

A person is sitting on a grey couch in a living room, looking at a laptop screen. The room has wooden floors and a large window in the background showing a green landscape. The person is wearing a blue shirt and is holding the laptop with both hands.

**MAGNA**

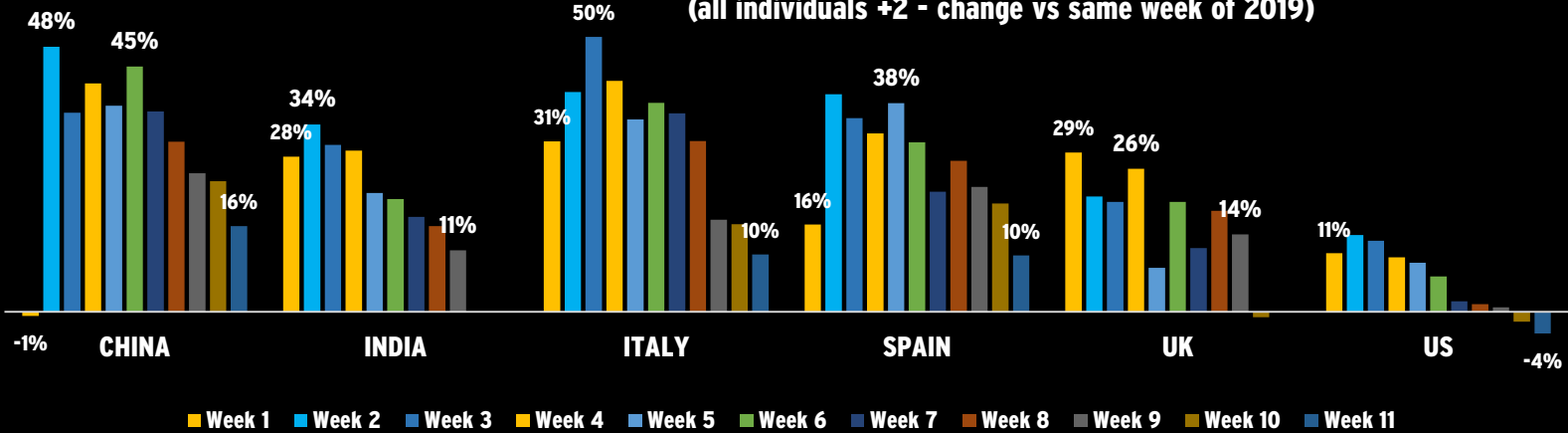
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# **STUCK AT HOME: MEDIA BEHAVIOR IN THE TIME OF CORONAVIRUS**

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# LINEAR TV CONSUMPTION IN THE TIME OF CORONAVIRUS – KEY FINDINGS

**TV Viewing Trend since Lockdown ("week 1")**  
(all individuals +2 - change vs same week of 2019)



- After 11 weeks of lockdown and quarantine in most of Europe and Asia, and as lockdown are starting to be relaxed in most markets, linear TV viewing levels are gradually returning to 2019 levels in many markets but we are still seeing the last two weeks up 4% to 10% vs 2019, despite the lack of sports and fresh content on TV.
- In Canada, the US and the UK, viewing has fallen below 2019 by now. In the US in lockdown week 11, viewing was down -4% on Persons 2+ and -13% on adults 18-45.
- The return of major sports competitions (European Soccer, NASCAR etc) may sustain consumption in June.
- For full details, see page 6

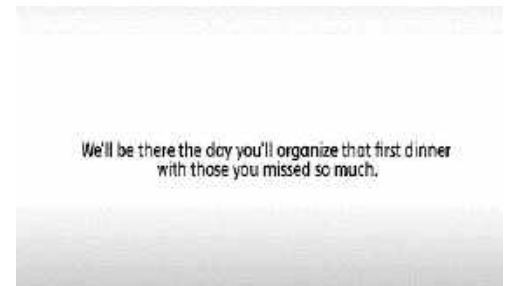
## SPOTLIGHT ON BRAND RESPONSE



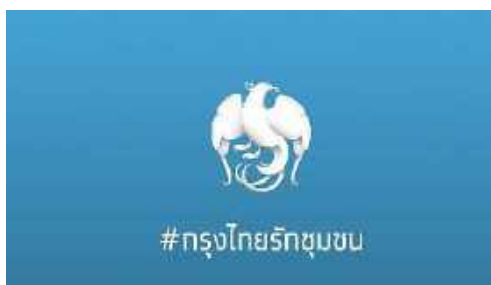
WhatsApp (tech) "Rays of Sunshine" video campaign, **Brazil**



Kiri (food) "#BetterWhenShared" campaign, **UAE**



Intermarche (retail) "I Want to be With You" campaign, **France**



Krungthai Bank "#StandByRoadsideStoreSide" campaign, **Thailand**



Carlton Draught (alcoholic beverages) "We Miss the Pub" campaign, **Australia**



eBay (retail) "Stronger as One" campaign, **UK**



## MARKETS

## KEY FINDINGS

### AUSTRALIA

- Linear TV consumption (all people, all day) peaked in the second week of lockdown (week of March 29), with viewing up +9% vs 2019. For several weeks viewing then stabilized at around +5% to +7% vs 2019, with news broadcasts seeing the most significant increases in time spent.
- As of late May, linear TV consumption is beginning to normalize: viewing was up just +3.5% vs 2019 in the week of May 24, week 10 of lockdown.
- National Rugby League (NRL) resumed televised, behind-closed-doors matches on May 28, and the Australian Football League (AFL) is scheduled to resume play on June 11.

### CHINA

- Linear TV consumption has essentially returned to pre-Covid levels: average time spent (all day, A4+) was 134 minutes/day the week of May 25, -6% lower than the same week in 2019 (146 minutes/day).
- The same trend is seen across age groups, except kids 4-17 still up vs 2019 (+23%).

### INDIA

- TV viewing (all day) was up +11% vs 2019 during the week of May 16, week 9 of lockdown, for individuals 2+. It peaked early April at +30% or more. Kids viewing is now up +13% vs 2019.
- Time spent peaked in week 2 of lockdown at 4 hours 48 minutes, around an hour longer than typical time spent in January 2020. The average number of channels watched increased from 16 to 23.

### JAPAN

- By week 12 since the work from home period began (week of February 24), TV consumption was still up +17% YoY (households, all day).
- 55% of Japanese report spending more time keeping up with the news, 37% said they are watching more TV, 28% watching more streaming services, and 26% spending more time with social media (UM).

### SOUTH KOREA

- As of May 25, week 14 since most businesses shifted to work from home, linear TV consumption has almost returned to 2019 levels, up just +4% YoY (all individuals, all day).
- Kids stuck at home continue to watch more linear TV: +19% YoY, down from +28% at the peak.
- Among adults 18-49, time spent with TV was flat YoY.

### THAILAND

- TV consumption has now almost returned to 2019 levels, with time spent up just +2% (A15+, prime) the week of May 25 (week 11 of lockdown).
- Social media usage has grown considerably since the start of the lockdown (March 16), with social platform LINE reporting usage up +236%.



COUNTRY	KEY FINDINGS
FRANCE	<ul style="list-style-type: none"> <li>As of week 11 since the lockdown began, French consumers are spending an average of 3 hours and 35 minutes watching linear TV, +10% vs 2019.</li> <li>Around 44.5 million viewers are tuning in, up +11% compared to the same week in 2019.</li> <li>Schools are partly re-opening since Mid-May.</li> </ul>
ITALY	<ul style="list-style-type: none"> <li>Linear TV time spent was up +4% vs 2019 on the week of May 23, week 12 of lockdown.</li> <li>TV time spent is gradually declining week over week as more people return to work and more shops, restaurants, and cultural institutions re-open.</li> <li>Only kids continue to spend significantly more time with linear TV, up +26% vs 2019, as schools remained closed.</li> <li>The Italian football championship, Serie A, is set to resume on 06/20.</li> </ul>
NETHERLANDS	<ul style="list-style-type: none"> <li>Dutch TV consumption patterns have pretty much returned to normal as the country re-opens. Time spent (all 6+, all day) was down -2% the week of May 25 when compared to the same week last year.</li> <li>Declines are even steeper for younger demos: TV viewing was down -16% YoY for A20-34.</li> </ul>
SPAIN	<ul style="list-style-type: none"> <li>Linear TV viewing was up +9% YoY the week of May 25, week 12 of lockdown.</li> <li>Time spent has gradually declined since the peak in week 2 (+40% vs 2019).</li> <li>Among kids 4-12, time spent was still up by double-digits, +23% vs the same week in 2019.</li> <li>Spanish football championship, La Liga, is set to resume on June 11.</li> </ul>
UNITED KINGDOM	<ul style="list-style-type: none"> <li>TV viewing was back to the 2019 level by the week of May 25: -1% YOY (all individuals, all day).</li> <li>Among younger demos the decline was steeper, with time spent down -14% YoY for A18-34 and -16% for kids (&lt;15).</li> <li>The combination of nice weather and increased mobility (due to the relaxation of lockdown restrictions) likely played a role in the decline seen the week of May 25, which was also half-term break for students.</li> <li>The #1 sports event (English Premiere League football) is set to resume on 6/17.</li> </ul>



# AMERICAS

## MARKET KEY FINDINGS

### BRAZIL

- Since the start of lockdown in late March, Brazilians have spent almost 8 hours a day with linear TV, though time spent has been declining gradually week over week.
- Average ratings began to decline in June, when some cities began to relax the quarantine. Ratings remain slightly above pre-Covid levels: 18.8% in June compared to 17.8% in January.

### CANADA

- Linear TV time spent has been down -7% to -8% over the last few weeks (second half of May), due in part to increased mobility and the relaxation of lockdown restrictions.
- This same period (May 11-31) was also a very strong time for linear TV in 2019, with popular events like the NBA Eastern Conference Championship (which the Toronto Raptors won), the NBA Championship, and the Game of Throne finale.

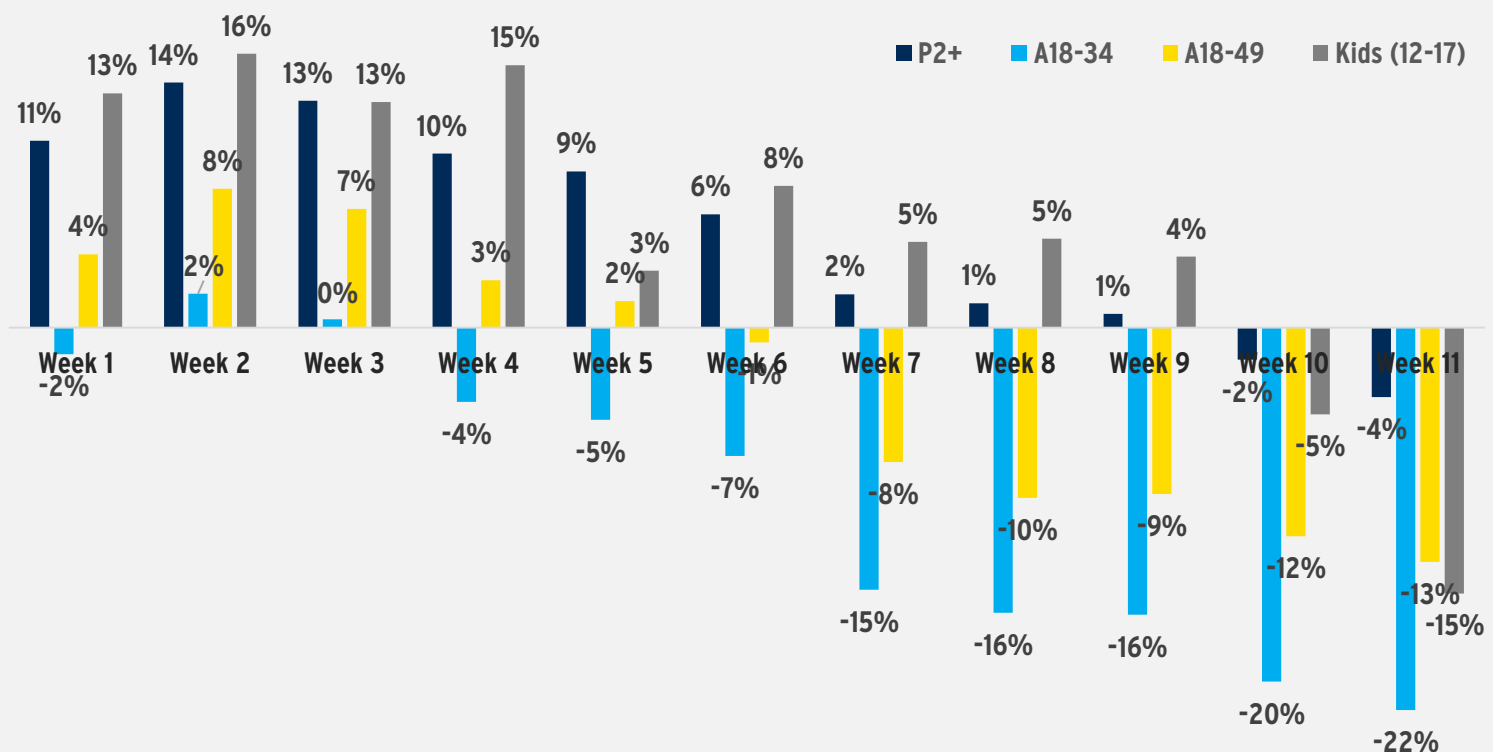
### MEXICO

- Time spent across all audience (prime) has been consistently up +10% vs 2019 throughout May.
- Adults 18-34 viewing was up +13% YOY in the week of May 25.

### UNITED STATES

- As of May 25 (week 11 since most cities implemented stay-at-home orders), linear TV viewing was down -4% vs 2019.
- Early morning, prime, and late night are experiencing similar levels of decline: -17%, -16%, and -13% resp.
- The return of some sports, including NASCAR and Bundesliga soccer, has benefitted cable sports, with viewing up more than +30% YoY for both FS1 and FS2.
- Amazon and Netflix continue to see week-over-week growth in streaming, though all of the big 4 video streaming services are still seeing increased usage compared to the same time last year.

## US 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) and daypart (total day), unless otherwise indicated.

Across the markets surveyed by MAGNA, linear TV viewing increased by an average +21% in the week 1, compared to the same week in 2019. The most significant increase in time spent was generally in week 2, with a global average of +27%.

The last week considered below is the week commencing Monday May 25.

	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	Week 13	Week 14
AUSTRALIA	March 22	7%	9%	6%	5%	6%	5%	7%	7%	7%	4%				
CANADA	March 17	11%	13%	11%	9%	1%	0%	1%	3%	-7%	-8%	-7%			
CHINA	January 23	-1%	48%	36%	42%	38%	45%	36%	31%	25%	24%	16%	17%	14%	2%
FRANCE	March 17	38%	42%	35%	30%	40%	24%	35%	24%	18%	16%	10%			
INDIA	March 24	28%	34%	30%	29%	22%	21%	17%	16%	11%					
ITALY	March 9	40%	50%	42%	35%	38%	36%	31%	17%	16%	10%	4%			
JAPAN	February 24	9%	9%	3%	12%	23%	19%	29%	26%	24%	26%	19%	17%		
MEXICO*	March 31	8%	11%	6%	8%	7%	10%	9%	10%	9%					
NETHERLANDS	March 16	20%	22%	17%	4%	19%	2%	9%	0%	2%	3%	-2%			
SOUTH KOREA	February 24	17%	18%	16%	12%	12%	9%	10%	16%	10%	10%	10%	7%	8%	4%
SPAIN	March 14	16%	40%	35%	32%	38%	31%	22%	27%	23%	20%	10%	9%		
THAILAND*	March 16	-4%	8%	8%	13%	17%	8%	14%	6%	8%	8%	2%			
UNITED KINGDOM	March 24	29%	21%	20%	26%	8%	20%	12%	18%	14%	-1%				
UNITED STATES	March 16	11%	14%	13%	10%	9%	6%	2%	1%	1%	-2%	-4%			

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.

\* - Mexico and Thailand data is based on Primetime viewing. These two markets have been excluded from the averages referenced above.

Please see the associated excel for the full data set.

## ABOUT MAGNA

MAGNA Intelligence is the leading source for insights and forecasts on the global advertising market place and media economy, since 1950.

Produced by a New York-based analyst team supported by an international research network.

Topics/metrics include net ad spend trends, ad sales, ad costs, media consumption and ad tech (programmatic). Data and forecasts for 70 countries and 15+ media categories.

Deliverables include reports, online datasets, analysts briefings.

Subscribed by 30+ major media/tech companies. Quoted by trade press, Bloomberg and Wall Street.

Access to reports, data and analysts is free for Mediabrands employees and available to third party companies for an annual fee.

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## LATEST REPORTS:



### Asian Americans: Future Ready

By: Brian Hughes  
May 2020



### Programmatic Report

By: Luke Stillman  
May 2020



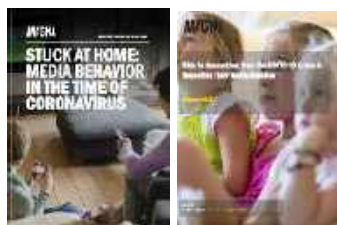
### 2Q20 Video Update

By: Stef Morales + Brian Hughes  
May 2020



### Influencer Report

By: Sophia Solana + Luke Stillman  
April 2020



### COVID Special Reports

By: MAGNA Intelligence  
April-June 2020

## UPCOMING REPORTS:



### Global Ad Forecast

By: Luke Stillman + Vincent Letang  
June 2020



### Media Access Quarterly

By: Stefanie Morales + Mike Leszega  
June 2020



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By: Mike Leszega + Vincent Letang  
June 2020

+ Continued COVID Updates from the MAGNA Intelligence Team