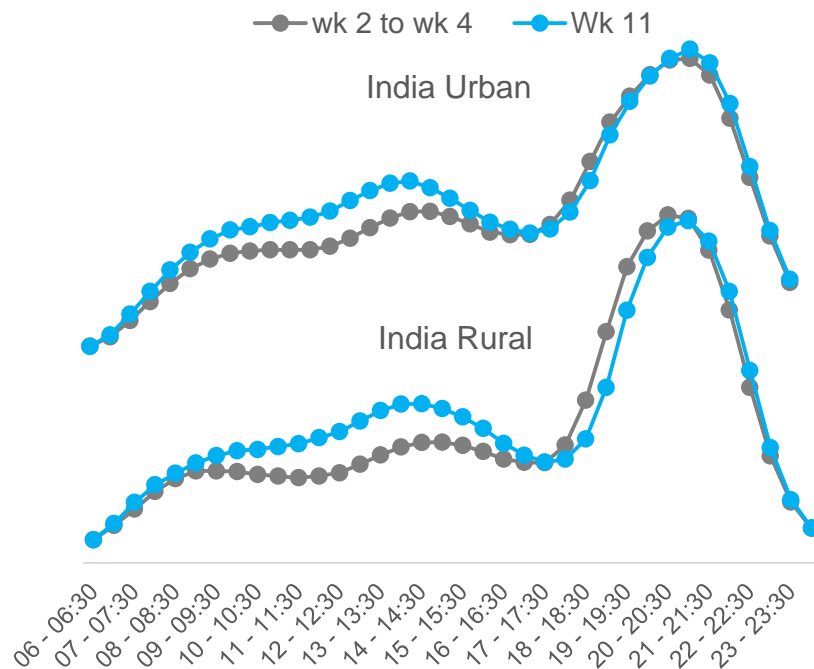
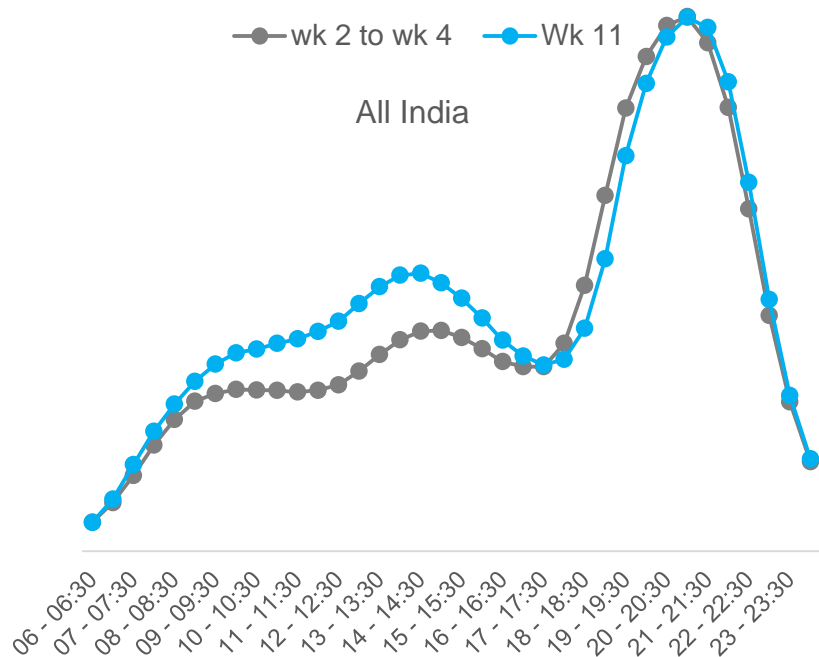
Movies, News, Kids, the key contributors to the growth in viewership  
Reach across most of the Genres has increased

Genre	Impressions	Daily Avg. Reach	Daily ATS
<b>TOTAL</b>	<b>8%</b>	<b>6%</b>	<b>2%</b>
News	57%	34%	17%
Movies	14%	10%	4%
Kids	33%	20%	11%
GEC	1%	6%	-5%
Infotainment	25%	22%	3%
Teleshopping	28%	34%	-4%
Music	0%	9%	-8%
Sports	-69%	-29%	-56%
Youth	16%	13%	2%
Devotional/Spiritual	0%	15%	-13%
Others	15%	13%	2%
Lifestyle	18%	15%	3%
Business News	63%	67%	-2%

# THE VIEWERSHIP GROWTH IS DRIVEN BY THE NON PRIME TIME

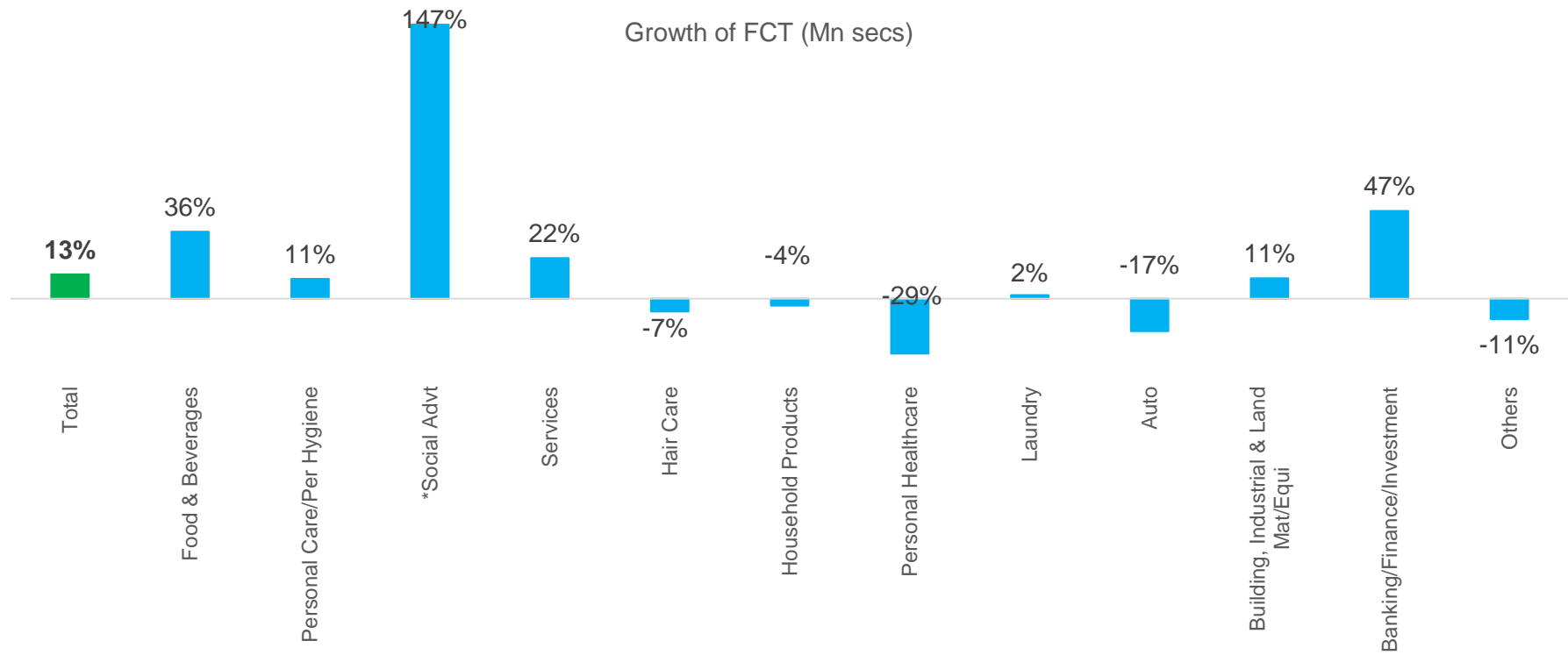
Prime Time in Urban India is at similar level as Pre-Covid

	All India	Urban	Rural
6AM to 6PM	20%	18%	23%
6PM to Midnight	-2%	0%	-5%



# BUSINESS CONTINUES AS USUAL IN WEEK 1 OF COVID DISRUPTION

Advertising FCT has increased by 13%. The top 3 sectors show significant growth



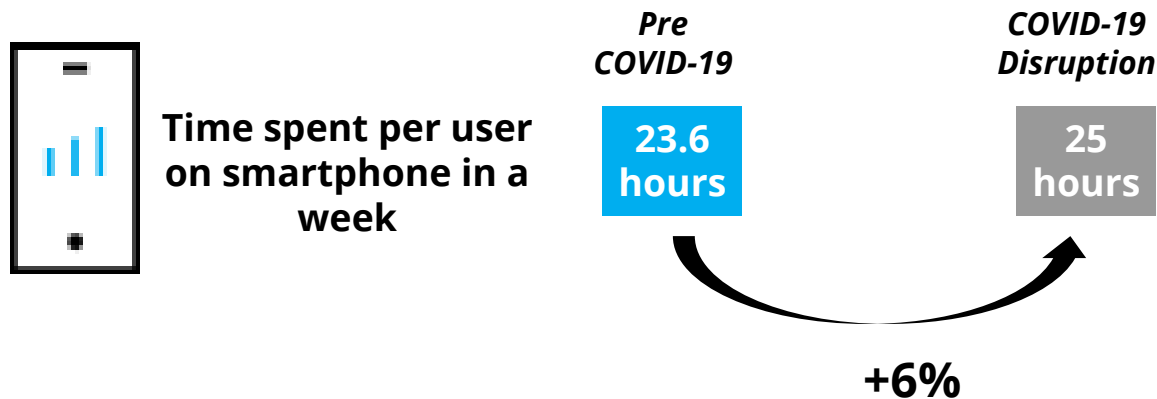
Growth in Week 11 (week starting 14 March) data as compared to Week 2 to Week 4 (11 Jan to 31 Jan)



# A PEEK INTO **SMARTPHONE USAGE** OF CONSUMERS HOW HAS IT CHANGED IN WEEK 1 OF COVID DISRUPTION?



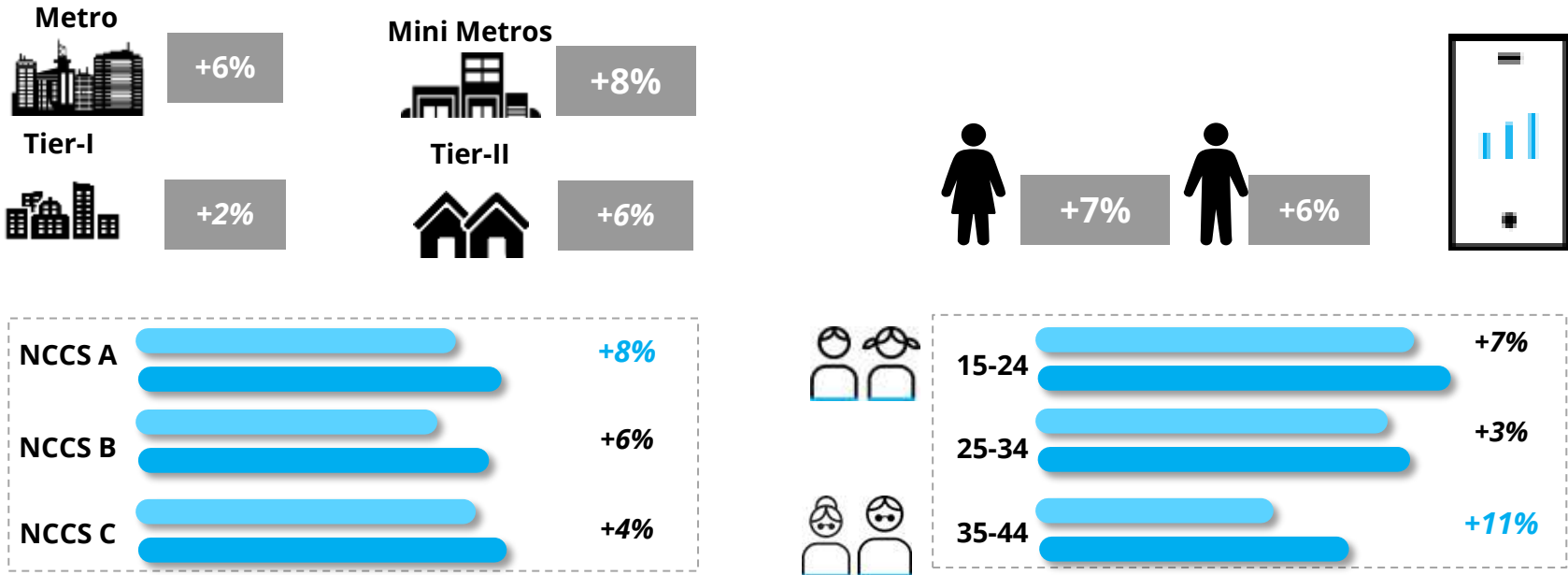
# THE TIME SPENT ON SMARTPHONE IN WEEK 1 OF COVID DISRUPTION HAS INCREASED BY **1.5 HOURS**



Based on smartphone panel representing 1L+, NCCS ABC, 15-44

COVID Disruption Data (16th Mar'20 - 22nd Mar'20) as compared to Pre COVID-19 Data (13th Jan'20 - 2nd Feb'20)

# ON SMARTPHONES, MAXIMUM INCREASE IN TIME SPENT IS SEEN FOR 35-44 YRS. MINI METROS & NCCS A ALSO SHOW A GOOD INCREASE








Based on smartphone panel representing 1L+, NCCS ABC, 15-44

COVID Disruption Data (16th Mar'20 - 22nd Mar'20) as compared to Pre COVID-19 Data (13th Jan'20 - 2nd Feb'20)

# NEWS USER BASE GROWS IN THE 1ST WEEK OF COVID DISRUPTION

## CONSUMERS SPENT ~25% MORE TIME CHATTING & ON SOCIAL NETWORKING

### THE INCREASE IN CALL TIME IS ONLY 4%




		% USERS/WEEK		TIME SPENT/USER/WEEK (Min)	
	News	20%	<b>+8%</b>	32 min	<b>+17%</b>
	Chat VOIP	98%	-	277 min	<b>+23%</b>
	Social Networking	87%	-	242 min	<b>+25%</b>
	Gaming	61%	<b>+2%</b>	169 min	<b>+11%</b>
	VOD	96%	-	219 min	<b>+3%</b>



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# COVID HITS TRAVEL TECH, FOOD TECH & ETAIL SEVERELY !

		% USERS/WEEK		TIME SPENT/USER/WEEK (Min)	
	Shopping	67%	-	38 min	-11%
	Travel	6%	-24%	10 min	-32%
	Food Ordering	11%	-13%	13 min	-21%



Based on smartphone panel representing 1L+, NCCS ABC, 15-44

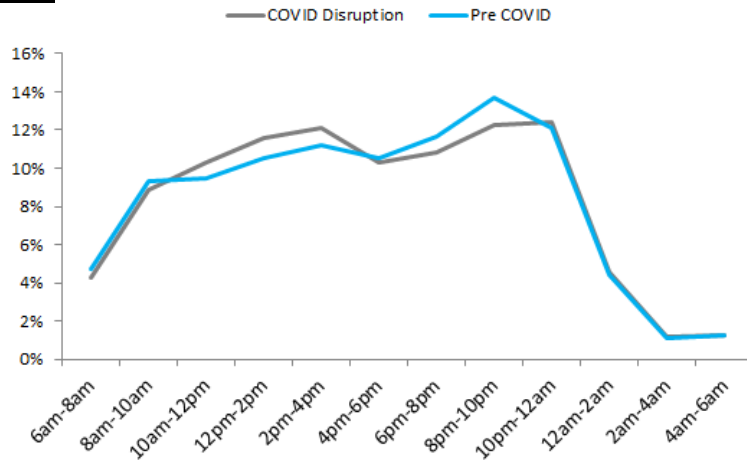
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# CONSUMPTION ON SOCIAL NETWORKING, VIDEO STREAMING & GAMING INCREASED DURING 10AM TO 4PM IN WEEK 1 OF COVID DISRUPTION



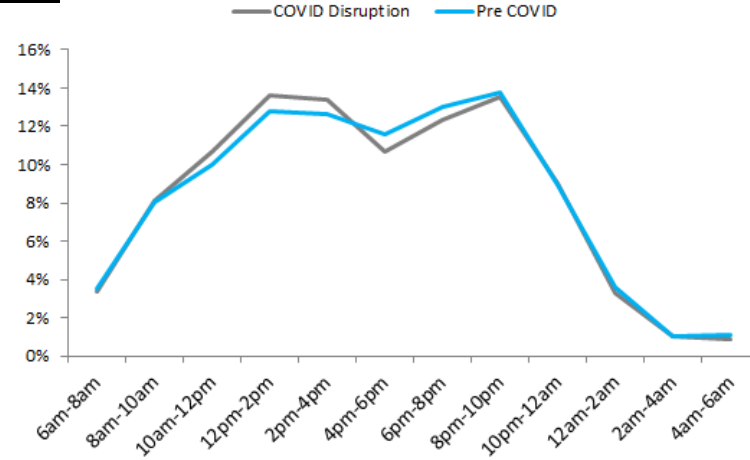
## Social Networking

% breakup of time spent through the day



## Gaming





% breakup of time spent through the day



Based on smartphone panel representing 1L+, NCCS ABC, 15-44

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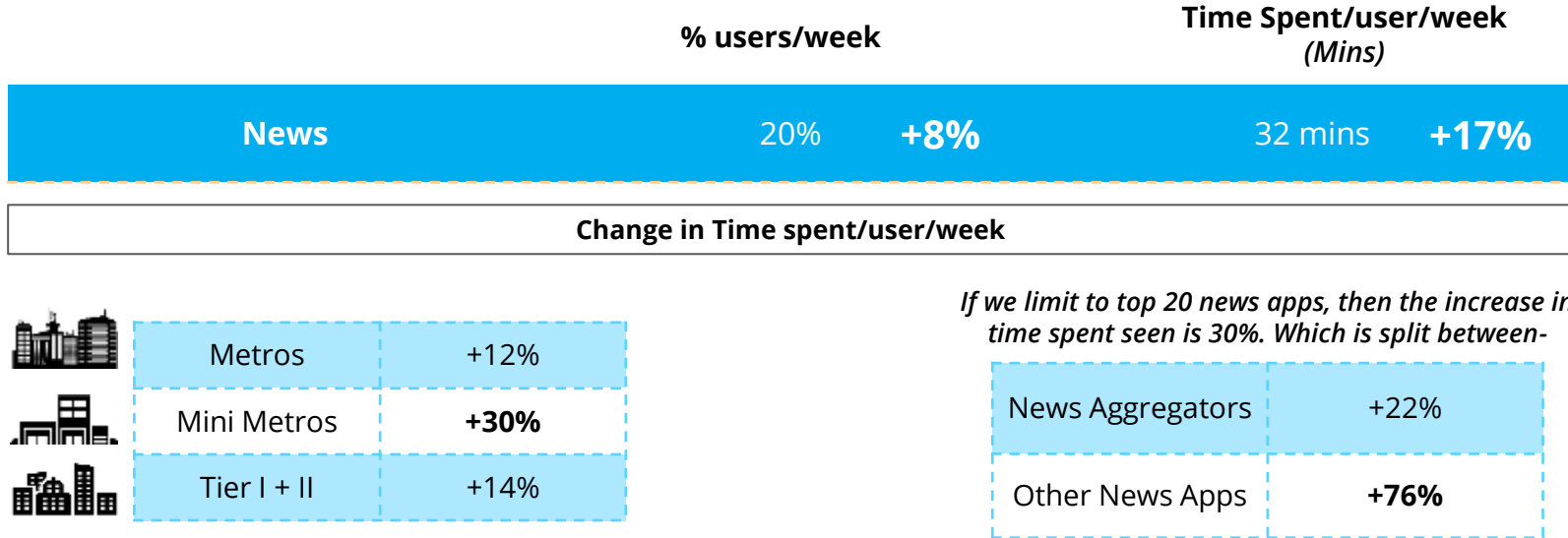
# CONSUMERS ACCESSING SOCIAL MEDIA APPS MANY MORE TIMES THAN BEFORE !

		# Sessions /week / user (change)	Time Spent / user / week (change)
<b>Social Networking</b>		<b>+19%</b>	<b>+25%</b>
	Facebook	+18%	+23%
	Tik Tok	+20%	+20%
	Instagram	+20%	+25%
<hr style="border-top: 1px dashed black;"/>			
	Whatsapp	+17%	+27%

Based on smartphone panel representing 1L+, NCCS ABC, 15-44

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# IMPACT ON NEWS CONSUMPTION ON SMARTPHONES TRICKLES DOWN BEYOND METROS!



*Not just apps, news websites were also visited by 26% more users while the number of website visits per user went up by 29%*

Based on smartphone panel representing 1L+, NCCS ABC, 15-44

COVID Disruption Data (16th Mar'20 - 22nd Mar'20) as compared to Pre COVID-19 Data (13th Jan'20 - 2nd Feb'20)

# VOD TIME INCREASE LED MORE BY METROS & 34 YEARS+ IN WEEK 1 OF COVID DISRUPTION

	% users/ week		Time Spent / user / week (Mins)	
<b>VOD</b>	96%	-	219 mins	<b>+3%</b>

## Change in time spent/user/week

	Metros	+4%	15-24 years	-	
	Non-metros	+2%	25-34 years	+2%	
			35-44 years	+11%	

Based on smartphone panel representing 1L+, NCCS ABC, 15-44

COVID Disruption Data (16th Mar'20 - 22nd Mar'20) as compared to Pre COVID-19 Data (13th Jan'20 - 2nd Feb'20)



# WEEK 1 SHOWS AN INCREASE IN TIME SPENT FOR **MOST** GAMING GENRES

	% users/ week		Time Spent / user / week (Mins)	
<b>Gaming</b>	61%	<b>+2%</b>	169	<b>+11%</b>
<b>Change in Time spent/user/week</b>				
<b>15-24 yrs</b>			<b>+16%</b>	
<b>Action</b>			<b>+12%</b>	
<b>Board</b>			<b>-2%</b>	
<b>Puzzle</b>			<b>+13%</b>	
<b>Adventure</b>			<b>+38%</b>	
<b>Quiz</b>			<b>+24%</b>	

*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.*

**Based on smartphone panel representing 1L+, NCCS ABC, 15-44**

**COVID Disruption Data (16th Mar'20 - 22nd Mar'20) as compared to Pre COVID-19 Data (13th Jan'20 - 2nd Feb'20)**

# Exclusive Preview to the Biggest News Event ever

# PROOF OF CREDIBILITY & AUTHENTICITY OF TV AS A MEDIUM

PM Modi address on 'Complete Lockdown' was the biggest ever News event.

Unique viewers higher than the IPL Finals (133 Mn)



Date	PM's Address to the Nation	Channels	No. of People who viewed the telecast (in Mn.)	Viewing Minutes (Mn)
8th Nov 2016	Demonetization	114	57	842
8th Aug 2019	Article 370	163	65	934
19th Mar 2020	COVID-19 ('Janta Curfew')	191	83	1275
24th Mar 2020	*COVID-19 ('Complete Lockdown')	201	197	3891

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

1. COVID Disruption W1 shows a significant increase in television viewership, smartphone usership & VOD consumption
2. The PMs address to the Nation on **complete lockdown** garnered **unprecedented viewership of 197Mn people watching it on television** across the country
3. The growth in TV largely comes from **Non Prime time viewership**
4. **News followed by Kids Genre and Movies** have contributed to the growth in TV viewing
5. Digital consumption of **News and Gaming** shows huge increase in both incidence and time spent
6. **Chatting and Social networking** also show a significant increase in time spent in W1.
7. **Shopping Apps, Travel Apps and Food Apps** take a huge hit in W1.
8. **Advertising FCT on TV** sees a significant increase in W1.

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ONE MEDIA TRUTH™



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