

KANTAR

TV & Video consumption in the new normal

What audiences say and do –
and how we respond

Wednesday 22nd April



TV & Video consumption in the new normal



What audiences say



What audiences do



How we respond

KANTAR

What audiences say

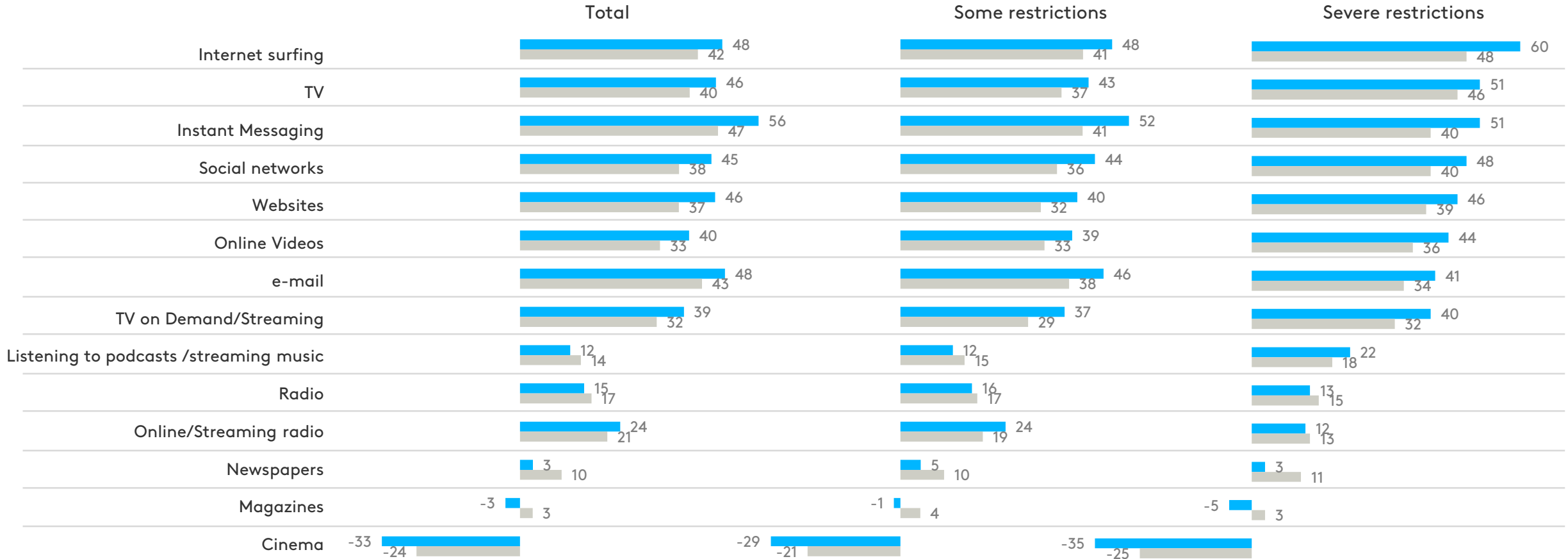
Jane Ostler

Global Head of Media, Insights Division
Kantar

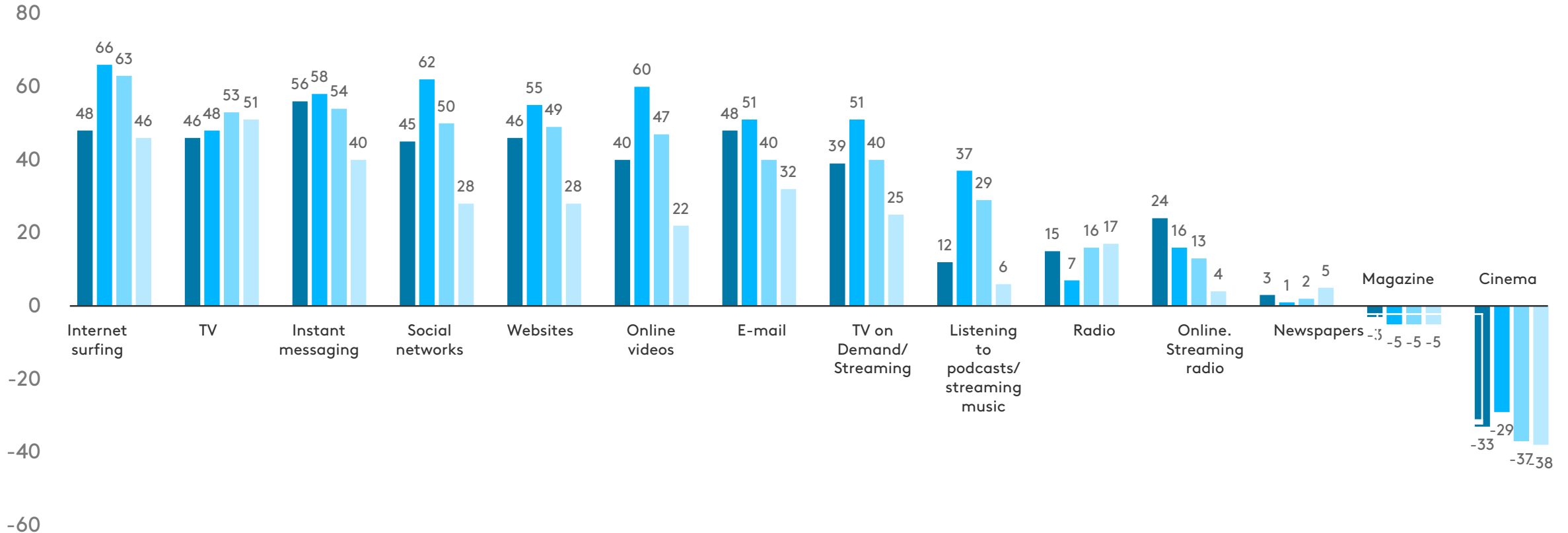
Wednesday 22nd April



Overall media consumption is increasing significantly in lockdown, with online media channels and TV providing new opportunities to reach audiences



Online viewing changes are more pronounced among the younger audiences across most media channels as markets enter severe restrictions



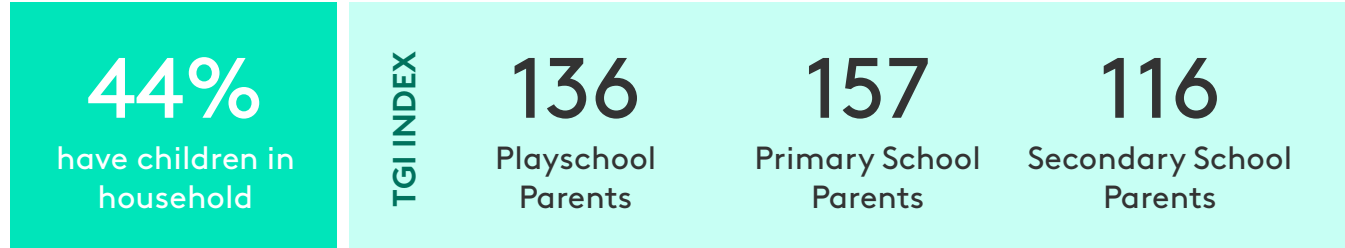
Improving understanding of heavier online viewers during the crisis

Gaining richer profiling insights from TGI



Target Group

Def. Agree: **In the past few weeks, I'm watching more online video and TV on demand** (e.g. YouTube, iPlayer, Netflix)
= 20% of All Adults 18+



Agree: **"I find it difficult to balance work, children and social life"**
Index: 158

Def Agree: **"Advertising helps me choose what I buy"**
Index: 245

Def. Agree **"I prefer to buy products from companies who sponsor TV programmes"**
Index: 267

Def Agree: **"When I see a new brand I often buy it to see what it's like"**
Index: 230

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What audiences do

Andy Brown

Global CEO & Chairman, Media Division
Kantar

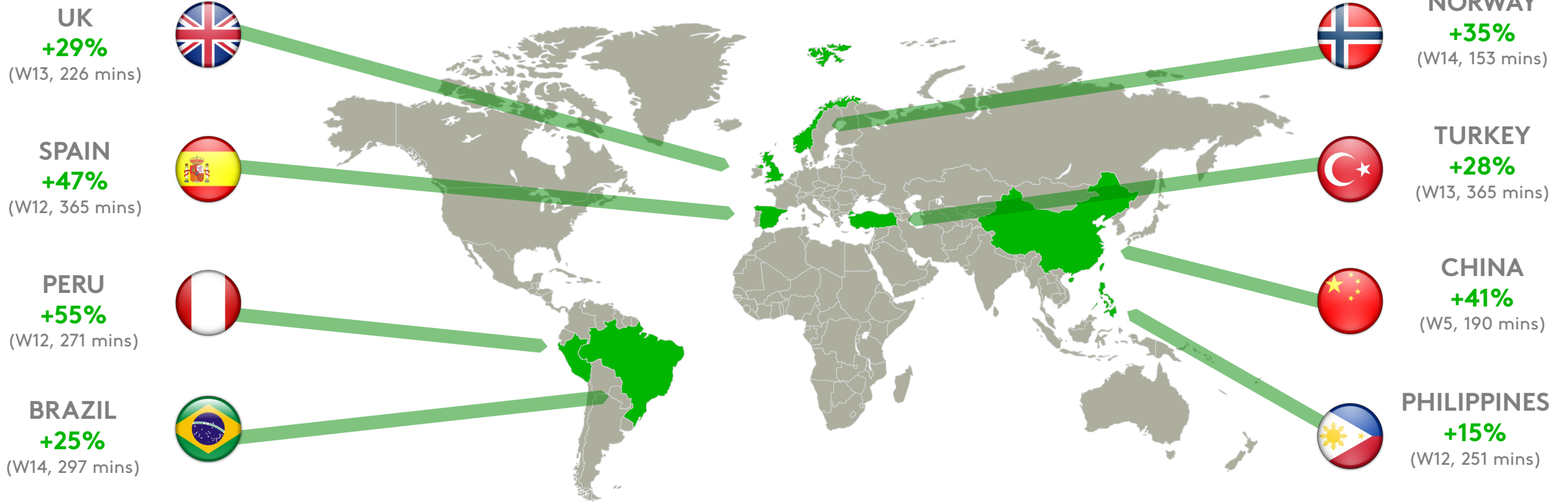
Wednesday 22nd April



Snapshot: TV viewing uplifts across the world

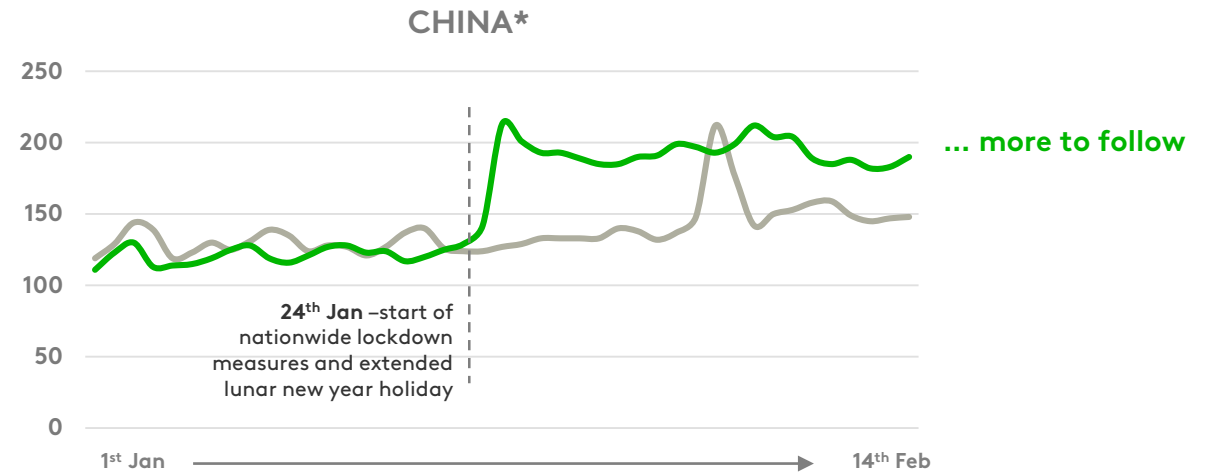
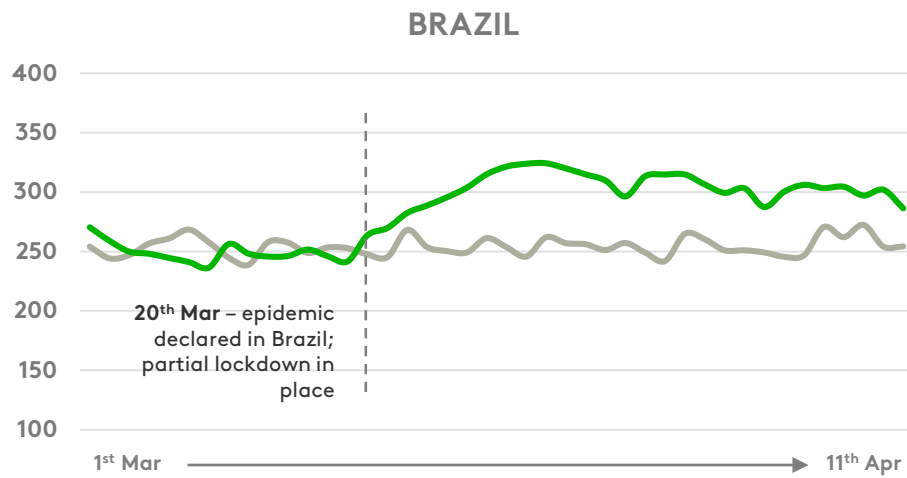
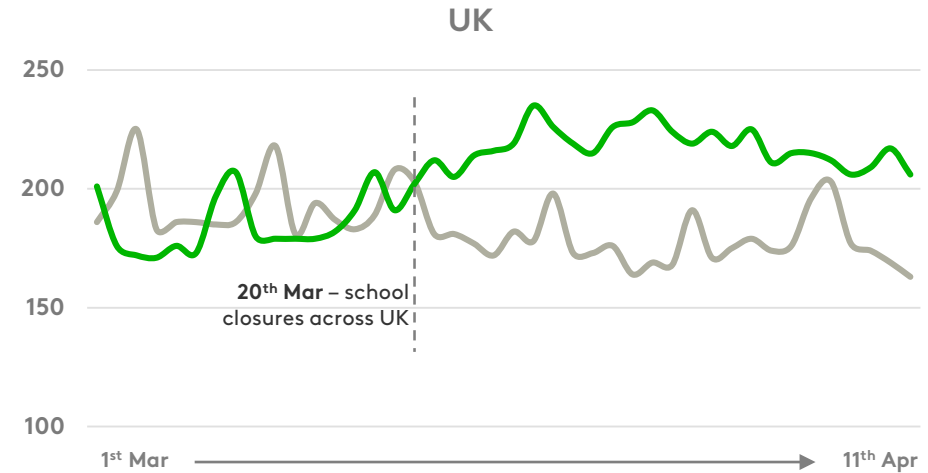
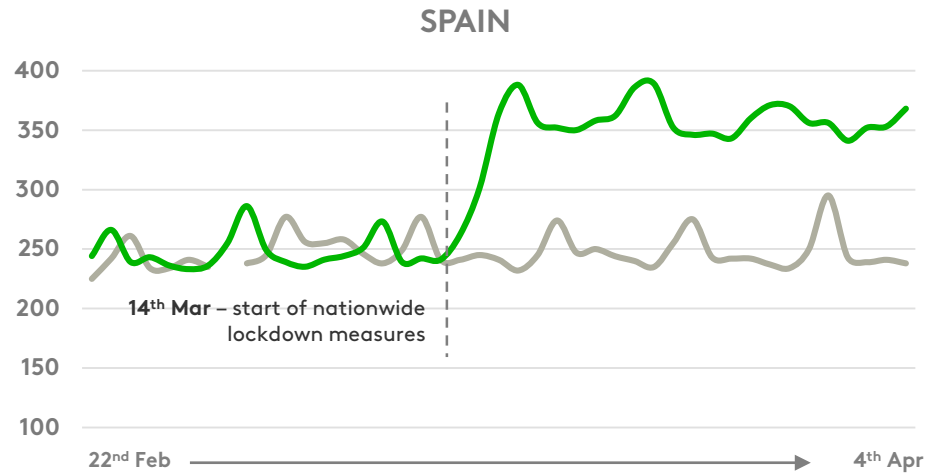
Our measurement fuels \$86 billion of advertising spend decisions worldwide.

KEY
COUNTRY
% Increase vs. 2019
(WEEK #, # mins in 2020)



TV viewing levels soar as stay-at-home measures take hold

— 2020
— 2019



 **Harnessing the strength
of news and information**

COVID-19: A moment in UK television history



28 million

(overnights)

28.2 million

(consolidated)

The Prime Minister's Statement on COVID-19
23 March 2020, 20.30-20.35
BBC1, ITV, CH 4, Ch 5, Sky News, BBC News

Biggest UK live TV events, 1981-2020



Funeral of Diana, Princess of Wales
6 September 1997

32.1 million



Prince Charles & Lady Diana Wedding
29 July 1981

28.4 million



COVID-19 Prime Ministers Statement
23 March 2020

28.2 million



Summer Olympics Opening ceremony
27 July 2012

24.5 million



Summer Olympics Closing ceremony
12 August 2012

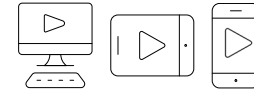
24.2 million

COVID-19: A moment in UK television history



COVID-19
5 April 2020

24.3 million



+256k additional audience on PCs, tablets and smartphones

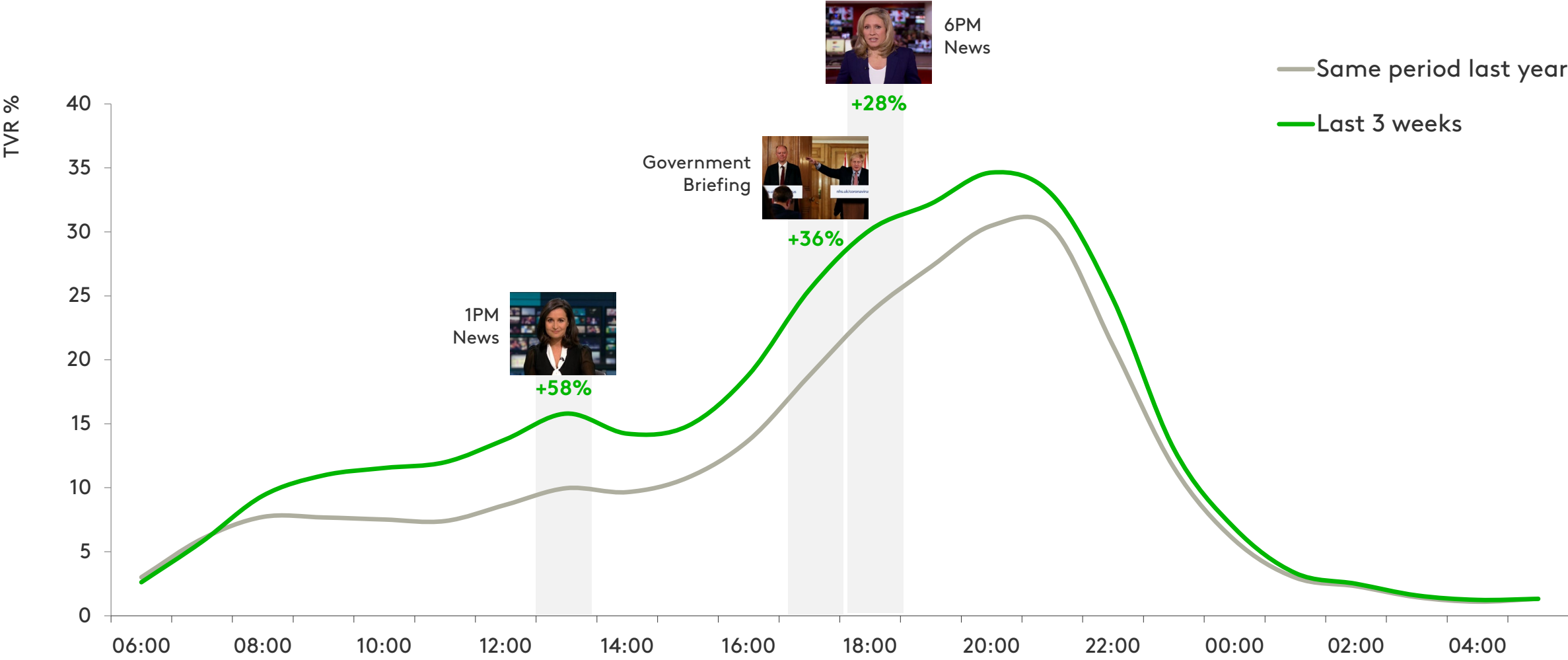


Death of the Queen Mother
8 April 2002 10.8 million



Diamond Jubilee
5 June 2012 9.8 million

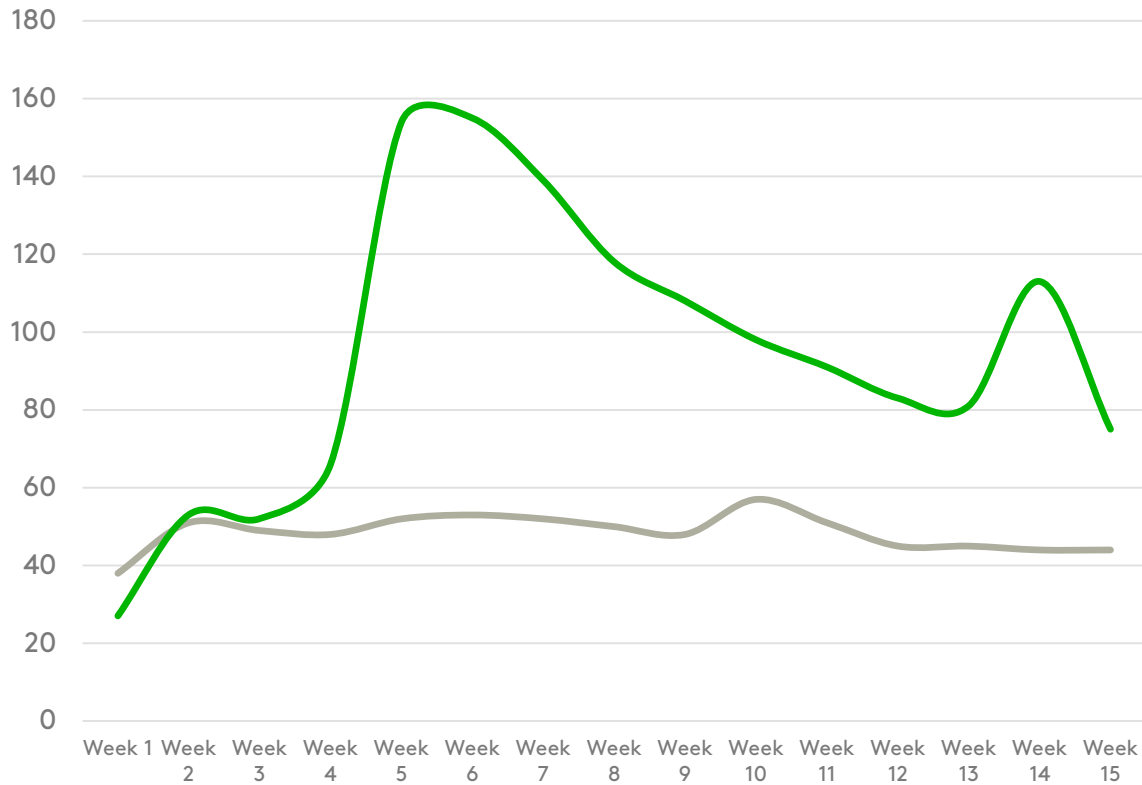
Audiences thirst for TV news rises as part of COVID-19 routines



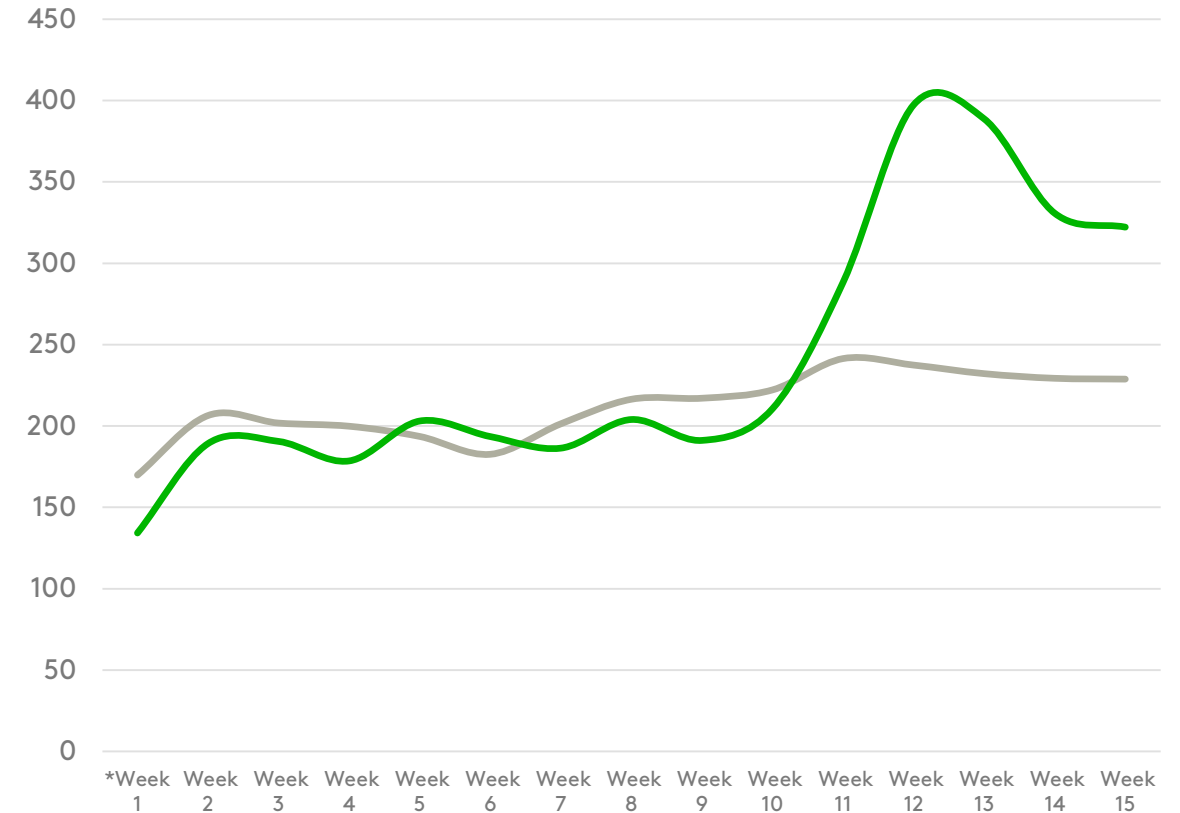
TV viewing rises as COVID-19 breaks audience records for news channels



In China*, news viewing has almost doubled so far in 2020 (1,413 mins vs. 727 mins in 2019)

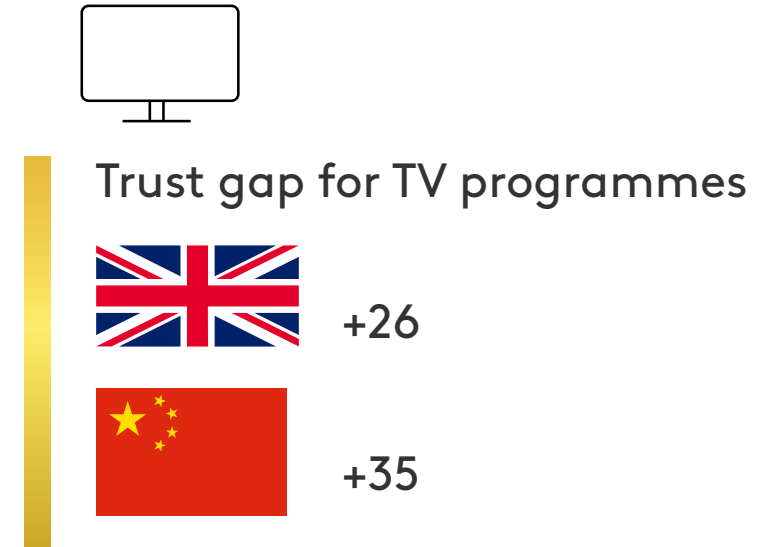
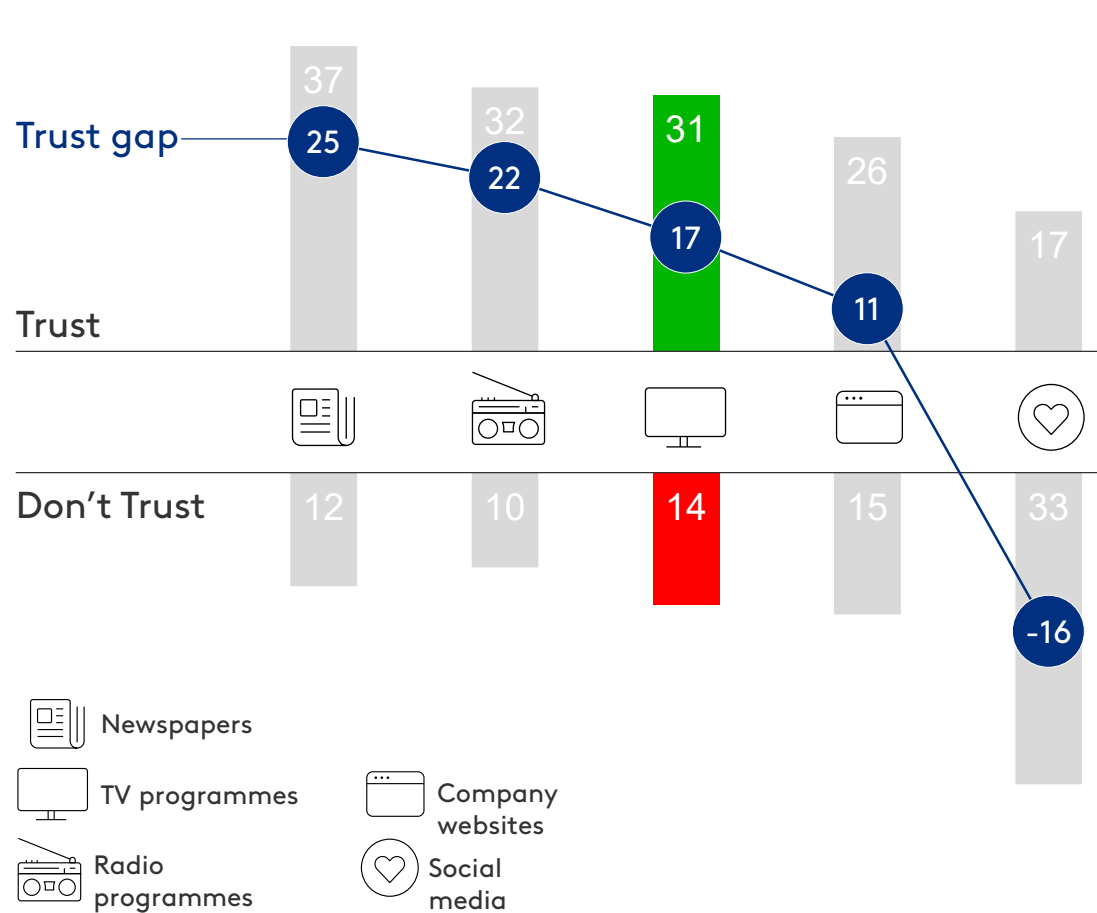


In Argentina**, news viewing has increased 55% since w/c 12th March (1,439 mins vs. 927 mins in 2019)



TV programmes are amongst the most trusted channels for news and information

DIMENSION 2020 – The trust gap





**Who's watching what,
where and when?**

Households are watching TV together more

Rise in co-viewing (% of total TV audience)



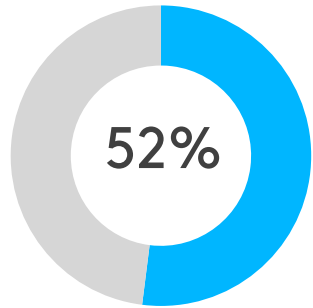
Spain



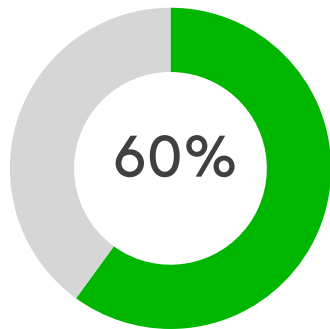
Russia



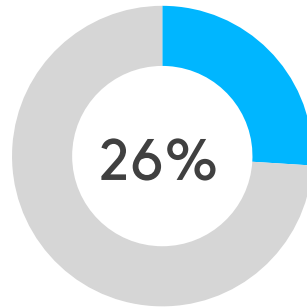
Turkey



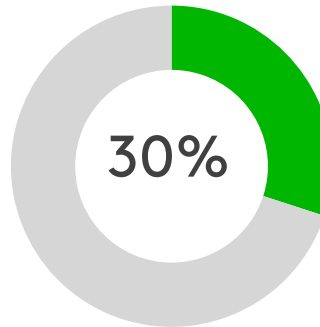
Pre- lockdown
(10 Feb – 8 March)



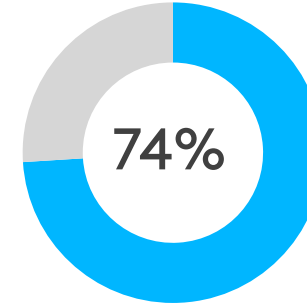
Lockdown
(16 March – 14 April)



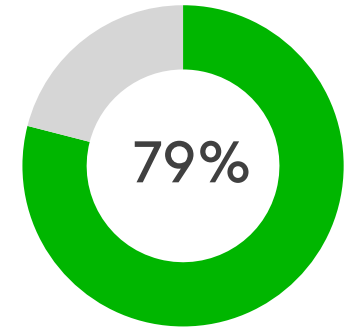
Pre lockdown
(2–13 March)



Lockdown
(30 March–10 April)



Pre lockdown
(24 Feb – 8 March)

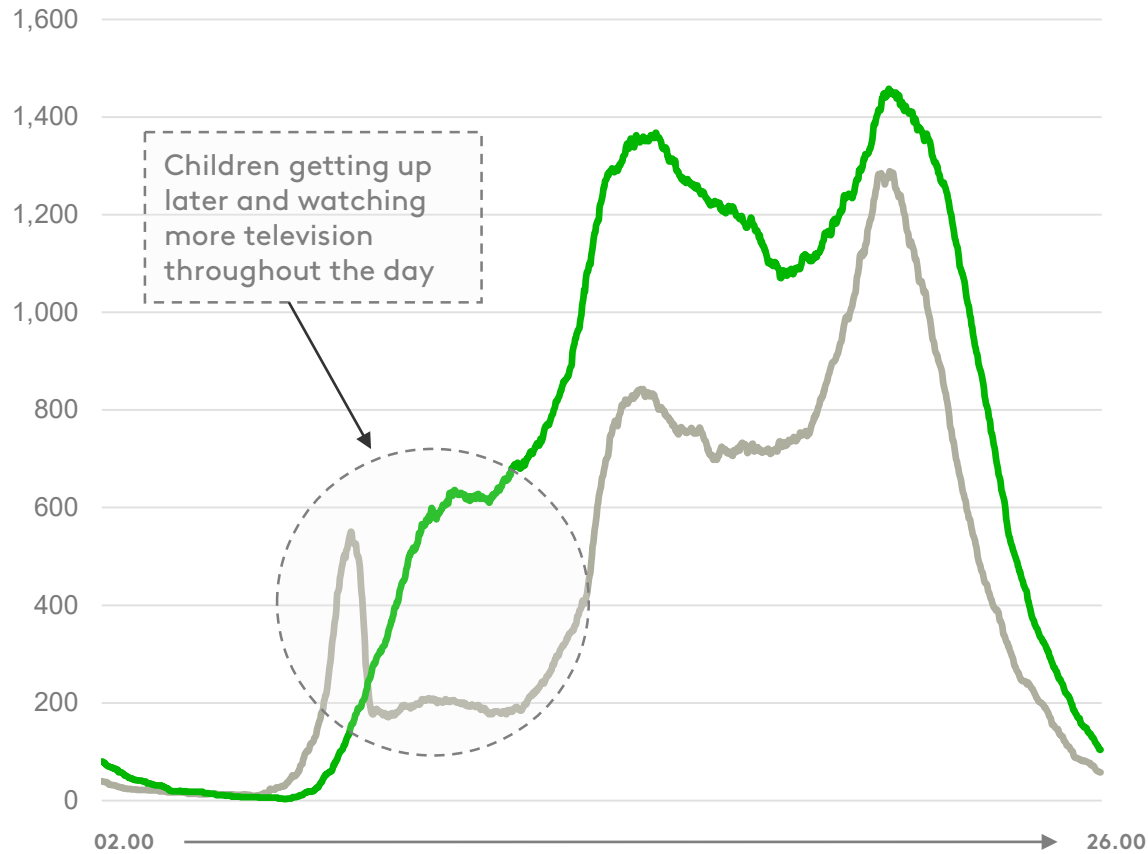


Lockdown
(16 March – 12 April)

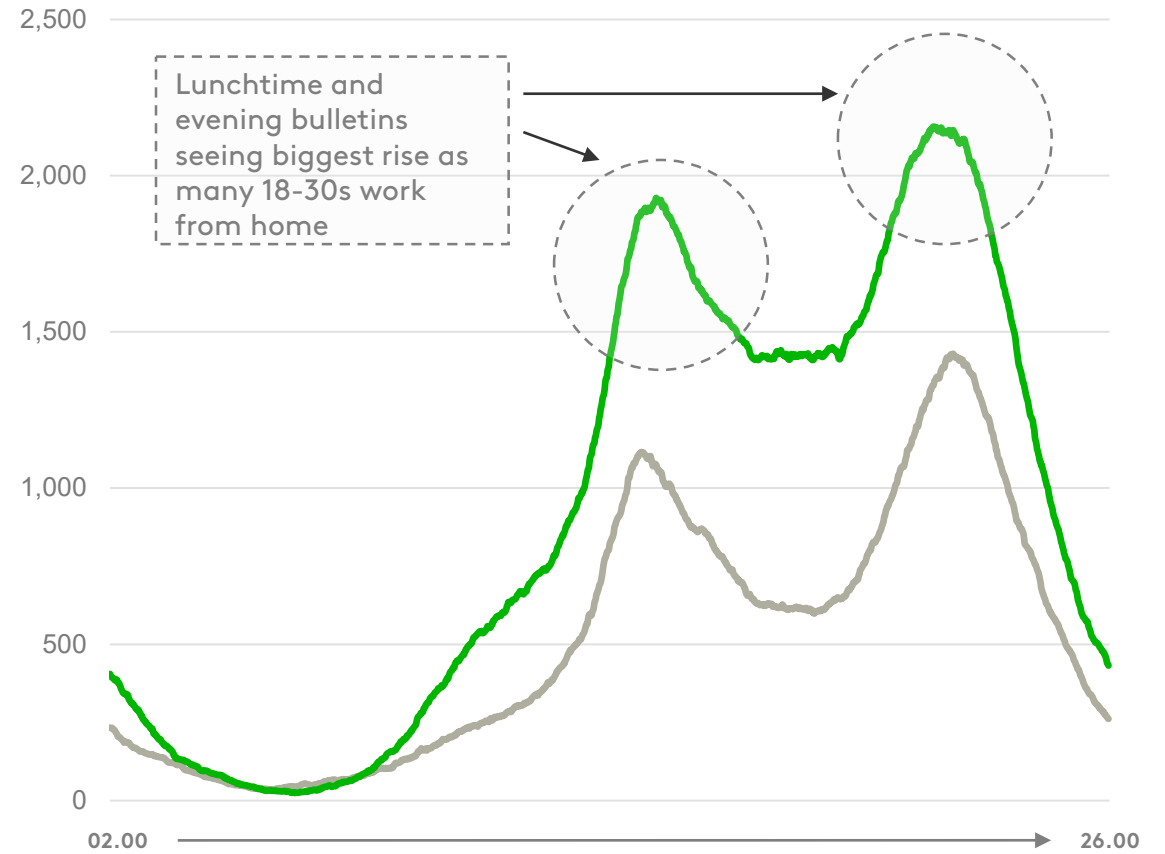
TV viewing is changing as Spanish children & young adults adjust to their new stay-at-home and remote working environment.



4-12 years old



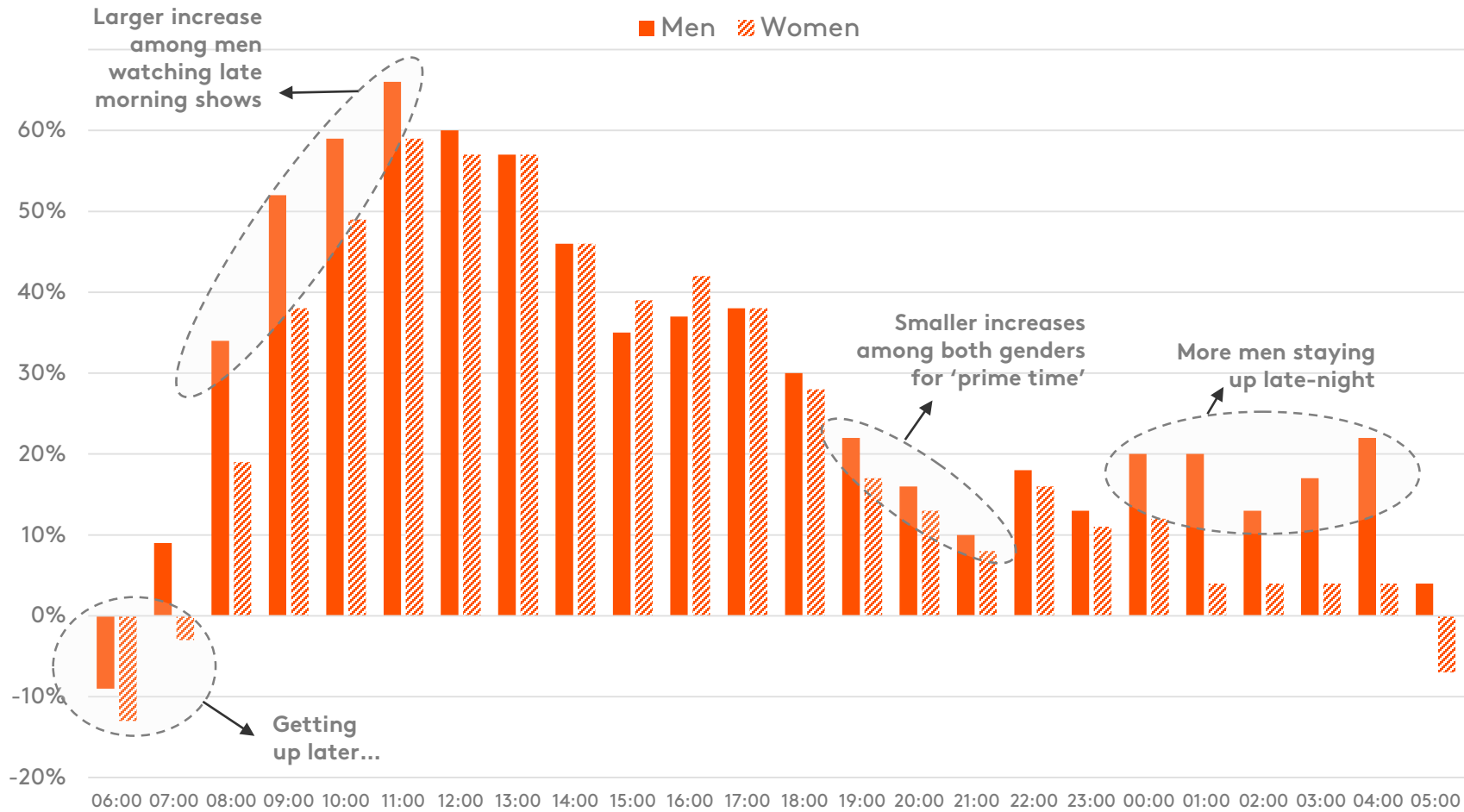
18-30 years old



Changes in viewing behaviour across the day by men & women

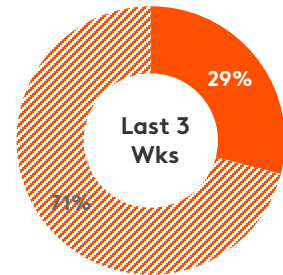
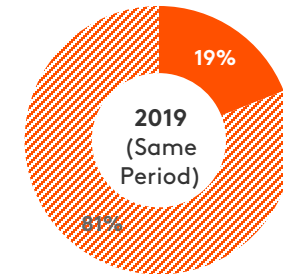


% Change in TVR (Last 3 Weeks vs. Same Period Last Year)



+177%

Male audience of ITV's "This Morning" has increased by huge factor – now representing 29% of all viewers, up from 19%

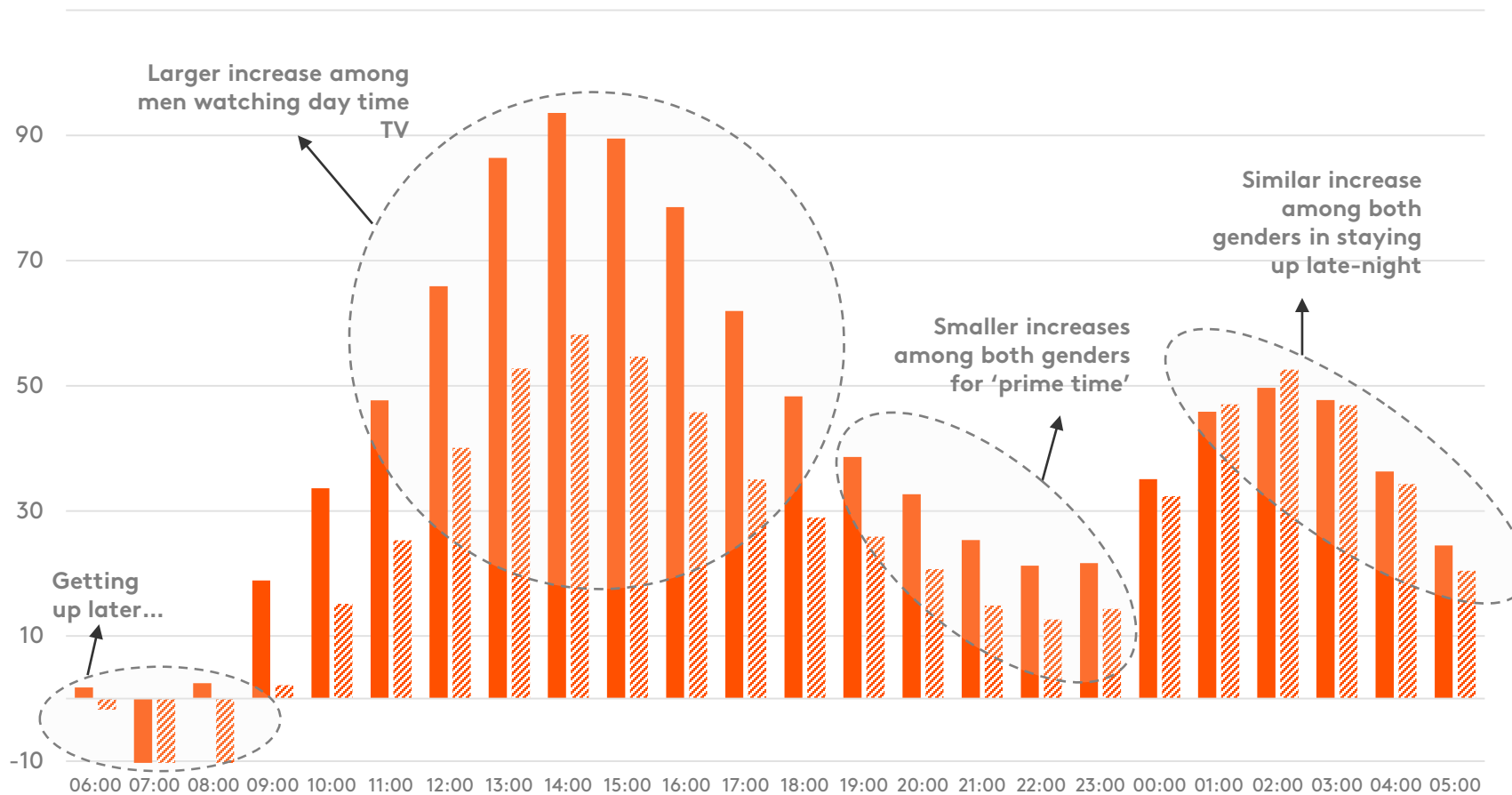


Changes in viewing behaviour across the day by men & women



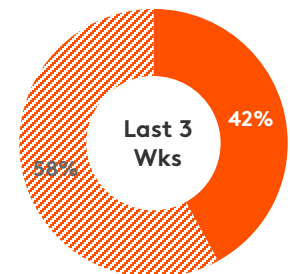
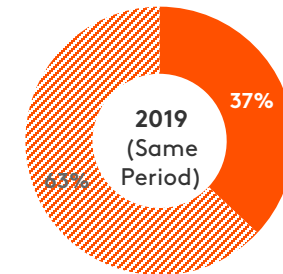
% Change in TVR (Last 3 Weeks vs. Same Period Last Year)

■ Male 18+ ▨ Female 18+

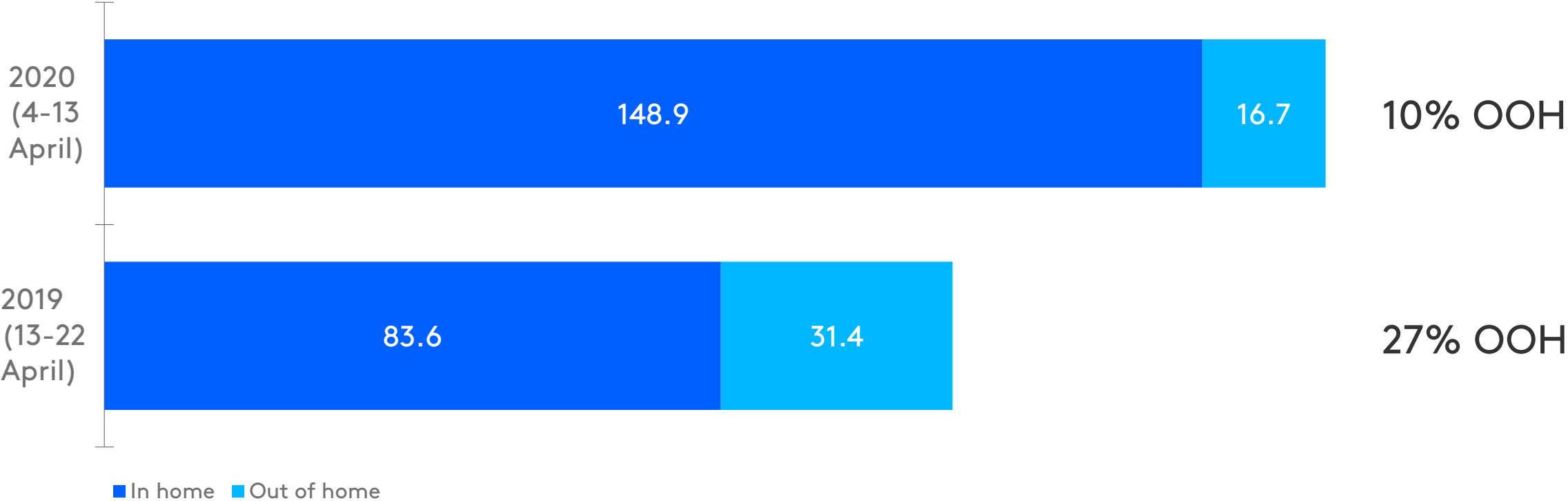
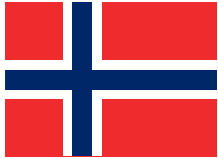


+180%

Male audience of ATV's afternoon talk show *ESRA EROL'DA* has increased by huge factor – now representing 42% of all viewers, up from 37%

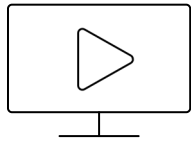
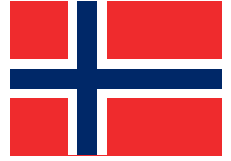


TV & Video viewing out of home during the holiday period falls as the impact of stay at home measures take hold



Norwegian audiences are using all screens to consume more content

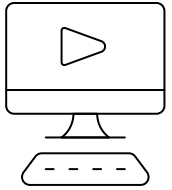
Average daily time spent (TV & Video)



TV



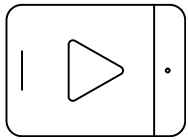
+30%



PC / Mac



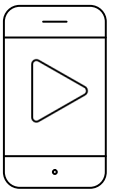
+83%



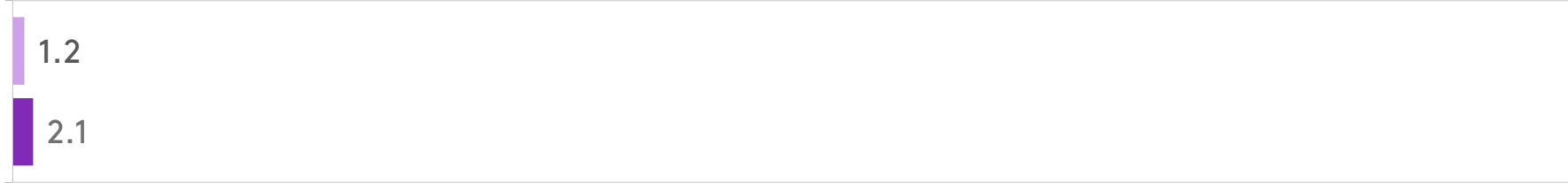
Tablet



+77%



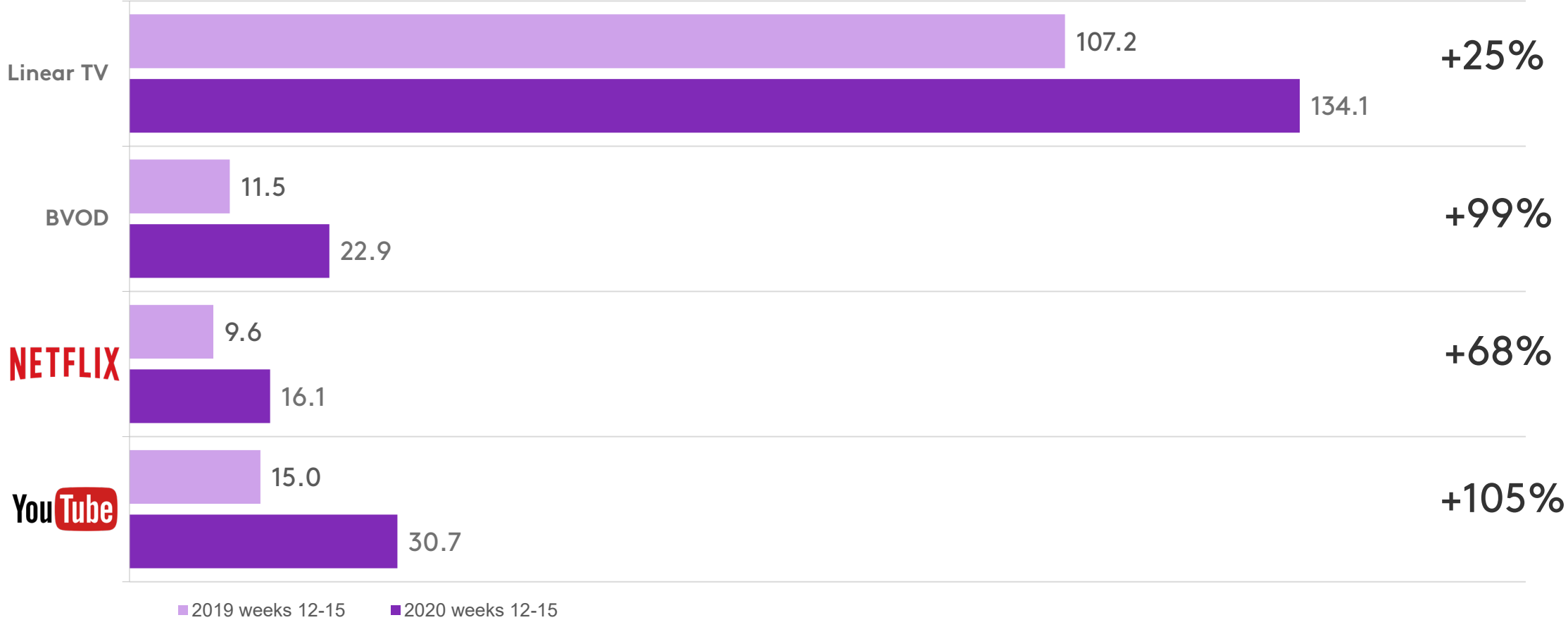
Smartphone



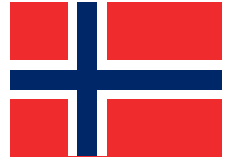
+75%

■ 2019 ■ 2020

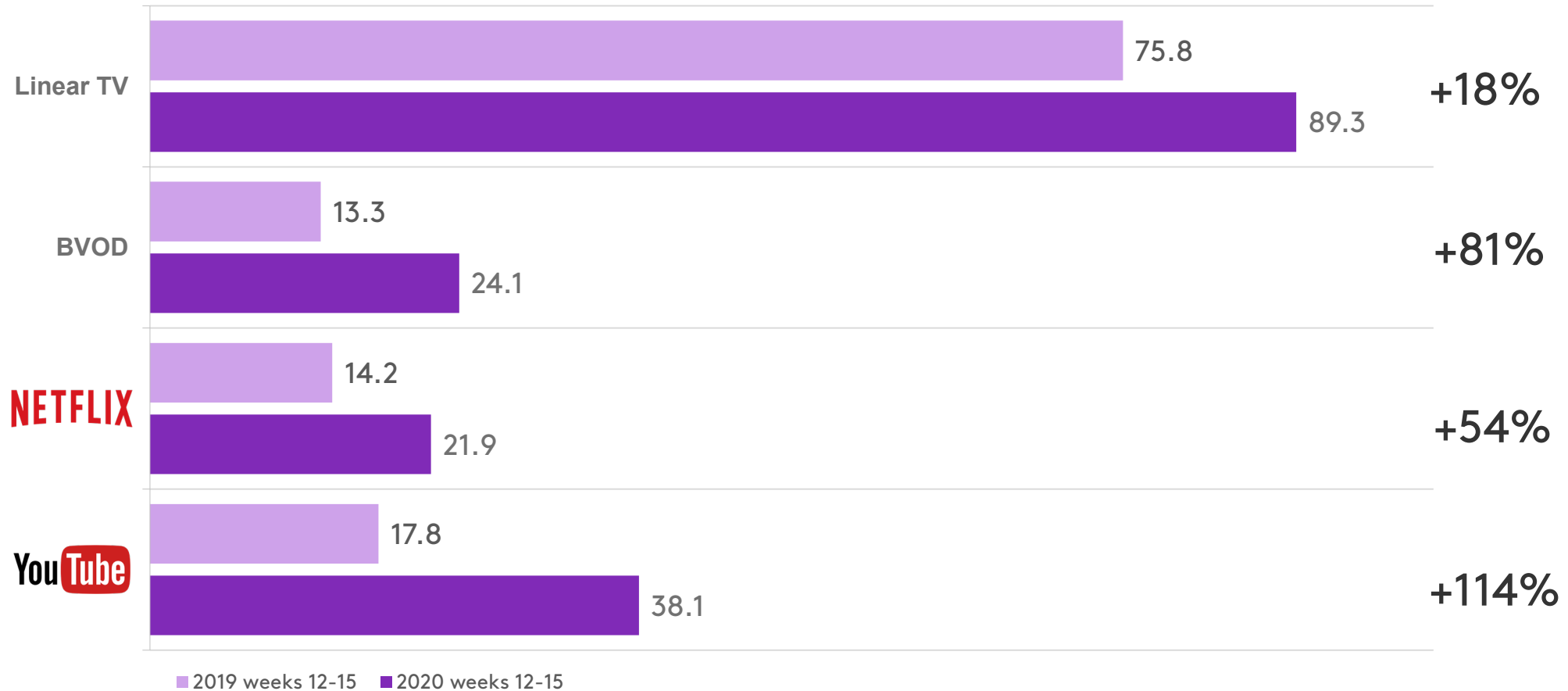
All content platforms enjoy an uplift as Norwegians embrace the 'new normal'



Norwegian households with a Netflix subscription increase their viewing on YouTube & broadcaster players more than Netflix



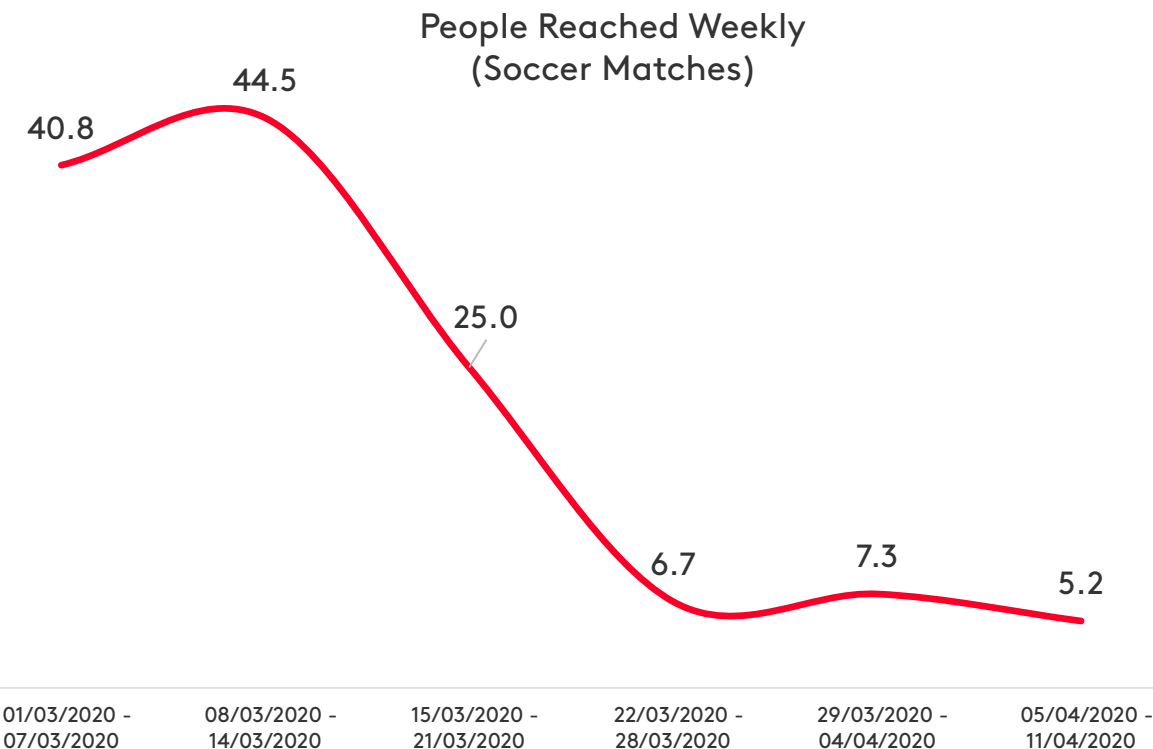
Average daily viewing minutes for households with a Netflix subscription



Repeats are helping Brazilians to get their football fix



Suspension of Brazilian soccer championship has seen an **87% decrease** in soccer viewing...



... but a repeat broadcast of Brazil's victorious FIFA World Cup win from 2002, reached

40% of households

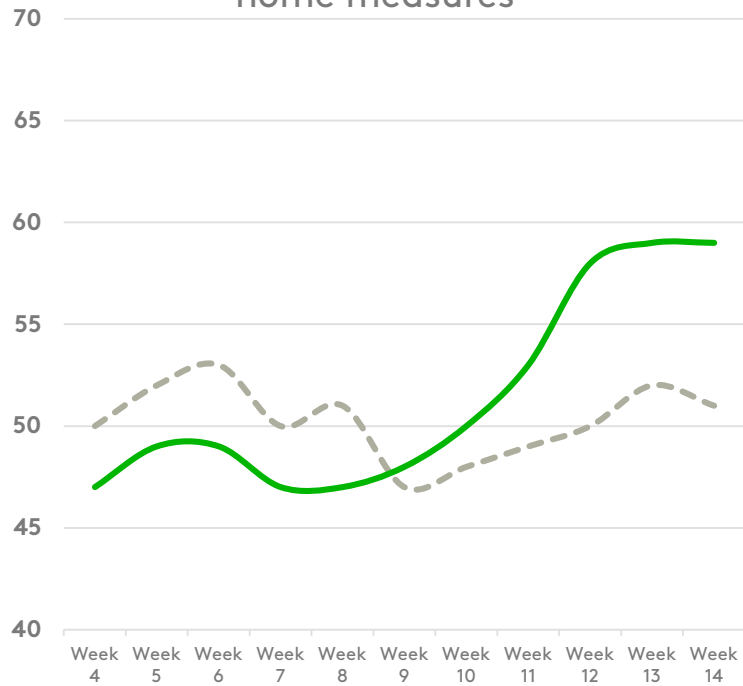
in the country, equivalent viewing levels of a live local soccer game.



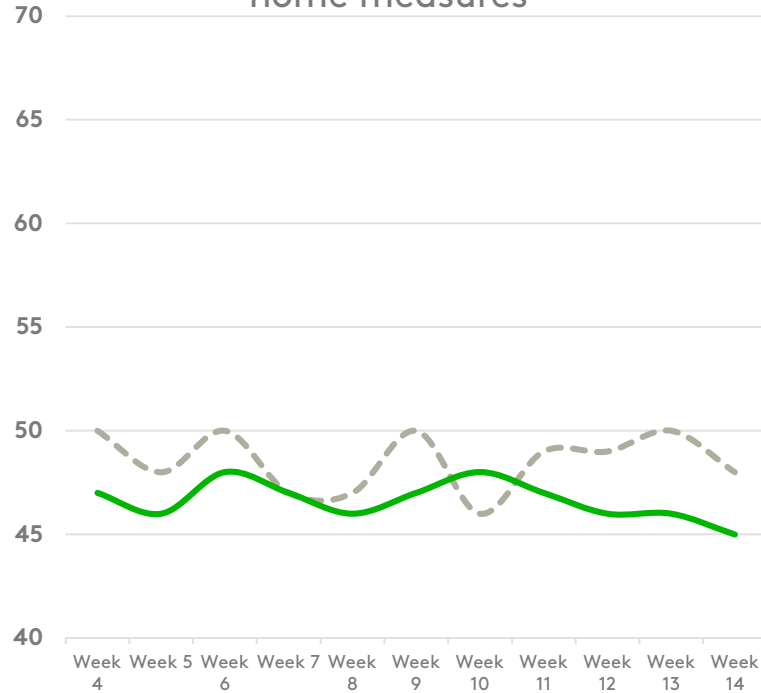
Swedish radio habits have shifted as listeners transition to staying at home and working remotely.



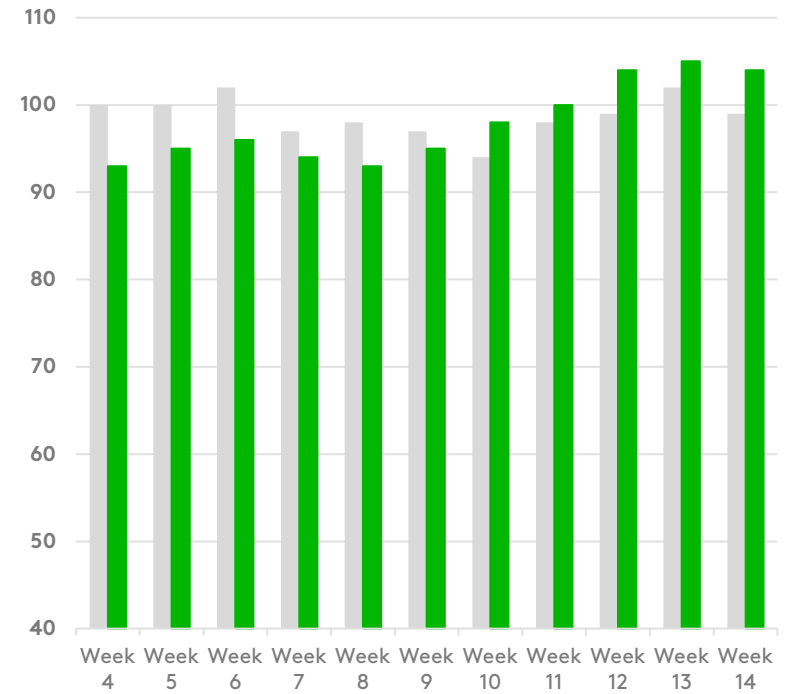
In-home radio listening increases as government implements stay at home measures



Out of home radio listening falls as car usage falls during the stay at home measures



Overall radio listening has increased (mins)

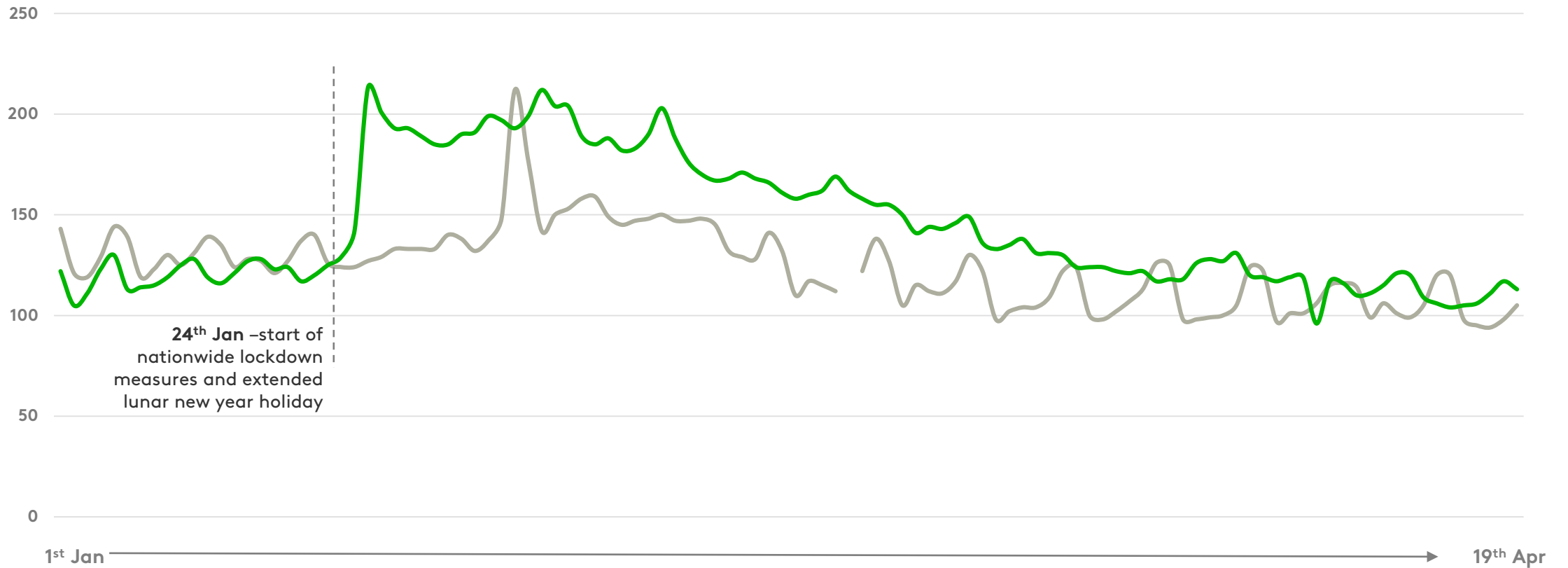


TV Viewing in China has started to stabilise

Are we heading “back to normal”?



— 2020
— 2019



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**What have we
learnt?**

**How do we
respond?**

**Implications &
Considerations**



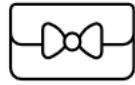
China: rebound potential for most sectors

(Expected) After the epidemic

Spending decreased/canceled

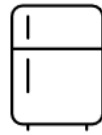


Online entertainment



Luxury

Less affected by the epidemic/ Almost unchanged



Large appliances



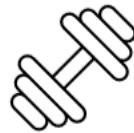
Small appliances



Consumer electronics



Alcohol



Home fitness equipment



Medical beauty

Spending increased



Out-of-home dining and gathering



Travel



Out-of-home entertainment



Basic epidemic prevention products



Food and beverage



Medical /life insurance



Clothing and accessories



Advanced epidemic prevention products



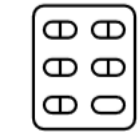
Nutrition and health products



Household cleaning products



Personal care products



Medicine



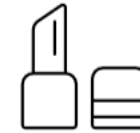
Fitness group classes



Financial management /stock

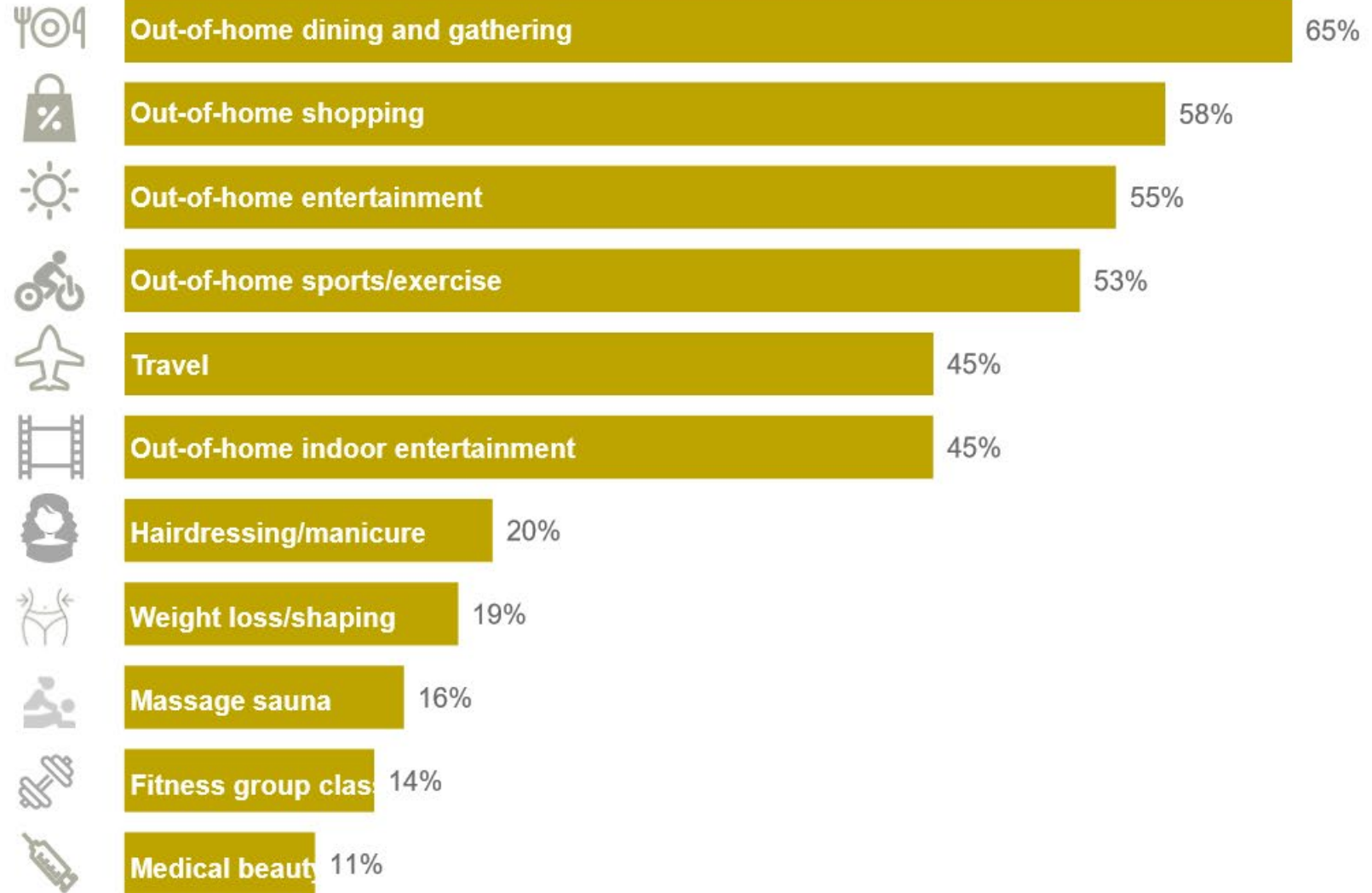


Hairdressing /manicure



Beauty products

China: looking forward to 'returning' to the new normal



And while

only 8%

...of consumers believe that companies should stop advertising, we know budgets are under increasing pressure.



But advertising should be useful, positive and consistent with your values - don't just drive your usual messages

Advertising...

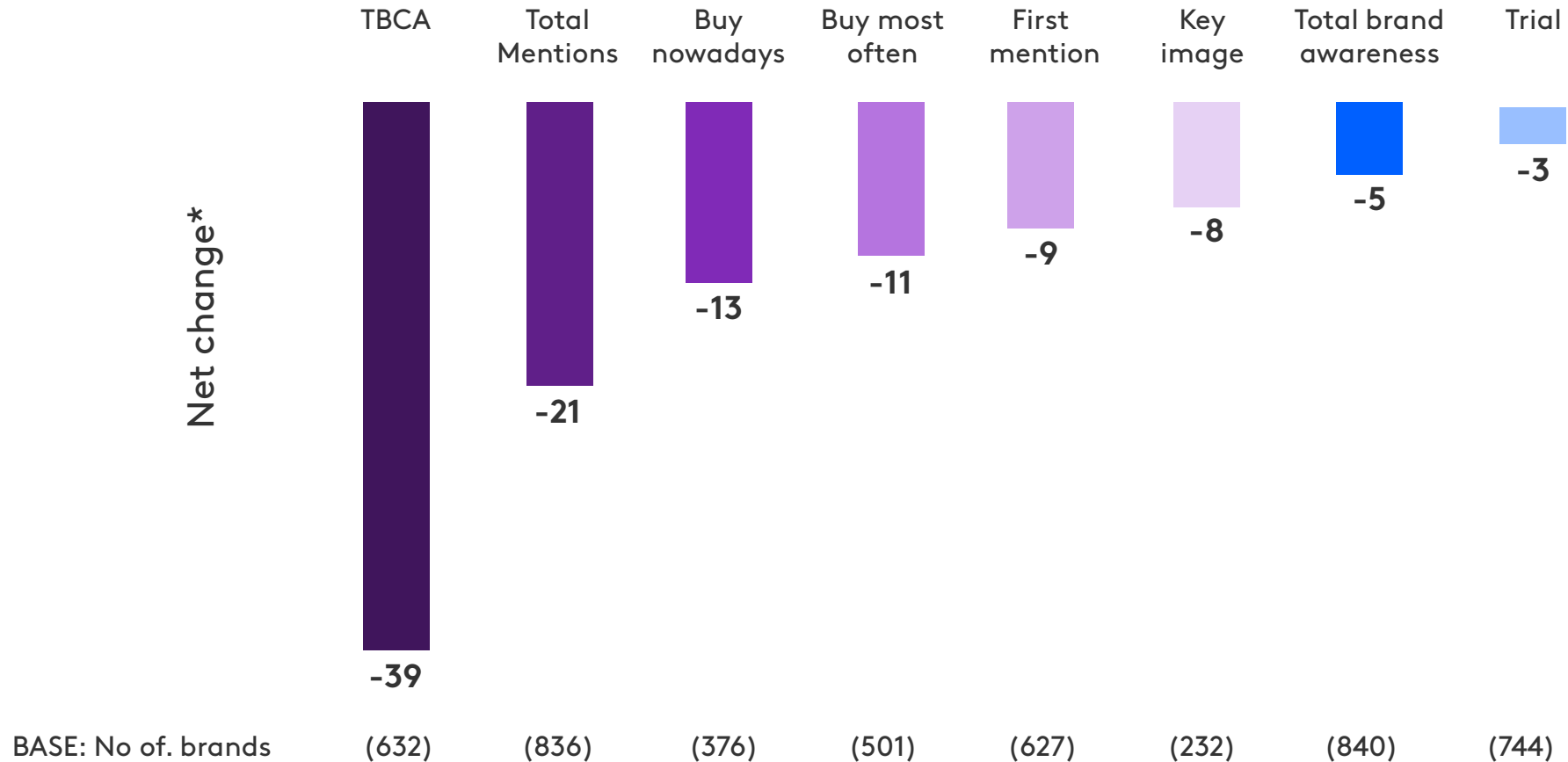
Most importantly, people don't want brands to exploit the situation

Our numbers suggest that people do want acknowledgement that things are different right now, even if advertising does not need to overtly address the crisis.

	78%	75%	72%	65%	50%	67%
Should	Show how they can be helpful in the new everyday life	Inform about their efforts to face the situation	Use a reassuring tone	Should communicate brand values	Should talk about brands like they have always done	Should offer a positive perspective
Should not	74% exploit coronavirus to promote a brand					

What happens to brand health measures if you stop advertising on TV?

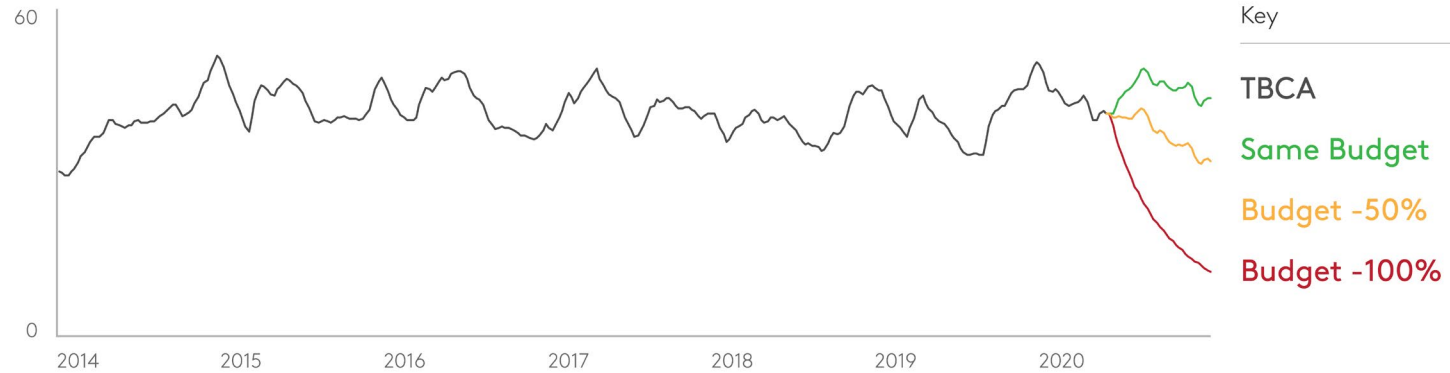
Net effects on brand measures 6 months after stopping TV advertising



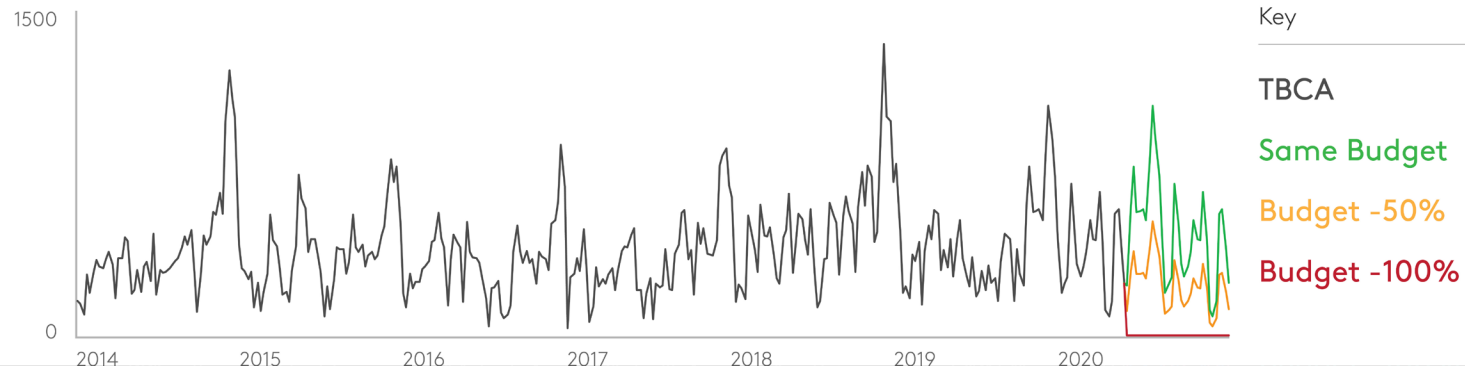
What happens if you decrease your adspend?

Simulation for a real beer brand to March 2021

Advert awareness



Media spend



What does this mean for media plans?

Cinema advertising:

- Closing of cinemas at lockdown, releases postponed, productions delayed

Out of Home:

- Outdoor advertising in new hotspots – e.g. closer to supermarkets and pharmacies, or donating OOH space – e.g. United Airlines

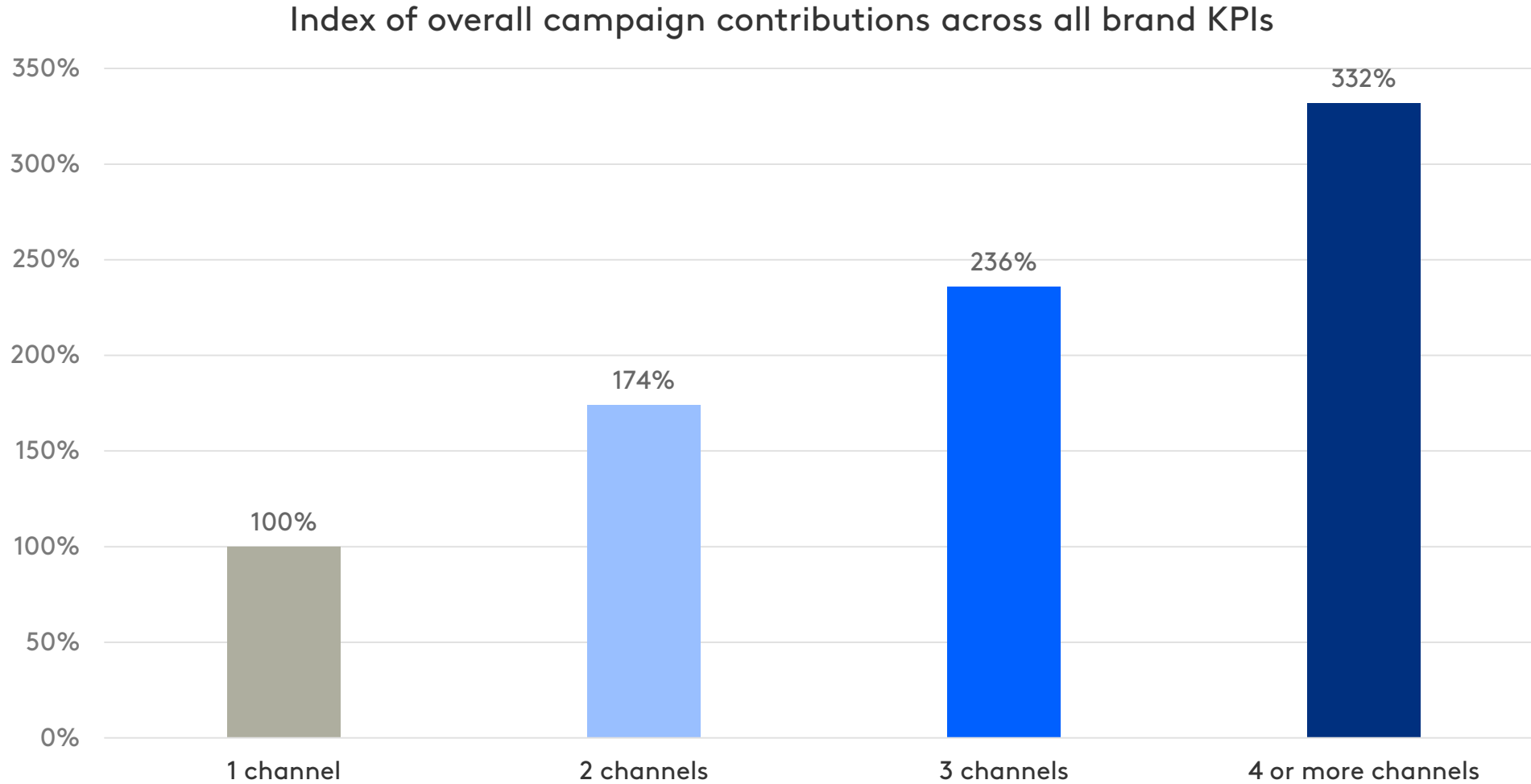
Sponsorship:

- Cancellation or postponement of live events (e.g. live sports events, concerts) - where contracts allow, sponsorship moved to virtual or esports events

Global media investment predicted to fall by 23% in H1 2020, disproportionately affecting 'traditional' media

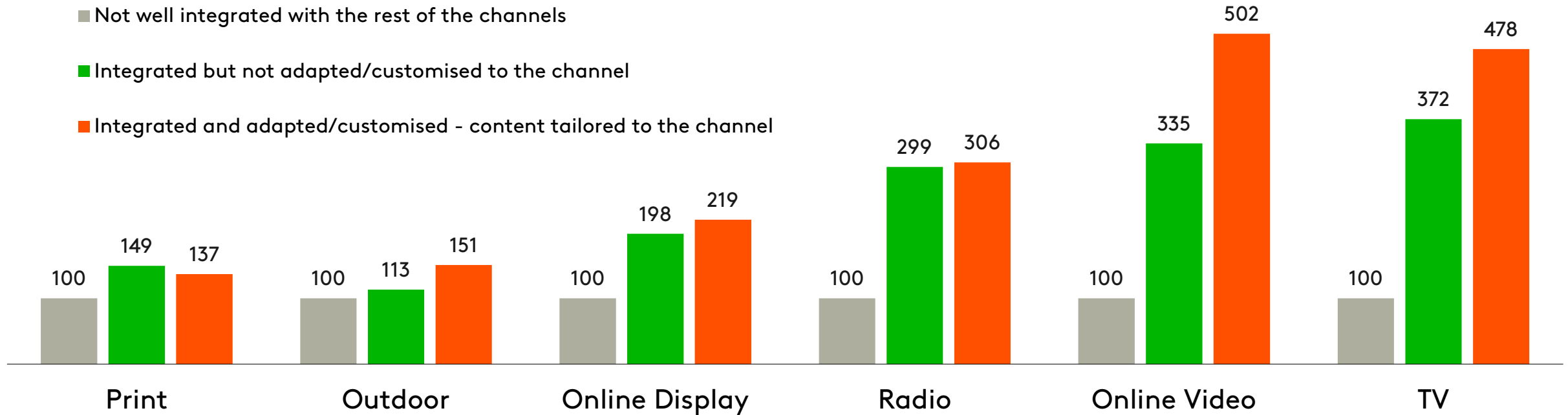


Back to basics: multimedia campaigns are more impactful

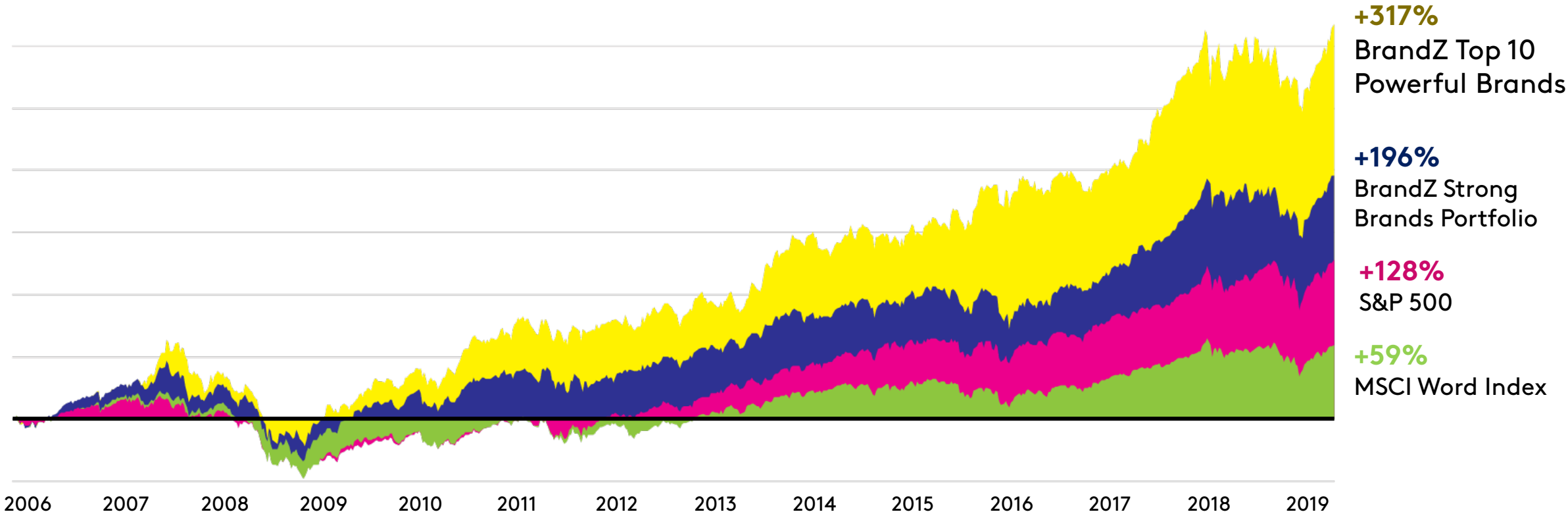


TV and online video benefit most from integration and customisation

Channel level contribution by campaign type



We've seen before that strong brands recovered NINE TIMES faster following the financial crisis of 2008



Implications for measurement

More choice

More TV & Video content



More choice for audiences

More competition

The Streaming wars are accelerating



Everything is measurable!

- 1 Do we need more investment in
 - cross-platform measurement?
 - streaming measurement?
- 2 Without a total view of TV & Video consumption how can content providers shape and monetise their future audience offering?
- 3 Might economic circumstance accelerate the advancement of cross screen measurement?

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Thank You

Materials will be available to download
via [kantar.com](https://www.kantar.com) tomorrow

Please complete our short pulse survey

