

MAGNA

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STUCK AT HOME: MEDIA BEHAVIOR IN THE TIME OF CORONAVIRUS



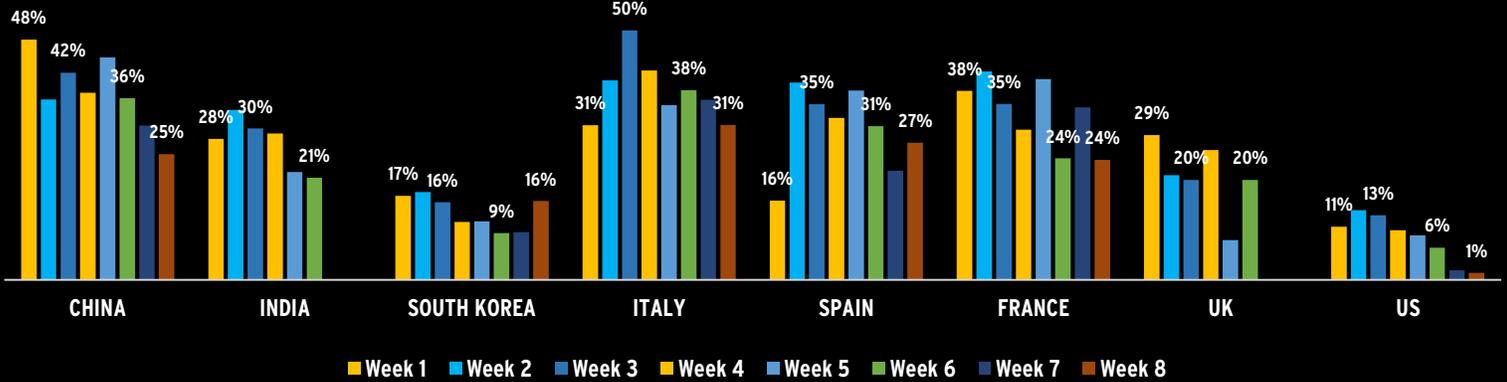
MEDIA BEHAVIOR IN THE TIME OF CORONAVIRUS

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COUNTRY	KEY FINDINGS
GLOBAL TREND	<ul style="list-style-type: none"> After 8 weeks of lockdown, and as several countries are reopening, linear TV viewing levels remain 10% to 20% above 2019 levels in most markets while some (e.g. North America) are now level year-over-year Where TV remains well above 2019, it is often concentrated on kids, while other demographics are close to 2019 levels The lack of fresh content is affecting ratings in several markets, but News Channels continue to experience a significant uplift and some major sports events are finally coming back (football in Germany and England)
CHINA	<ul style="list-style-type: none"> TV viewing was up almost 50% vs 2019 in the early stages of lockdown As China re-opens, linear TV viewing has been returning to 2019 levels: time spent was flat YoY the week of May 4, week 16 since the start of lockdown
INDIA	<ul style="list-style-type: none"> Linear TV consumption has stabilized at a high level, around +20% YoY Digital time spent is up nearly +20% compared to pre-Covid
SOUTH KOREA	<ul style="list-style-type: none"> As of week 11 of lockdown (May 4-10), TV viewing is up +10% YoY Ratings for general entertainment shows continues to grow, suggesting “news fatigue” has set in
THAILAND	<ul style="list-style-type: none"> Linear TV consumption (primetime) was up +6% YoY in week eight of lockdown Radio listenership has been down throughout Feb-April
FRANCE	<ul style="list-style-type: none"> The French are spending, on average, 4h20m a day watching linear TV, a +24% YoY increase 24-hour news channels continue to see significant increases in time spent
ITALY	<ul style="list-style-type: none"> Linear TV time spent was up +17% YoY the week of May 4 TV time spent is gradually declining week over week as more people return to work
NETHERLANDS	<ul style="list-style-type: none"> TV consumption was flat in the eighth week of confinement, the week of May 4 Online radio listenership has been up +16% YoY, on average, throughout the lockdown period
SPAIN	<ul style="list-style-type: none"> Across all audiences, average time spent with linear TV was up +23% YoY the week of May 4 OTT platforms continue to see strong growth: consumption is up +50% since early February
UNITED KINGDOM	<ul style="list-style-type: none"> On average, linear TV viewing was up +20% YoY in week six of lockdown (April 27). EPL back in June British digital users are spending an average of 17 more minutes per day online
BRAZIL	<ul style="list-style-type: none"> Brazilians spent around 475 minutes/day watching linear TV in April, compared to 390 in January Traffic to online gaming sites, news sites, and social media platforms is up by double digits
CANADA	<ul style="list-style-type: none"> TV viewing has largely returned to pre-Covid levels, with YoY time spent flat over the last few weeks Kids are the only demo still watching slightly more TV
UNITED STATES	<ul style="list-style-type: none"> As of May 4, week eight of lockdown, linear TV viewing was flat YoY Weekday daytime usage is still up compared to 2019, driven mainly by cable news

LINEAR TV CONSUMPTION IN THE TIME OF CORONAVIRUS – GLOBAL OVERVIEW

TV Viewing since Lockdown (all individuals all day - change vs same week of 2019)



- After 8 weeks of lockdown, linear TV viewing levels are still 15% to 20% above 2019 levels.
- In early pandemic markets (China, Italy) that are now gradually relaxing lockdown, media consumption generally remains above 2019 levels, though declining week over week.
- 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 Spain and South Korea.
- See page 11 for detailed data table.

APAC CHINA

- **As China’s phased re-opening continues, theme parks, restaurants, and schools continue to reopen, though under restrictions designed to reduce capacity and enforce social distancing measures**
- Average time spent watching linear TV has been slowly returning to 2019 levels as China re-opens: viewing was flat YoY the week of May 4 at 150 minutes a day.
- Chinese viewers spent, on average, 60 more minutes a day watching TV during the first four weeks of quarantine (Feb-March) than they did during the same period in 2019.
- By early April, average time spent dropped to around 140 minutes per day, **still 20% higher than 2019** but below the peak of 200+ minutes in January and February.



- **In fact, only kids (4-17) continue to watch more TV than they did in 2019.** Average time spent was up +53% YoY the week of May 4, compared to -4% for A18-49 and -13% for A18-34.
- This is below the peak of +70-80% we saw in February and March, suggesting that kids viewing is beginning to return to normal as schools and activities (parks, shops, museums) re-open.
- Radio consumption remained stable throughout the lockdown, around 57 minutes per day, compared to 53 during this same period in 2019.

APAC INDIA



- **The government of India began loosening some restriction on April 24, including opening some shops in non-hotspot areas**
- **States have the authority to set their own restrictions. Some, including Kerala and Gujarat, have eased some lockdown measures, while Maharashtra (Mumbai) remains closed**
- **Linear TV consumption surge has stabilized at +22% YoY during the weeks of April 20 and April 27 (all day, A2+).** We expect viewing will gradually return to 2019 levels as India re-opens. TV viewing had peaked in week two of the lockdown (March 30), up +34% compared to the same week in 2019—which was already a very strong time for TV viewing, given the IPL matches.
- **Movies (+13%) and news (+36%) continue to draw the largest audiences, while general content channels are suffering (-10%) as fresh content dries up.**
- **Digital time spent is up +16% so far** and data usage is up +21% compared to pre-Covid levels in January and February 2020. Time spent is up in all categories: gaming, videos, education, news, and social/messaging.
- **Print suffered heavily in the first couple weeks of lockdown, as circulation stopped in many cities due to fear of the virus.** Over the last few weeks the situation has begun to improve, with average reading time up from 40 mins/day to 60 mins/day (Avance).
- **Time spent with radio increased by +23%** to over two hours a day. Radio in-home listenership now accounts for 86% of all radio time spent, compared to 22% pre-Covid. (AZ Research).

APAC SOUTH KOREA



- **No “stay at home” order was officially issued, but most businesses started working from home around Feb. 23**
- **Restrictions began to loosen on May 6; cases have since begun to climb again, leading to the possibility of a second lockdown**
- **TV viewing is up +10% YoY** as of week 11 of lockdown (May 4 - 10), (total individuals, all day). This is below the peak of +18% seen in the week after Koreans began working from home, but still a significant reversal of the downward trend seen in recent years.
- **On average, TV viewing has been up +13%** throughout mid-February to early May. The most dramatic viewing increases are still found among kids, +23% YoY the week of May 4. Viewing among A18-49, on the other hand, was up just +5%.
- **News programs continue to see ratings above 2019 levels, though news viewership has been gradually declining since March.** Ratings for entertainment shows continue to grow, suggesting that “news fatigue” has set in and Koreans are switching from news channels to comedy and drama programming.

SPOTLIGHT ON BRAND RESPONSE, APAC



Sunsilk (haircare) “My Lockdown Hairstyle” digital video ad, India



Mama Noodles (food) “Thank You All Thais” video campaign, Thailand



BBD0 Malaysia static digital “Be a Chicken. Be Safe.” campaign



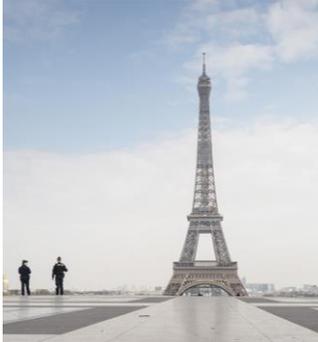
- **Some businesses, including restaurants and hair salons, began cautiously reopening on May 3**
- **Bars remain closed, but the ban on takeaway alcoholic drinks has been lifted**
 - Linear TV consumption (A15+, primetime) was up +6% the week of April 27 compared to the same week in 2019, week eight of the lockdown. This is a significant deceleration from the previous week, when viewing was up +17% YoY—one of the strongest weeks since the lockdown began.
 - Primetime viewing has increased the most among A20-49: average time spent has been up an average of +24% every week since the beginning of the shutdown.
 - **Radio listenership (linear & digital) has been down in February-April** for most of the major radio stations in Bangkok. EFM FM94 saw a spike in web listenership in March (audience up +16% compared to February), but overall audiences are down month over month.
 - Covid-related topics have taken over social media during this time. “Stay at home” conversations on Twitter, for example, increased +195% in March (vs. Jan-Feb 2020). Conversations around food delivery, video streaming, and online shopping are also up (Crimson Hexagon).
 - Eyeballs are down -50% to -99% for the major OOH vendors (as of late April) as people stay home from work, school, and other daily activities.

A P A C
OTHER MARKETS



- Most APAC countries have begun to partially reopen areas least impacted by the virus, though significant restrictions remain for most industries.
- MAGNA expects that media behaviors will slowly return to normal over May and June as business operations resume across the region. The lack of fresh content, as filming and production is suspended in most areas, could also contribute to a gradual decline in linear TV consumption (from the peak in late March-early April)
- We are already seeing time spent with TV returning to 2019 levels in **China** as more industries and schools reopen, and we anticipate this trend will be seen across the region. OOH and radio, both of which have suffered, should bounce back relatively quickly as commuting resumes.
- Scott Morrison, prime minister of **Australia**, announced a three-step plan to reopen the country by mid-July on May 8.
- In step one, small gatherings will be allowed, students can return to school, and restaurants, stores, and cafes can re-open. In step two, community sporting events can take place and cinemas will re-open.
- **Japanese** Prime Minister Shinzo Abe announced on May 14 that restrictions would be lifted ahead of schedule for 39 of the 47 prefectures. Tokyo, Osaka, Kyoto, and other high-risk areas will remain under lockdown.
- Shops, sports clubs, karaoke bars, and museums across the country began to re-open in many areas in early May. Schools reopened on May 7 in three prefectures, with several others planning to follow by the end of May.
- The federal government of **Malaysia** has extended the movement control order through June 9, though most business are now allowed to operate as long as they abide by certain social distancing guidelines.
- TV consumption peaked at the beginning of quarantine, with weekly TV ratings reaching 16.7%. As the lockdown continued, TV ratings normalized at pre-Covid levels of 13.2%.
- Netflix and YouTube saw a surge in traffic between March and April: +14% and +38%, respectively.
- OTT consumption has now begun to decline, with many people back at work.

EMEA FRANCE



- **Though Paris remains under tight restrictions, some other parts of the country have begun to relax restrictions**
- **Primary schools opened across much of the country on May 11, but schools for older children will not open until mid-May or June. Cafes and restaurants will open in June in less hard-hit regions**
- **TV viewing time remains around four hours and twenty minutes a day the week of May 4 (A4+, total day), +24% more than the same week in 2019.** This is a slight decline from the previous week, when time spent was a little over four and a half hours. TV viewing surged on Friday, May 1, which was public holiday International Worker's Day, to over four hours and forty minutes.
- **24 hour news channels continue to see significant increases in time spent, 24 minutes/day the week of April 17 compared to 14 minutes/day in 2019 (approx. +70%).** News fatigue does not seem to have set in, as time spent with news has been fairly stable over the last month.
- **In March, time spent with internet was +25% higher than March 2019,** over two and a half hours per day. Smartphone use accounts for around an hour and a half of this time. News websites are still very popular, with the number of daily visits among top news sites (Le Monde, Le Figaro, etc.) still well above 2019.
- **Across social networks, TikTok has seen the fastest growth in users (from a low base).** Facebook, Instagram, Twitter, and LinkedIn all saw an increase in the number of unique users in March (compared to February).

EMEA ITALY



- **Many offices began to re-open the week of May 6, though schools and daycares remain closed**
- **Bars and restaurants are still take-out only, though parks and some small shops have re-opened**
- **Linear TV consumption was up +17% YoY (all individuals, all day) the week of May 4.** In the previous week, by comparison, viewing was up +31% YoY. As expected, linear TV consumption is gradually returning to pre-Covid patterns as people begin to go back to work and resume normal habits.
- **Linear TV consumption peaked for all demos in the third week of lockdown (March 22): +50% for all individuals, +76% A18-34, and +84% for kids.** Kids TV viewing time spent is fairly stable around +50% vs 2019 over the last four weeks.
- **MAGNA expects that viewing will remain elevated for several more weeks,** given that the country has not fully re-opened and many people are still working remotely. With restaurants, bars, and cinemas still closed, Italians are still mostly staying in at night.

SPOTLIGHT ON BRAND RESPONSE, EMEA



Free (telecom) "They Stay at Home" video campaign, **France**.



Coop (retail) pricing freeze campaign, **Italy**



Tourism Ireland (travel) "We Will Return" video campaign, **Ireland**

EMEA NETHERLANDS



- **Schools and businesses began to reopen on May 11, though with restrictions**
- **Public transportation will return to normal schedules beginning June 1, with reduced seating**
- Linear TV viewing was flat YoY (-1%) the week of May 4, the eighth week of confinement. Kids viewing was up +5% YoY, while linear TV time spent declined for the fifth week straight (-11%) among young adults A20-34.
- **Adults A20-34 are now spending 42% of total viewing time with other, non-linear services** (incl. video streaming platforms and smartTVs), compared to 39% in 2019 and just 32% in 2018. Among A6+, 22% of screen time is devoted to other platforms.
- All five of highest-rated TV programs so far in 2020 have been related to COVID-19, including three press conferences and the king's March 20th speech.
- Public channel Ster market share has growth from 29% to 32%, at the expense of Talpa TV. Ster (owner of *NOS Journaal*) is known as a trusted news source.
- **Radio listening time has increased 6-12% YoY every week since mid-March.** Online listening is up +16% YoY, on average. Many radio stations are offering free airtime for Covid-19 related spots.

EMEA SPAIN



- **Some regions began to re-open on May 9 after 8 weeks of lockdown; most major cities, including Madrid, Barcelona, and Valencia, remain under full lockdown**
- **The Spanish government continues to encourage remote working where possible, including in areas that have begun "phase 1" of re-opening**
- In the general population, time spent with linear TV was up +23% in the week of May 4 (compared to the same week in 2019), the 9th week of the shutdown. Kids viewing has seen the most significant increases, with time spent up +37% during the week of May 4.
- **Time spent online increased +30% YoY in March**, to over 215 minutes a day.
- 72% of internet users with children under 14 report watching more television with their children. 62% report watching more free and paid channels to combat boredom (AIMC).
- **OTT platforms also continue to see strong growth:** consumption has increased by more than +50% (since early February) for Netflix, HBO, and Movistar. The number of new Netflix users has increased +60%.
- Spaniards are spending more time with digital platforms that allow them to connect with others (messaging apps, video conferencing), be entertained (streaming TV, online videos), and keep informed (online press, economic & sports news).

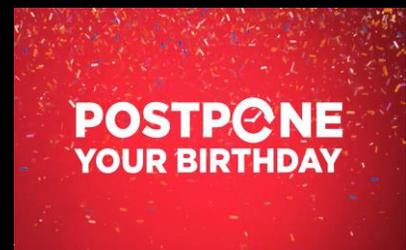
SPOTLIGHT ON BRAND RESPONSE, EMEA



Penny (retail) "#firstmoments" digital video campaign, **Germany**



HUN Wine (beverage) "Worst Time to Launch a New Brand" DOOH campaign, **UK**



Jupiler (beverage) "Postpone Your Birthday" social campaign, **Belgium**



- **Prime Minister Boris Johnson introduced the first phase of re-opening on May 12**
- **Schools and non-essential shops will remain closed until June; bars and restaurants will open in July**
- **Linear TV viewing was up +20% YoY (all individuals, all day) in week 6 of lockdown (April 27).** When compared to the previous week, TV audiences were up +8%. Kids (0-15) time spent was up +30% YoY, compared to increases of +12% for A18-49 and +11% for A18-34.
- Networks ITV, C4, and SkyMedia all saw YoY audience growth across all demos during the week of April 27, with ITV, in particular, seeing a significant increase on May 3 (+44%).
- **Broadcasters are under serious pressure when it comes to new content:** ITV, for example, will run out of *Emmerdale* episodes at the end of May, and *Coronation Street* will run out of episodes in June. Filming new episodes while complying to social distancing protocol will be difficult, which will likely lead to a reliance on re-runs.
- Britain's #1 sport program, the football **English Premier League** will resume on June 1st on Sky Sports, BT and Amazon Video, with ten match days left to complete the season
- According to ComScore, Britons spent an average of **17 more minutes per day online** in March '20 vs. January '20. Zoom, HouseParty, and YouTube have all seen significant increases in daily time spent.

EMEA
**OTHER
MARKETS**



- The **Belgian** government announced that schools, markets, museums, and zoos will begin to re-open in mid-May.
- Linear TV consumption is gradually returning to 2019 levels in both the Dutch-speaking north and French-speaking south. Time spent is up +5% in the north and +3% in the south (all audiences, week of May 4).
- Live TV still accounts for the bulk of screen time (62%), but is slowly losing share to VOD (15% share) and time-shifted viewing (19%).
- **Finland** will begin opening some restaurants, cinemas, and public services like libraries on June 1, assuming the country continues to hit public health benchmarks.
- Commercial TV viewing increased +13% in March-April 2020 (vs. Feb 2020), according to Sanoma. Viewing time has slowly declined week over week since the surge in mid-March, but remains around +20% higher than time spent in April 2019.
- MTV3 has seen the largest growth in viewing, due to their news content as well as popular content like *Masked Singer Finland*.
- Newspapers—print and digital formats—remain key sources of information for Finns.
- In **Greece**, most retail businesses, except for shopping malls and department stores, were allowed to re-open on May 11. The country plans to re-open for tourism on July 1.
- Average TV viewing time reached around six hours/day the week of April 20, a +44% YoY increase. This is an acceleration over the previous week, when time spent was up just +20% compared to 2019.
- Digital consumption, meanwhile, seems to have plateaued, with traffic up just +2% compared to the previous week.
- Average daily radio reach was down -10% in the first half of April compared to the first half of March. Transport listenership is down -50%, though streaming audio is up +14%.
- **Russian** businesses will re-open the week of May 11, after six weeks of lockdown. Local governments in hard-hit areas will have the option to maintain lockdown measures.
- Linear TV time spent (A4+, all day) has been up an average of +30% YoY throughout the six weeks of shutdown, with kids viewing up +40% and A18-34 up an average of +20%.
- **South African** president Cyril Ramaphosa announced on May 13 that restrictions would be relaxed starting June 1, but the country would remain on high alert.
- Media consumption is up across almost all online and offline channels, with the exception of OOH. 24% report watching more broadcast TV and digital video (GWI).



AMERICAS BRAZIL



- **Lockdown began on March 21. President Bolsonaro has publicly wrestled with state governors over isolation orders**
- **Bolsonaro has urged businesses like gyms and hair salons to re-open by re-classifying them as essential services**

- On average, Brazilians (all individuals, all day) spent 475 minutes/day watching linear TV the week of April 12, compared to 390 minutes per day in January.
- Though time spent has increased across all dayparts, daytime has seen the most significant increases.
- Research by Newton suggests that internet traffic increased by +40% since the beginning of the quarantine.
- According to Comscore, traffic to online video games sites increased +20% in the second half of March, when WFH policies began and schools closed, compared to the first half. Visits to news/information sites increased by +43%, social +26%, and family/youth also +43%.

AMERICAS CANADA



- **As some areas of the US start to re-open, several Canadian provinces have pushed to keep the border between the two closed**
- **Some retail stores and property management services have re-opened in Ontario. Schools will remain closed in Montreal through at least August**

- Similar to the US TV viewing has now largely returned to pre-Covid levels, with time spent (A25-54, all day) flat over the last three weeks (April 13-27). Daytime continue to over-index while primetime is under-indexing compared to early March.
- Kids are the only demo still watching slightly more TV: time spent was still up +4% YoY in week eight of the shutdown (April 27).
- Radio consumption (A25-54, Mon-Fri) has consistently been down around -30% since the beginning of the shutdown. In-home listening has increased somewhat, but not enough to compensate for the declines in linear consumption.
- Radio is expected to bounce back fairly quickly as workplaces reopen, especially if more commuters turn to cars, rather than trains, in an effort to maintain social distancing practices.

SPOTLIGHT ON BRAND RESPONSE, AMERICAS



Tim Horton's (restaurant) digital video campaign, **Canada**.



Karsten (beverage) static digital "Windows" campaign, **Brazil**



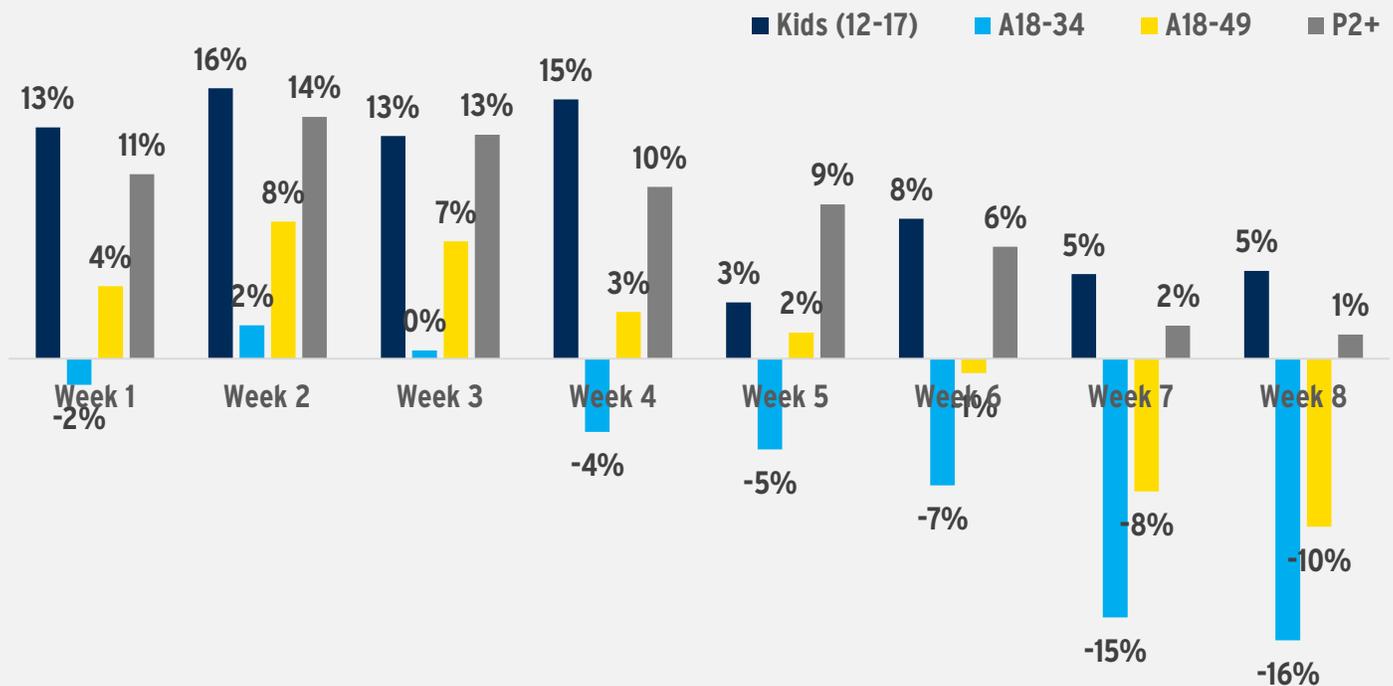
Progressive (finance) digital video "WFH" campaign, **US**

- **Several US states have begun a phased reopening, including less-populated areas of hard-hit states like New York and Virginia**
- **Most major cities and metropolitan areas will remain shut down through at least mid-June**



- Linear TV time spent has gradually returned to 2019 levels since the peak during the second week of lockdown (+14%). **As of May 4, week 8 of lockdown, TV viewing was flat YoY (P2+, total day).**
- Mon-Fri daytime total usage is still up YoY (+7%), but is mainly driven by cable, specifically cable news. Broadcast daytime programming is nearing pre-COVID-19 levels, and is down -9% YoY. **Broadcast Prime remains down year-over-year**, especially as many programs finished their seasons early.
- For the week of April 27- May 3, most of the four major SVOD players saw a slight uptick in total viewing minutes, with only Hulu dropping week-to-week. Of the four, **only YouTube has doubled the time spent in the same week last year, with +124% growth.** Amazon, Hulu, and Netflix are also up significantly, though, with +78%, +71%, and +87% YoY growth, respectively. Perennial favorite *The Office* reclaimed the top spot in terms of total minutes spent by A18-49.
- According to Triton Digital, **radio streaming remains consistent with pre-Covid levels**, around 100 minutes per week. Podcast downloads were flat week-over-week for May 4-10 for the third consecutive week (PodTrac). Weekly downloads are still up by around +25% compared to January 2020, and audiences are up +9%. News/information remains by far the most popular genre, followed by comedy and business (PodTrac).

USA: Weekly Viewing Trend Since "Week 1" of Lockdown, by Demo



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 +24% in the 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. +15% to +30% 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
BELGIUM (North)	March 18	35%	36%	24%	14%	36%	16%	17%	5%				
BELGIUM (South)	March 19	19%	25%	25%	10%	26%	9%	15%	3%				
CANADA	March 17	11%	13%	11%	9%	0%	1%	2%					
CHINA	January 23	-1%	48%	36%	42%	38%	45%	36%	31%	25%	24%	16%	17%
FRANCE	March 17	38%	42%	35%	30%	40%	24%	35%					
INDIA	March 24	28%	34%	30%	29%	22%	21%						
ITALY	March 9	40%	50%	42%	35%	38%	36%	31%	17%				
NETHERLANDS	March 16	20%	22%	17%	4%	18%	2%	9%	-1%				
RUSSIA	March 30	35%	30%	29%	28%	20%	27%						
SOUTH KOREA	February 24	17%	18%	16%	12%	12%	9%	10%	16%	10%	10%	10%	
SPAIN	March 14	40%	35%	32%	38%	31%	22%	27%	23%				
UNITED KINGDOM	March 24	29%	21%	20%	26%	8%	20%						
UNITED STATES	March 16 (many cities)	11%	14%	13%	10%	9%	6%	2%	1%				

Sample reading: The first day of the lockdown in France was on March 17. Time spent with linear TV increased +38% the first week of the lockdown (March 16-22) compared to the same week in 2019. In the second week of the lockdown (March 23-29), TV consumption was up +42% compared to the same week in 2019.



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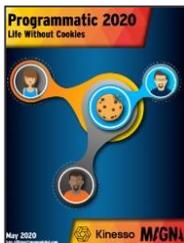
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June 2020



US Industry Report
By: Mike Leszega
March 2020

+ Continued COVID Updates from the MAGNA Intelligence Team