

PHENOMENAL SURGE IN WEEKLY TV VIEWING MINUTES (6%) AND WEEKLY TIME SPENT PER USER ON SMARTPHONES (6.2%) AMIDST THE COVID-19 PANDEMIC

BARC India & Nielsen Explain The Impact Of COVID -19 On TV And Digital Media Behaviour Across India

27th March 2020, Mumbai: On March 24, 2020, with the Prime Minister announcing a total lockdown in the country, people are slowly coming to terms with the new normal. It started with many states enforcing the lock-down, partially and fully, and many places of work enforcing work from home (WFH). Faced with the predicament of not being able to move out of their homes, people are creating new ways of spending time productively.

It is a well known fact that Television Viewing is an integral part of the Indian ethos. An average Indian is known to spend a considerable number of hours with 3 hours, 51 minutes every day on TV. So, it is obvious that forced confinement will lead to changes in TV consumption behaviour.

Today if there is one device besides the TV which is an integral part of the Indian consumers' lives, it is the smartphone. People today depend on their smartphones not just for communication and social interactions, but also for entertainment, banking and financial transactions, purchase of daily need goods like groceries, personal care to durables. It is but natural that this period of forced confinement would also engender some change in the way people interact with their smartphones.

BARC is the official currency on Television Measurement in India and Nielsen runs a 12000 strong smartphone panel passively capturing smartphone behaviour.

BARC and Nielsen have jointly put together a report to understand the changes in consumption behaviours of TV and Smartphones, respectively, given the extraordinary situation surrounding the COVID pandemic and its fallout.

Sharing her views on the current surge in smartphone usage, **Dolly Jha, Country Leader Nielsen Global Media, South Asia** said, "We are living through unprecedented times! Physical Social Distancing seems to have led to a phenomenal growth in Virtual Social Togetherness with an almost 20% increase in time spent per user on Chats, Social Media and News in the last one week. And we anticipate this to grow further"

Elaborating on the topic **Sunil Lulla, Chief Executive Officer, BARC India** said, "These are unfortunate and unprecedented times. Working closely with Nielsen, we bring for our customers and stake-holders, this very significant and important update, on change in content and advertising consumption behaviour, with a significant population at home. We will report soon enough, the impact of total lockdown. Our respective brave teams are working (WFH) round the clock to ensure the TV measurement currency, continues uninterrupted."

Some of the Key Highlights of what we have seen are as follows: -

Considerations:

	BARC	Nielsen Smartphone Panel
Coverage	All India (Urban + Rural)	All India (Urban 1 Lakh plus)
TG	ALL NCCS 2+ years	NCCS ABC 15-44 years Android Smartphone Users
Time Period	PRE COVID - 11th Jan 2020- 31st Jan 2020	PRE COVID - 13th Jan 2020 - 2nd Feb 2020
	COVID DISRUPTION - 14th March 2020 to 20th March 2020	COVID DISRUPTION - 16th March 2020 to 22nd March 2020
Week definition	Saturday to Friday	Monday to Sunday

1. Expectedly the COVID Disruption period has seen an increase in television viewership - 6% increase in TV Reach and 8% increase in TV viewing minutes /week. The time spent on TV / viewer has seen a jump by 2%.

The PMs address to the Nation on complete lockdown garnered unprecedented viewership of 197Mn watching it across the country.

2. When we look at smartphone behaviour the time spent on smartphones per user has gone up by 6.2%. The time spent/user/week on VOD apps has also seen an increase of 3%. If we look at the increase in the time spent/user/week over that of the previous week (to take away the impact of Cricket viewing in the PRE COVID period considered), we can see a jump of 5%.
3. Kids' schools being shut down and the stress of exams off their shoulders; this increase in Television viewing is driven by Kids (+20%). With corporate India getting into Work from Home mode, we are seeing NCCS A showing an 11% increase in viewership. Even on smartphone usage, the increase in driven NCCS A (+7.7%) and 35-44 year olds (+10.7%).
4. People staying at home means watching TV throughout the day and hence the growth in TV viewing is coming during Non-Prime Time slots (8am – 5 pm).
5. The need for continuous updates expectedly has led to a huge increase in news consumption on Television (57% increase in Impressions), while spending more time as a family together could be leading to the Movies genre and the Kids genre also showing significant increases.

6. This behaviour is seen in digital consumption as well with News and Gaming showing huge increases. News apps saw 8% more users per week with an increase of 17% in time spent/user/week. This growth was led by non-English News apps (+87%). Gaming apps saw an increase of 2% in users/week and with a 11% increase in time spent/user/week.
7. With a lot of uncertainty around what is happening, people have increased their time spent on Chatting (+23%) and Social Networking (+25%) apps. Almost all social networking apps - Facebook, Instagram and TikTok have seen significant increases not only in time spent /user/week but also in the sessions/ user/ week.
8. Expectedly Shopping Apps, Travel Apps and Food Apps have seen a huge drop in both users/ week and time spent/user/week.
9. It's not just TV viewership that has seen an increase – we can advertising FCT on TV has increased by 13%.

As the situation continues to evolve in the coming weeks, BARC and Nielsen will also continue to track shifts in TV and Smartphone audience behaviour. Future reports will be released on a weekly basis to keep the ecosystem abreast of how audiences in India are adjusting their TV and Smartphones consumption around the new normal.

BARC India & Nielsen Media Explain “The Crisis Consumption - Impact Of COVID -19 On TV And Smartphone Behaviour Across India – Edition 3”

9th April 2020, Mumbai: This is the third part of the report on “Crisis Consumption on TV and Smartphones” released jointly by BARC and Nielsen Media.

BARC is the official currency on Television Measurement in India and Nielsen Media runs a 12000 strong smartphone panel in India passively capturing smartphone behaviour.

Some of the Key Highlights of TV and Smartphone consumption during the third week of Lockdown are as follows: -

Considerations:

	BARC	Nielsen Smartphone Panel
Coverage	All India (Urban + Rural)	All India (Urban 1 Lakh plus)
TG	ALL NCCS 2+ years	1. NCCS ABC 15-44 years

		2. Android Smartphone Users
Time Period	PRE COVID - 11th Jan 2020- 31st Jan 2020	PRE COVID - 13th Jan 2020 - 2nd Feb 2020
	COVID DISRUPTION Week 2 - 21 st March 2020 to 27 th March 2020 Week 3 – 28 th March 2020 to 3 rd April 2020	COVID DISRUPTION Week 2 - 21 st March 2020 to 27 th March 2020 Week 3 - 28 th March 2020 to 3 rd April 2020

1. India divided on various emotions of feeling Happy, Anxious, Frustrated, Scared and Peaceful – missing out on me-time indulgences and office time
2. The Prime Minister’s request on **#9PM9MINS** garnered the **lowest ever Total TV viewership for those 9 mins since 2015**
3. India follows the global trend in showing continued increase in TV (43%) and Smartphone consumption(13%) this week vis-à-vis the Pre COVID period
4. The growth in TV consumption this week driven by the **Movies Genre(77% growth)**. Significant increase in Time spent on watching **Movies (52% growth)** on the Smartphone
5. Return of the Classics makes **DD National** the most watched channel this week across India.
6. While the return of the **Old Classics** improves viewership on **DD National** and **Pay GEC Channels**, Smartphone viewers increase consumptions on **Original Series with 32%** growth over the Pre COVID period
7. **Non-Primetime** continues **to be the growth driver** for TV (81% over the Pre COVID period) with early morning and late night slots also showing a growth
8. **Social Connectivity stabilizing** as people get used to **the new normal** while the surge in time spent on Digital News consumption stays
9. **Gaming** continues to show growth (44% over the Pre COVID period) - categories like Virtual Education and Virtual Drives increased consumption

10. **Free Commercial Time (FCT)** on TV advertising grows by 9% on the back of social advertising
11. **On Digital Advertising**, no drop in the count of creatives for 11 out of 19 categories – drop seen in Retail, Travel and Auto

BARC India & Nielsen Media Explain “The Crisis Consumption - Impact Of COVID -19 On TV And Smartphone Behaviour Across India – Edition 4

16th April 2020, Mumbai: This is the fourth part of the report on “Crisis Consumption on TV and Smartphones” released jointly by BARC India and Nielsen Media.

BARC India is the official currency on Television Measurement in India and Nielsen Media runs a 12000 strong smartphone panel in India passively capturing smartphone behaviour.

Some of the Key Highlights of TV and Smartphone consumption during the fourth week of Lockdown are as follows: -

Considerations:

	BARC	Nielsen Smartphone Panel
Coverage	All India (Urban + Rural)	All India (Urban 1 Lakh plus)
TG	ALL NCCS 2+ years	1. NCCS ABC 15-44 years 2. Android Smartphone Users
Time Period	PRE COVID - 11th Jan 2020- 31st Jan 2020	PRE COVID - 13th Jan 2020 - 2nd Feb 2020
	COVID DISRUPTION Week 3 – 28 th March 2020 to 3 rd April 2020 Week 4 – 4 th March 2020 to 10 th April 2020	

1. COVID-19 is taking the most mind space with **~40% of top 100 Google searches last week being in COVID** and **1 in 8 consumers** accessing **the AAROGYA SETU app**
2. **PM's address** on Lockdown extension garnered **4 Bn viewing minutes** - the highest of the 4 addresses on COVID-19
3. **TV consumptions** grows **38% over pre-COVID period** now at **1.2 Trillion minutes**
4. **Hindi GEC** attains **all time High Viewership of 4 Bn since 2015** in **HSM Urban** this week
5. **Movies** show an **increase across HSM**, while **GEC** maintains share and continues to **lead in South markets**
6. **Top 5 content for digital audiences** is a mix of **Fiction, History, Mythology and Supernatural**
7. **Premium audiences** on **Digital** clock **remarkable growth** in time spent on **News, Chat, Fitness and Streaming**
8. The News franchise on Digital is close to 50% now (+25% over PreCovid period) - **Video News** consumption shows a **huge growth of 75%** over the PreCovid period
9. COVID Lockdown gives a big fillip to **Education Apps** , Surge by **30%+**
10. Overall FCT on TV drops by 26% over the PreCovid period- however a **142% increase** seen in FCT for **Social Ads** - Digital ads also showing a slowdown in last week

BARC India & Nielsen Media Explain "The Crisis Consumption - Impact Of COVID -19 On TV And Smartphone Behaviour Across India – Edition 5

23th April 2020, Mumbai: This is the fifth edition of the report on 'Crisis Consumption on TV and Smartphones' jointly released by BARC India and Nielsen Media.

BARC India is the official currency on Television Measurement in India and Nielsen Media runs a 12000 strong smartphone panel in India passively capturing smartphone behaviour.

Some of the Key Highlights of TV and Smartphone consumption during the fifth week of Lockdown are as follows: -

Considerations:

	BARC	Nielsen Smartphone Panel
Coverage	All India (Urban + Rural)	All India (Urban 1 Lakh plus)
TG	ALL NCCS 2+ years	3. NCCS ABC 15-44 years 4. Android Smartphone Users
Time Period	PRE COVID - 11th Jan 2020- 31st Jan 2020	PRE COVID - 13th Jan 2020 - 2nd Feb 2020
	COVID DISRUPTION Week 4 – 4 th March 2020 to 10 th April 2020 Week 5 – 11 th April 2020 to 17 th April 2020	

1. "CORONA Virus" continues to be most searched among Top 100 Google searches
2. 1 in 5 smartphone consumers use the Aarogya Setu app now - an 80% + increase v/s the launch week
3. TV consumption continues to show a growth of 40% over pre-COVID period now at 1.24 Trillion minutes - the increase led by both Reach and Average Time Spent
4. The new normal of 3 hrs, 40 minutes+ a day on Smartphone continues - 10% increase over pre Covid times
5. TV Viewership Growth led by News and Movies - the Movies growth coming more from the PAY platform
6. News franchise on Smartphone continued to be nearly 50% of all smartphone audience, Views grow by 40%
7. Hindi GEC in HSM at an all-time high with 8.5 BN impressions with Mythological shows leading the way. HSM Urban is all time high for 3rd week in Row.

8. Strong double- digit growth seen across various segments of OTTs (movies, originals, etc) while Audio streaming apps show a decline possibly on account of commuting going down.
9. FCT on TV recovers a bit after a huge fall last week - most advertisers using the COVID19 theme; Essentials category sees a growth across genres; while on Digital Video Advertising spends drop across most categories

BARC India & Nielsen Media Explain “Impact Of COVID -19 On TV Viewership And Smartphone Behaviour Across India – Edition 6

30th April 2020, Mumbai: This is the sixth edition of the report on ‘Crisis Consumption on TV and Smartphones’ jointly released by BARC India and Nielsen Media.

BARC India is the official currency on Television Measurement in India and Nielsen Media runs a 12000 strong smartphone panel in India passively capturing smartphone behaviour.

Some of the Key Highlights of TV and Smartphone consumption during the fifth week of Lockdown are as follows: -

Considerations:

	BARC India	Nielsen Smartphone Panel
Coverage	All India (Urban + Rural)	All India (Urban 1 Lakh plus)
TG	ALL NCCS 2+ years	5. NCCS ABC 15-44 years 6. Android Smartphone Users
Time Period	PRE COVID - 11th Jan 2020- 31st Jan 2020	PRE COVID - 13th Jan 2020 - 2nd Feb 2020
	COVID DISRUPTION Week 5 – 11th April 2020 to 17th April 2020	

Week 6 – 18th April 2020 to 24th April 2020
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1. “CORONA Virus” searches now waning - down to 32% among Top 100 Google searches
2. TV consumption seems to be stabilising now - at 1.16 Trillion minutes this week, a drop from last week but growth of 31% over pre-COVID period - Growth in Mega Cities is higher than growth in Rural
3. The new normal of around 3 hrs, 40 minutes spent per day on Smartphone seems to have set in
4. News and Movies on TV have started to taper off as compared to last few weeks but continue to operate at 2X levels over the pre-COVID period
5. News franchise on Smartphone continues to evoke massive interest among Audiences
6. Hindi GEC in Urban HSM grew by 31% over the pre-COVID period whereas strong gains for Movies and Original Series on OTT platforms continue on the Smartphone
7. Drop observed in viewership as Ramayana transitioned to Uttar Ramayan
8. Heavy viewers of last year’s IPL watched just 2% of sports in the last 4 weeks (down from 20% last year) - viewership shifted to GEC, Movies, News
9. Lack of Sports pushes the Sports Audiences to more Virtual Connectedness & Gaming Apps
10. FCT on TV stable this week whereas Digital Video Ad spends (select platforms) at the lowest among last three weeks across most categories

BARC India & Nielsen Media Explain “Impact Of COVID -19 On TV Viewership And Smartphone Behaviour Across India – Edition 7

7th May 2020, Mumbai: This is the seventh edition of the report on ‘Crisis Consumption on TV and Smartphones’ jointly released by BARC India and Nielsen Media.

BARC India is the official currency on Television Measurement in India and Nielsen Media runs a 12000 strong smartphone panel in India passively capturing smartphone behaviour.

Some of the Key Highlights of TV and Smartphone consumption during the seventh week of Lockdown are as follows: -

Considerations:

	BARC India	Nielsen Smartphone Panel
Coverage	All India (Urban + Rural)	All India (Urban 1 Lakh plus)
TG	ALL NCCS 2+ years	7. NCCS ABC 15-44 years 8. Android Smartphone Users
Time Period	PRE COVID - 11th Jan 2020- 31st Jan 2020	PRE COVID - 13th Jan 2020 - 2nd Feb 2020
	COVID DISRUPTION Week 6 – 18 th April 2020 to 24 th April 2020 Week 7 – 25 th April 2020 to 1 st May 2020	

1. Total TV viewership grew over the Pre-COVID period by 29% & the week recorded 1.14 Trillion Viewing Minutes
2. News & Movies continued to drive the growth for TV

3. Mythological shows witnessed a huge increase across GECs – the re-runs of classics like Mahabharata and Ramayana on other channels continue to attract significant viewers and helped the channels increase the slot viewership.
4. Retro music on TV seems to be playing more, with the 41+yr olds increasing time spent on music
5. 10% increase in the count of brands advertising on Television, with 395 new brands coming into play
6. Internet Penetration in India is now at 40%, with 504 Mn Active Internet Users (5+yrs)
7. Time spent on Smartphone increased by 16% versus Pre Covid, the highest usage since the COVID-19 lockdown - resulted in 18.7 Bn minutes on the smartphone/day in the recent week.
8. Gaming, Education Apps, Social Networking continue their trailblazing increase!