DEEP DIVE INTO CONTENT & ADVERTISING CONSUMPTION DURING COVID

EDITION 5

23RD APRIL 2020

AGENDA

TV Consumption

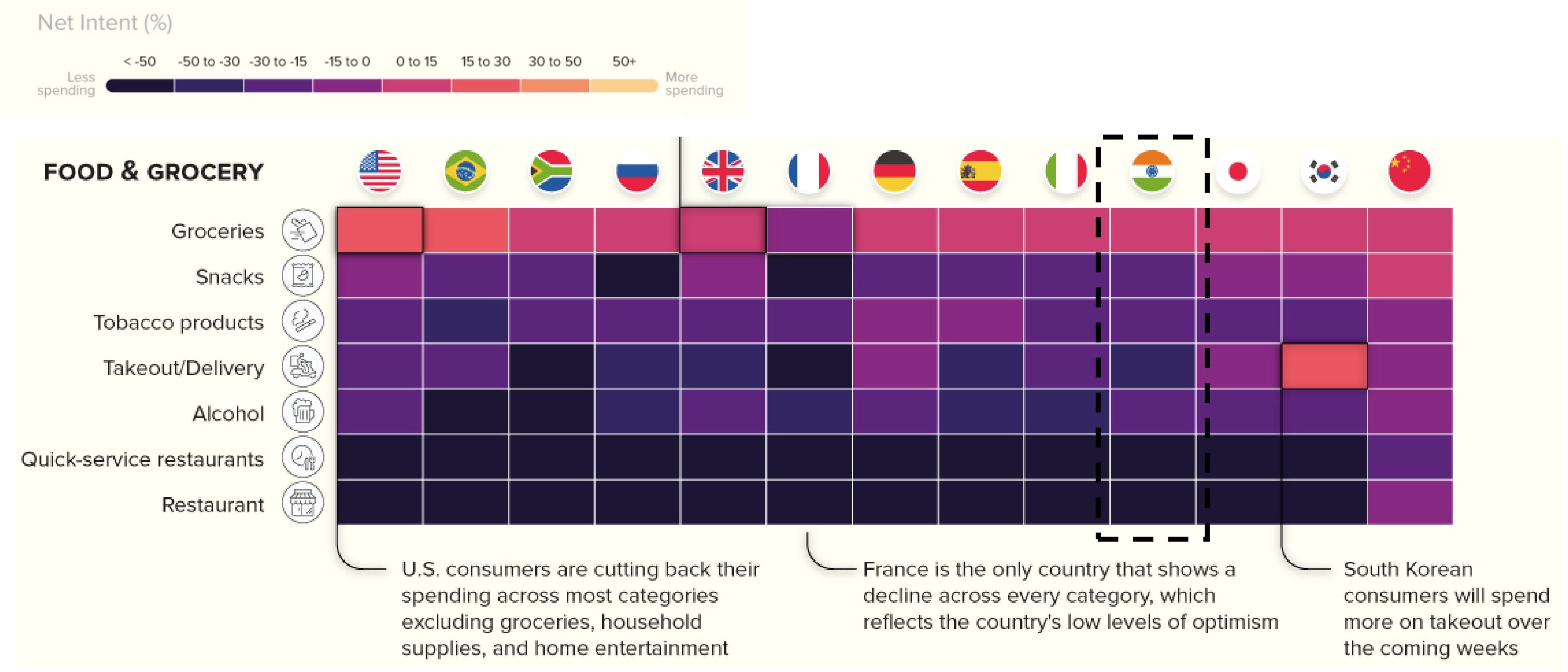
1. Global Landscape
2. Indian TV Landscape: Week 15
3. Audiences: Deep Dive Content & Viewing
4. Advertising Trends & Deep Dive

Smartphone Consumption

1. Trends in the US
2. India Smartphone Behaviour
3. Digital Advertising Trends

GLOBAL LANDSCAPE

HOW COVID-19 CONSUMER SPENDING IS IMPACTING INDUSTRIES

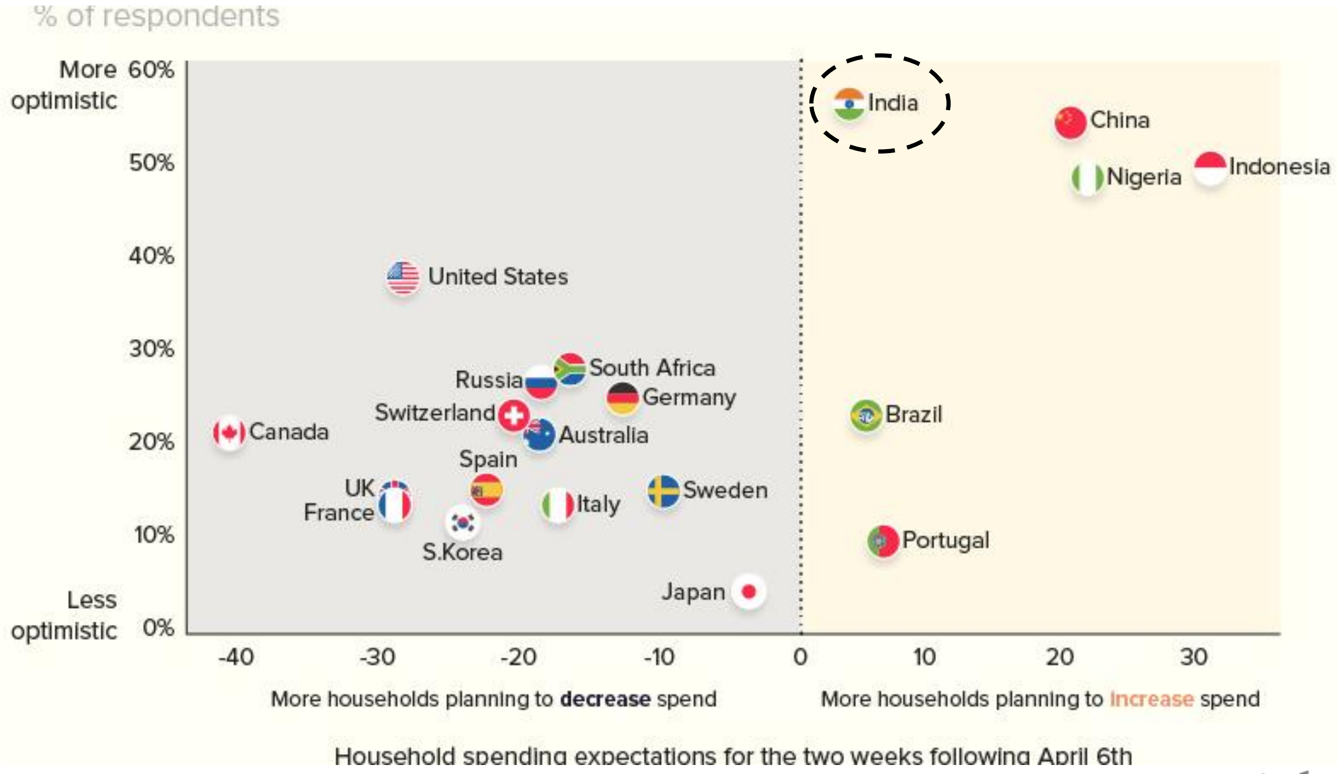


Expected spending per category over the next 2 weeks; Based on survey conducted by McKinsey between 15 Mar-6 Apr

Source: Visual Capitalist

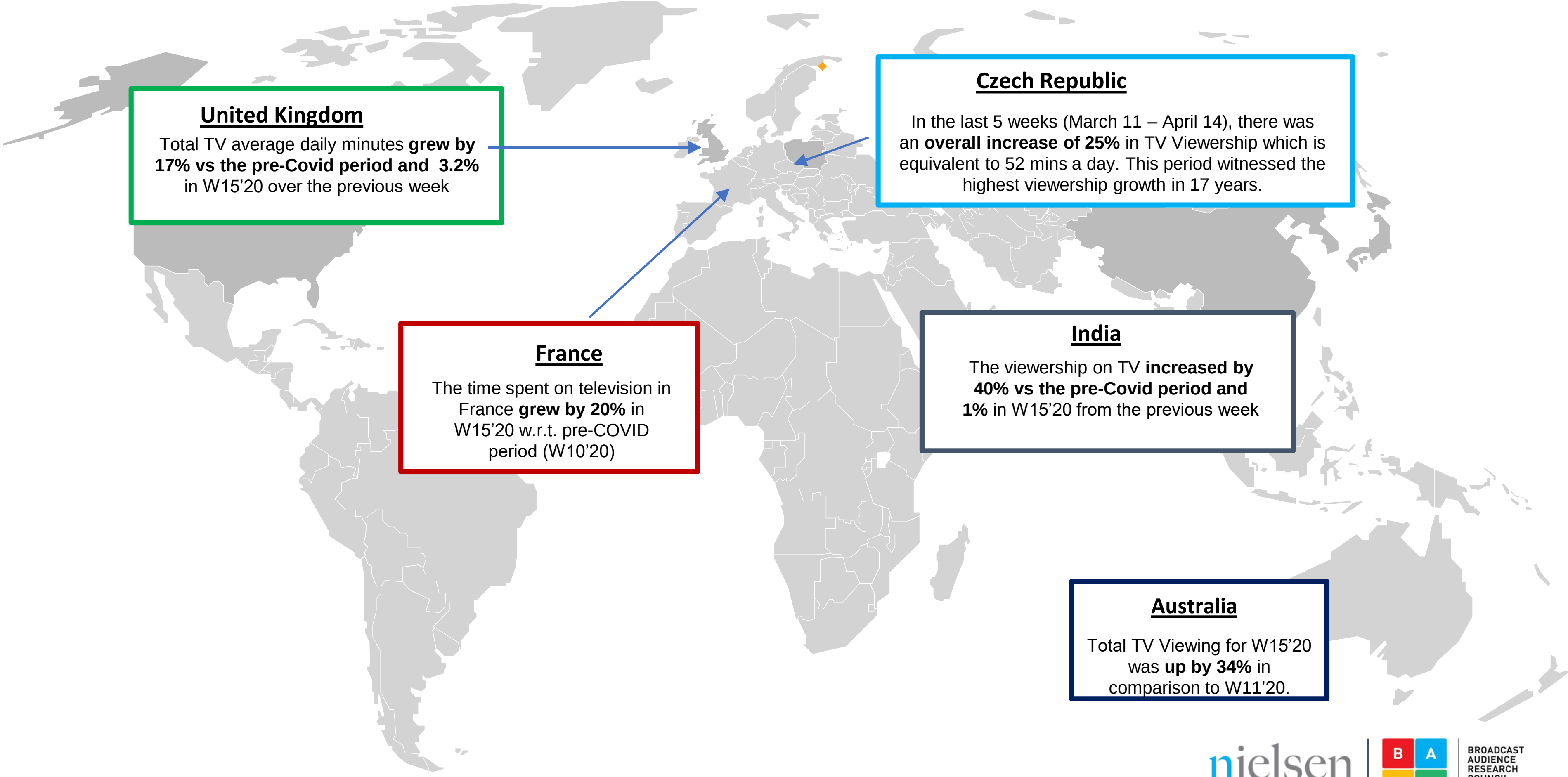
OPTIMISM ABOUT COUNTRY'S RECOVERY AFTER COVID-19

➢ **India's consumers are displaying higher levels of optimism**, with more households planning to increase spend—a trend that is also evident in China, Indonesia, and Nigeria



Based on survey conducted by McKinsey between 15 Mar-6 Apr
Source: Visual Capitalist

THE TELEVISION VIEWERSHIP CONTINUES TO GROW ACROSS THE GLOBE



United Kingdom

Total TV average daily minutes **grew by 17% vs the pre-Covid period and 3.2%** in W15'20 over the previous week

Czech Republic

In the last 5 weeks (March 11 – April 14), there was an **overall increase of 25%** in TV Viewership which is equivalent to 52 mins a day. This period witnessed the highest viewership growth in 17 years.

France

The time spent on television in France **grew by 20%** in W15'20 w.r.t. pre-COVID period (W10'20)

India

The viewership on TV **increased by 40% vs the pre-Covid period and 1%** in W15'20 from the previous week

Australia

Total TV Viewing for W15'20 was **up by 34%** in comparison to W11'20.

'ONE WORLD: TOGETHER AT HOME' CELEBRITY CONCERT FOR COVID RELIEF WAS SIMULCAST ON 26 U.S. TV NETWORKS & DREW **21 MILLION VIEWERS**

This Virtual Concert was an exciting innovation which leveraged TV's reach to help raise $127 million
New rules of engagement!

Source: *Nielsen*

THE SCOPE OF OUR ANALYSIS: INDIA

Television Behavior

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

Time Period:
Pre COVID-19: *11th Jan'20 - 31st Jan'20*

COVID Disruption:
Edition 5: 11th Apr'20-17th Apr'20

Frequency: Weekly

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:
Edition 5: 11th Apr'20-17th Apr'20

Frequency: Weekly

We refer to **Jan 2020 as the Pre Covid-19 period** and compare it with recent weeks.

INDIAN TV LANDSCAPE
Key Highlights

WEEK 15 RECORDED 40% GROWTH OVER PRE COVID-19 AT 1.24 TRILLION MINUTES

- Individuals watching TV for all 7 days increase to 48%
- Viewership grew by 1% over Week 14 led by ATS

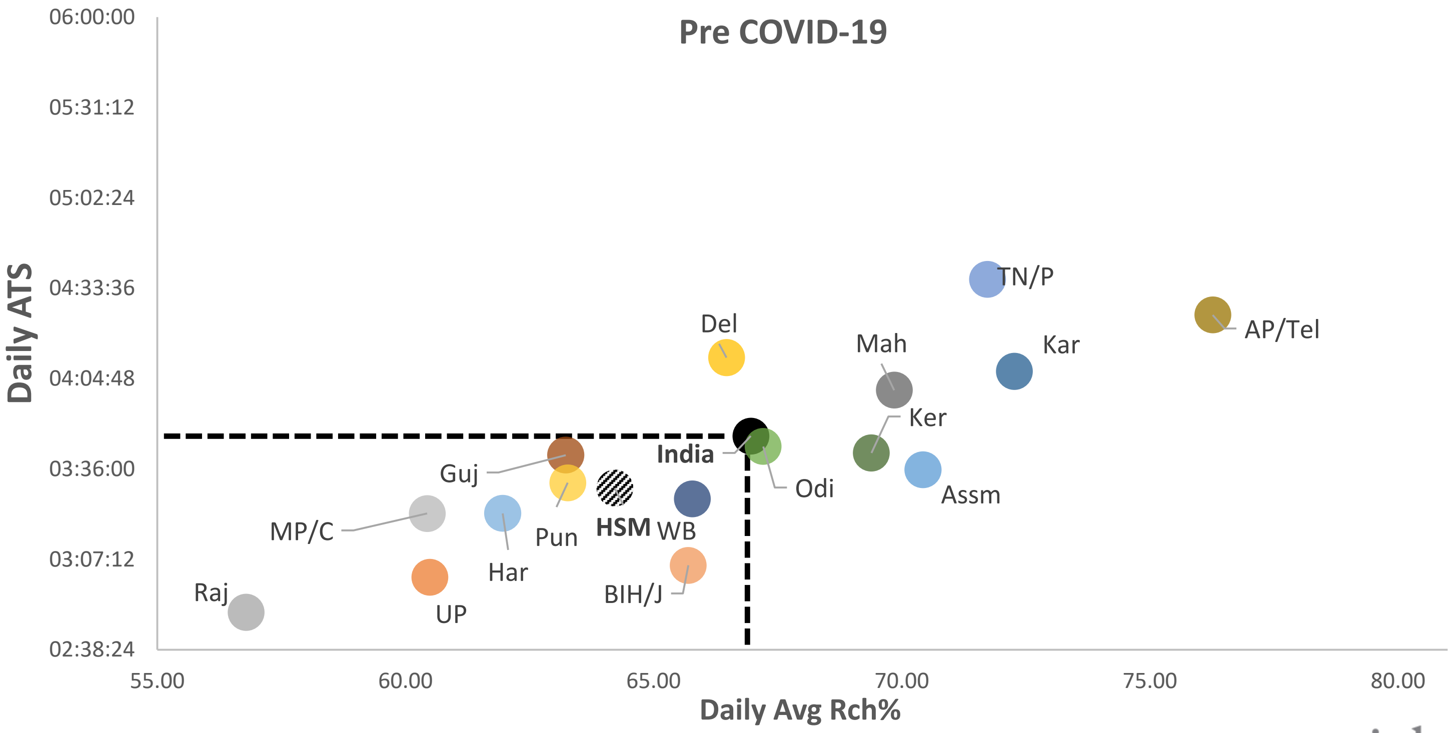
Metric	Pre COVID-19 (11 Jan to 31 Jan)	Week 14	Week 15	Growth
Weekly Viewing Minutes in Bn	887	1223	1239	+40%
Watch 7 days in a week	32%	47%	48%	+16%
Avg. Daily Reach in Mn	560	627	627	+12%
Daily ATS/Viewer (hh:mm)	03:46	04:38	04:42	+25%
Number of channels watched/per viewer/week	16	22	22	+38%

Pre COVID-19 (11 Jan to 31 Jan) *Week 14* *Week 15*

Week 15 (week starting 11 April) & Week 14 (week starting 4 April) data as compared to Pre COVID-19 i.e. Week 2 to Week 4 (11 Jan to 31 Jan)

PRE COVID-19 VIEWERSHIP: STATE -WISE

- Southern states significantly ahead
- AP/Telangana had the highest daily reach of 76% while TN/Pondicherry led in daily ATS of 4 hours 36 minutes



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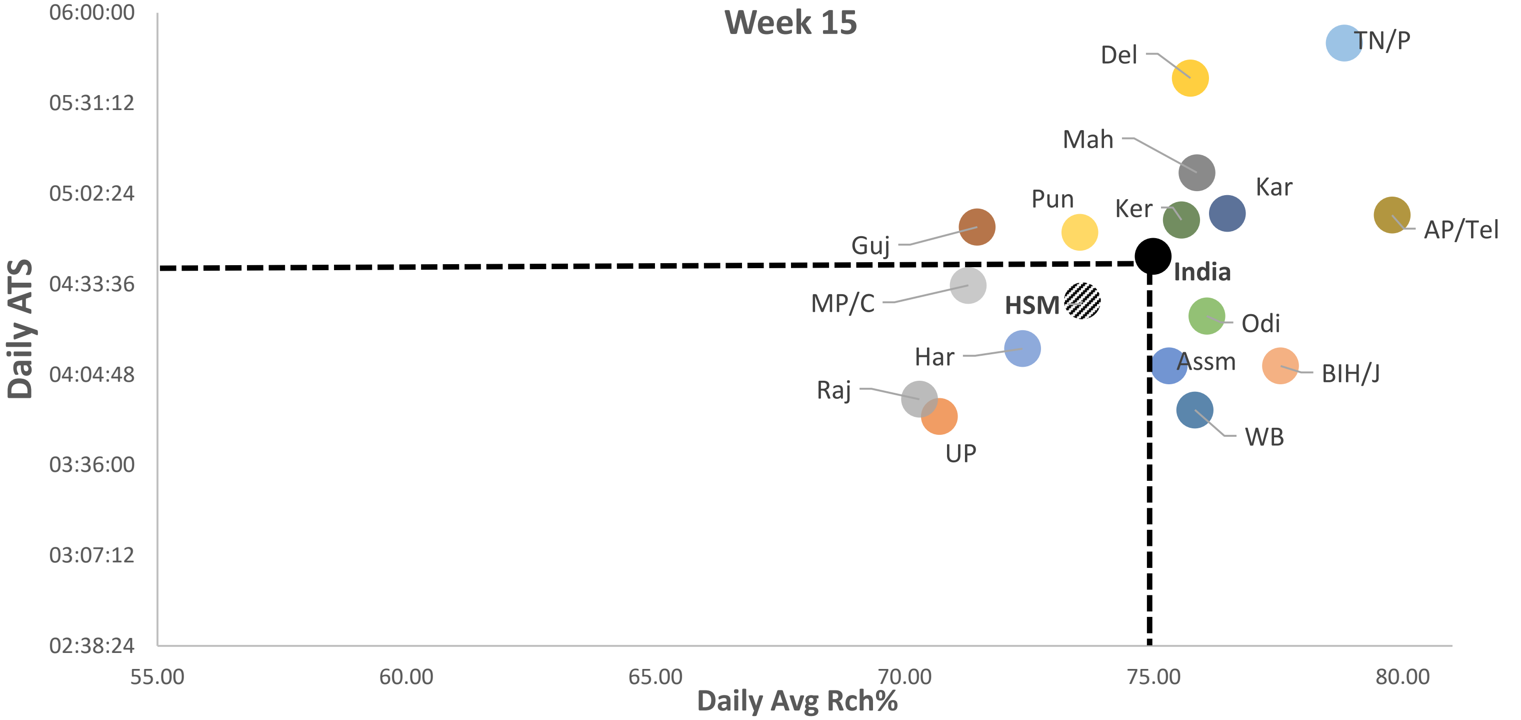
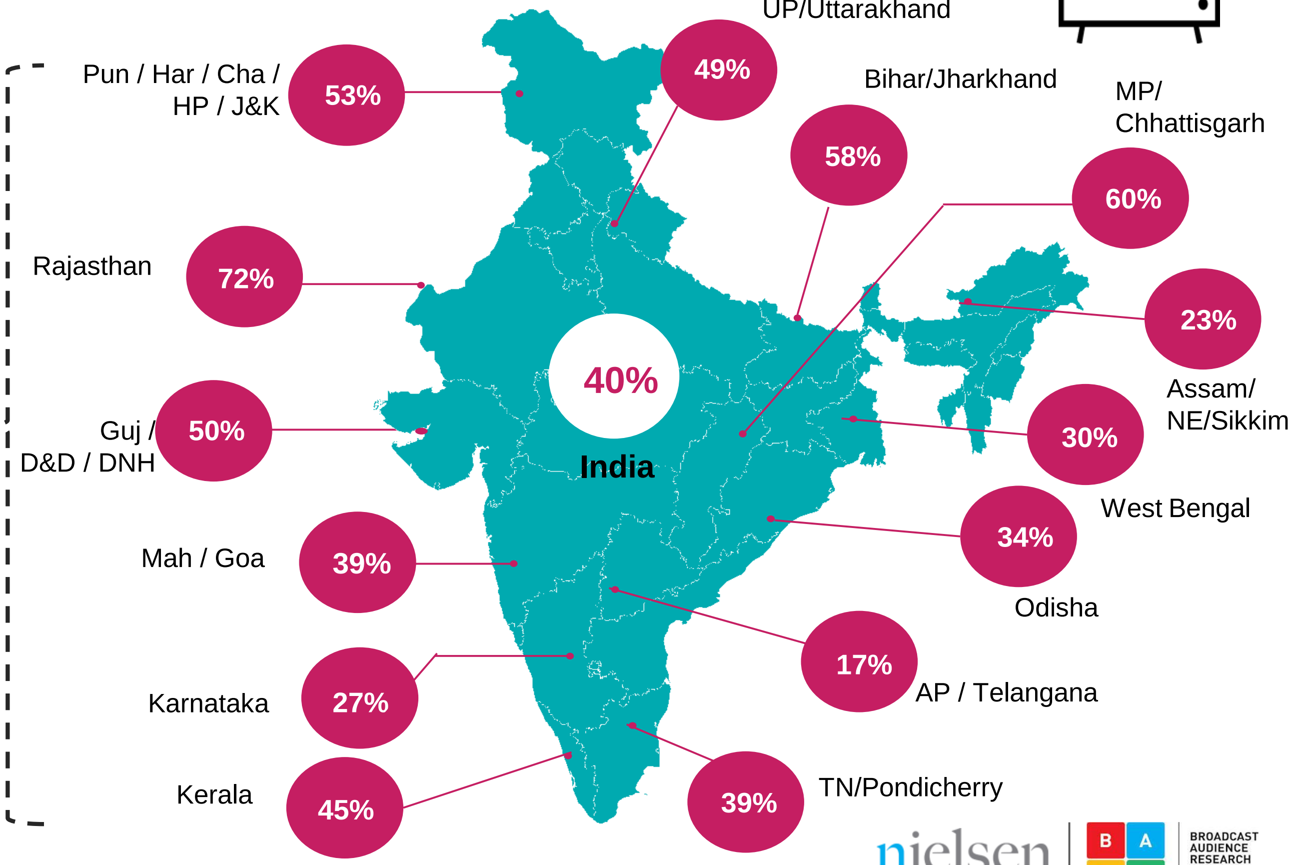
WEEK 15 VIEWERSHIP GROWTH DRIVEN BY BOTH REACH AND ATS

- Southern states still ahead
- TN/Pondicherry has the highest daily ATS of 5 hours 50 minutes



TOTAL TV CONSUMPTION INCREASED BY 40% AT ALL INDIA IN WEEK 15

Region	Growth in Week 15 over Pre COVID-19
India	40%
HSM	46%
South	29%



Growth based on Viewing Minutes

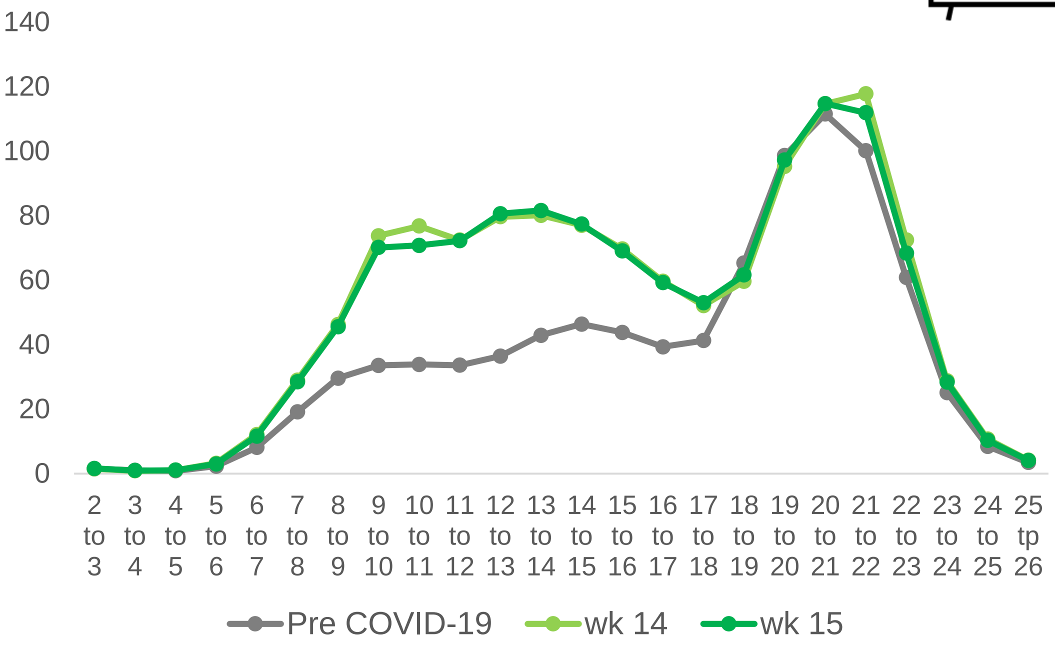
Week 15 (week starting 11 April) data as compared to Pre COVID-19 i.e.Week 2 to Week 4 (11 Jan to 31 Jan)

NON-PRIME IS STILL THE DRIVER FOR TV VIEWERSHIP GROWTH IN WEEK 15

➢ Prime-Time as well as Non-Prime-Time register a growth of 1% each in week 15 as compared to last week

	All Day	Non-Prime Time	Prime Time
India	40%	79%	6%
HSM	46%	95%	9%
South	29%	56%	0%

Growth in Week 15 (During COVID-19) data as compared to Week 2 to Week 4 (Pre COVID-19)



Viewing Minutes Mn, India, 2+,

Week 15 (week starting 11 April), Week 14 (week starting 4 April),Pre Covid i.e. Week 2 to Week 4 (11 Jan to 31 Jan)

ALL INDIA: NEWS & MOVIES CONTINUE TO GROW

- At HSM Urban, GEC growth is higher as compared to All India level

NEWS	BUSINESS NEWS	MOVIES	INFOTAINMENT	YOUTH	KIDS
195%	82%	67%	48%	41%	39%

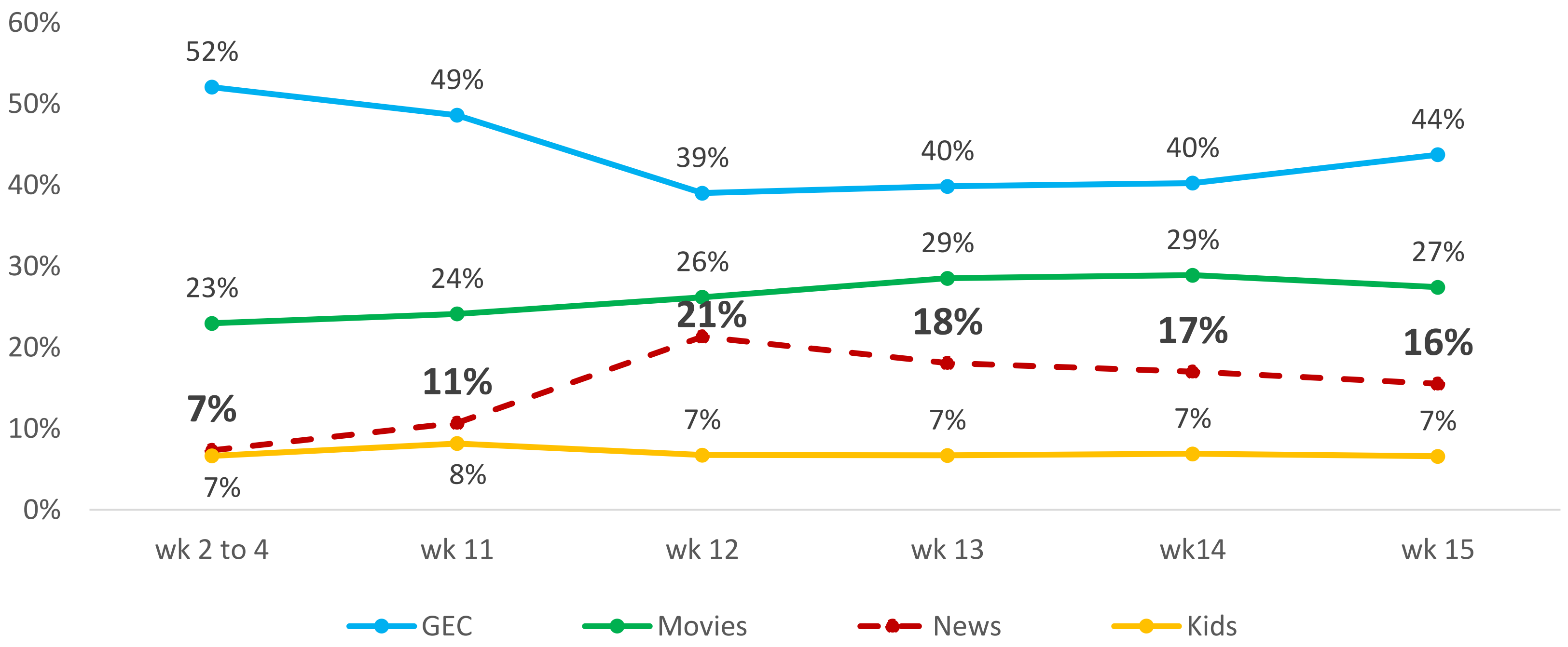
LIFESTYLE	GEC	DEVOTIONAL
35%	17%	5%

Hindi GEC grew by 43% in HSM Urban

The analysis is based on Channel Genres

Week 15 (week starting 11 April) data as compared to Pre COVID-19 i.e.Week 2 to Week 4 (11 Jan to 31 Jan)

GENRE-WISE SHARE : NEWS & MOVIE CONSUMPTION SHARE SURGED AND NOW CONTINUE TO OPERATE AT A HIGHER LEVEL

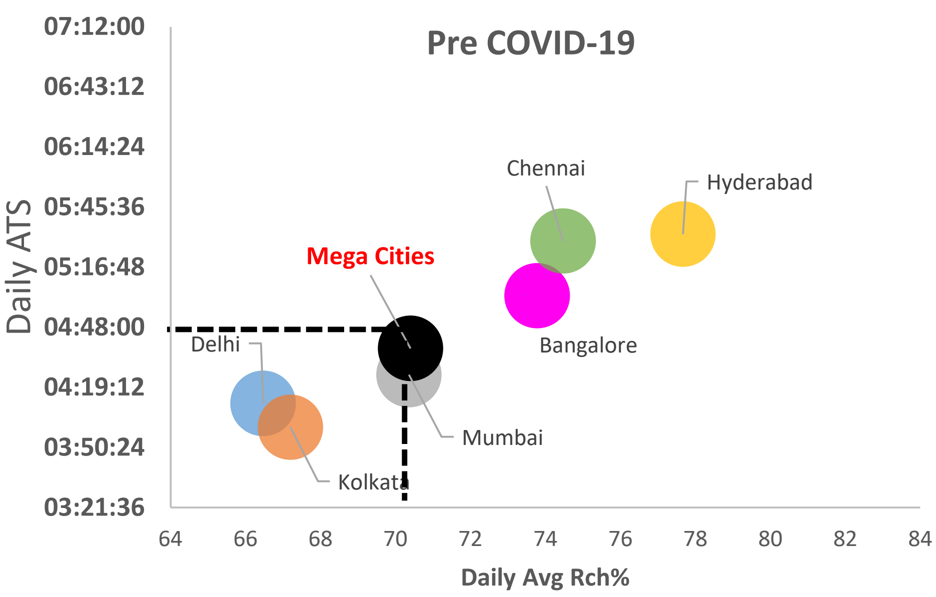


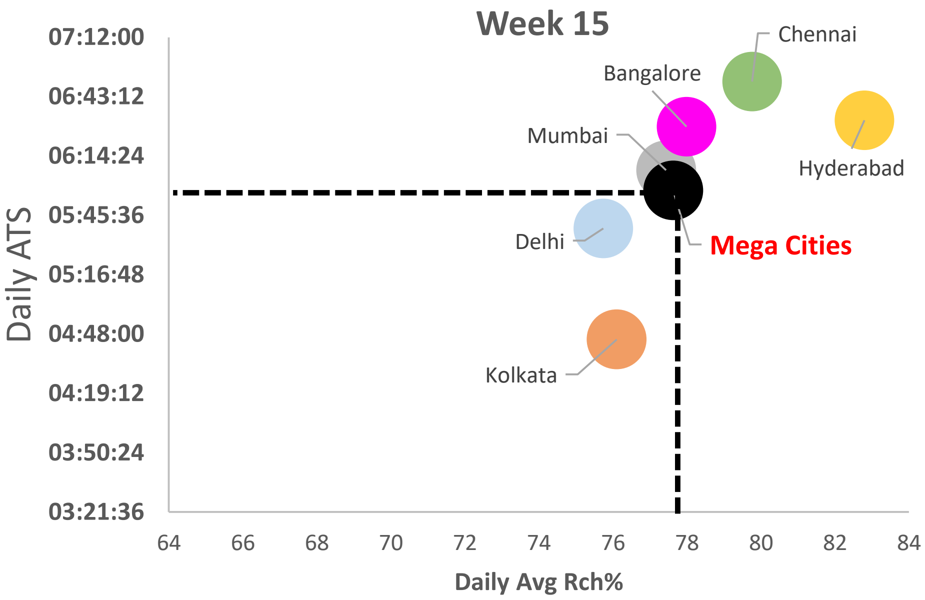
All India, 2+

Week 15 (week starting 11 April) ; Pre COVID-19 i.e.Week 2 to Week 4 (11 Jan to 31 Jan)

MEGACITIES HAVE GROWN DURING COVID-19 DRIVEN BY BOTH REACH AND ATS

- ATS for Mumbai has grown the most, by 1 hour 42 mins (39% growth)

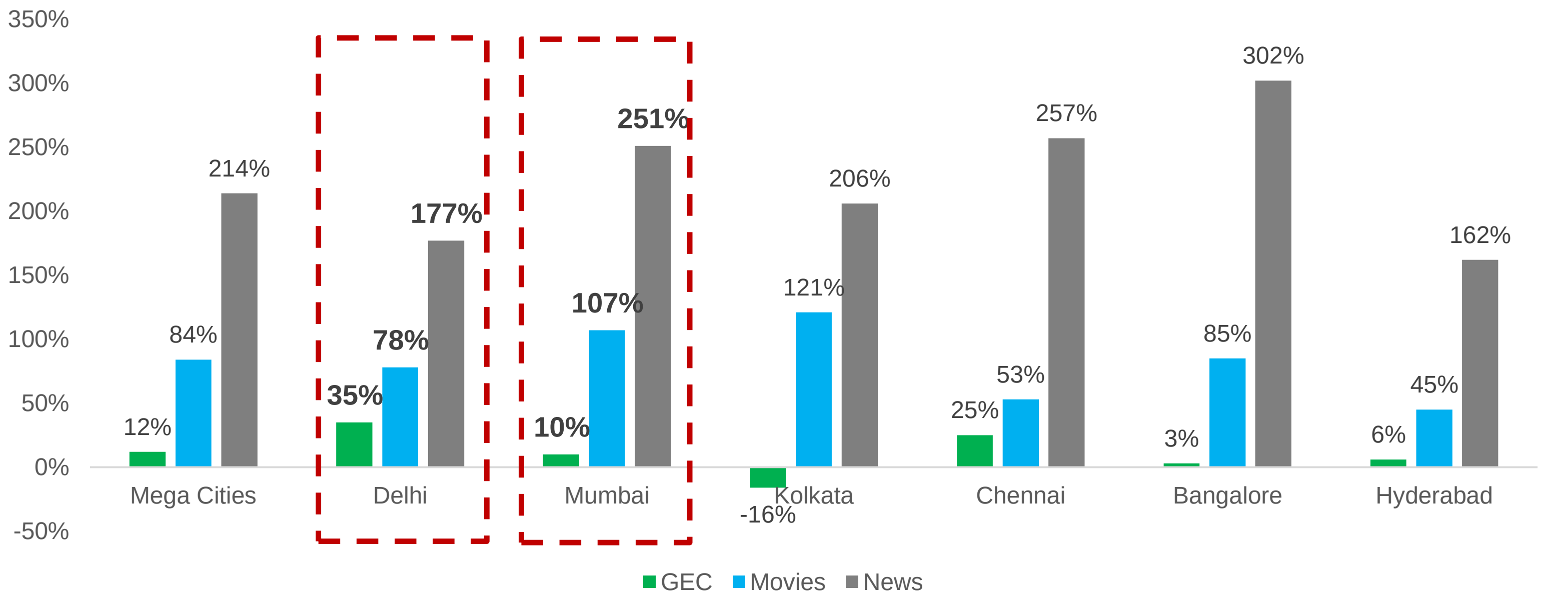




Week 15 (week starting 11 April) ; Pre COVID-19 i.e.Week 2 to Week 4 (11 Jan to 31 Jan)

VIEWERSHIP GROWTH IS THE HIGHEST IN DELHI & MUMBAI VS REST OF THE MEGACITIES

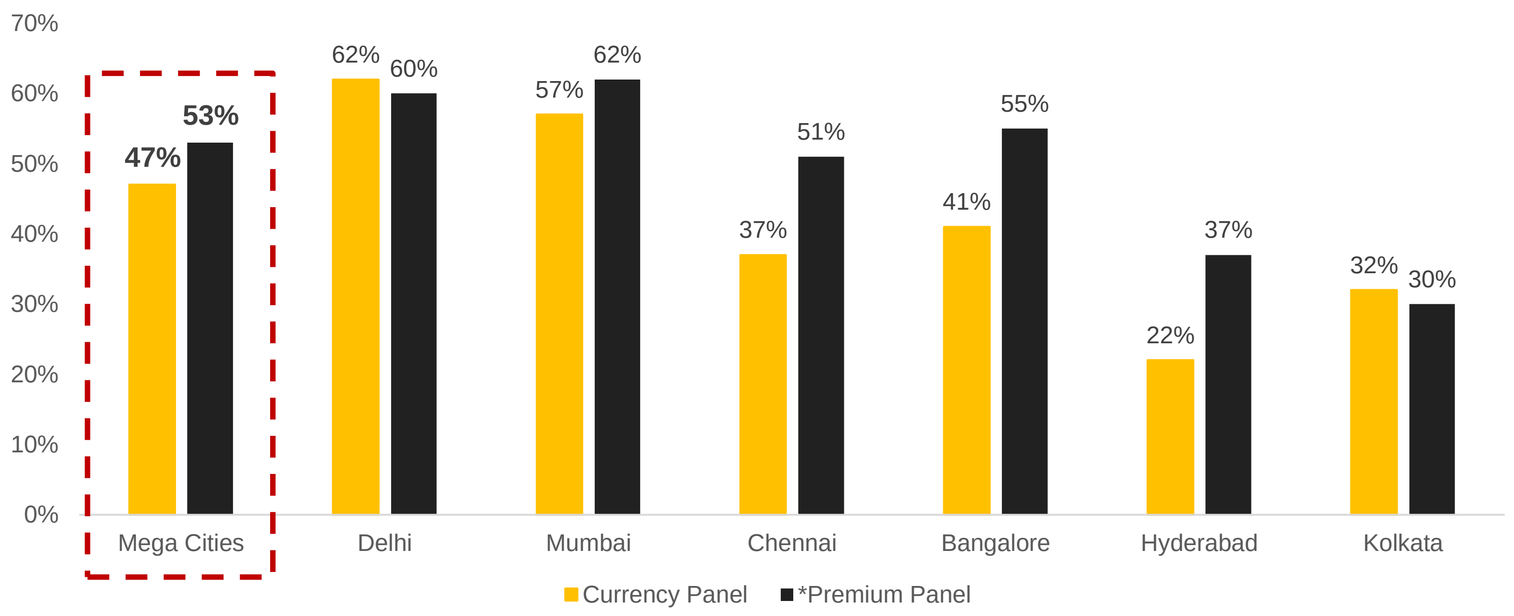
➢ Movies & News have grown across all megacities



Growth in Week 15 (week starting 11 April) data as compared to Pre COVID-19 i.e. Week 2 to Week 4 (11 Jan to 31 Jan)

LAUNCHING PRIMAVU INDIVIDUAL DATA TODAY

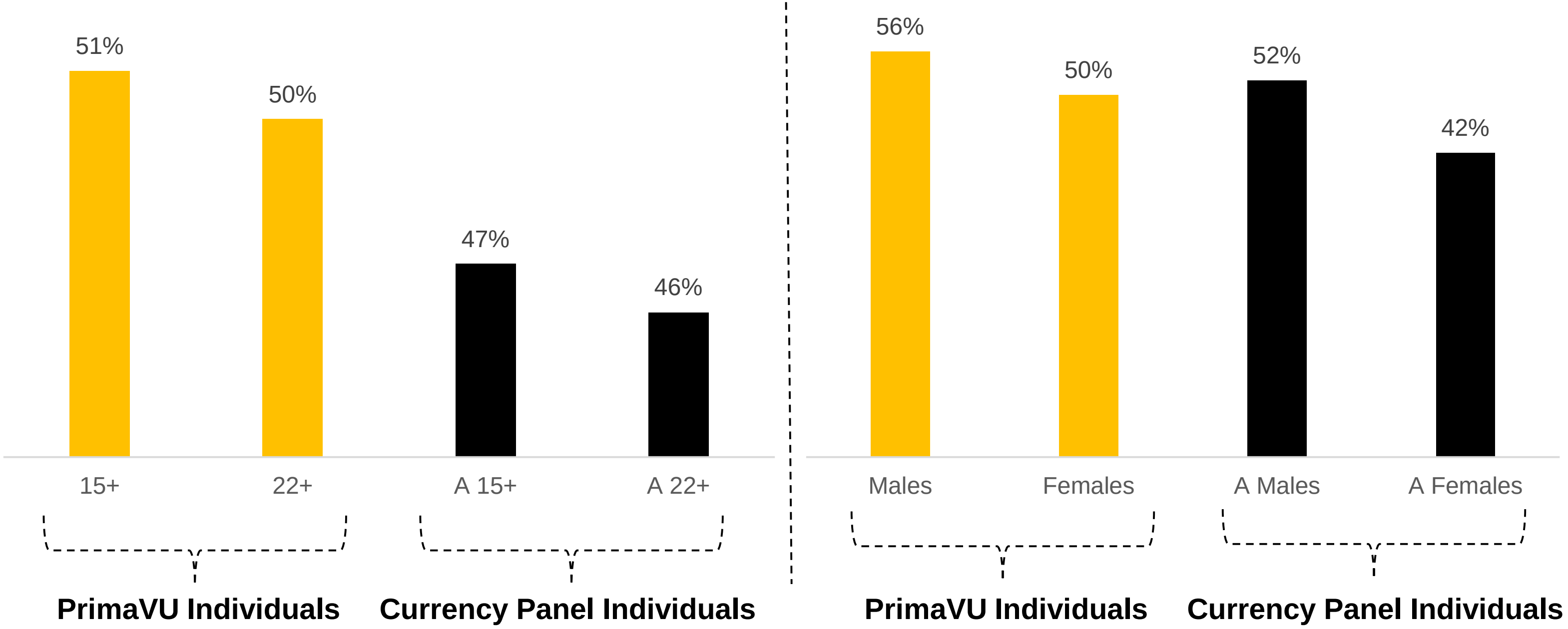
- Individual viewership: Megacities grew by 53% in Premium Panel Vs 47% in Currency Panel



*Premium Panel Growth is from BARC's Product PrimaVU Individual data (measuring top 3% of Socio Economic Strata in 6 Megacities at 2+)
Currency Panel is at NCCS A, Megacities
Growth in Week 15 (week starting 11 April) data as compared to Pre COVID-19 i.e. Week 2 to Week 4 (11 Jan to 31 Jan)

LAUNCHING PRIMAVU INDIVIDUAL DATA

➢ 15+ and Males are driving the growth in Premium Homes



*Premium Panel Growth is from BARC's Product PrimaVU Individual data (measuring top 3% of Socio Economic Strata in 6 Megacities at 2+)
Currency Panel is at NCCS A, Megacities

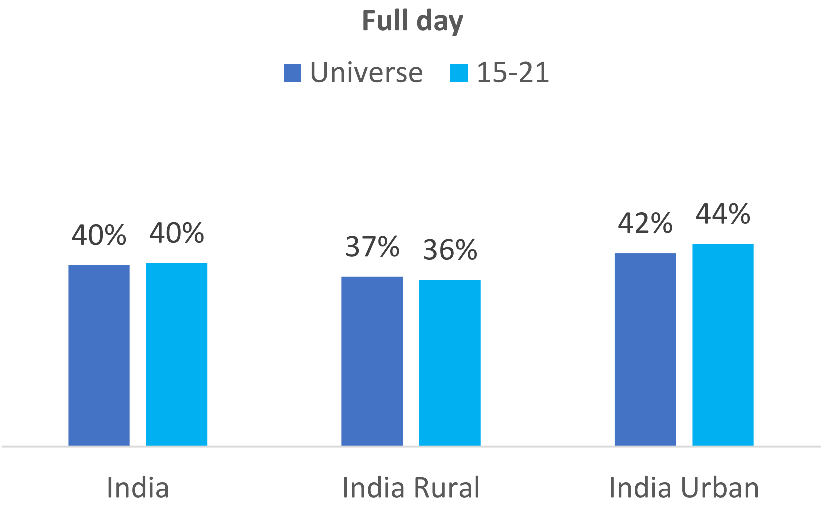
Growth in Week 15 (week starting 11 April) data as compared to Pre COVID-19 i.e. Week 2 to Week 4 (11 Jan to 31 Jan)

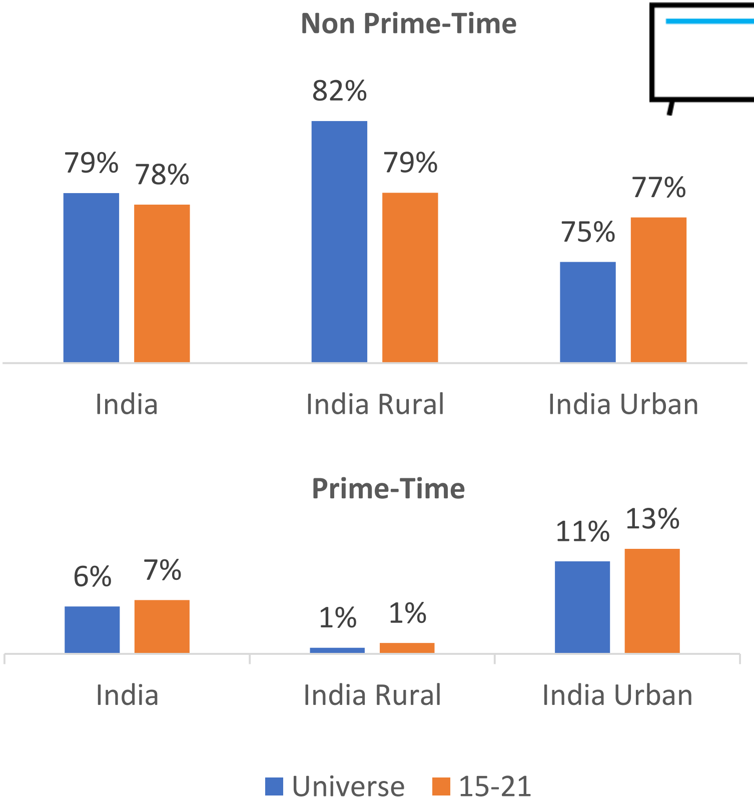
AUDIENCES : CONTENT & VIEWING

A Deep Dive Into Demographic-wise & Market-wise Consumption

VIEWERSHIP GROWTH IN 15-21 AGE-GROUP IS DRIVEN LARGELY BY THE URBAN MARKET

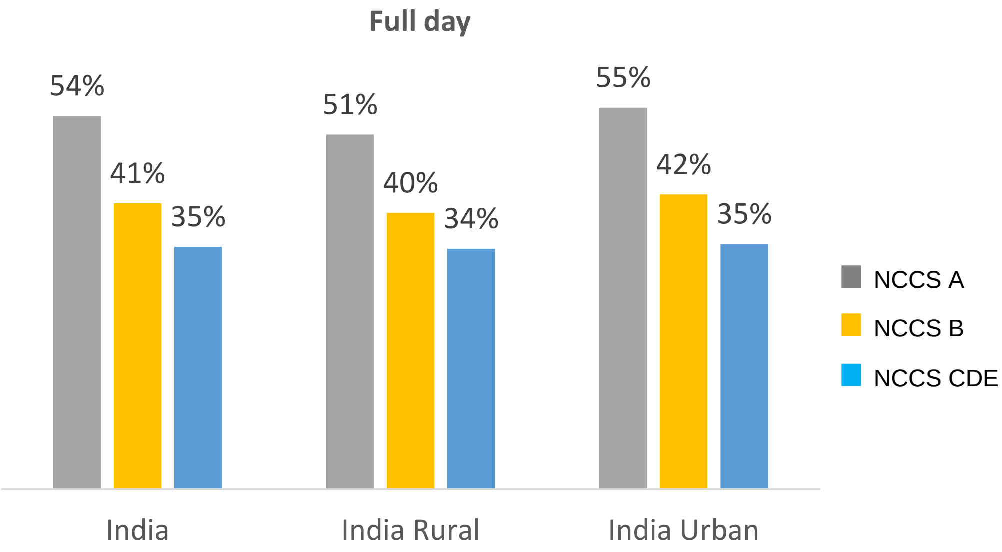
15-21 age group contribute to 16% of the Total TV viewership

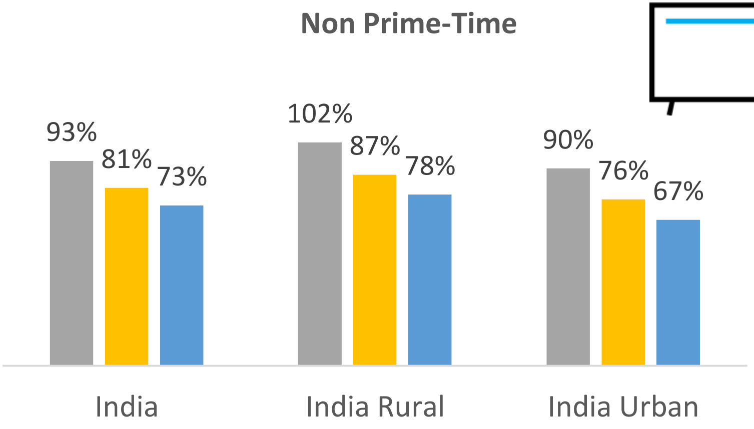


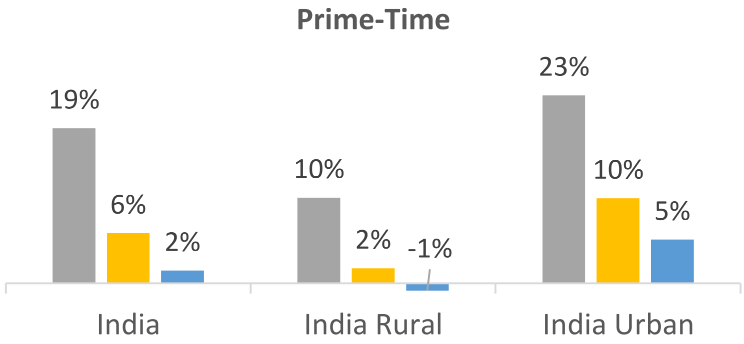


Week 15 (week starting 11 April) data as compared to Pre COVID-19 i.e.Week 2 to Week 4 (11 Jan to 31 Jan)

NCCS A HAS SEEN THE HIGHEST VIEWERSHIP GROWTH DURING COVID-19 ACROSS URBAN AND RURAL MARKET

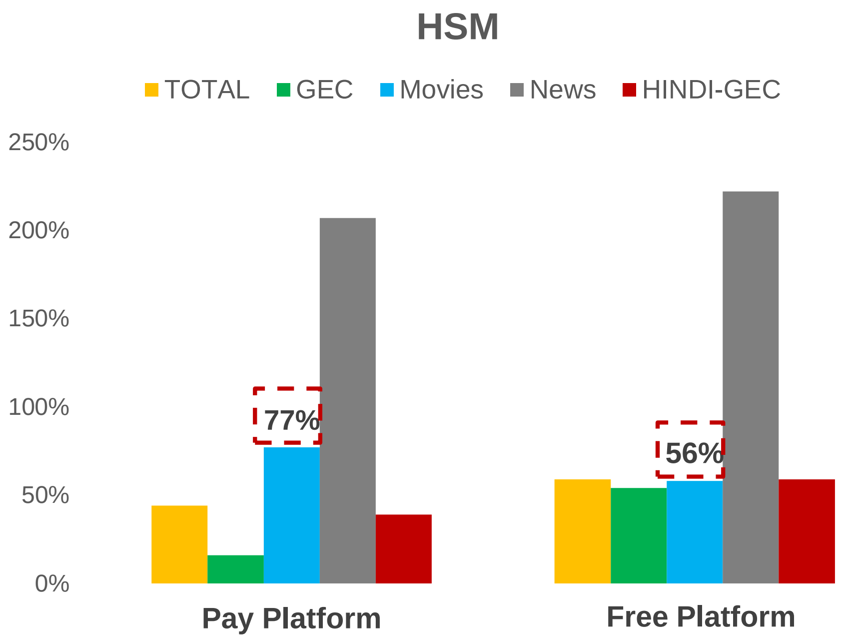






Week 15 (week starting 11 April) data as compared to Pre COVID-19 i.e.Week 2 to Week 4 (11 Jan to 31 Jan)

HSM : WHILE NEWS STAYS STRONG, VIEWING OF MOVIES INCREASED MORE IN THE PAY PLATFORM

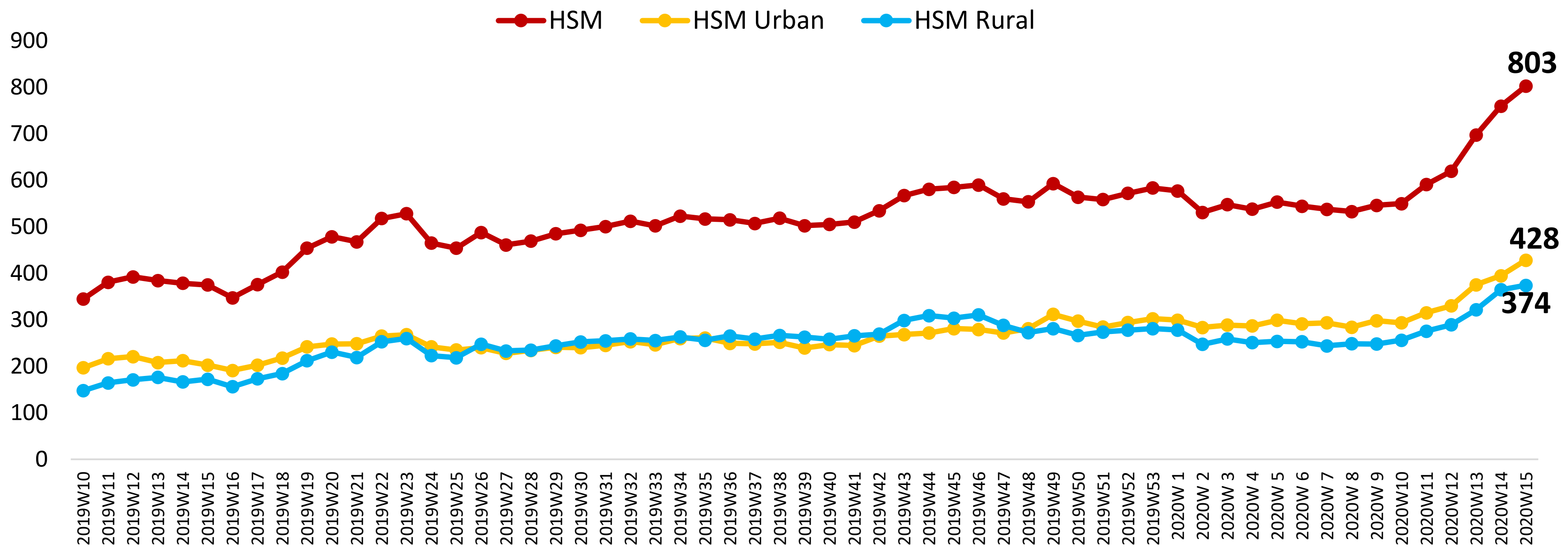


- Growth in Movie viewership is coming largely from pay platforms across Urban and Rural market (82% and 69% respectively)
- News stays strong in HSM with over 200% growth in week 15 over Pre COVID period

No. of channels in Free platform (Freedish & Terestrial): 83 Watermarked channels

Week 15 (week starting 11 April) data as compared to Pre COVID-19 i.e.Week 2 to Week 4 (11 Jan to 31 Jan)

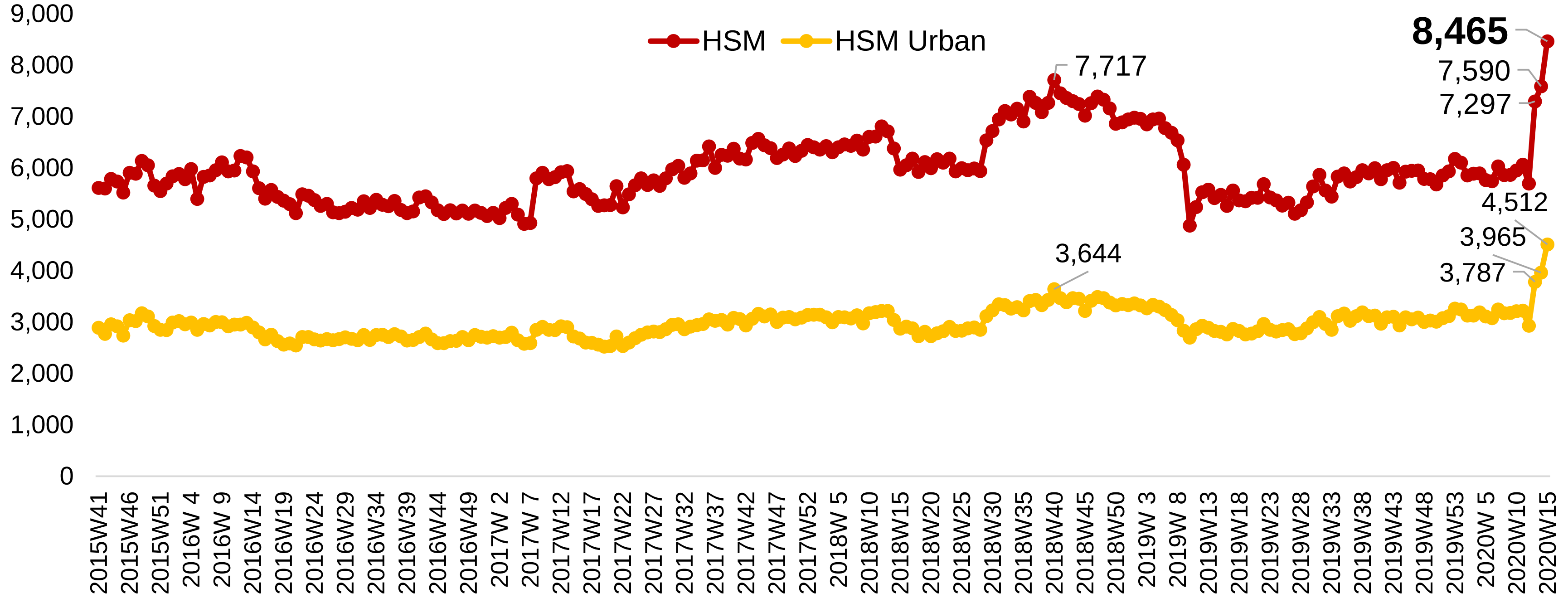
'RE-RUNS DRIVEN' HINDI GEC CHANNELS ATTAINED ALL TIME HIGH VIEWERSHIP POST EXIT FROM FREEDISH



HSM / 2+/Hindi GEC/ Imp in Mn
Channels considered : STAR Utsav, Zee Anmol, Colors Rishtey & Sony Pal
These channels are free during COVID period

HINDI GEC IN HSM IS AT AN ALL TIME HIGH: 8.5 BN IMPRESSIONS

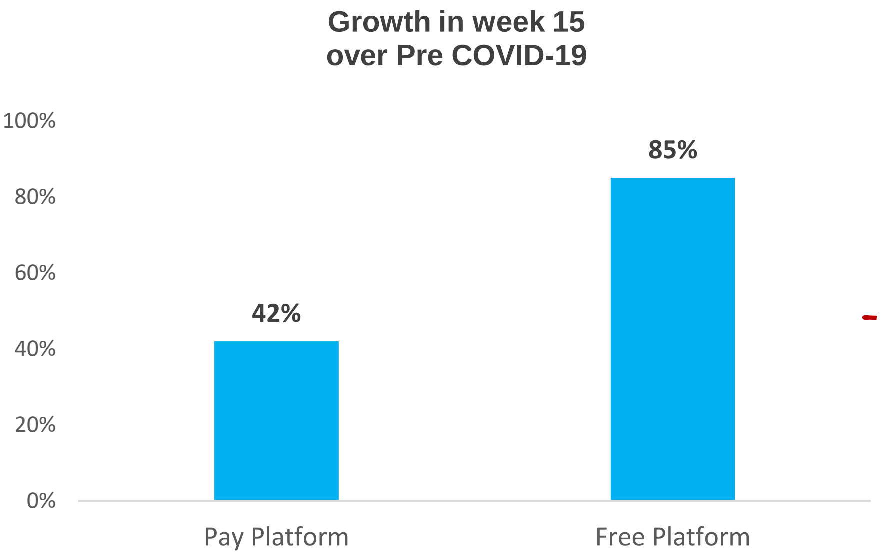
➢ HSM Urban registers all time high viewership for 3 weeks in a row with 4.5 Bn Impressions in week 15



HSM /HSM Urban/ 2+/ Imp in Mn

HINDI GEC (W/O DD) IN HSM SHOWS GROWTH ACROSS PLATFORMS IN NON PRIME-TIME IN WEEK 15 OVER PRE COVID PERIOD

- Even HSM Urban registers growth in Pay platform in week 15 over last week on the back of Mythos



HSM
(Non-Prime-Time w/o DD)

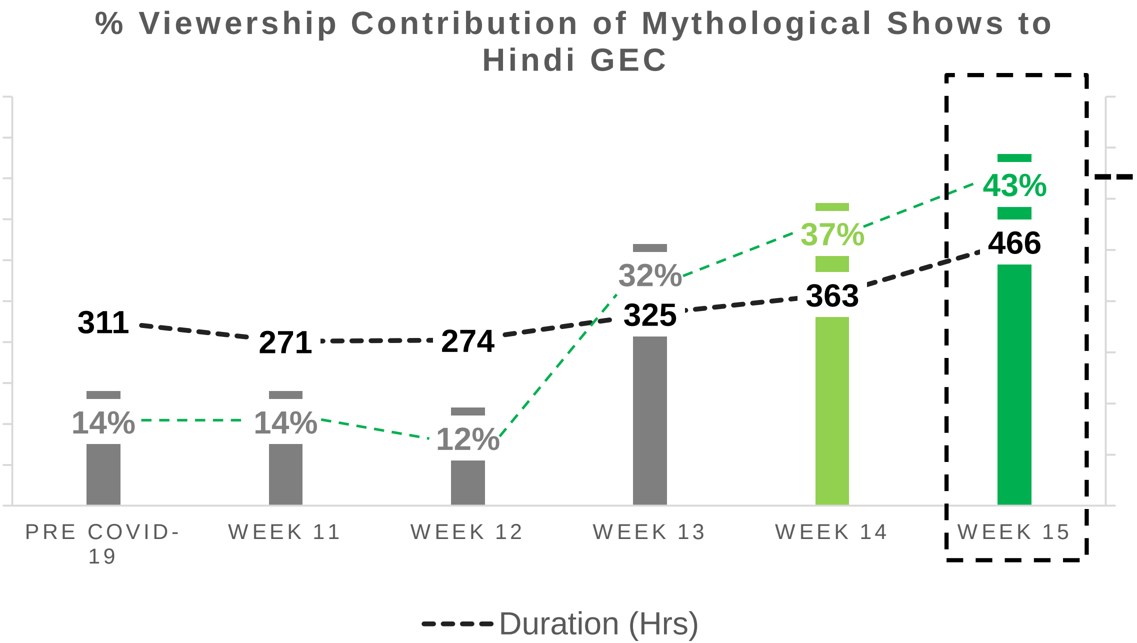
Growth in week 15 over week 14

	Pay Platform	
	Non Prime-Time	**Prime-Time**
Hindi GEC	13%	15%
Hindi GEC (w/o DD)	5%	5%

HSM Urban

Week 15 (week starting 11 April) data as compared to Week 14 (week starting 4 April) and Pre COVID-19 i.e.Week 2 to Week 4 (11 Jan to 31 Jan)

MYTHOLOGICAL SHOWS HAVE BECOME THE MAIN SOURCE OF ENTERTAINMENT AMONG HINDI GEC'S



2020W15

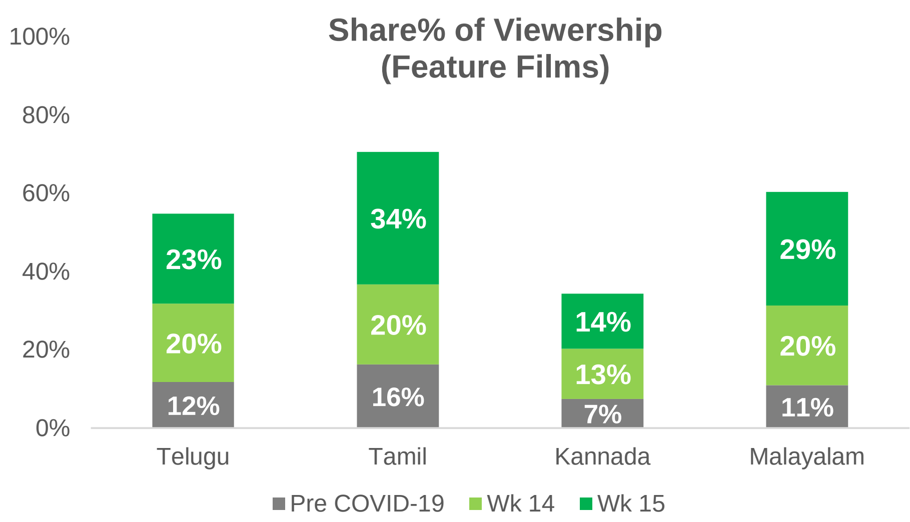
*Garnered **109 Bn** Viewing Minutes*

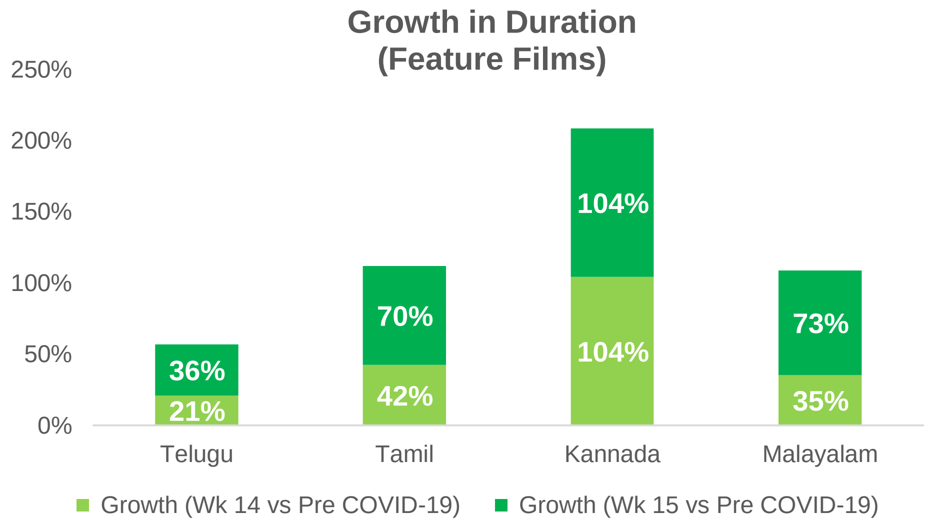
*Watched by **353 Mn** Viewers*

HSM 2+/ SOV based on Viewing Minutes/ Mythological Show classification based on Programme Genre – "Mythological/ Costume Drama"

Week 15 (week starting 11 April); Pre COVID-19 i.e.Week 2 to Week 4 (11 Jan to 31 Jan)

GEC'S IN THE SOUTH ARE LEVERAGING THEIR MOVIE LIBRARY TO SUSTAIN VIEWERSHIP



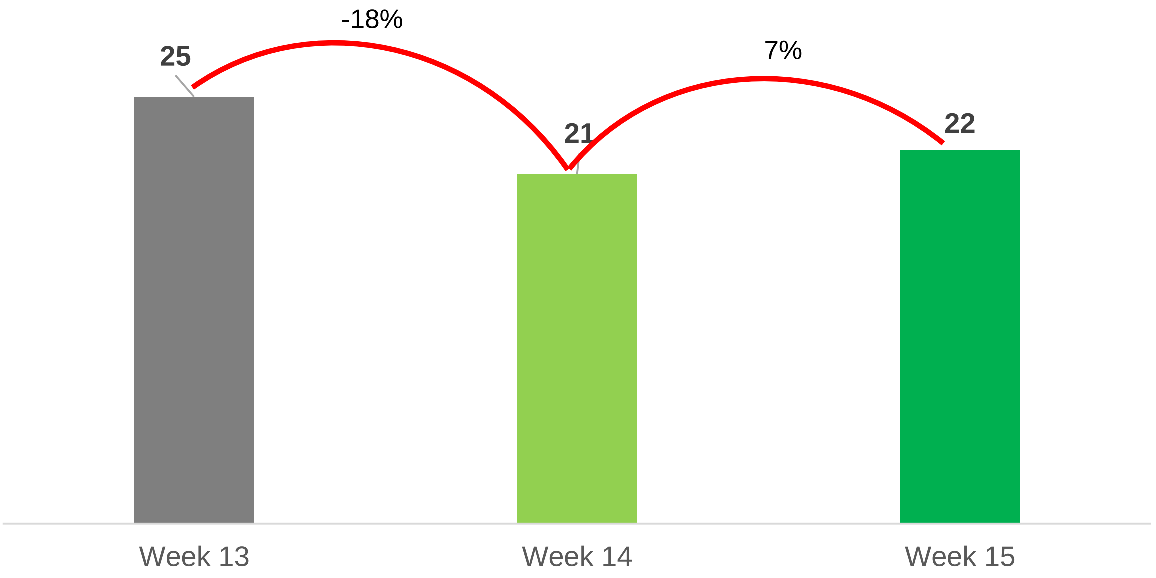


AP-Telangana/TN-Pondicherry/Karnataka/Kerala 2+ Imp'000(Shr%) and Feature Films
Week 15 (week starting 11 April) ; Week 14 (week starting 4 April); Pre COVID-19 i.e.Week 2 to Week 4 (11 Jan to 31 Jan)

ADVERTISING TRENDS

OVERALL FCT: TOTAL INVENTORY CRAWLING BACK

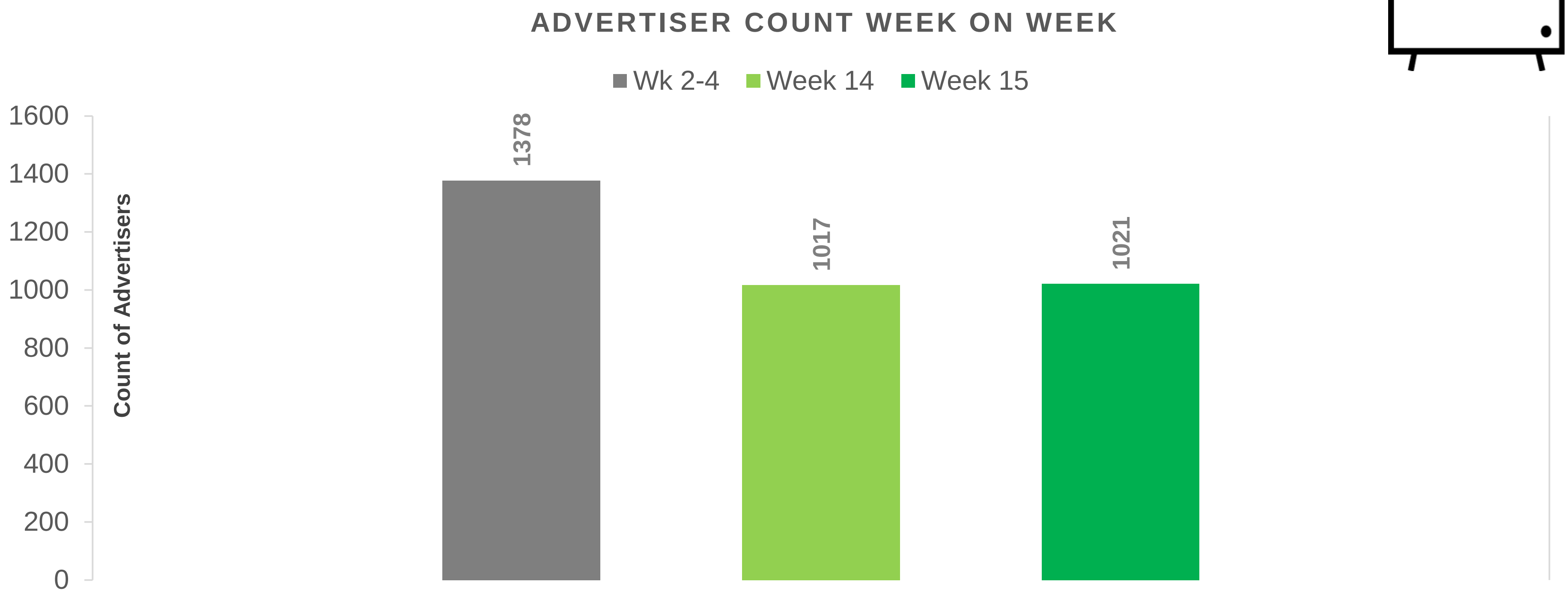
- Week 15 observes 7% growth



FCT in Mn secs

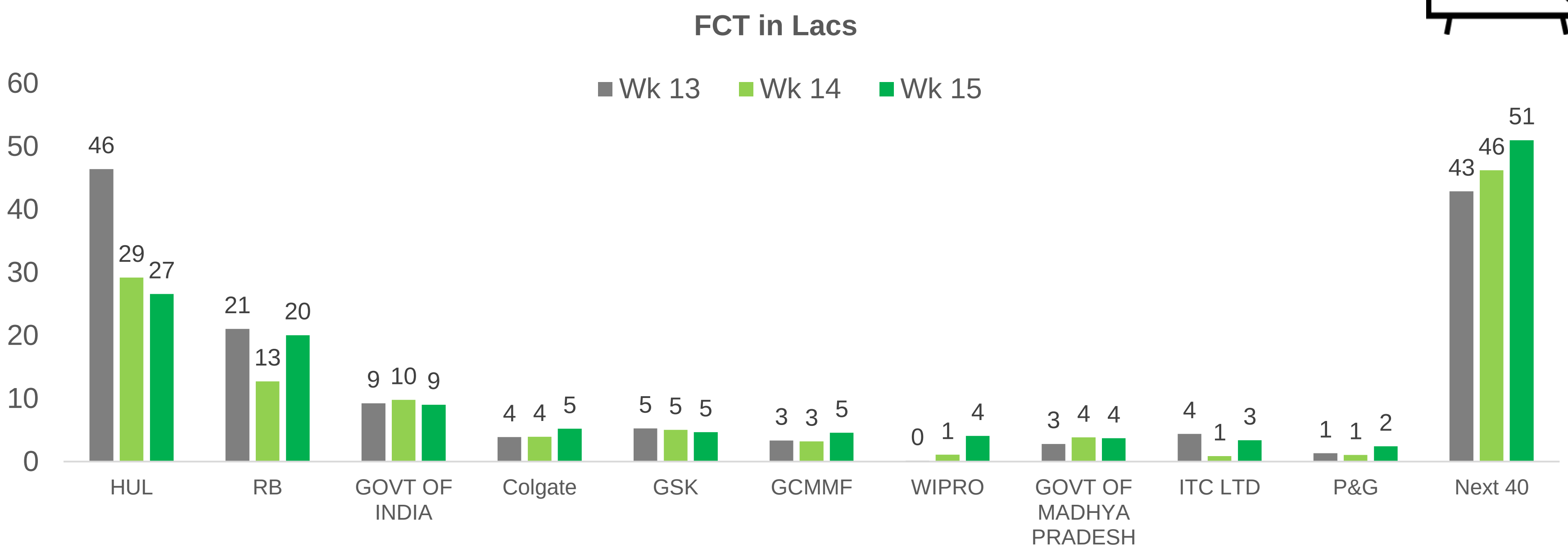
Week 13 (week starting 28 March);Week 14 (week starting 4 April); Week 15 (week starting 11 April)

TOTAL ADVERTISERS ON TV CLIMBING BACK



Data considered from 1st April till 17th April
Week 15 (week starting 11 April) ; Week 14 (week starting 4 April); Pre COVID-19 i.e.Week 2 to Week 4 (11 Jan to 31 Jan)

INVENTORY LEVELS: TOP 10 ADVERTISER INVENTORY GROWS BY 18% AND NEXT 40 GROWS BY 10% (Week 15 over Week 14)

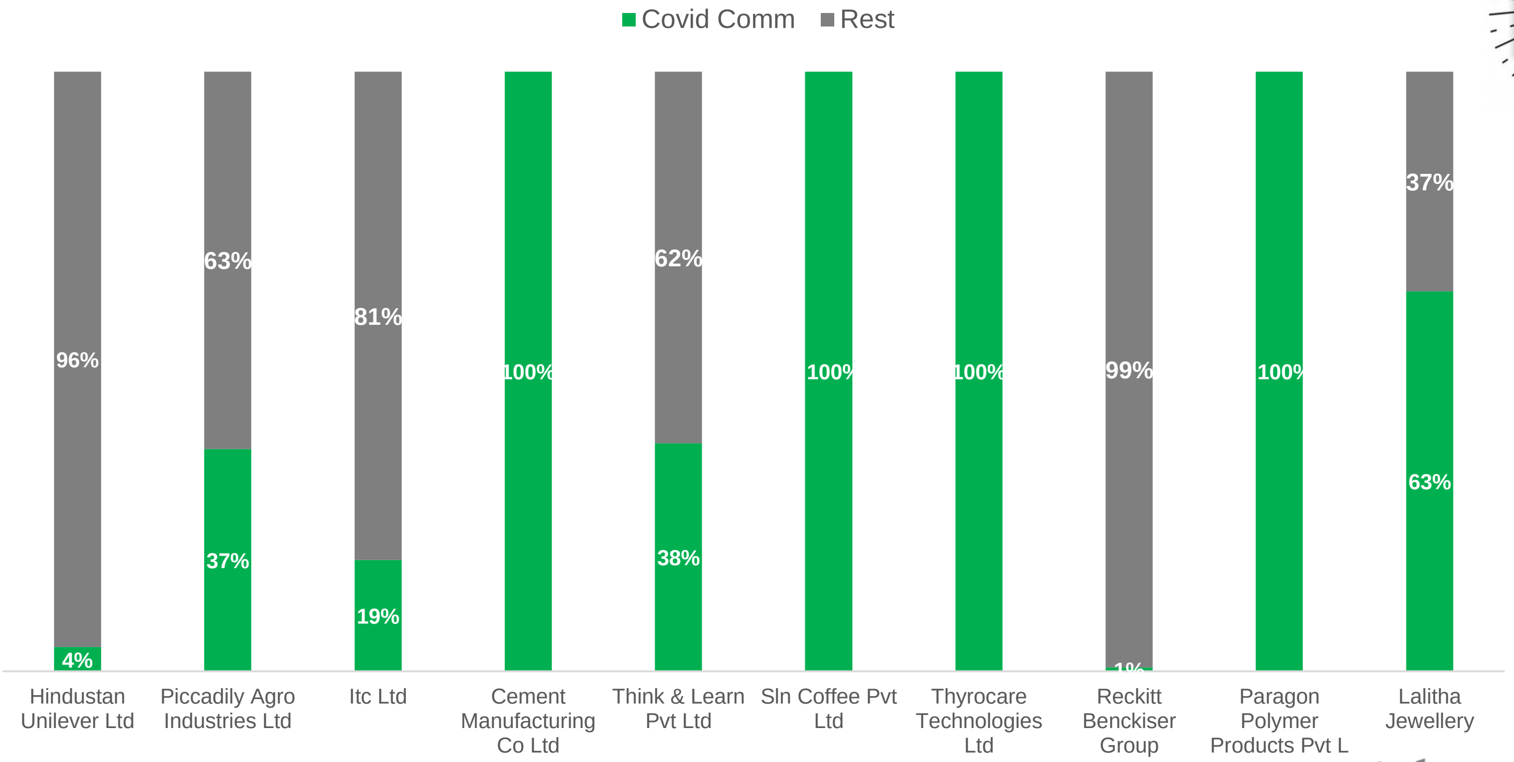


Top 10 Advertisers basis Week 15
FCT in lacs

COVID-19 COMMUNICATION

141 (14%) ADVERTISERS USING THE COVID-19 THEME

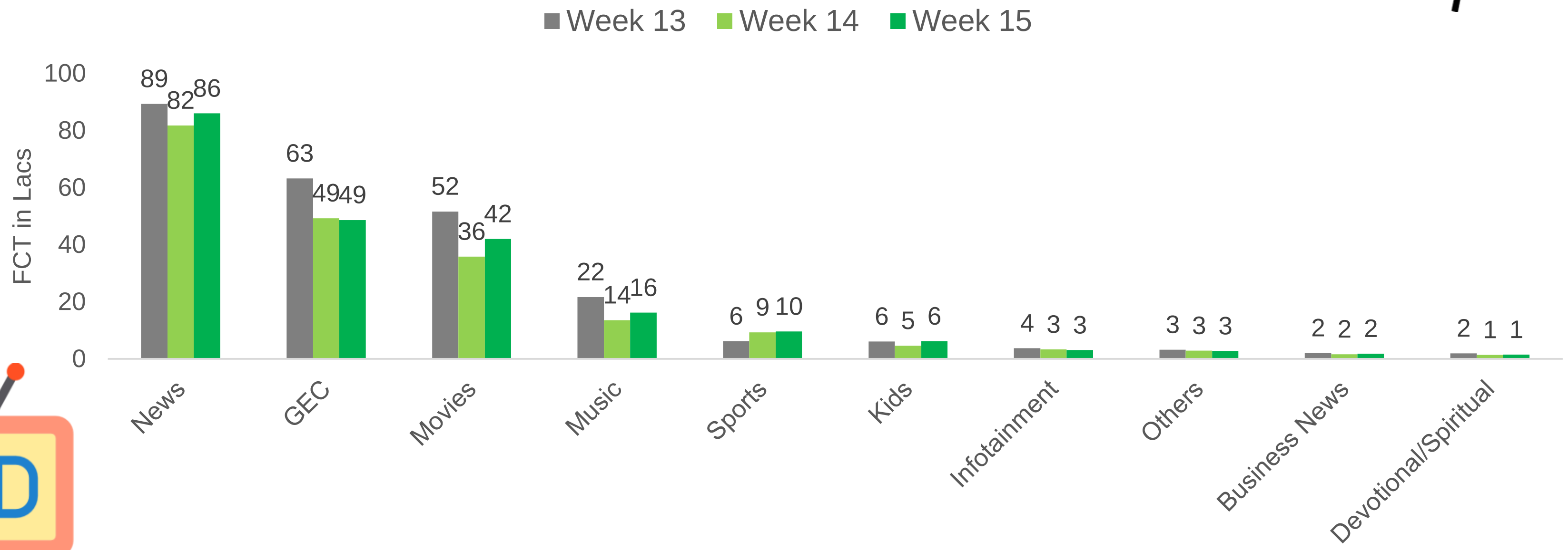
➢ Total of about 10.7 Lac seconds on COVID-19, Top 10 Advertisers account for about 64%



FCT % Covid-19 commercials vs other creatives
1st April till 17 the April

AD VOLUME BY GENRE: GROWTH IN FCT ACROSS NEWS, MOVIES & KIDS GENRE (Week 15 /14)

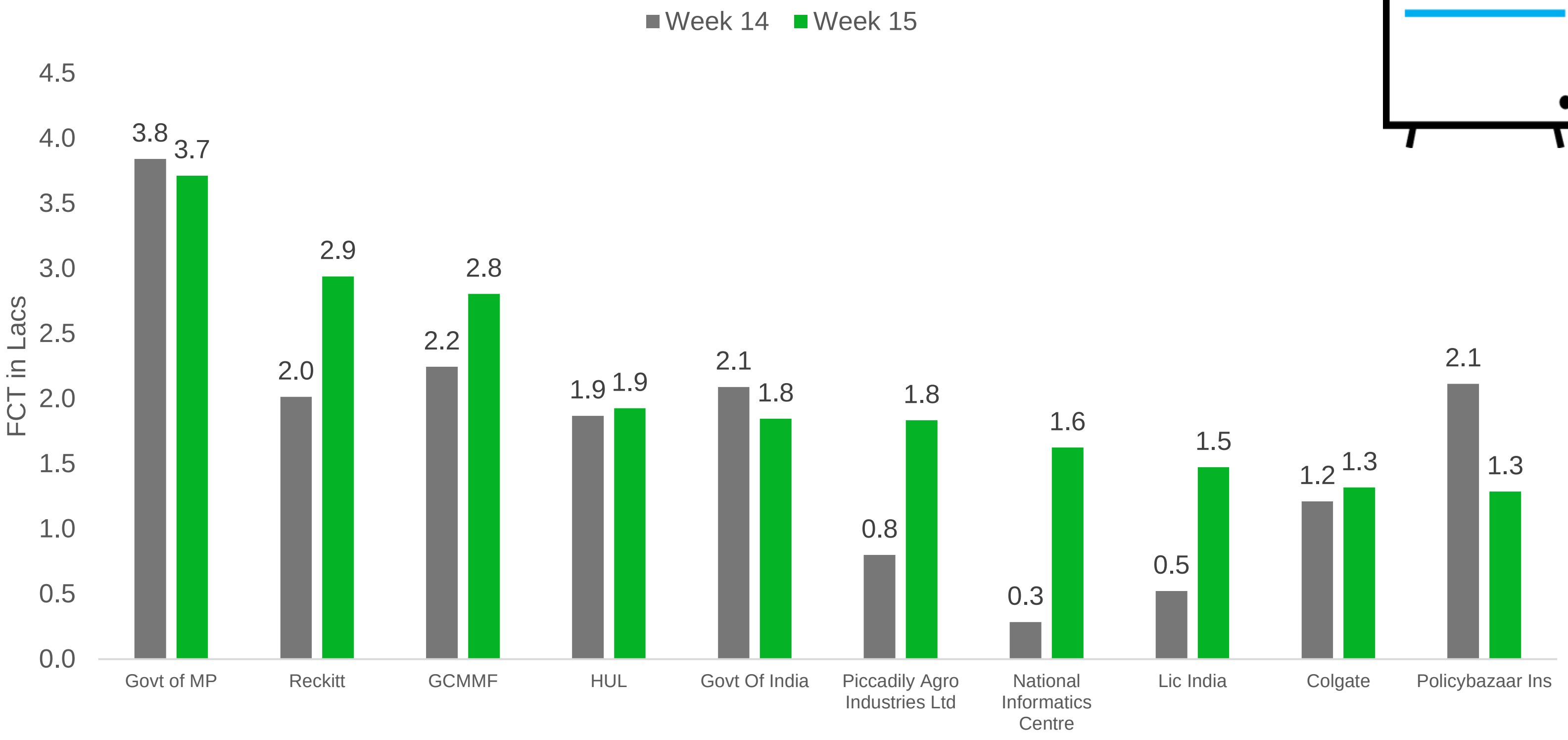
- GEC manages to sustain FCT levels



*Only a few Genres mentioned above
FCT in Lacs
Week 13 to Week 15 (28 March to 17 April)

NEWS GENRE: TOP ADVERTISERS

- Govt of MP,Reckitt, Amul, HUL, GOI, LIC increase FCT

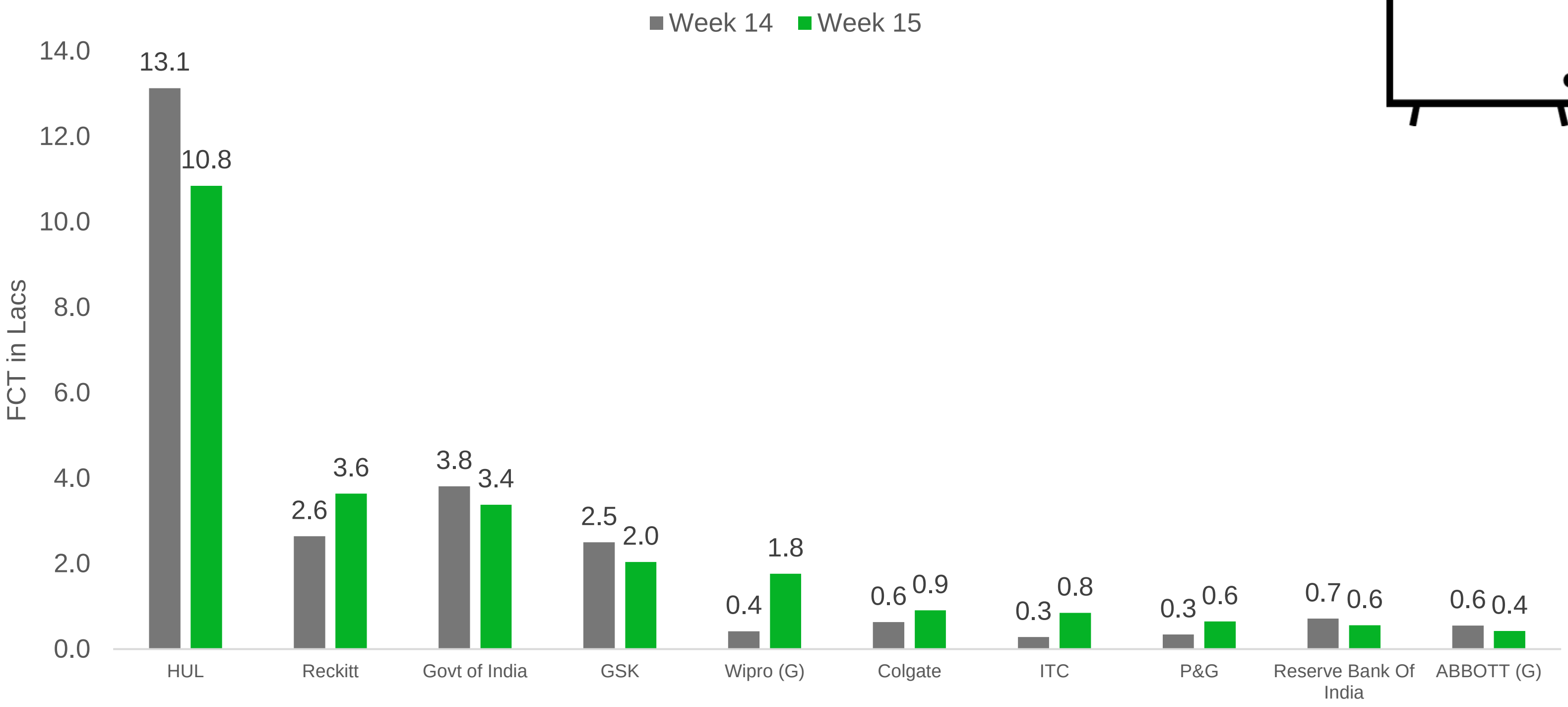


FCT in Lacs (Excluding Broadcaster inventory)

Week 14 to Week 15

GEC: TOP ADVERTISERS

- Many FMCG’ companies increase FCT compared to the last week

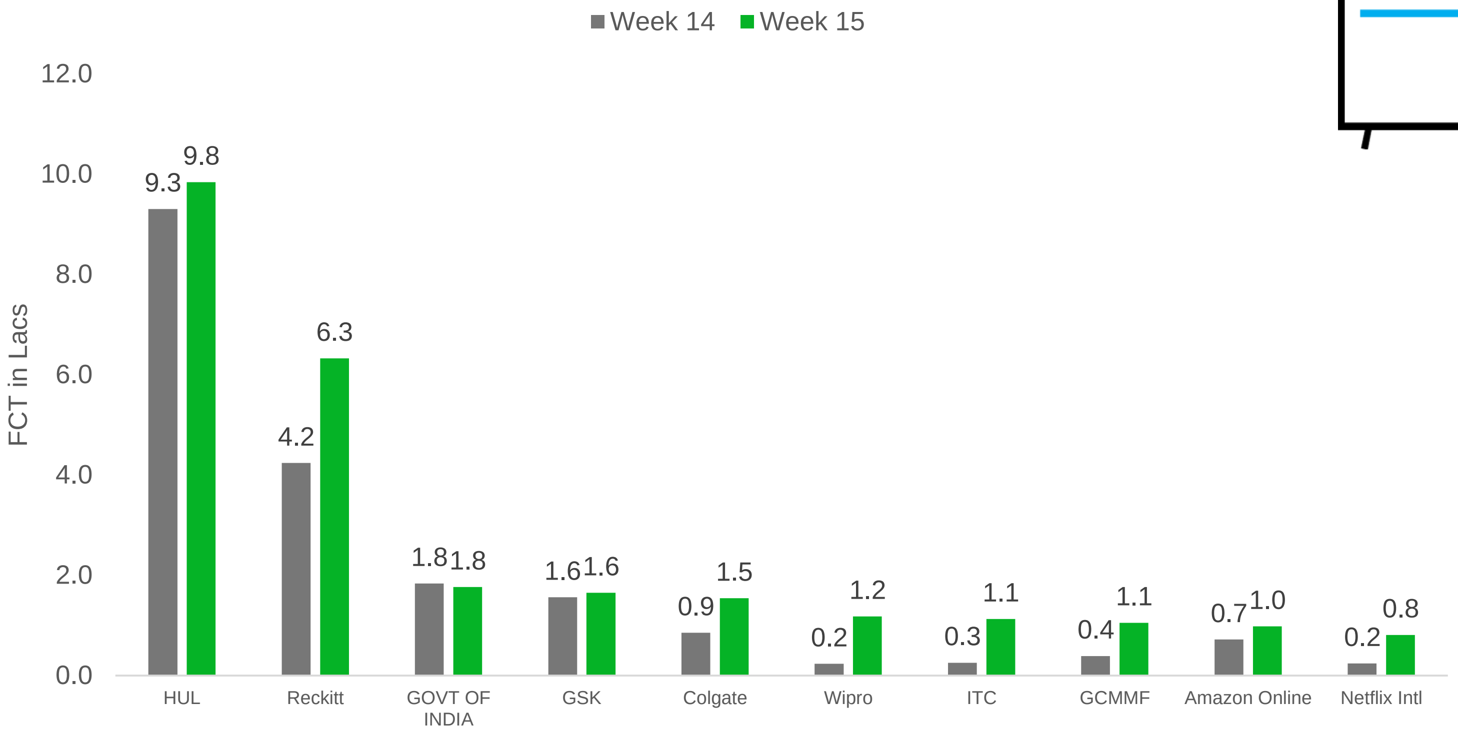


FCT in Lacs (Excluding Broadcaster inventory)

Week 14 to Week 15

MOVIES: TOP ADVERTISERS

- 9 out of Top 10 Advertisers increase their FCT

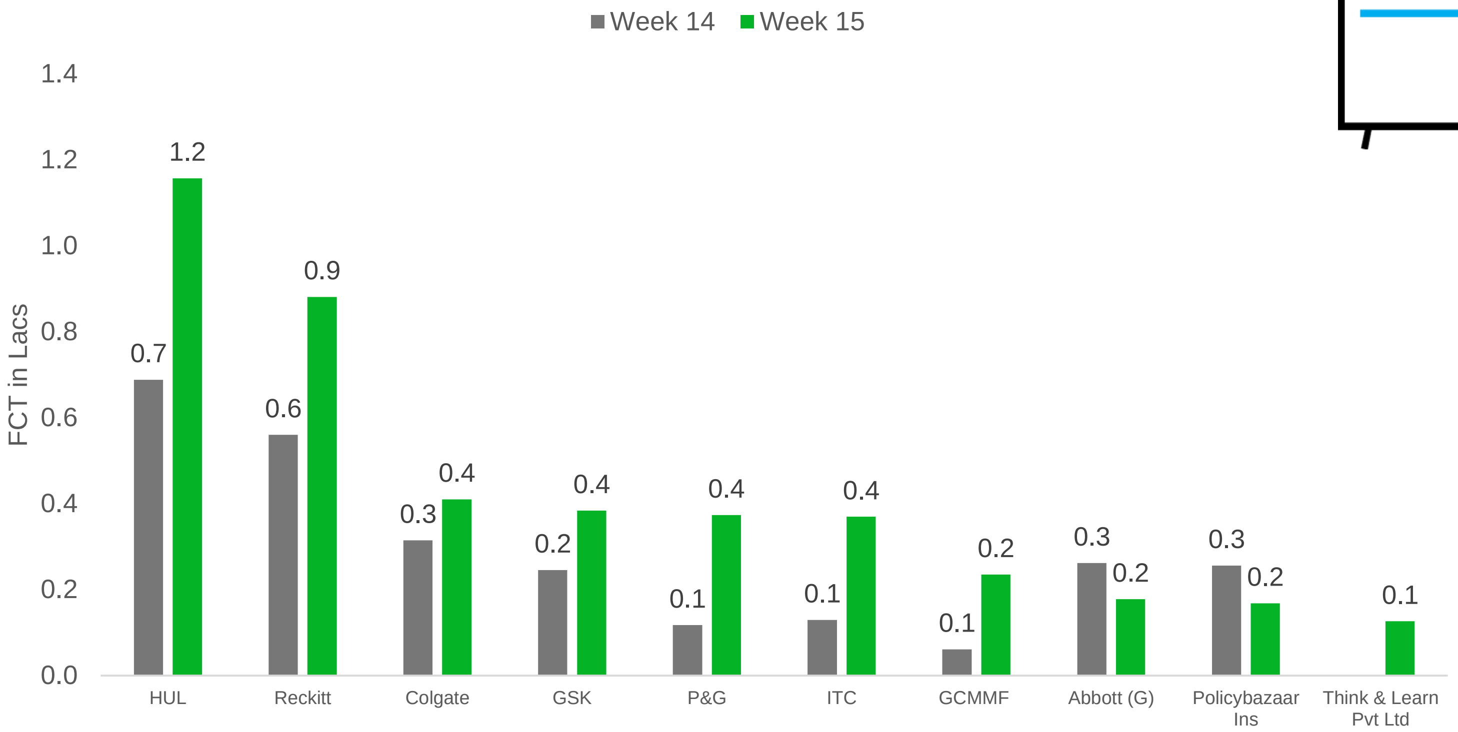


FCT in Lacs (Excluding Broadcaster inventory)

Week 14 to Week 15

KIDS: TOP ADVERTISERS

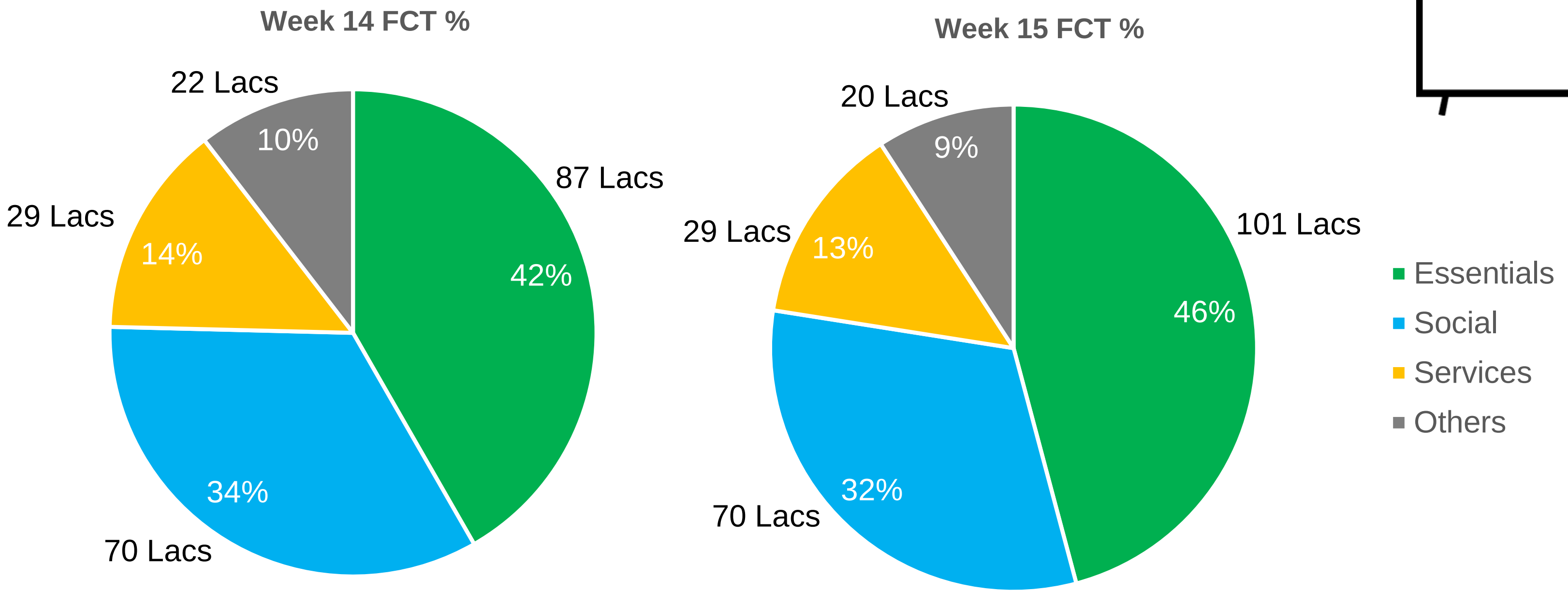
- Growth observed across all advertisers in week 15



FCT in Lacs (Excluding Broadcaster inventory)

Week 14 to Week 15

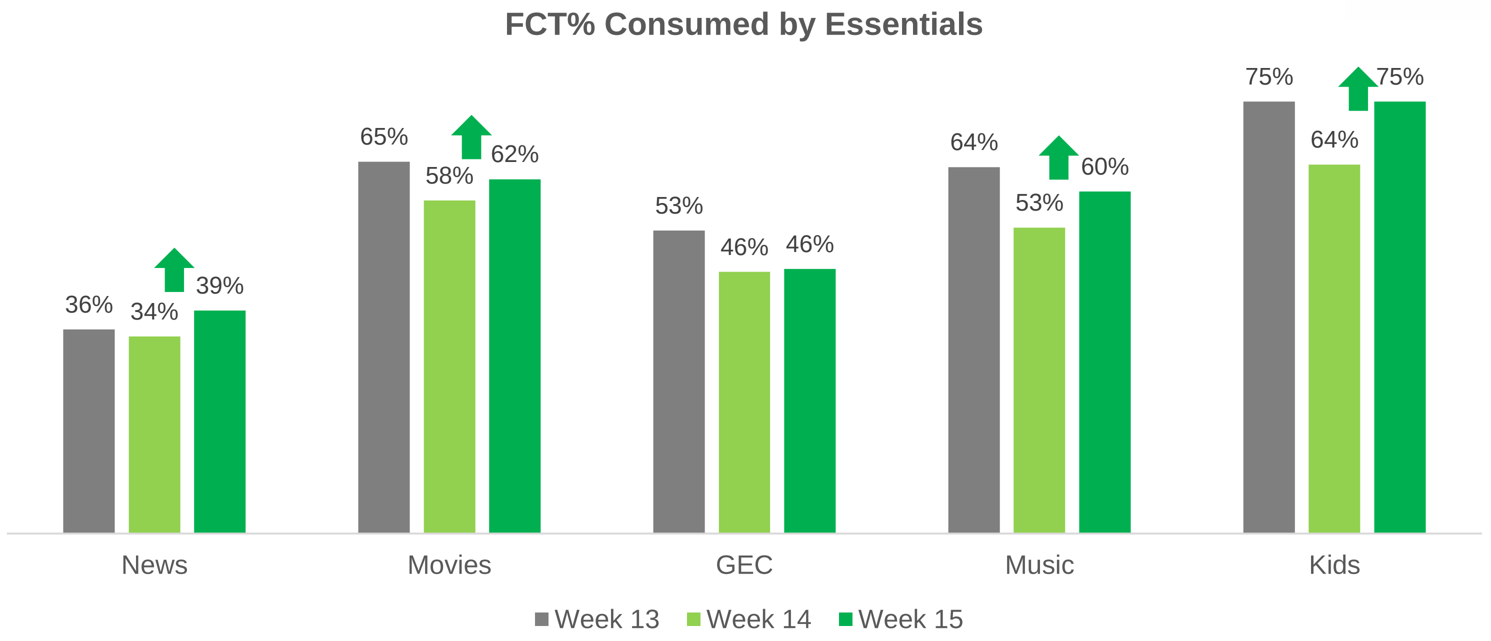
CONTRIBUTION OF ESSENTIALS GREW FROM 42% IN WEEK 14 TO 46% IN WEEK 15



*__Essential Products considered basis the current scenario:__

Banking/Finance/Investment, Food & Beverages, Household Products, Personal Care/Personal Hygiene, Personal Healthcare, Telecom etc.

ESSENTIALS CATEGORY: INVENTORY GROWTH ACROSS GENRES



***Essential Products considered basis the current scenario:**
Banking/Finance/Investment, Food & Beverages, Household Products, Personal Care/Personal Hygiene, Personal Healthcare, Telecom etc.
FCT % for Essentials week wise

Week 13 (week starting 28 March);Week 14 (week starting 4 April); Week 15 (week starting 11 April)

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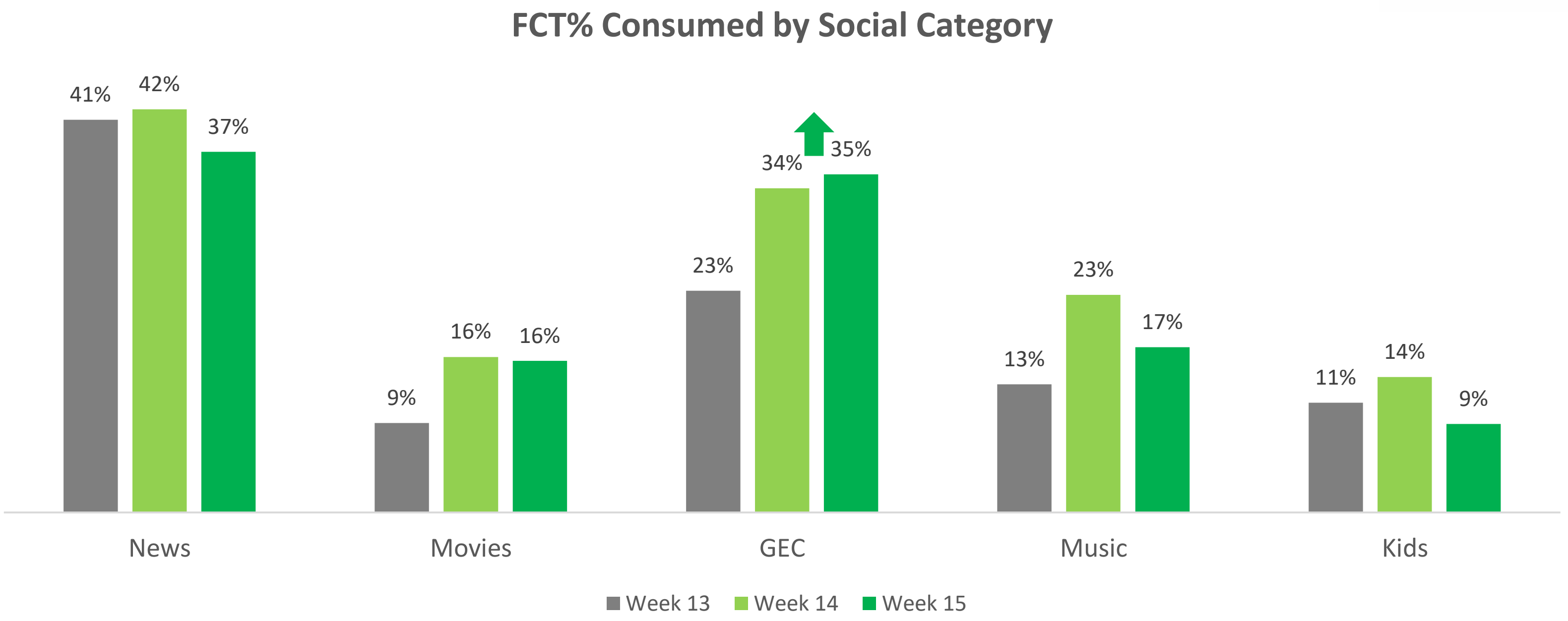
SOCIAL CATEGORY: INVENTORY ACROSS GENRES

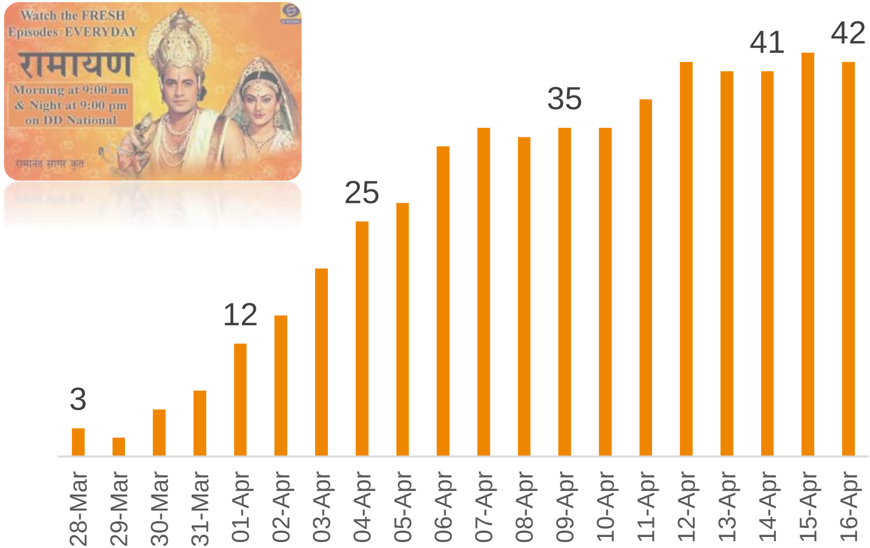


FCT % for Miscellaneous week wise

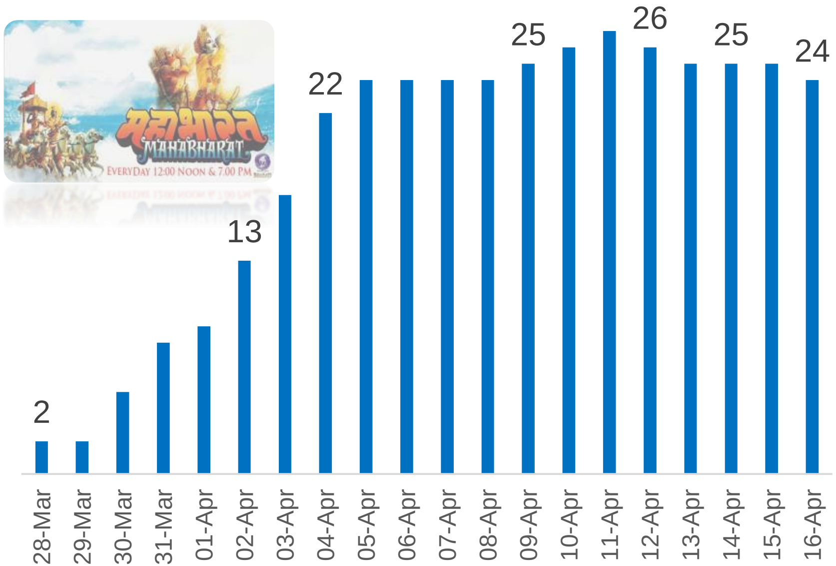
Week 13 (week starting 28 March);Week 14 (week starting 4 April); Week 15 (week starting 11 April)

RAMAYAN & MAHABHARAT ATTRACT MORE ADVERTISERS: ADVERTISER COUNT SEES A 14X & 12X INCREASE RESPECTIVELY

- Daily FCT hovering around 1900 to 2000 secs across both programs



Ramayan on DD National at 0900 & 2100 hrs



Mahabharat on DD Bharati at 1200 & 1900 hrs

Advertiser Count Day wise

BROADCAST AUDIENCE RESEARCH COUNCIL INDIA

SMARTPHONE BEHAVIOR

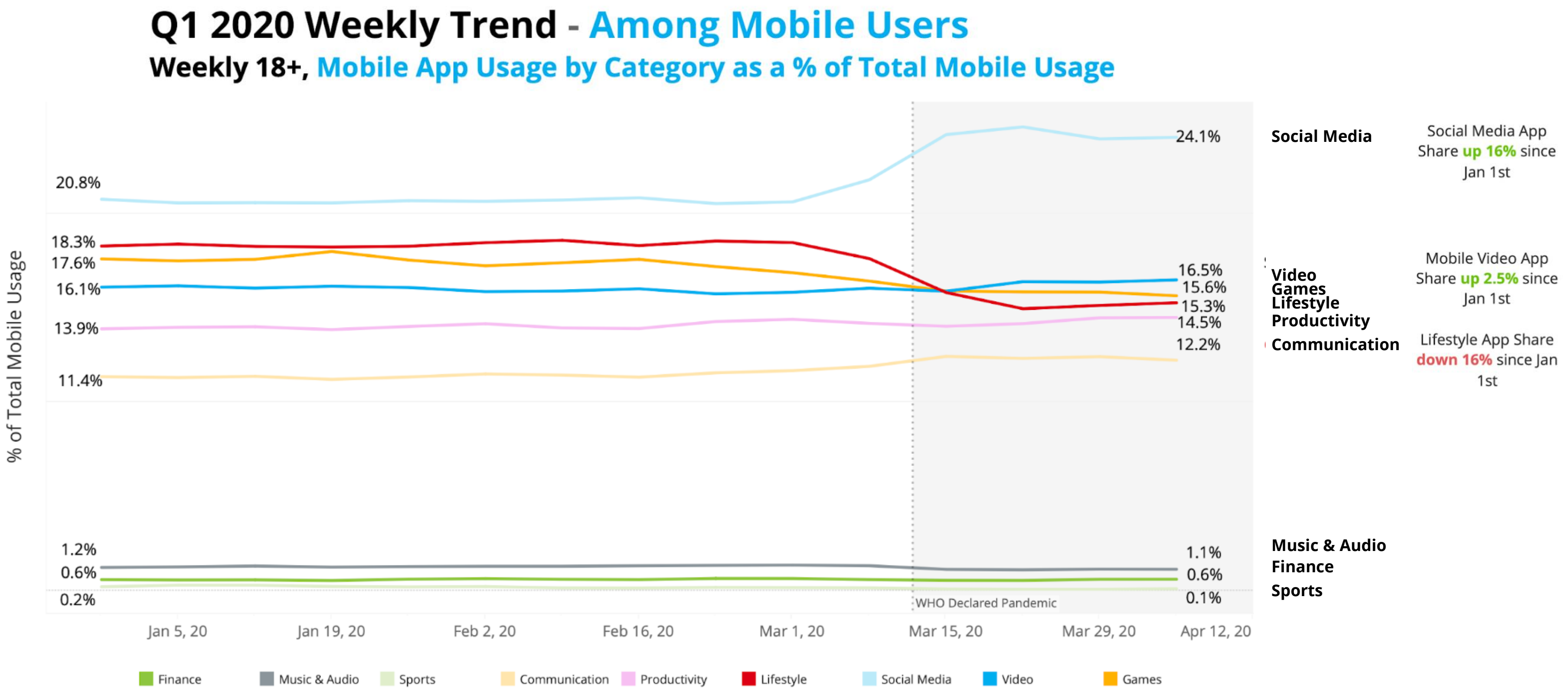
HIGHLIGHTS FROM TODAY'S SESSION

1. Coronavirus: Continues to be Most searched among Top 100 Google searches
2. Aarogya Setu used by 1/5 consumers - 80% + increase v/s the launch week
3. The *New Normal* of 3 hrs, 40 minutes+ per day on Smartphone continues, a 10% increase over pre- Covid times
4. Social networking adds 35% more time since Pre-Covid.
5. Professional suite surges in Covid lockdown.
6. News franchise continued to be nearly 50% of all smartphone audience . Views grow by 40%.
7. Entertainment galore !! Time on Movies grow by 48%, Originals by 69%.
8. Audio streaming apps decline possibly on account of travelling coming down.
9. Video Advertising spends drop across most categories. The growth categories were Corporate Images, F&B, Gaming, Media, Education, Land & Building Equipment.
10. Benchmarking India behaviour on Smartphone vs US - VOD share is similar, BFSI > 3X

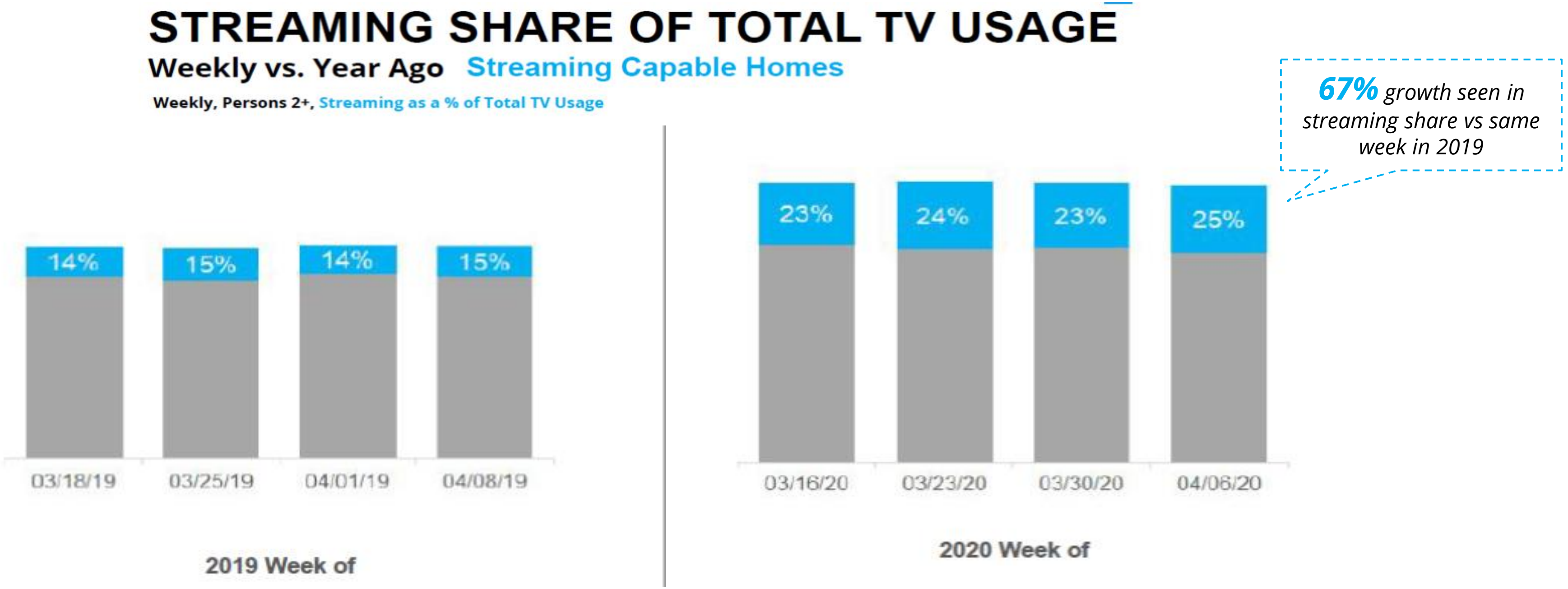
A LOOK AT SOME TRENDS SEEN IN THE US

SOCIAL MEDIA ACCOUNTS FOR NEARLY A FOURTH OF MOBILE USAGE IN THE US

MOBILE USAGE BY APP IN THE US



25% OF TOTAL TELEVISION VIEWING IN THE US WAS **ON STREAMING** IN THE WSD 8TH APR



Source: Nielsen, Streaming Meter Homes, Sum of Daily Streaming Minutes (Weighted) as a percent of Total TV Usage, P2+,Total Day,

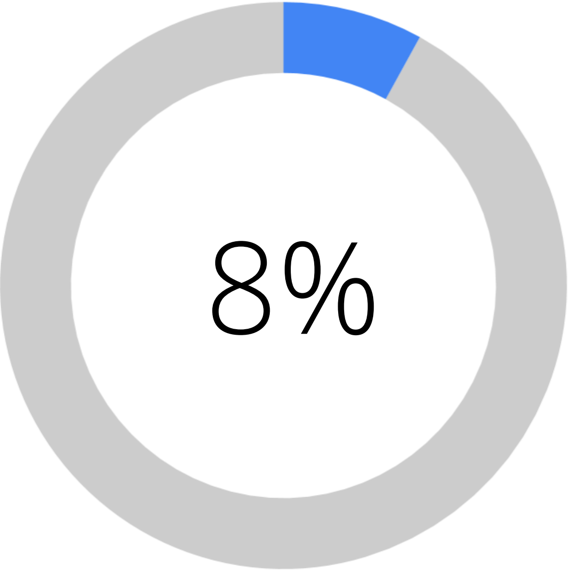
Streaming = content watched via OTTs

INDIA
SMARTPHONE BEHAVIOR

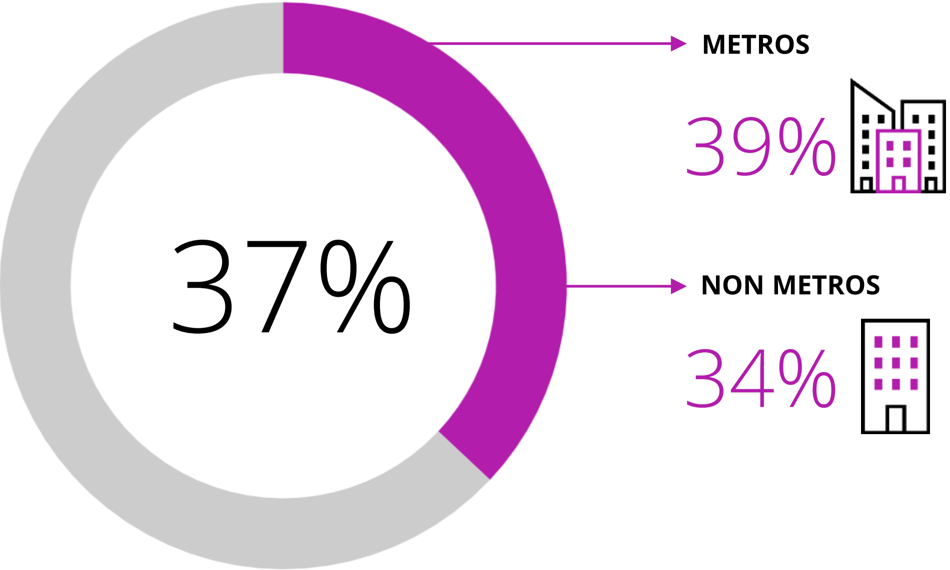
ALMOST 4 IN 10 SEARCHES ARE AROUND CORONAVIRUS IN WEEK 5, **4x TIMES** THE PROPORTION SEEN FOR WEEK 1

TOP GOOGLE SEARCHES WEEK 5 V/S WEEK 1

COVID 19 DISRUPTION - WEEK 1



COVID 19 DISRUPTION - WEEK 5



COVID RELATED SEARCH TERMS

Top 100 Google Searches by Frequency are considered for above
Based on Nielsen Android Smartphone Panel representing 1L+, NCCS ABC, 15-44

PEOPLE SEEN RESPONDING TO PM MODI'S URGES: **USER BASE FOR AAROGYA SETU JUMPED BY 81% IN WEEK 2 V/S WEEK 1 OF ITS LAUNCH, 1 IN 5 NOW HAVE THE APP !!**

DOUBLING OF USER BASE OBSERVED FOR FEMALES & NCCS C

TIMESOFINDIA.INDIATIMES.COM
'Commend your leadership': Bill Gates lauds Modi govt's efforts to flatten Covid curve

	15-24 YRS	25-34 YRS	35+ YRS
% Users/week	18%	23%	**25%**
Growth	+70%	**+85%**	**+94%**

	FEMALE	MALE
% Users/week	**19%**	23%
Growth	**+117%**	+66%

	METROS	NON METROS
% Users/week	**21%**	22%
Growth	**+92%**	+76%

	NCCS A	NCCS B	NCCS C
% Users/week	23%	19%	**22%**
Growth	+76%	+68%	**+115%**

% USERS /WEEK	GROWTH V/S WEEK 4
21%	**+81 %**

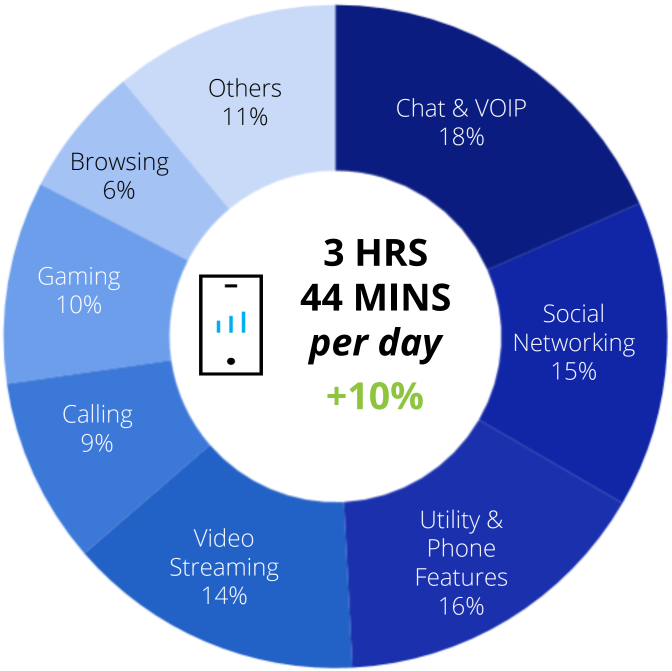
Based on Nielsen Android Smartphone Panel representing 1L+, NCCS ABC, 15-44

CONSUMERS LARGELY CONTINUED ON **THE NEW NORMAL** IN WEEK 5

	Pre COVID-19	COVID-19 Disruption: Week 4	COVID-19 Disruption: Week 5
Daily Time Spent on smartphone	**16.1 Billion mins**	**18.1 Billion mins**	**17.8 Billion mins**
Data Consumption per day per user (in GB)	**1 GB**	**1.2 GB**	**1.2 GB**

+10%

SHARE OF TIME SPENT ON VARIOUS ACTIVITIES ON THE SMARTPHONE-COVID DISRUPTION IN WEEK 5



Others includes-Offline Multimedia, BFSI/Payment, E-Commerce, News Apps, Education, Health, .Astrology, Dating Apps, Mobile Coupons,etc.

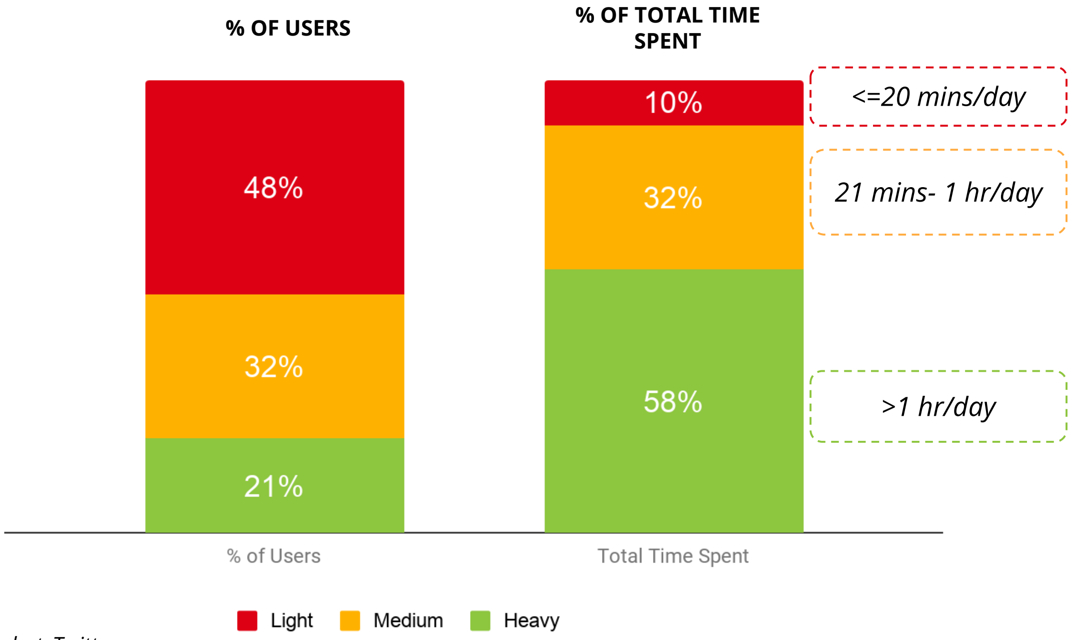
Based on Nielsen Android Smartphone Panel representing 1L+, NCCS ABC, 15-44

~35% OR MORE INCREASE IN TIME ON SOCIAL NETWORKING ACROSS CONSUMER GROUPS. 1 IN 5 SPEND MORE THAN AN HOUR / DAY

Social Networking accounts for 15% share of time on Smartphone

	% USERS/WEEK	TIME SPENT/DAY/USER
SOCIAL NETWORKING	89% -	38 mins +36%

	Change in Time Spent/user/week
15-24 years	+34%
25-34 years	+35%
35-44 years	**+45%**
Premium Users (Metros, NCCS A1)	**+40%**
Working Individuals	**+45%**



All social networking apps included. Top ones are Facebook, Tiktok, Instagram, Helo, Snapchat, Twitter

Based on Nielsen Android Smartphone Panel representing 1L+, NCCS ABC, 15-44

COVID Disruption W5 as compared to Pre COVID-19 Data

WHEN **YOUR HOME** BECOMES **YOUR OFFICE** : **STAGGERING 200% INCREASE** SEEN IN TIME SPENT ON VIDEO CONFERENCING, TIME SPENT ON VIRTUAL DRIVES **SEEN TO DOUBLE**

FOR WORKING PEOPLE

PROFESSIONAL SUITE OF APPS	Change in % users/week	Change in time spent/week
VIDEO CONFERENCING	+546%	+200%
VIRTUAL DRIVES	+19%	+58%

Video Conferencing includes apps like Zoom, Skype, Hangouts & Virtual drives includes apps like Google drive, Onedrive

Based on Nielsen Android Smartphone Panel representing 1L+, NCCS ABC, 15-44

COVID Disruption W5 as compared to Pre COVID-19 Data

~**HALF THE AUDIENCE** IS ON NEWS PLATFORMS, LAPPING UP **21 VIEWS/ WEEK** …

	% USERS/WEEK		NUMBER OF VIEWS/WEEK/USER	
TOTAL NEWS (APPS+WEBSITES+VIDEO)	47%	+25%	21	+41%

A whopping ***805*** million views logged on news in Week 5 of COVID

	% USERS/WEEK		NUMBER OF VIEWSWEEK/USER	
NEWS APPS	21%	+11%	16	+25%

News Apps includes all types of apps like aggregators, Hindi, English, Regional. Examples of apps are Dailyhunt, Newspoint, Dainik Bhaskar, Aaj Tak

	% USERS/WEEK		NUMBER OF VIEWS/WEEK/USER	
NEWS WEBSITES	15%	+25%	23	+45%

Websites includes top 50 news websites

	% USERS/WEEK		NUMBER OF VIEWS/WEEK/USER	
VIDEO NEWS	28%	+62%	11	+50%

Video News includes TV news channels streamed on YouTube, JioTV, Hotstar, MX Player & Zee5

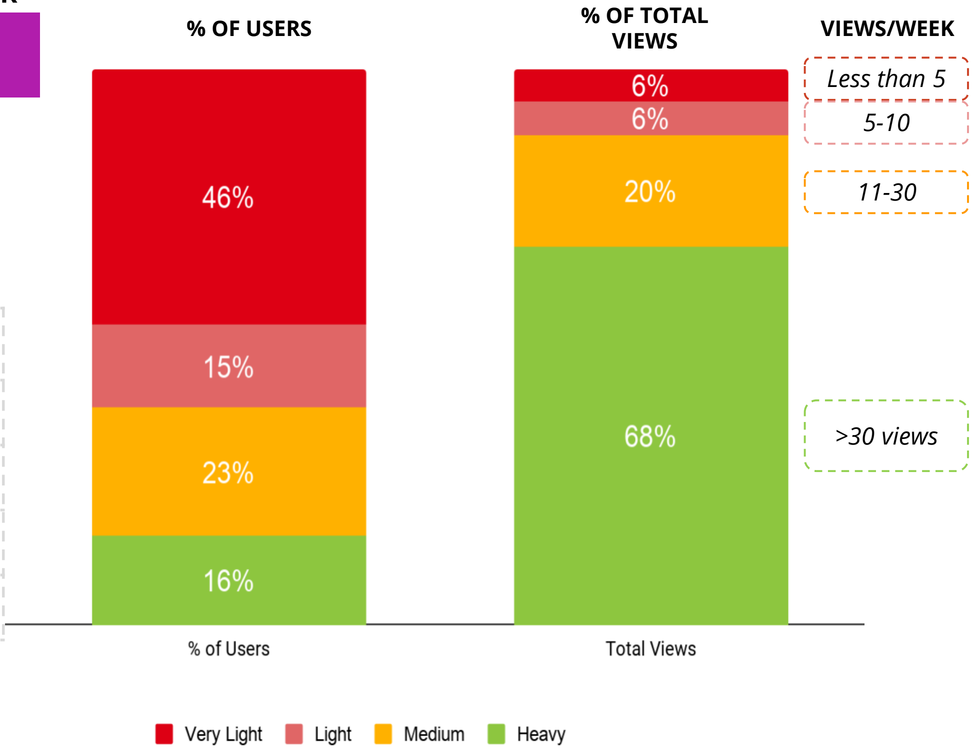
Based on Nielsen Android Smartphone Panel representing 1L+, NCCS ABC, 15-44

COVID Disruption W5 as compared to Pre COVID-19 Data

16% VISIT ANY NEWS PLATFORM MORE THAN 30 TIMES IN A WEEK

	% USERS/WEEK		NUMBER OF VIEWS/WEEK/USER	
TOTAL NEWS (APPS+WEBSITES+VIDEO)	47%	+25%	21	+41%

	Change in %Users/Week	Change in number of sessions/week
North	+26%	+48%
East	+25%	+27%
West	+29%	+48%
South	+15%	+47%



Based on Nielsen Android Smartphone Panel representing 1L+, NCCS ABC, 15-44

COVID Disruption W5 as compared to Pre COVID-19 Data

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COVID PERIOD VIEWING RESULTS IN **A VERY STRONG GROWTH** ACROSS ALL SEGMENTS OF OTTs

	% USERS/WEEK	TIME SPENT/USER/WEEK(Min)
VOD	96% -	3 hrs 55 mins +10%

VOD= Video Streaming Platforms, including Youtube

18 Billion mins/week

Below Table : YT Not included, OTT Apps included below are : Amazon Prime, Hotstar, MX Player online, Netflix, Voot, Zee5

	Change in % users/week	Change in Time Spent/user/week
LIVE TV	+38%	+71%
MOVIES	**+56%**	**+48%**
INDIAN MOVIES	+43%	+30%
INTERNATIONAL MOVIES	+187%	+52%
ORIGINAL SERIES	**+141%**	**+69%**
INDIAN ORIGINAL SERIES	+151%	+58%
INTERNATIONAL ORIGINAL SERIES	+161%	+57%
SYNDICATED SERIES	-45%	-8%

Syndicated Shows - Includes shows from parent brand, which were not originally created for the OTT platform
Original Series- Content that is tagged as original or exclusive on the platform

Based on Nielsen Android Smartphone Panel representing 1L+, NCCS ABC, 15-44
COVID Disruption W5 as compared to Pre COVID-19 Data

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AUDIENCE SCAPE FOR OTT VIEWERS AS IT STANDS TODAY..

75% USER PREFERENCE (BASIS TIME) IS STACKED BETWEEN MOVIES & SYNDICATED CURRENTLY

Below Table : YT Not included, OTT Apps included below are : Amazon Prime, Hotstar, MX Player online, Netflix, Voot, Zee5

Basis Category Wise Time Spent on OTT	**Second Screen Viewers**	**Movie Buffs**	**Preferrers of Syndicated Shows**	**Preferrers of Original Shows**
Audience Sizing	11%	**38%**	**37%**	14%
Demographic Highlights *(Over indexed)*	NCCS C,25-34 yr old users , Coming from Tier I towns	NCCS A, 15-24 yrs old users coming from Metros	Female users coming from Metros	NCCS B, 15-24 yrs, Female users, coming from Metros & Tier I towns
Behavioural Highlights *(Over indexed)*	Heavy users of News	High incidence for Fitness Apps & are spending substantial time on Shopping apps		Heavy users of Social Media & Chat and VOIP

Based on category with most time spent: Second Screen Viewers- Most time on OTT spent on Live Channels, Movie Buffs-Most time on OTT spent on Movies, Preferrers of Syndicated Shows / Original Shows -Most time on OTT spent on syndicated/original series

Syndicated Shows - Includes shows from parent brand, which were not originally created for the OTT platform
Original Series- Content that is tagged as original or exclusive on the platform

Based on Nielsen Android Smartphone Panel representing 1L+, NCCS ABC, 15-44
COVID Disruption W5 as compared to Pre COVID-19 Data

LESSER TIME SPENT ON AUDIO STREAMING POSSIBLY ON ACCOUNT OF TRAVELLING COMING TO A HALT

	CHANGE IN % USERS/WEEK	CHANGE IN TIME SPENT/ USER/WEEK
Audio Streaming	-5%	-32%

Time Spent based on audios streamed on top 6 audio streaming apps

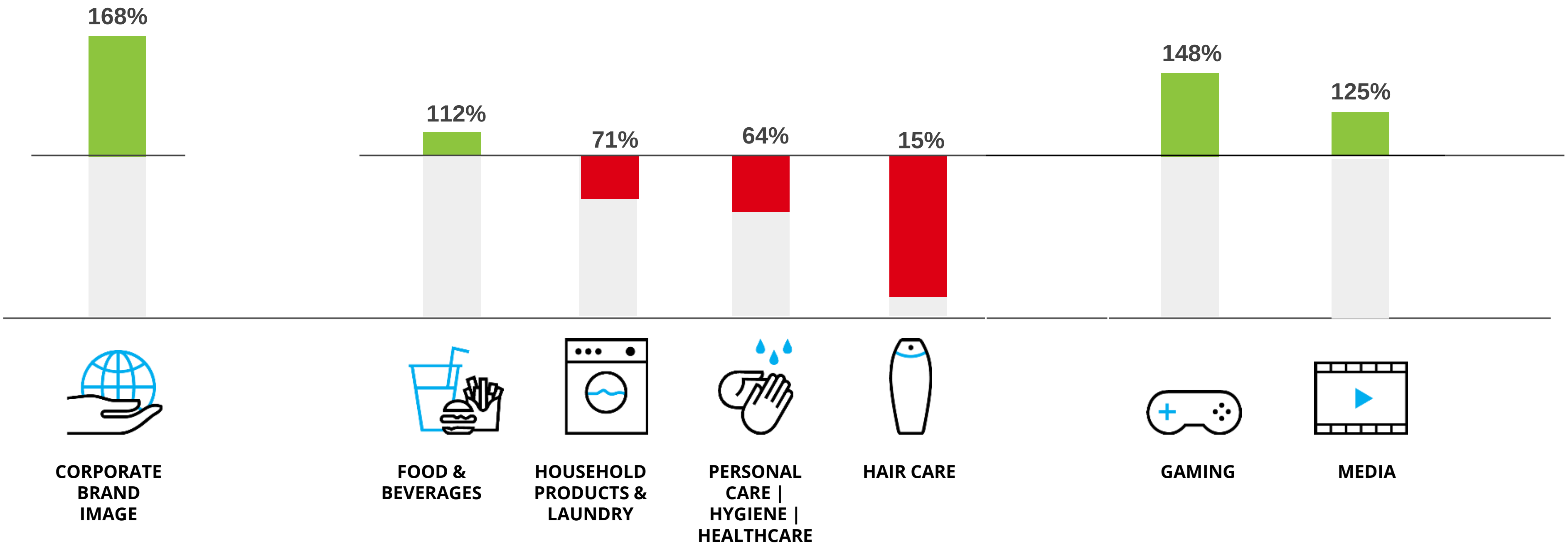
	Change in % users/week	**Change in Time Spent/user/week**
Metros	-6%	**-42%**
Non-metros	-5%	-26%

Based on Nielsen Android Smartphone Panel representing 1L+, NCCS ABC, 15-44
COVID Disruption W5 as compared to Pre COVID-19 Data

DIGITAL ADS

DIGITAL VIDEO: **GROWTH IN DIGITAL AD SPENDS SEEN FOR F&B, GAMING & MEDIA**

Post Covid (28th Mar -10th Apr) vs Pre Covid (Jan)
% Change in Creative Counts



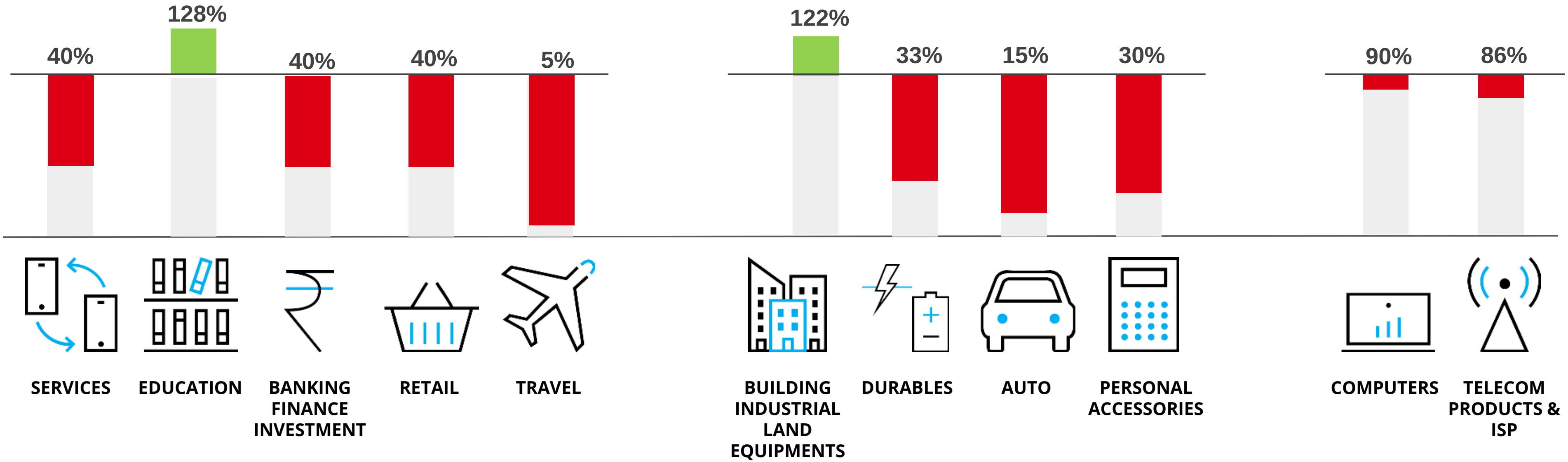
Unique Videos Creatives of Hotstar & YouTube (Pre roll & Mid roll) and TikTok

** : Current capability of Ad Scanning covers Video Ads, Above Data covers Youtube/ Hotstar / TikTok largely

Based on Nielsen Android Smartphone Panel representing 1L+, NCCS ABC, 15-44

DIGITAL VIDEO: **AD SPENDS DROP SEEN IN MOST OF CATEGORIES**

Post Covid (28th Mar -10th Apr) vs Pre Covid (Jan)
% Change in Creative Counts



Unique Videos Creatives of Hotstar & YouTube (Pre roll & Mid roll) and TikTok

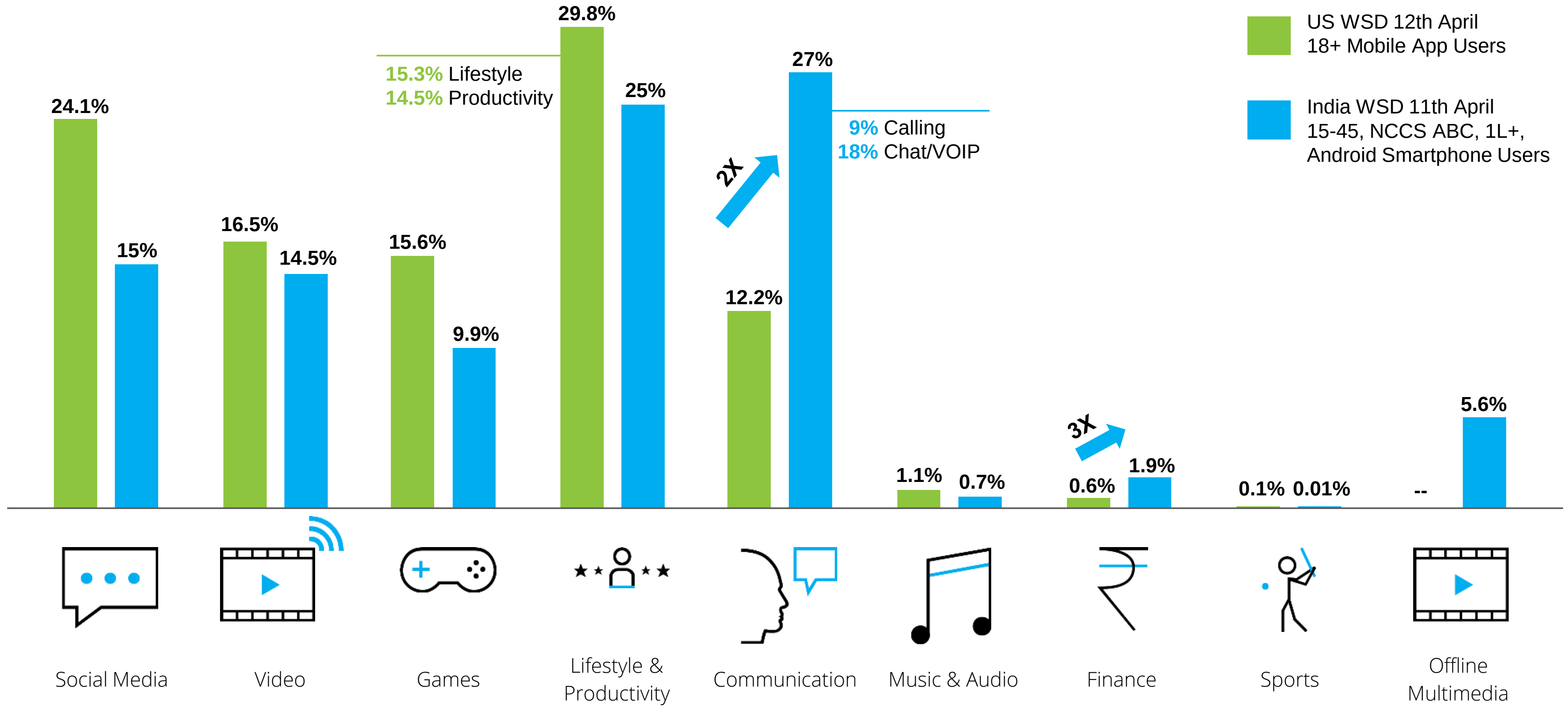
***For Services** Sector - it includes Digital Payment, Doc appointment, Web Hosting, etc,*

** : Current capability of Ad Scanning covers Video Ads, Above Data covers Youtube/ Hotstar / TikTok largely

Based on Nielsen Android Smartphone Panel representing 1L+, NCCS ABC, 15-44

HOW DOES **INDIA** STACK UP VERSUS THE **US** ON SHARE OF ACTIVITIES ON MOBILE APPS ?

SIMILAR SHARE FOR VOD, COMMUNICATION -- INDIA IS 2X, FINANCE - INDIA IS 3X



Lifestyle+Productivity includes Utility & Phone features, browsing/searching, ecom, health, news, education, travel.

SUMMARIZING THE KEY POINTS FROM TODAY'S SESSION

SUMMARY

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 **Mythologicals 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

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