HOW ARE MEDIA HABITS CHANGING AS INDIA ENTERS UNLOCK 2.0

EDITION 10

9TH JULY 2020

AGENDA

TV Consumption

1. Global Landscape
2. Indian TV Landscape
    a) TV Viewership : H1 2020 vs 2019
    b) Key Highlights of Week 26
3. Overview of:
    a) Language & Genre-wise performance
    b) Return of original programming
    c) Mythology content
    d) Free platform performance
4. Advertising Trends: H1 2020 vs 2019

Smartphone Consumption

1. Change in Smartphone Usage
2. Revival & Growth of categories with Unlock
3. Plight of the 59 banned Apps
4. News Consumption
5. Video Streaming Behavior
6. Advertising on Smartphone

GLOBAL LANDSCAPE

Deep-dive into the impact of COVID-19 on TV viewership & consumer sentiment by countries

COVID-19 IMPACT ON TV VIEWERSHIP

As lockdown restrictions have eased across countries, TV viewership has witnessed decline from its peak levels. ‘News’ continues to register high viewership.

United States

- The primetime viewership of 4 major broadcast networks (ABC, Fox, NBC, CBS) declined by 33% vs. 2019
- **Performance of President Trump’s speech in Tulsa, Oklahoma*** – 8.2 million watched on Fox News channel which aired it live (biggest Saturday night audience in the network’s history)
- **Impact of George Floyd’s death on news viewership*** - CNN’s primetime audience increased by 238% vs. 2019, Fox News +61%, MSNBC +40%

United Kingdom

- TV viewing peaked in week 13 to ~220 mins/day**. In week 26 it is **182mins/day** (17% decline from the peak levels, however it is still 11% more than same week of 2019)
- On 17th June, the **Premier League** returned – leading to **51% increase in live viewing** in week 25 vs. previous week, across all tagged BVOD# services on non-TV devices.

India

- In week 26 Total TV viewing is 15% more than Pre-COVID weeks, driven by 8% increase in Reach & 6% increase in average daily ATS

France

Total TV viewing continues to decline after witnessing a peak in April

- Total TV daily viewing time per individual was at 03:53 in Pre-COVID period, it **peaked to 04:40 in April** (20% higher than Pre-COVID). In 1st week of July (week 27) it is **03:26 (12% lower than Pre-COVID)**

Australia

- TV viewing witnessed a peak in week 13 with the onset of lockdown
- Gradual decline witnessed as restrictions are relaxed - but total TV viewing is ~10% higher across the day compared to pre-pandemic period

Sources: BARC (India), BARB (UK) ,OzTAM (Australia), Mediametrie (France)

USA : * Nielsen, https://www.latimes.com/entertainment-arts/tv/story/2020-06-16/no-sports-no-viewers-for-networks-as-tv-ratings-slide-for-week-of-june-8-14-2020, https://www.forbes.com/sites/bradadgate/2020/06/08/the-impact-of-coronavirus-on-cable-tv-is-mixed/#6c7fb2f72fda

**UK - consolidated 7-day TV set viewing to BARB-reported channels, average daily mins viewed

#BVOD – Broadcast Video on Demand

KEY SPORTING EVENTS RETURNED TO TV AFTER A HIATUS. GARNERING HIGHER VIEWERSHIP THAN PRE-LOCKDOWN PHASE

Germany

BUNDESLIGA

- Record viewership for in Germany. Re-start after a 66-day hiatus
- Main domestic broadcast partner Sky achieved an overall **27.2% market share**
- In the target group of **14-49 year olds**, the total market share was **more than 60%**
- In Germany more than 6 million tuned in to watch first league match

Spain

LaLiga

- Viewership **increased by over 48%**
- Watched by **4.5m** domestic viewers
- Viewing audiences increased by 72% in Asia, while in Europe, audiences swelled by over 56%, with the biggest spike (130%) coming from Belgium
- For the first round of matches on June 11, the biggest audience bounce came in Africa, where it received a 73% boost in viewers

UK

Premier League

- **Cumulative reach over 17.6m people** – i.e. 29% of individuals aged 4+ in TV households.
- Reach of the first match (Aston Villa vs Sheffield United) was **4.39m** people.
- The highest-reaching individual match was Bournemouth vs Crystal Palace on BBC1, with over **8.8m people** tuning into at least three minutes of the live game

Bundesliga: https://www.thenational.ae/sport/football/record-viewership-for-bundesliga-restart-in-germany-1.1020668
La Liga : https://www.straitstimes.com/sport/football/tv-viewership-of-la-liga-jumps-48-after-restart
English premier league: BARB

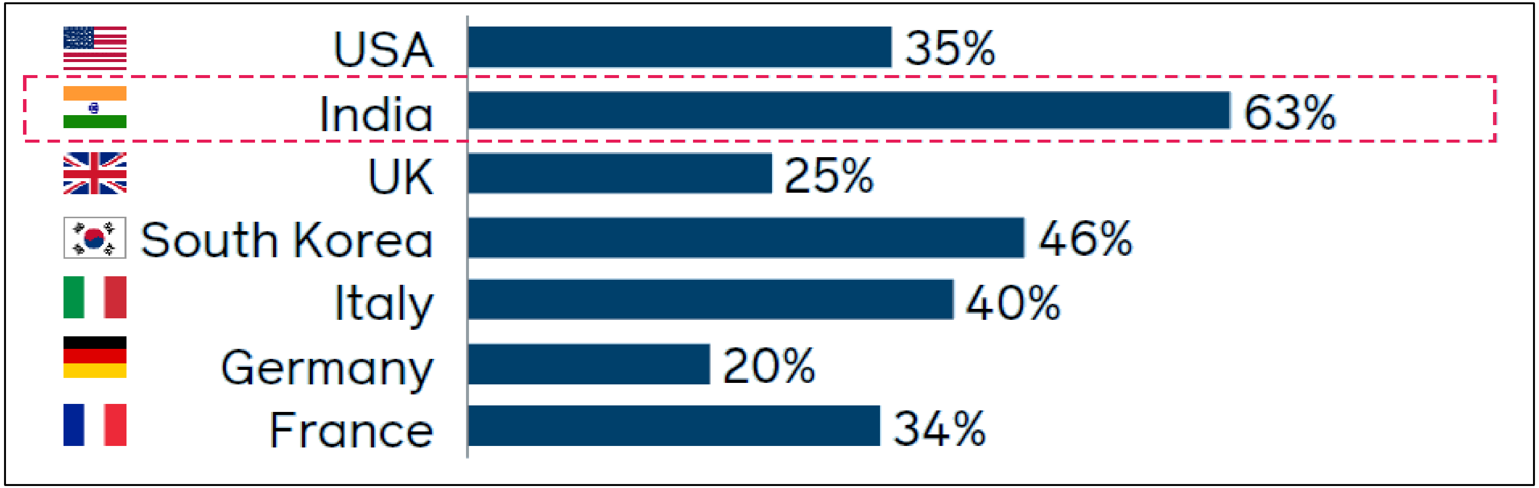
COVID-19 IMPACT ON CONSUMER SENTIMENT [1/2]
FOCUS ON PRODUCT ORIGIN IS MORE PRONOUNCED IN INDIA THAN OTHER COUNTRIES

Consumers gravitating to brands they can trust

65% Believe that brand's response to crisis would have impact on future purchase likelihood

63% Paying more attention to origin of products

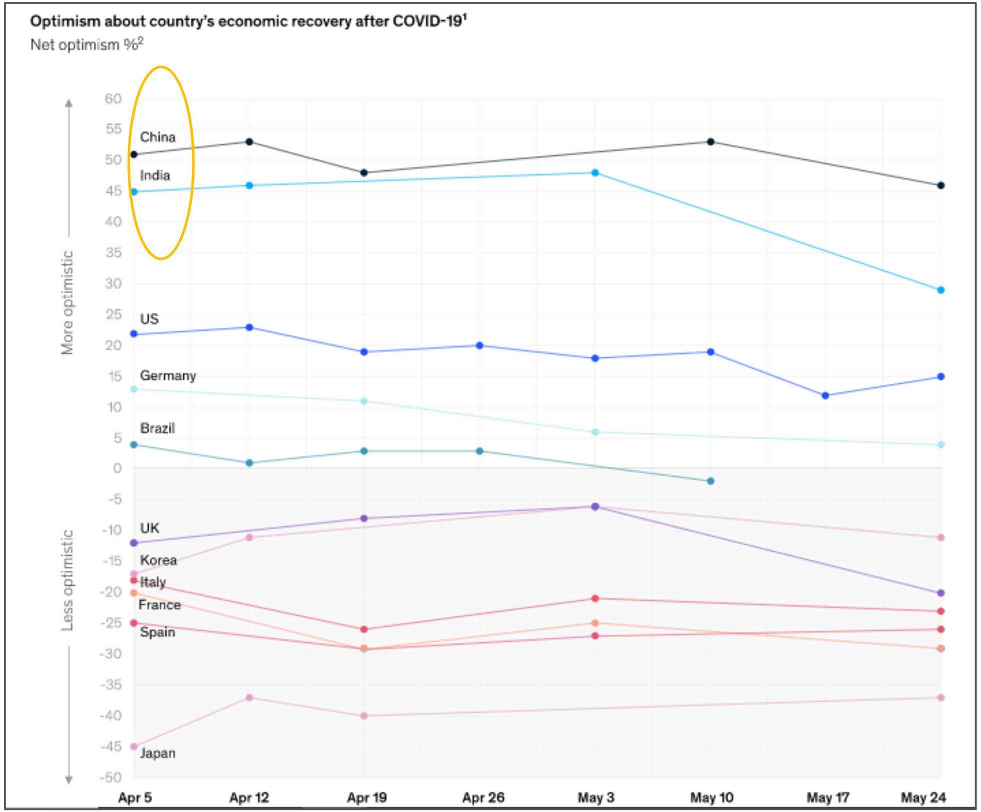
59% Continuing to purchase same brand as always



Source: BCG, Facebook "Turn the Tide" May 2020 report

COVID-19 IMPACT ON CONSUMER SENTIMENT [2/2]
INDIA IS MORE OPTIMISTIC THAN OTHER COUNTRIES

Consumer sentiment across countries as lockdown opens up



China and India remaining more **optimistic**

Japan being the **least optimistic** of the countries surveyed.

The US, Germany, and Brazil have more consumers who are optimistic about an economic recovery, while most European countries, Japan and Korea have more consumers who are less optimistic.

Source: McKinsey study, June 2020. Consumer sentiment tracked across 45 countries

THE SCOPE OF OUR ANALYSIS: INDIA

BROADCAST AUDIENCE RESEARCH COUNCIL 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 10: 27th June - 3rd July 2020

Frequency: Weekly

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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 10: 27th June - 3rd July 2020

Frequency: Weekly

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

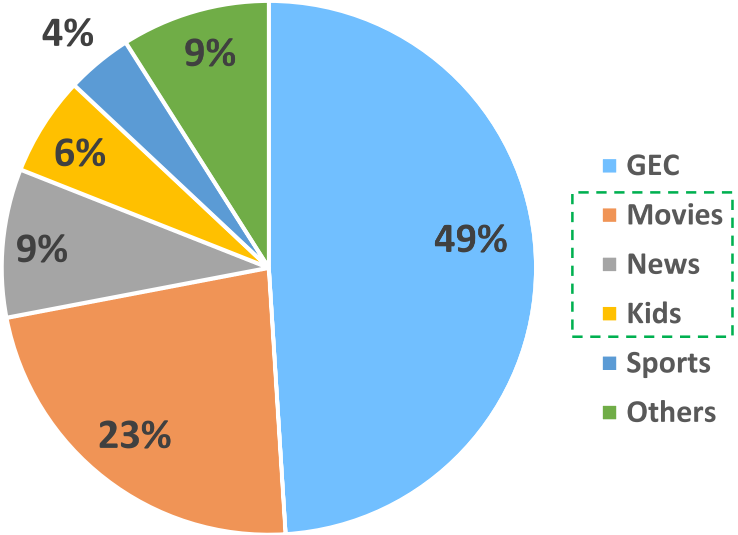
INDIAN TV LANDSCAPE

TV Viewership : H1 2020 vs 2019

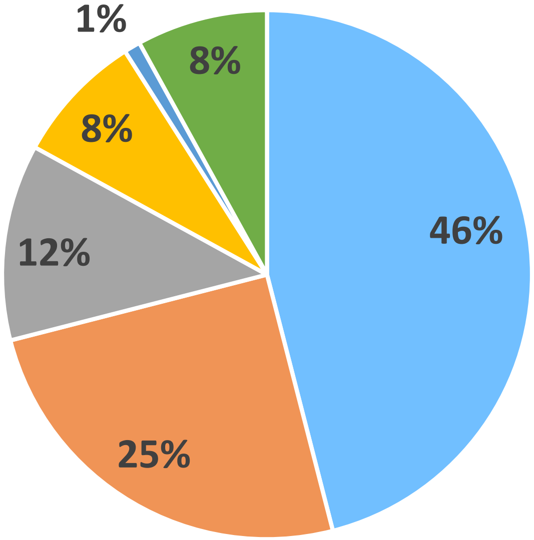
Key Highlights of Week 26

H1 PERFORMANCE 2020 VS. 2019 : SHARE OF GENRES VIEWERSHIP SHARE FOR MOVIES, NEWS & KIDS HAVE INCREASED

Share of GEC declined from 49% to 46% due to no original programming during lockdown period



2019 H1



2020 H1

Count of channels	
News	198
GEC	160
Movies	111
Sports	31
Kids	19
Others	131

Share% for the genre based on Imp'000
All India, 2+
H1- Week 1 to week 26

TOTAL TV IN H1 2020 IS 9% HIGHER THAN 2019 'NEWS' SHOWS HIGHEST GROWTH VS. 2019

Change% : H1 2020 VS. 2019

Channel	Full Day	NPT	PT
TOTAL TV	9%	14%	4%
GEC	2%	8%	-2%
Movies	19%	20%	19%
News	43%	41%	48%
Kids	31%	32%	28%
Music	-9%	-9%	-7%
Sports	-67%	-48%	-79%
Youth	-20%	-20%	-22%
Infotainment	16%	23%	7%
Devotional/Spiritual	22%	22%	22%
Lifestyle	28%	29%	25%
Business News	44%	60%	15%
Others	49%	38%	78%

H1 – Week 1 to 26
Week 26 i.e. week starting 27 June

India/ 2+/ % Gain-Drop in Genres Viewership   Full Day : 0200-2600; NPT : 0600-1800; PT : 1800-2400

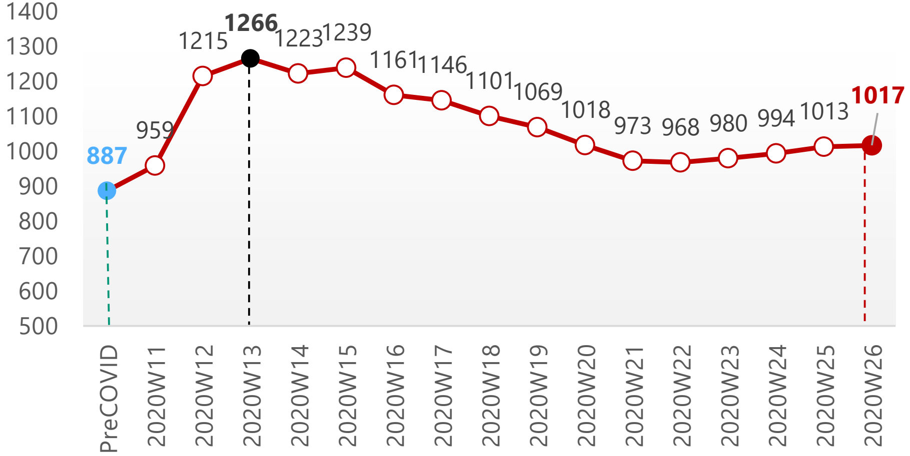
'Others' incudes 16 channels like News Time Assam, Oscar Movies Bhojpuri, Filmy, Lord Buddha TV etc.

IN WEEK 26 TOTAL TV VIEWERSHIP HAS RECORDED 1 TRILLION VIEWING MINUTES

Total TV viewership peaked by 43% (in week 13) and is at present 15% higher than pre-COVID viewing
Daily Reach continues to be over 600 million

Pre-COVID | Highest value for the respective statistic | Week 26

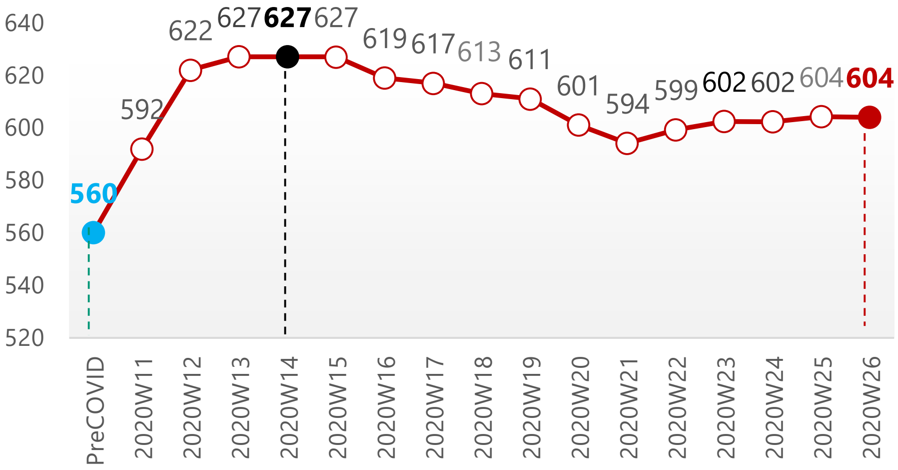
WEEKLY VIEWING MINUTES IN BN



Change%

W26 vs Pre-COVID	15%
W26 vs W13	-20%

DAILY AVG REACH IN MN



Change%

W26 vs Pre-COVID	8%
W26 vs W14	-4%

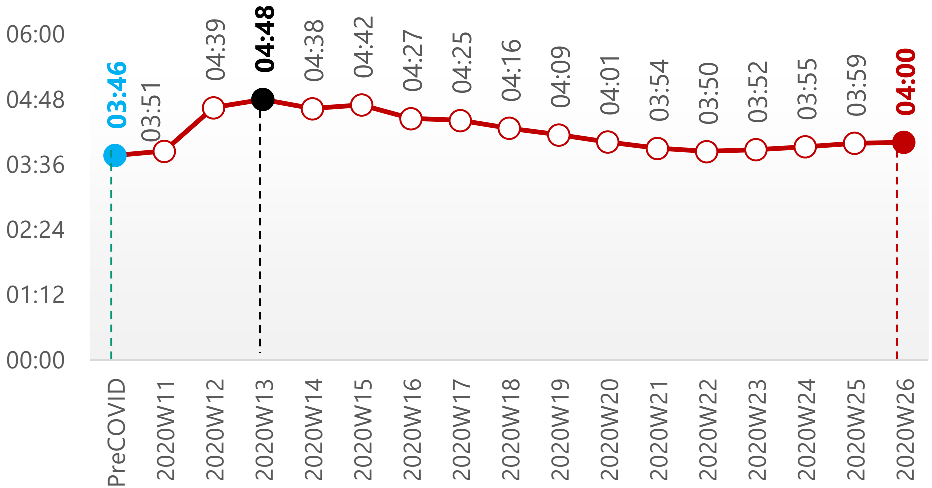
Week 26 (week starting 27 June) data as compared to Week 13 (week starting 28 March), Week 14 (week starting 4 April) and Pre COVID-19 i.e. Week 2 to Week 4 (11 Jan to 31 Jan)

nielsen | BARC BROADCAST AUDIENCE RESEARCH COUNCIL INDIA

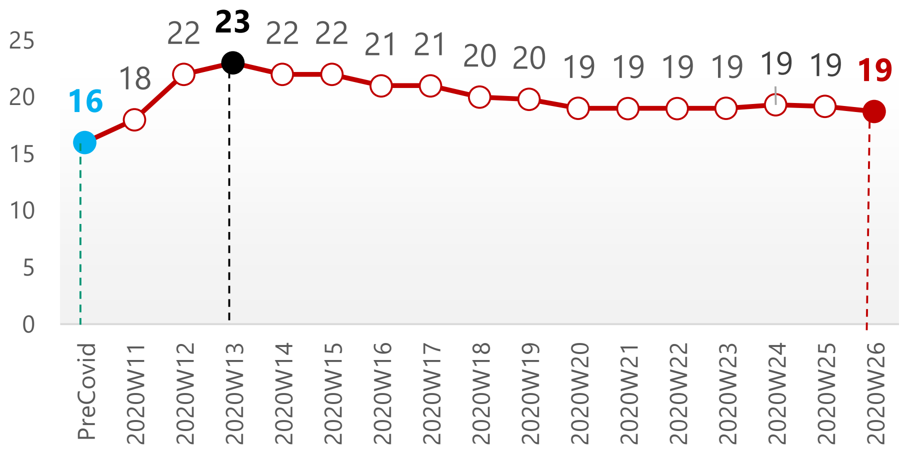
AVERAGE DAILY TIME SPENT PER VIEWER IS 4 HOURS (6% HIGHER THAN PRE COVID) TOTAL NUMBER OF CHANNELS WATCHED DECREASED FROM A PEAK OF 23 AND IS STABLE AT 19 IN RECENT WEEKS

Pre-COVID | Highest value for the respective statistic | Week 26

DAILY ATS/VIEWER (HH:MM)



Number of Channels Watched/Per Viewer/ Week



Change%

W26 vs Pre-COVID	6%
W26 vs W13	-17%

Change%

W26 vs Pre-COVID	16%
W26 vs W13	-18%

Week 26 (week starting 27 June) data as compared to Week 13 (week starting 28 March) and Pre COVID-19 i.e. Week 2 to Week 4 (11 Jan to 31 Jan)

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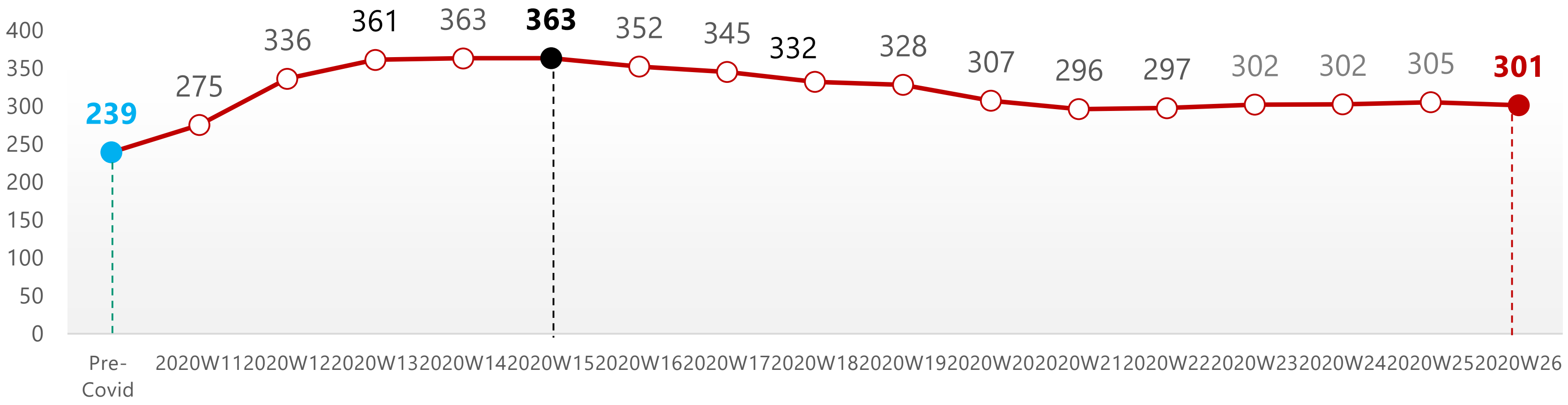
INDIVIDUALS WATCHING TV ALL 7 DAYS REACHED A PEAK OF 363 MN IN WEEK 15 IN WEEK 26 IT IS 301 MN. 26% HIGHER THAN PRE-COVID

INDIVIDUALS WATCHING 7 DAYS A WEEK

Cume Reach in Million



Change% in absolute numbers

W26 vs Pre-COVID	26%
W26 vs W15	-17%

Week 26 (week starting 27 June) & 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)

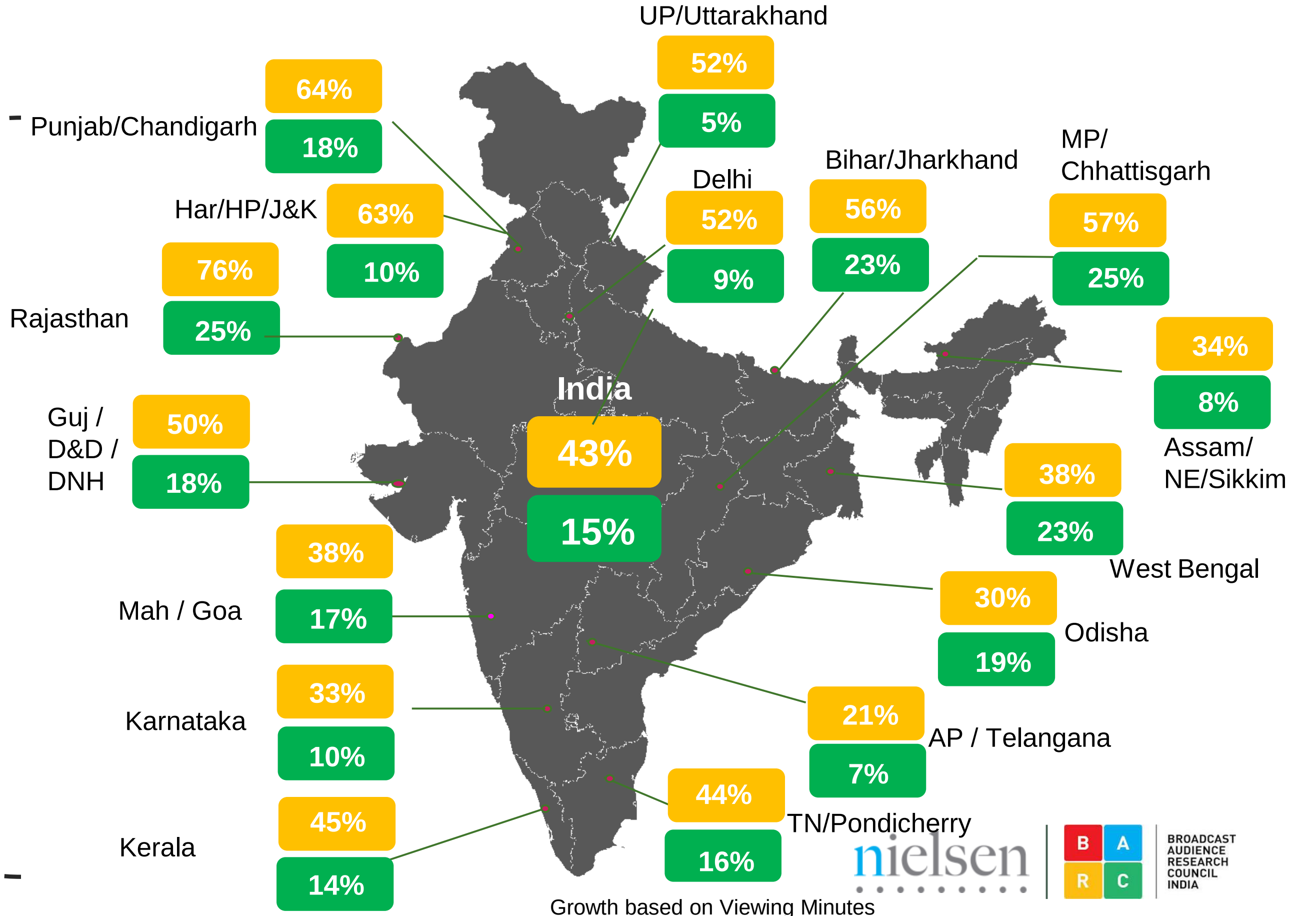
IN WEEK 26 TOTAL TV CONSUMPTION IS HIGHER THAN PRE COVID-ACROSS ALL MARKETS

Region	Growth in Peak period over Pre COVID
India	43%
HSM	49%
South	33%

Region	Growth in Week 26 over Pre COVID
India	15%
HSM	17%
South	11%

Peak week (Wk13) vs. Pre-COVID

Week 26 vs. Pre-COVID



Growth based on Viewing Minutes

Week 26 (week starting 27 June) data as compared to Peak period is Week 13 (week starting 28 March) and Pre COVID-19 i.e. Week 2 to Week 4 (11 Jan to 31 Jan)

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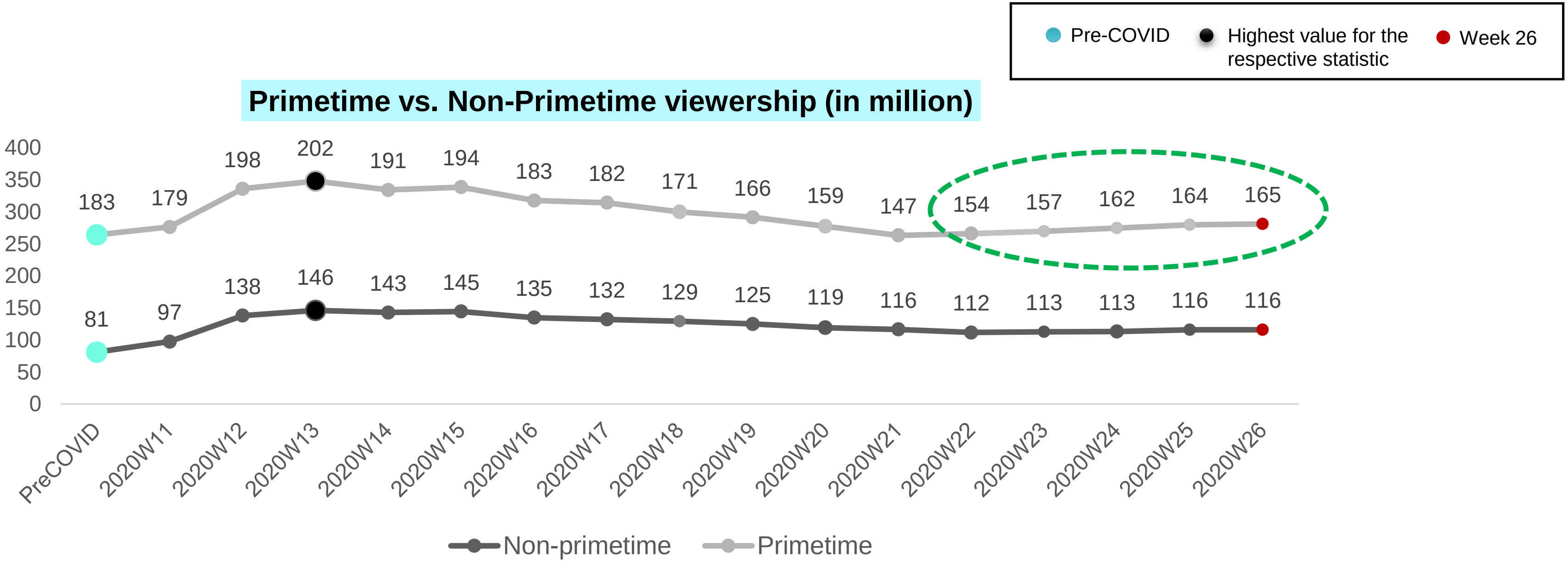
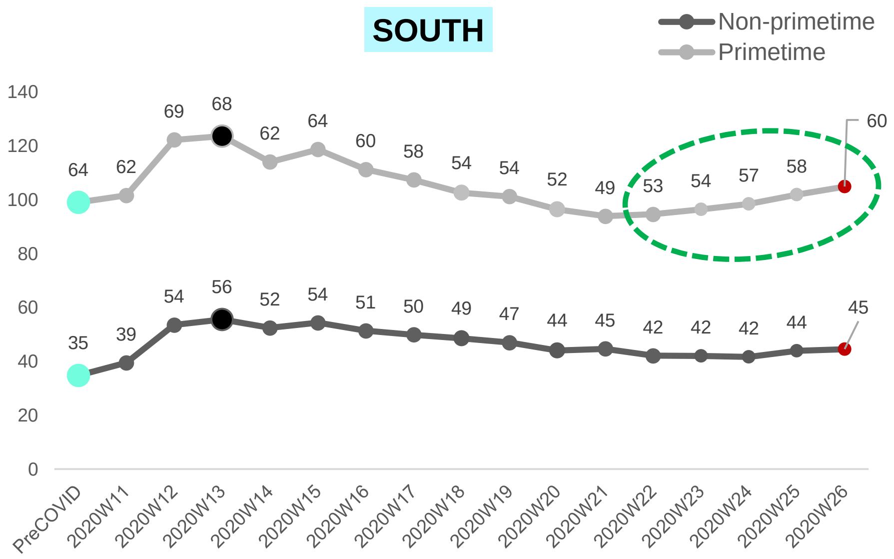
PRIMETIME VIEWERSHIP SHOWS CONSISTENT GROWTH IN THE LAST 5 WEEKS

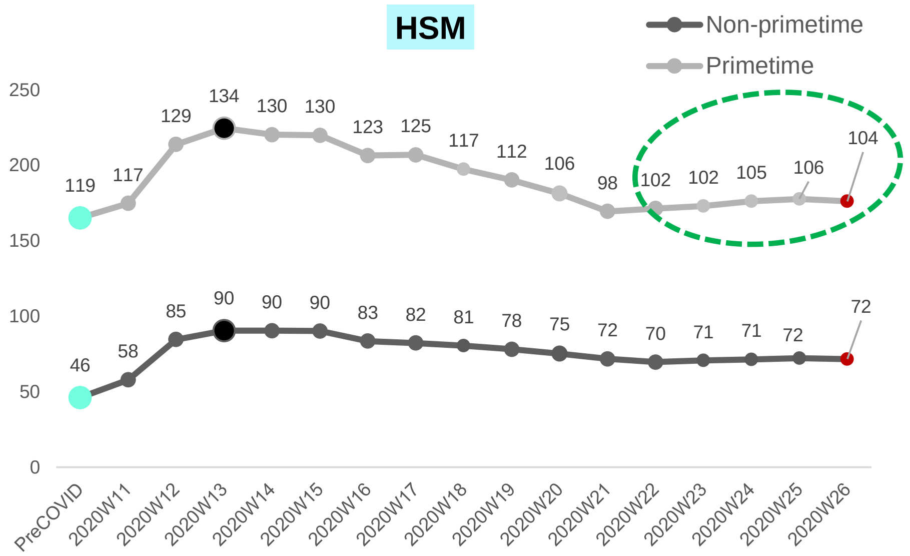


	Non Prime Time	Prime Time
W26 vs Pre-COVID	43%	-10%
W26 vs W13	-21%	-18%

Primetime: 18:00-24:00
Non-primetime: 06:00-18:00
Imp in Mn (Avg), India, 2+,
Week 26 (week starting 27 June) data as compared to Week 13 (week starting 28 March) and Pre COVID-19 i.e. Week 2 to Week 4 (11 Jan to 31 Jan)

PRIMETIME GROWTH IS MORE PRONOUNCED IN SOUTH THAN HSM





	Non Prime Time	Prime Time
W26 vs pre covid	28%	-6%
W26 vs Wk13	-20%	-11%

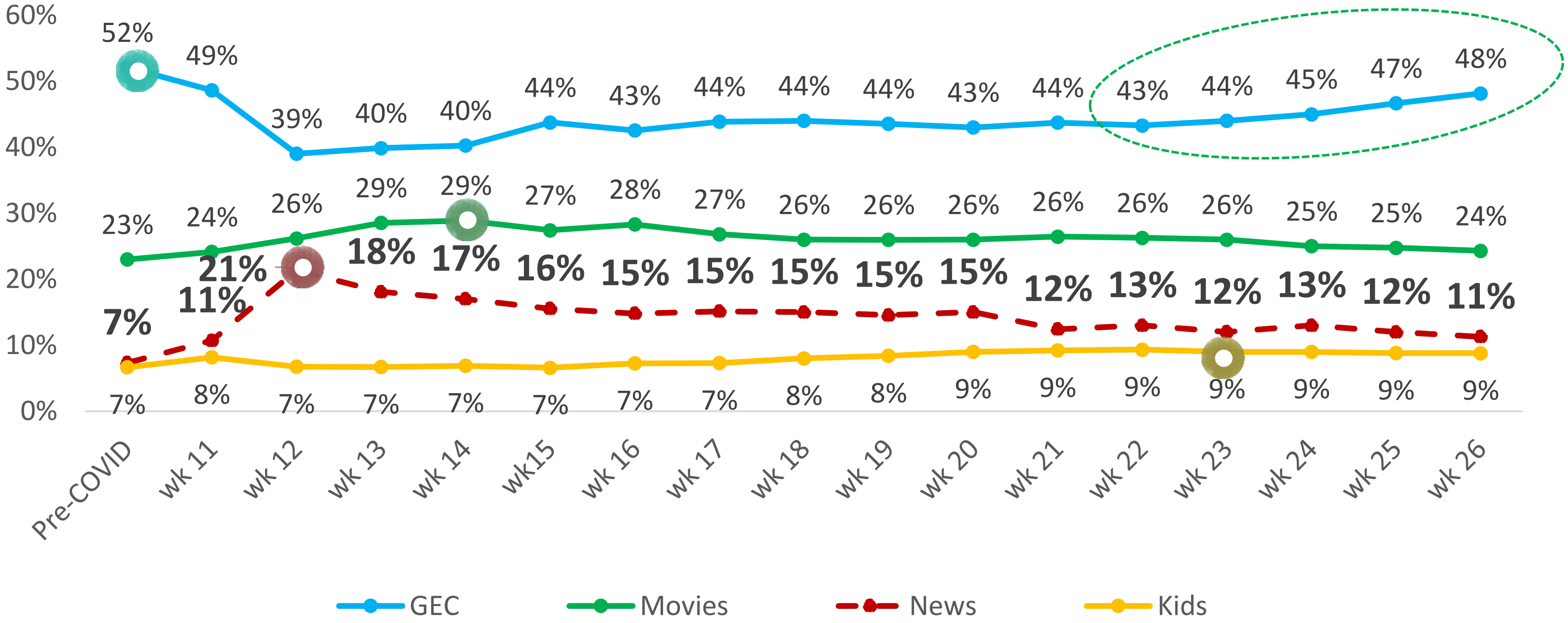
	Non Prime Time	Prime Time
W26 vs pre covid	55%	-12%
W26 vs Wk13	-21%	-22%

Primetime: 18:00-24:00
Non-primetime: 06:00-18:00
Imp in Mn (Avg), 2+,
Week 26 (week starting 27 June) data as compared to Week 13 (week starting 28 March) and Pre COVID-19 i.e. Week 2 to Week 4 (11 Jan to 31 Jan)

NEWS & MOVIES AFTER PEAKING TO 21% AND 29% GENRE SHARES RESPECTIVELY, HAVE STARTED TO STABILIZE

Both genres still higher than Pre-COVID levels. Kids genre stable at 9% for the 7th week

Share of GEC has increased in the last 5 weeks



Indicates peak share% for that genre

All India, 2+

Week 26 (week starting 27 June) data as compared to Pre COVID-19 i.e. Week 2 to Week 4 (11 Jan to 31 Jan)

AUDIENCES : CONTENT & VIEWING

- Language & Genre-wise performance
- Return of original programming
- Mythology content
- Free platform performance

VIEWING IMPRESSIONS OF HINDI GEC, MOVIES, NEWS & KIDS ARE OPERATING AT MUCH HIGHER LEVEL COMPARED TO PRE-COVID WEEKS. PRIMARILY DRIVEN BY NON-PRIME TIME

Hindi News Genre is still operating at a 71% higher level than Pre Covid period

Channel	W26 Vs Pre Covid Wks		
	Full Day	NPT	PT
TOTAL	**15%**	**43%**	**-10%**
Hindi GEC	25%	108%	-18%
Hindi Movies	24%	59%	-1%
Hindi News	71%	95%	52%
Hindi Regional News	19%	58%	-16%
English News	45%	30%	71%
English Business News	13%	34%	-46%
Music & Youth	-17%	-13%	-26%
Kids	50%	67%	17%
EEC	8%	26%	-18%
English Movies	70%	80%	57%
Sports	-79%	-77%	-82%

Week 26 i.e. week starting 27 June; Pre COVID-19 i.e. Week 2 to Week 4 (11 Jan to 31 Jan)

India/ 2+/ % Gain-Drop in Genres Viewership

Full Day : 0200-2600; NPT : 0600-1800; PT : 1800-2400

VIEWING IMPRESSIONS OF THE SOUTH LANGUAGES ARE OPERATING AT HIGHER LEVEL COMPARED TO PRE-COVID PERIOD. LARGELY DRIVEN BY NEWS GENRE

Channel	W26 Vs Pre Covid Wks		
	Full Day	NPT	PT
Kannada Channels	**6%**	**24%**	**-7%**
GEC	-10%	9%	-21%
Movies	26%	32%	20%
News	93%	89%	103%
Telugu Channels	**7%**	**21%**	**-8%**
GEC	0%	17%	-15%
Movies	10%	25%	-7%
News	40%	39%	45%
Tamil Channels	**15%**	**34%**	**-4%**
GEC	-2%	18%	-21%
Movies	26%	39%	16%
News	177%	160%	228%
Malayalam Channels	**12%**	**27%**	**0%**
GEC	2%	24%	-12%
Movies	-2%	-7%	1%
News	96%	83%	115%

Week 26 i.e. week starting 27 June; Pre COVID-19 i.e. Week 2 to Week 4 (11 Jan to 31 Jan)
India/ 2+/ % Gain-Drop in Genres Viewership

Full Day : 0200-2600; NPT : 0600-1800; PT : 1800-2400

IN HSM, BANGLA, PUNJABI & ORIYA IS OPERATING AT HIGHER LEVEL COMPARED TO PRE-COVID

Channel	W26 Vs Pre Covid Wks		
	Full Day	NPT	PT
Marathi Channels	-9%	34%	-34%
GEC	-44%	6%	-62%
Movies	34%	49%	20%
News	97%	98%	97%
Bangla Channels	8%	53%	-11%
GEC	-6%	42%	-21%
Movies	56%	100%	25%
News	75%	81%	70%
Punjabi Channels	**20%**	**37%**	**-7%**
GEC	47%	48%	41%
Movies	-3%	52%	-42%
News	29%	21%	37%
Music	26%	26%	22%
Oriya Channels	**9%**	**35%**	**-8%**
GEC	-2%	25%	-17%
News	101%	132%	73%

Week 26 i.e. week starting 27 June; Pre COVID-19 i.e. Week 2 to Week 4 (11 Jan to 31 Jan); to Week 13 i.e. week starting 28 March
India/ 2+/ % Gain-Drop in Genres Viewership Full Day : 0200-2600; NPT : 0600-1800; PT : 1800-2400

RETURN OF ORIGINAL PROGRAMMING: WEEK 26 VIEWERSHIP IS HIGHER THAN WEEKS WITH NO ORIGINAL PROGRAMMING

ORIGINAL PROGRAMMING

Genres	Total Original slots	Pre-COVID	Wk 16 to 19	Wk 26	Wk 26 over Pre Covid	Wk 26 over Wk16 to 19
Telugu	46	169923	96102	133259	-22%	39%
Kannada	36	103376	42537	81858	-21%	92%
Malayalam	27	39864	22369	36830	-8%	65%
Bangla	33	79005	29230	55150	-30%	89%
Oriya	16	27603	9191	23958	-13%	161%

Week 16-19 are weeks with no original programming

Week 26 i.e. week starting 27 June; Pre COVID-19 i.e. Week 2 to Week 4 (11 Jan to 31 Jan); Week 16 to week 19 (18 April to 15 May)
Respective markets considered

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GECs WHICH STARTED ORIGINALS, HAVE VIEWERS OF PRE-COVID PERIOD COMING BACK TO WATCH THE SHOWS
The reach is almost at par with Pre-COVID, however, ATS is lower than Pre-COVID

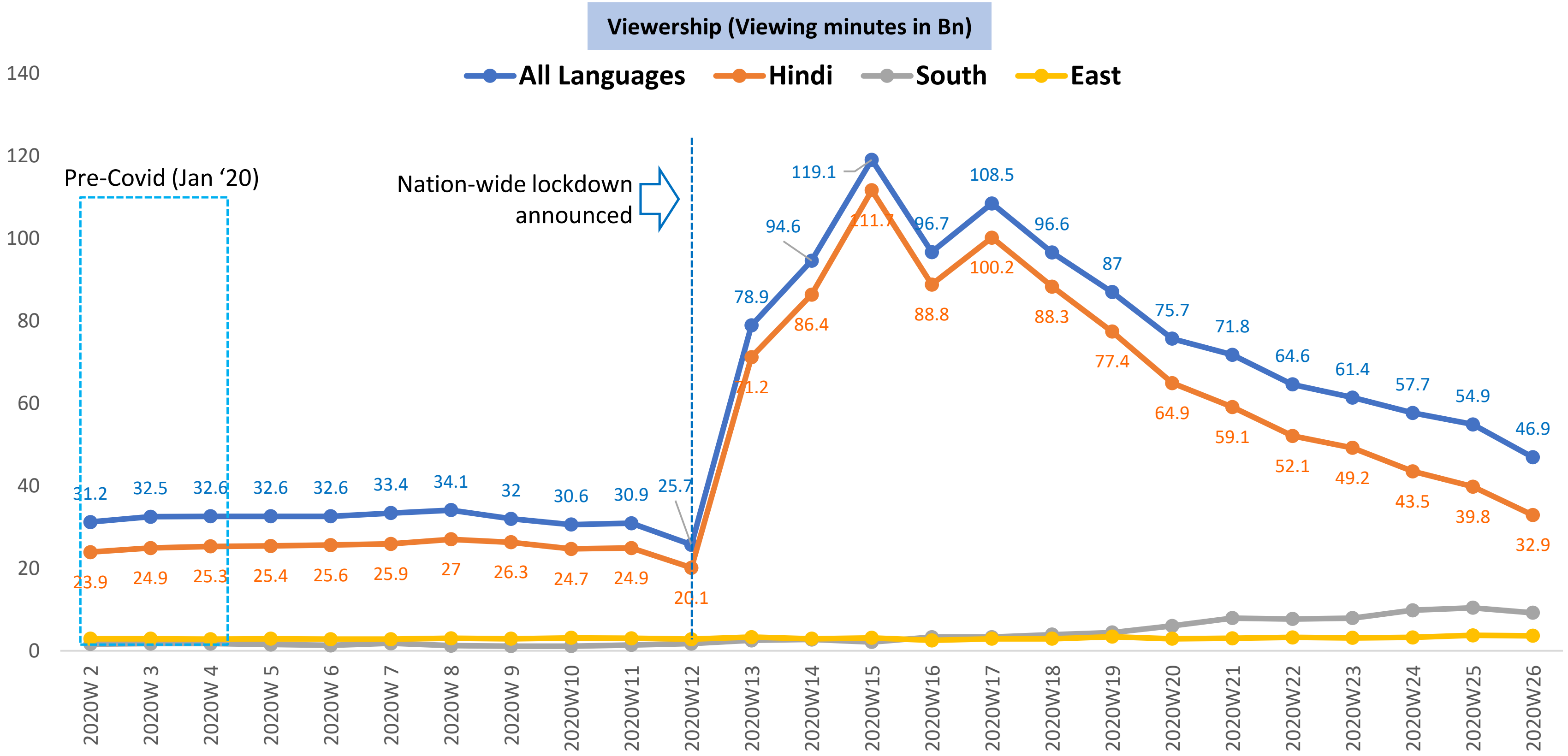
% Duplication on pre covid

	Wk 16 to 19	Wk 26
Telugu GEC	69%	73%
Kannada GEC	62%	72%
Malayalam GEC	68%	67%
Bangla GEC	55%	67%
Oriya GEC	57%	70%
Marathi GEC	44%	41%
Hindi GEC	61%	56%
Tamil GEC	73%	70%

7:30 PM to 10 PM Mon to Friday

Count of channels : Bangla -3, Oriya – 2, Malyalam – 5, Kannada -4, Telugu – 4, Marathi – 3, Hindi – All channel in Pay platform, Tamil – All channels

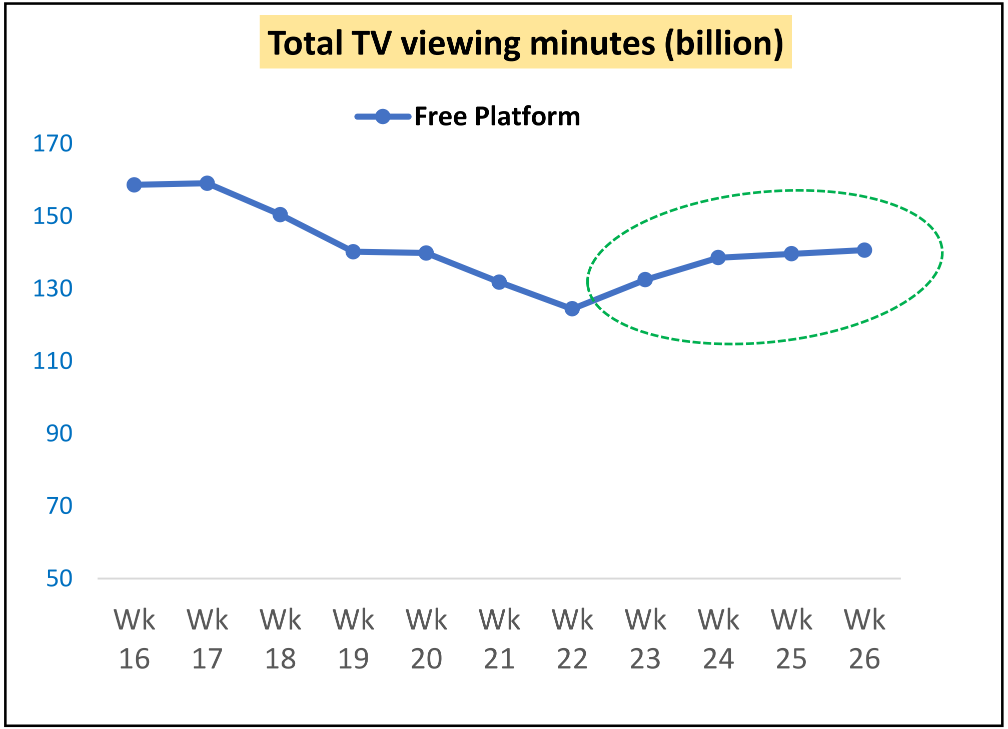
VIEWERSHIP OF MYTHOLOGY PROGRAMMING HAS DECLINED IN THE LAST 9 WEEKS
Duration of Mythology content has also declined in the last 5 weeks

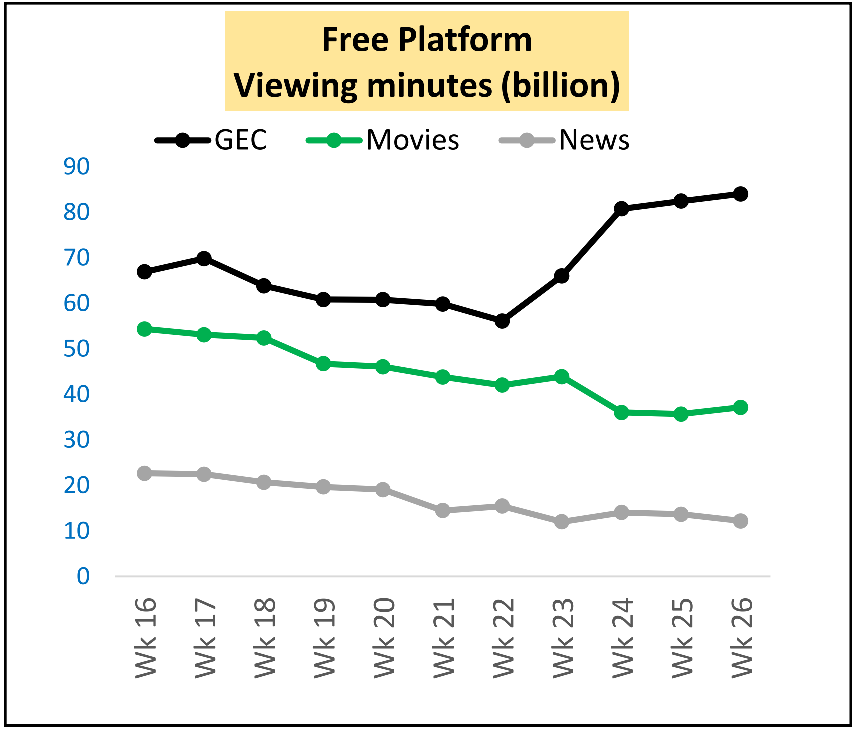


South Languages include – Kannada, Malayalam, Tamil & Telugu; East includes Oriya & Bengali

Week 26 i.e. week starting 27 June | Pre COVID-19 i.e. Week 2 to Week 4 (11 Jan to 31 Jan)

TOTAL TV VIEWING MINUTES ON FREE PLATFORM HAS INCREASED DUE TO INTRODUCTION OF 5 HINDI CHANNELS IN WEEK 23 – DRIVEN BY GROWTH IN ATS





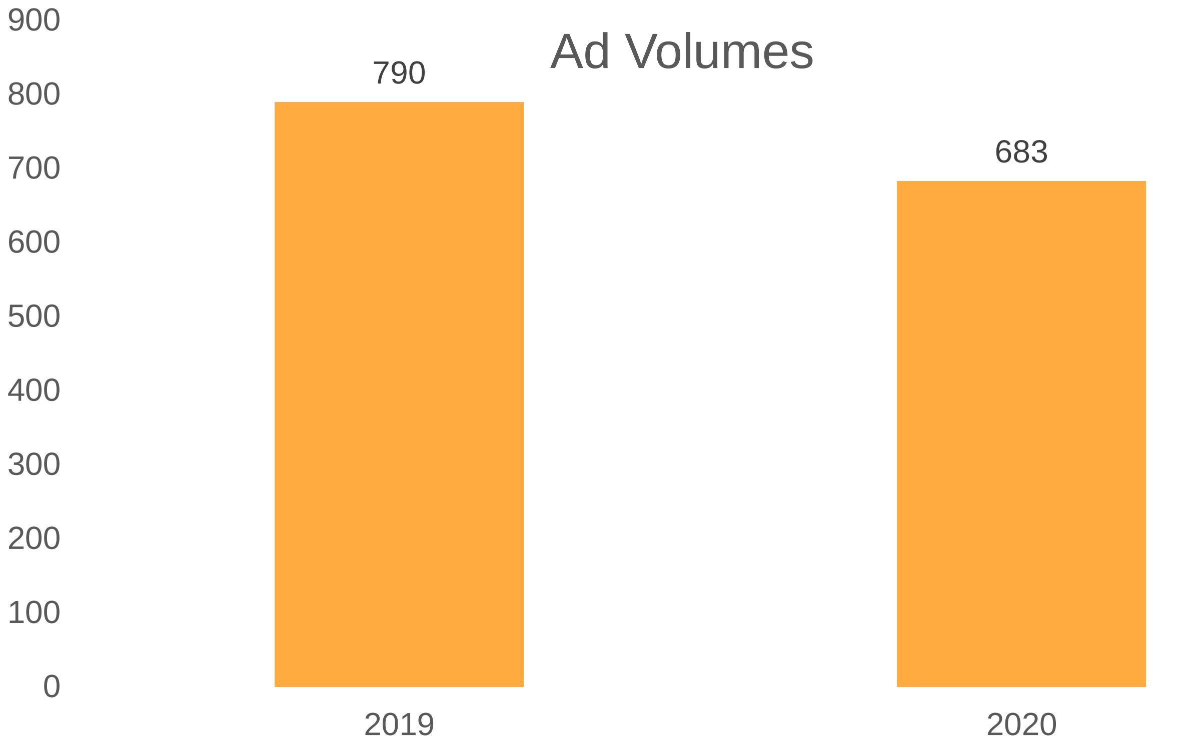
HSM/ 2+ Full Day : 0200-2600

ADVERTISING TRENDS
H1 2020 vs 2019

OVERALL AD VOLUMES: JAN - JUNE

H1 AD VOLUMES 13% LOWER ON ACCOUNT OF COVID

Channel count:
2019: 619
2020: 615



Ad Volumes in millions (Including IPL 2019)
IPL 2019 Ad Volumes = 3.44 Mn Secs
(IPL Matches Ad Volumes includes Live telecast Matches, Live Telecast of Post, Pre and Mid shows only)

AD VOLUMES: JUNE

SHOW SIMILAR TREND AS LY JUNE (EXCLUDING WORLD CUP INVENTORY)
NET VALUE IS LOWER IN JUNE 2020

June 2019

119.45 Mn Sec

=

Jan 2020

119.28 Mn Sec

=

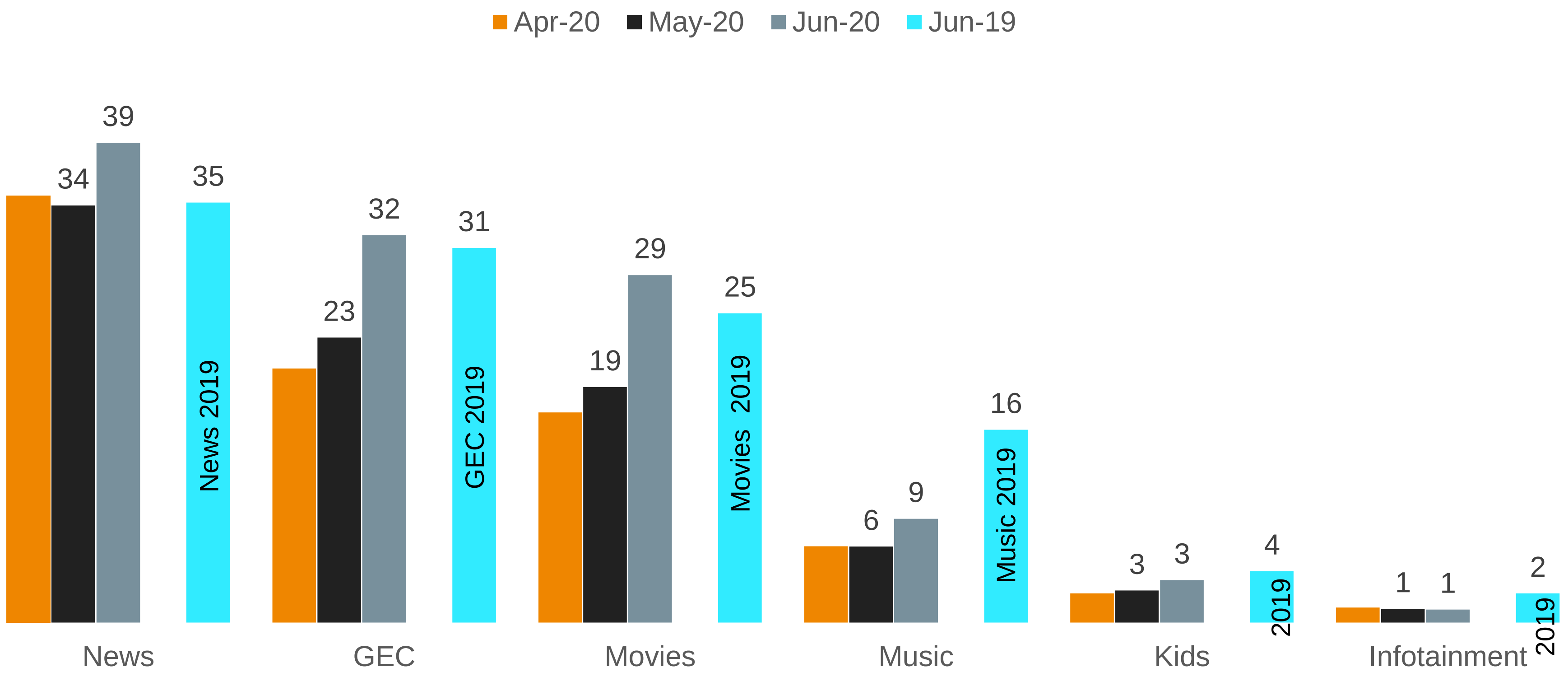
June 2020

119.38 Mn Sec

Ad Volumes in Millions
June 2019 without World Cup Ad Volumes
Live Matches , Pre ,Post and Mid excluded as World Cup Ad Volumes

AD VOLUMES: APR - JUNE

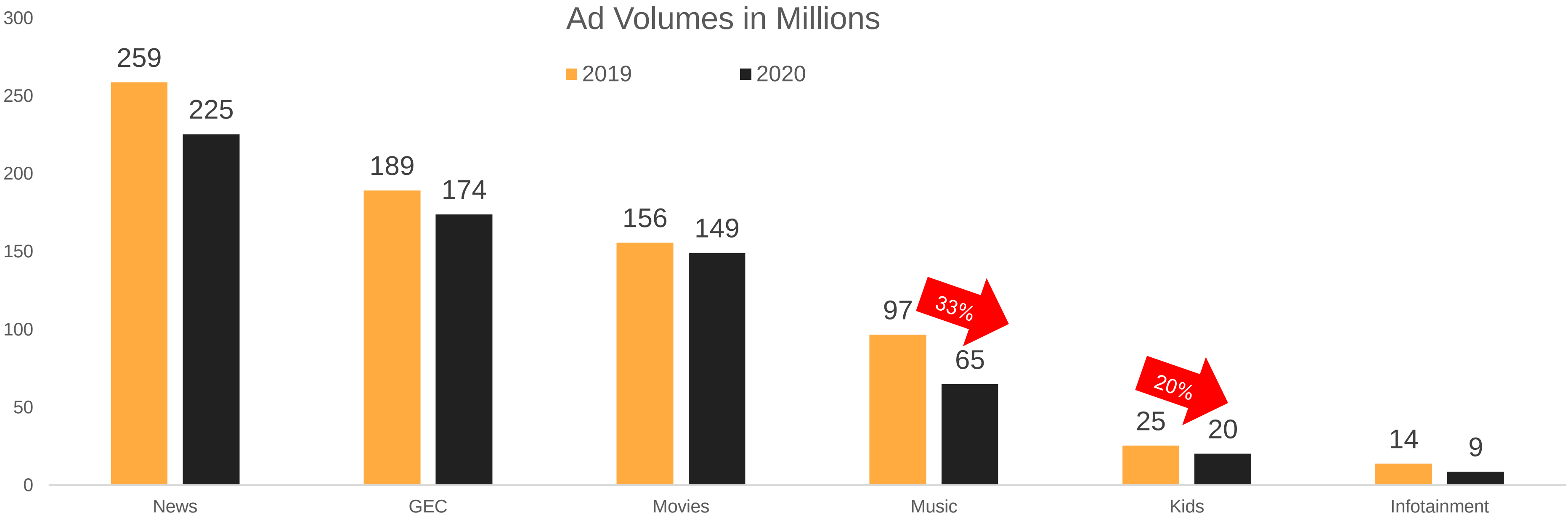
NEWS, GEC & MOVIES OPERATING AT HIGHER AD VOLUMES



Sorted basis genre – June 2020
*Only a few genre mentioned above
AD Volumes in millions

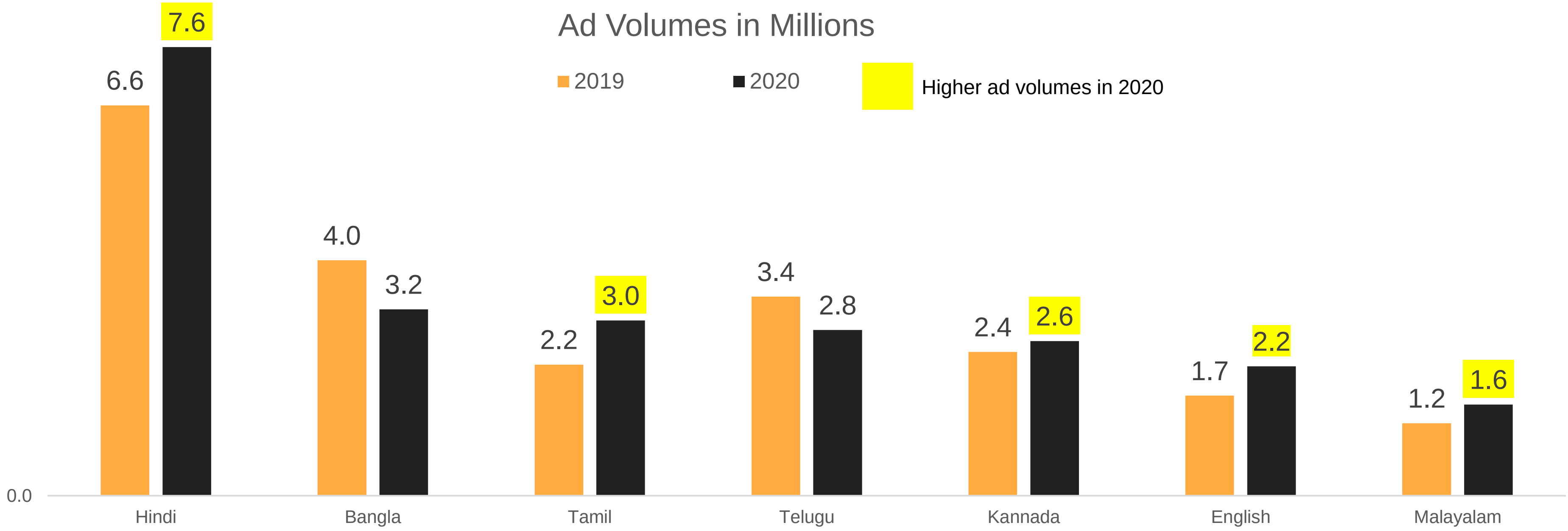
AD VOLUMES: JAN - JUNE

MUSIC AND KIDS IMPACTED THE MOST



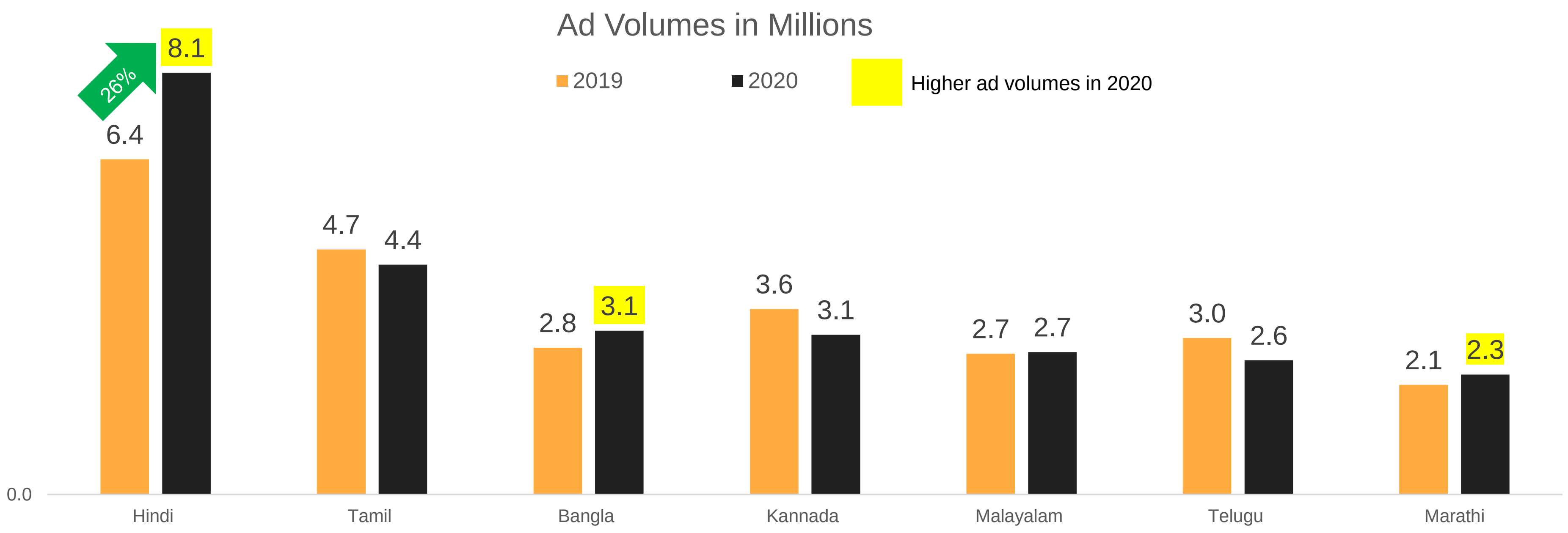
Sorted basis genre – Year 2020
*Only a few genre languages mentioned above
AD Volumes in millions

News Genre:
June 2020 vs June 2019 Ad Volume
Hindi, Tamil, Kannada, English & Malayalam see a growth in Ad Volumes



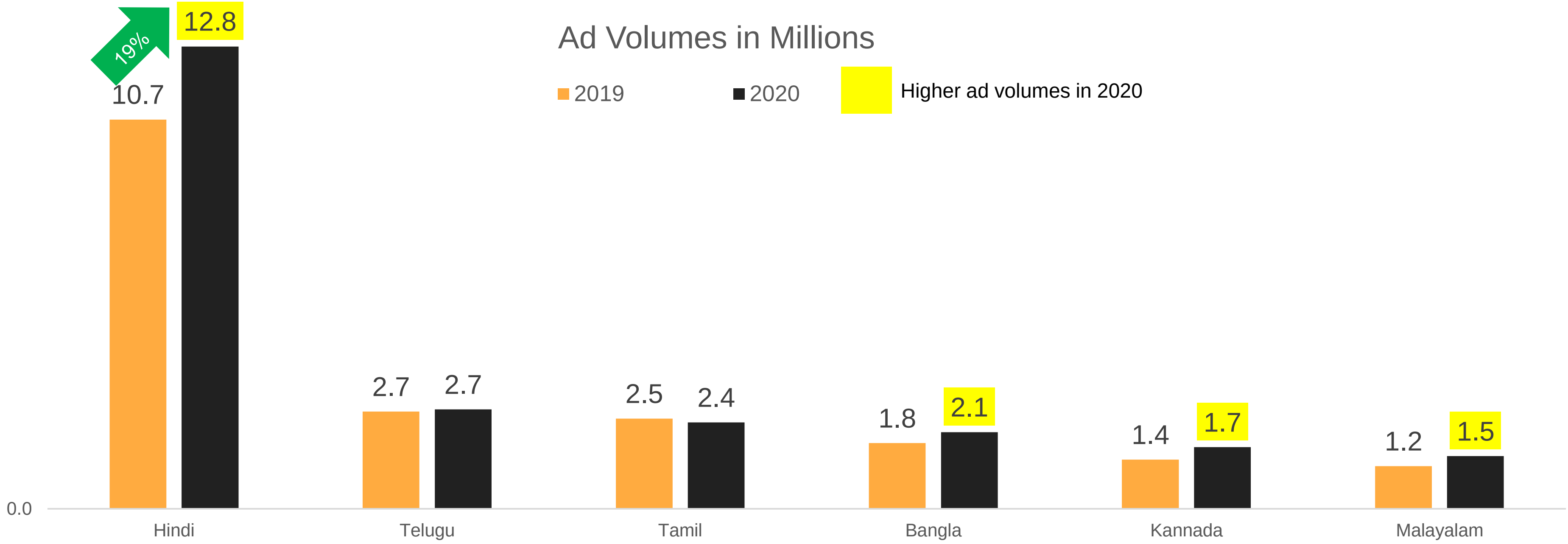
Sorted basis genre – Year 2020
*Only a few genre languages mentioned above
AD Volumes in millions

GEC Genre:
June 2020 vs June 2019 Ad Volume



Sorted basis genre – Year 2020
*Only a few genre languages mentioned above
AD Volumes in millions

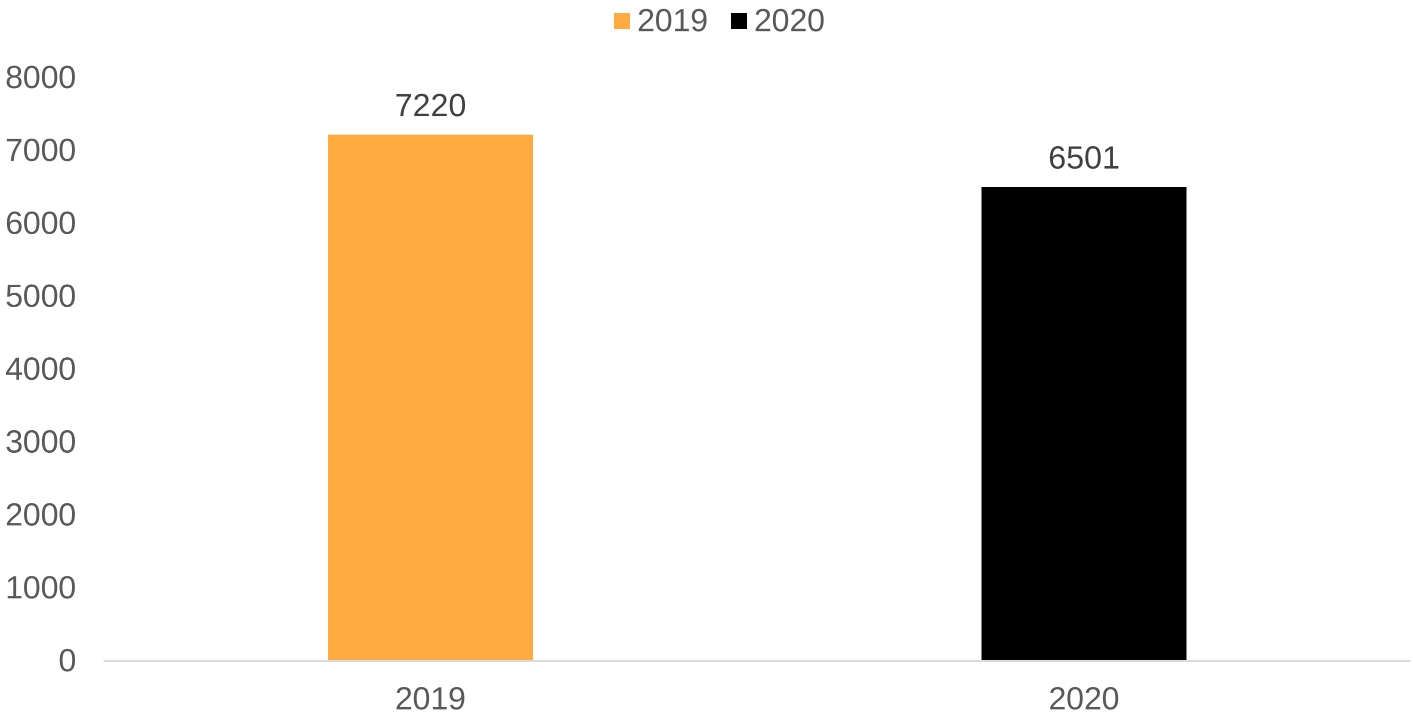
Movies Genre:
June 2020 vs June 2019 Ad Volume



Sorted basis genre – Year 2020
*Only a few genre languages mentioned above
AD Volumes in millions

TOTAL ADVERTISERS ON TV: Jan - June

10% LOWER ON ADVERTISER COUNT AS COMPARED TO 2019



Advertiser Count Jan-June (Including IPL 2019)

CONSUMPTION OF AD VOLUMES: JAN - JUNE

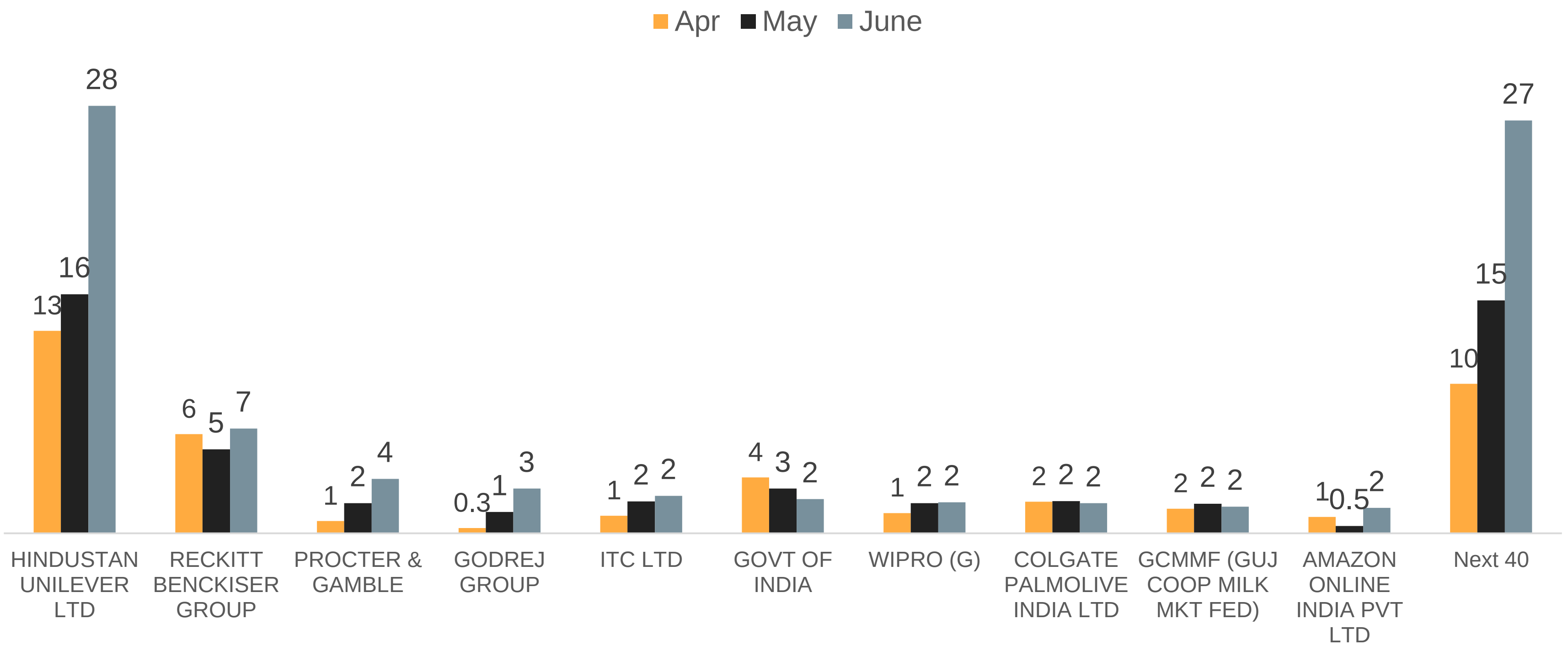
TOP 10 ADVERTISER CONSUMPTION INCREASES

Advertiser Group	2019	2020
Top 10	34%	39%
Rest 40	23%	22%
Others	42%	39%

Total Ad Volumes Jan-June
Data Sorted Basis in Descending order

AD VOLUMES: APR - JUNE

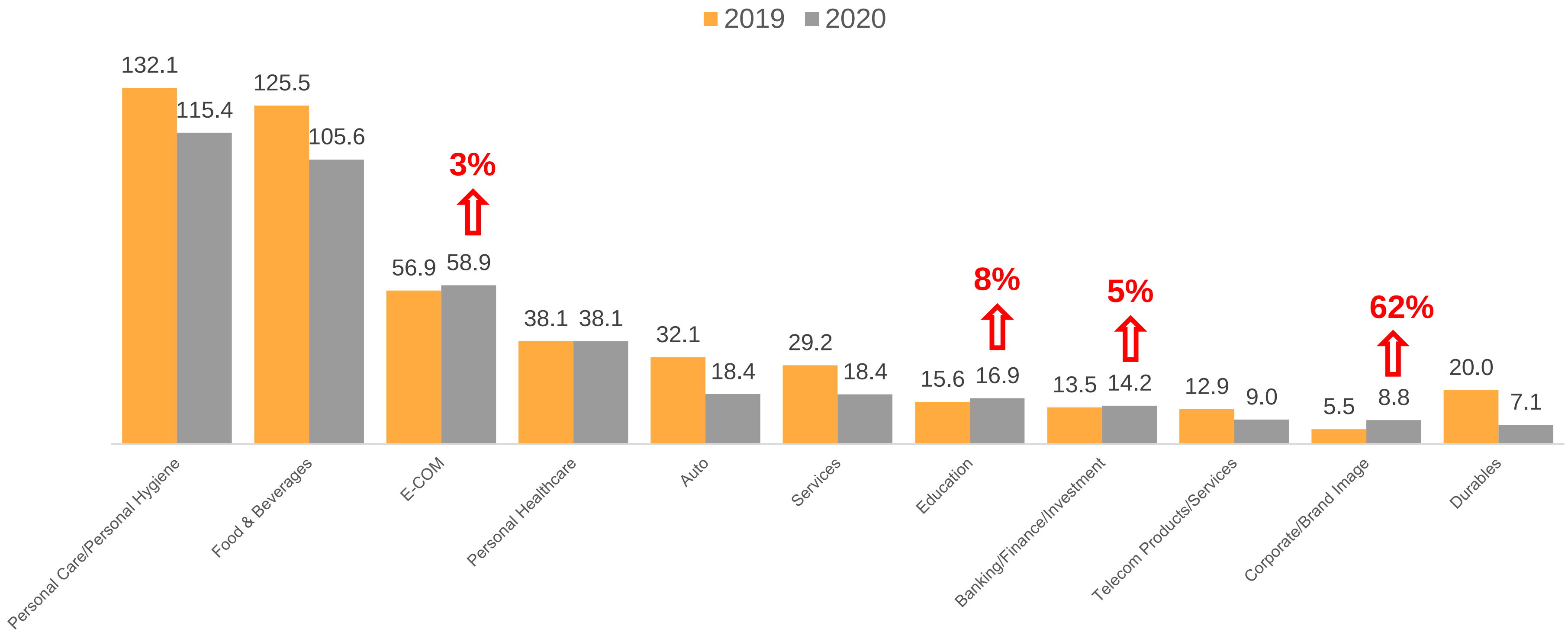
EXPONENTIAL GROWTH ACROSS NEXT 40 ADVERTISERS IN JUNE
TOP ADVERTISERS ALSO GREW



Ad Volumes in Millions
UNSP- Social Ads- NGO and Govt, Broadcasters and Int Cricket Council Excluded
Sorted Basis year June 2020 in Descending

SECTORS/CATEGORY AD VOLUMES: JAN – JUN

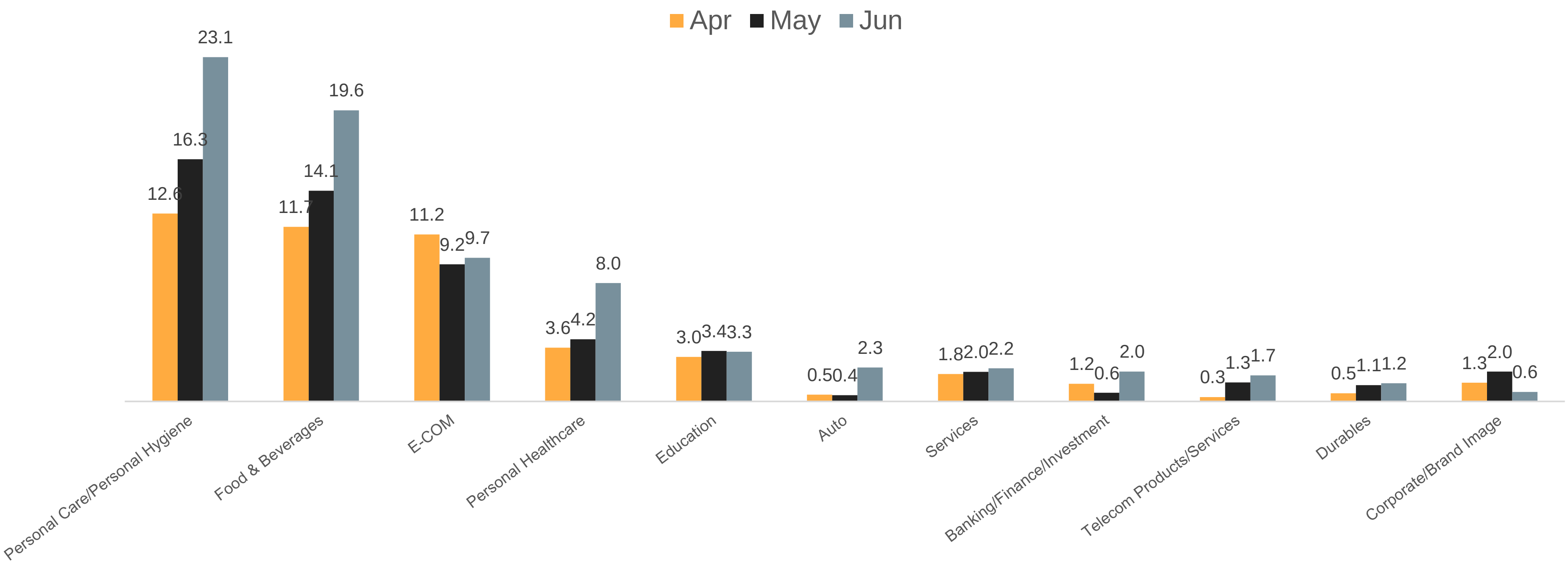
CORPORATE, EDUCATION, BANKING & E-COM SAW GROWTH COMPARED TO YEAR 2019



Total Ad Volumes in Millions (Including IPL 2019)
E-Com all Categories clubbed & Telecom Products and Telecom/Internet Services Providers combined

SECTORS/CATEGORY AD VOLUMES (APR- JUNE 2020)

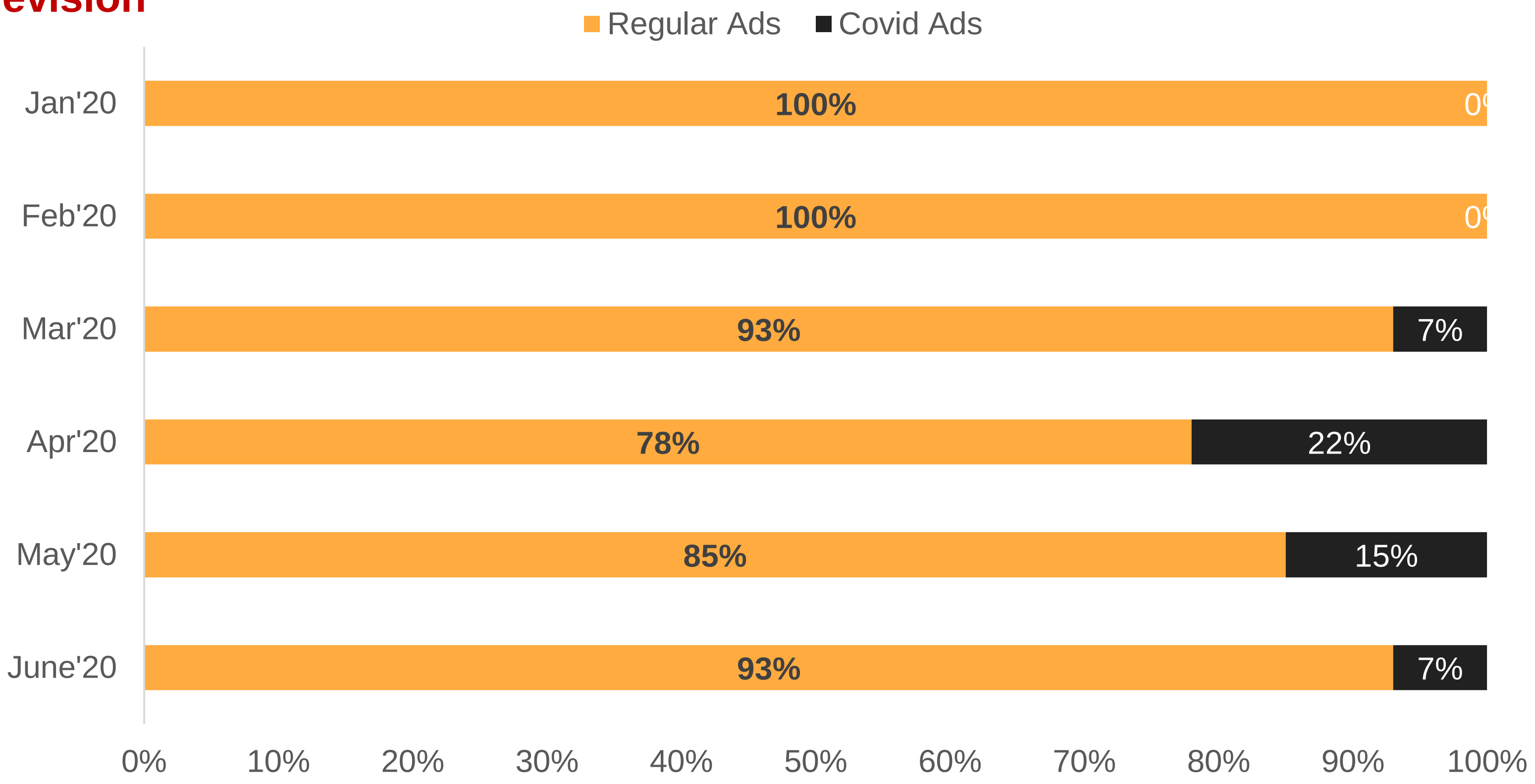
INCREASE ACROSS ALL SECTOR/CATEGORY EXCEPT EDUCATION & CORPORATE



Total Ad Volumes in Millions (Including IPL 2019)
E-Com all Categories clubbed & Telecom Products and Telecom/Internet Services Providers combined

COVID MESSAGE COMMERCIALS JAN-JUNE'20

April had the highest contribution in terms of COVID Message Commercials on Television



Ad Volumes %
COVID Ads considered basis Description= Coronavirus, COVID, Stay Home, Stay Safe, Lockdown

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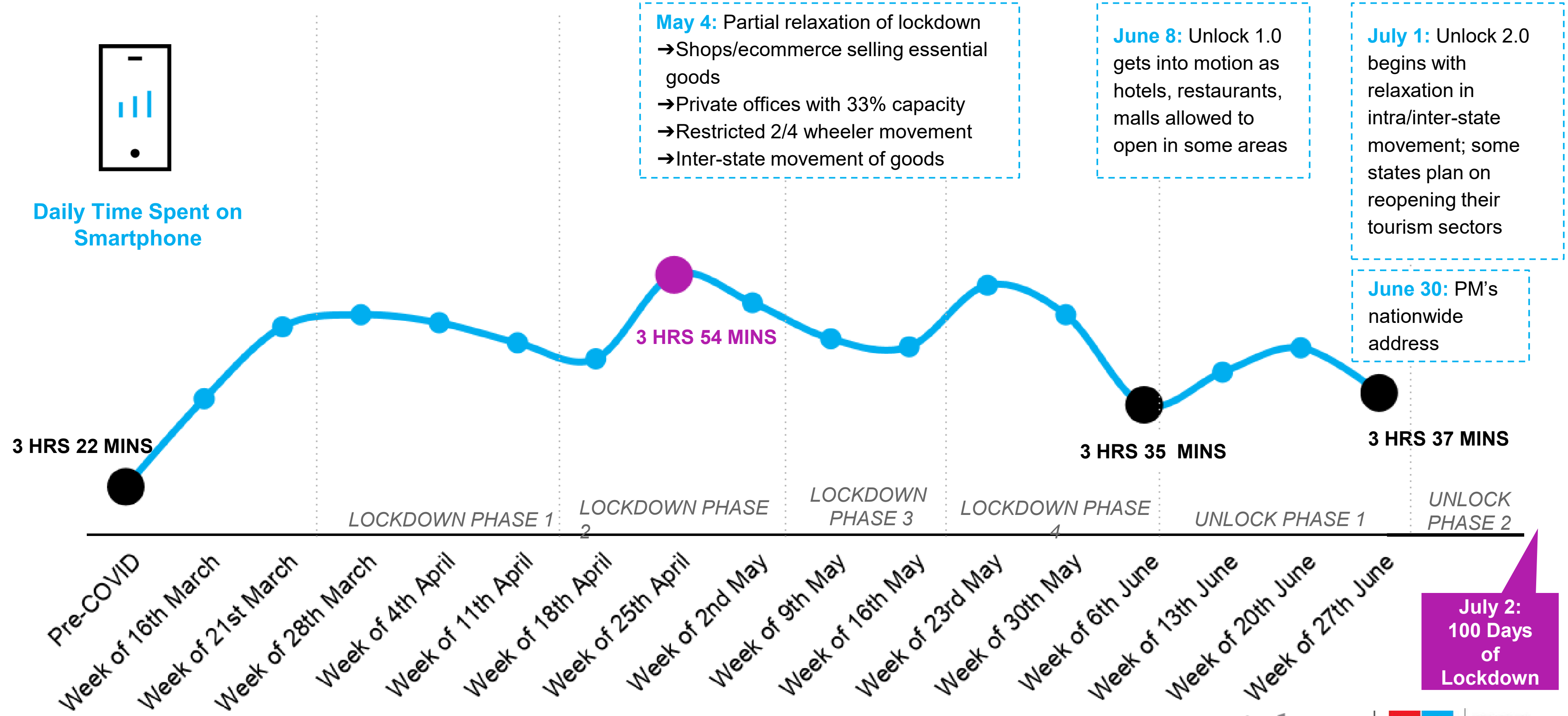
INDIA
SMARTPHONE BEHAVIOR

COVID LOCKDOWN TRENDS - LOOKING BACK AT EVENTS



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

TIME SPENT ON SMARTPHONE BACK TO LOCKDOWN PHASE 1 LEVEL - **DATA CONSUMPTION**, HOWEVER, SEES A **4% HIGHER GROWTH**

	Pre COVID-19	COVID-19 Disruption				
	13th Jan to 2nd Feb	Week of 16th March *LOCKDOWN 1*	Week of 25th April *LOCKDOWN 2*	Week of 16th May *LOCKDOWN 3-4*	Week of 6th June *UNLOCK 1*	Week of 27th June *CURRENT*
Daily Time Spent on Smartphone	16.1 Billion mins	17.1 Billion mins	18.7 Billion mins	17.8 Billion mins	17.1 Billion mins	17.2 Billion mins
Data Consumption per day per user (in GB)	1 GB	1.08 GB	1.21 GB	1.05 GB	1.06 GB	1.12 GB

Daily Time Spent on Smartphone:
+6%
+16%
+7%

Data Consumption per day per user:
+8%
+21%
+12%

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

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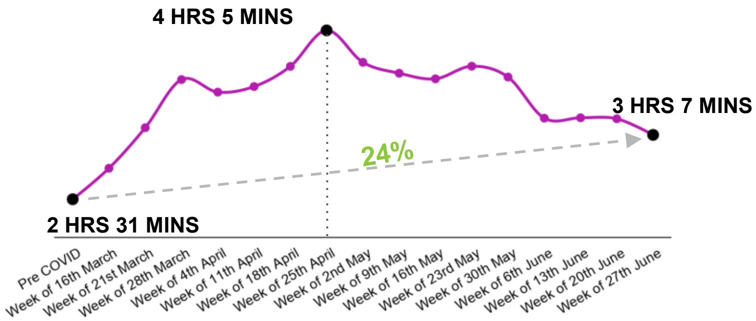
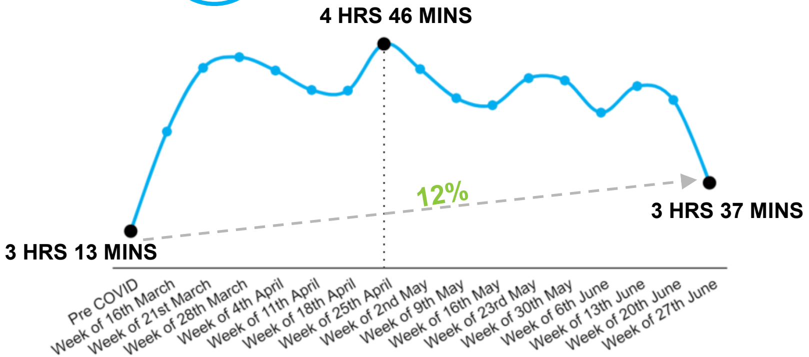
SOCIAL NETWORKING AND GAMING CONTINUE TO BE MUCH HIGHER VS THE PRE LOCK DOWN PERIOD, LOWER THAN THEIR PEAK TIMES THOUGH

WEEKLY TIME SPENT

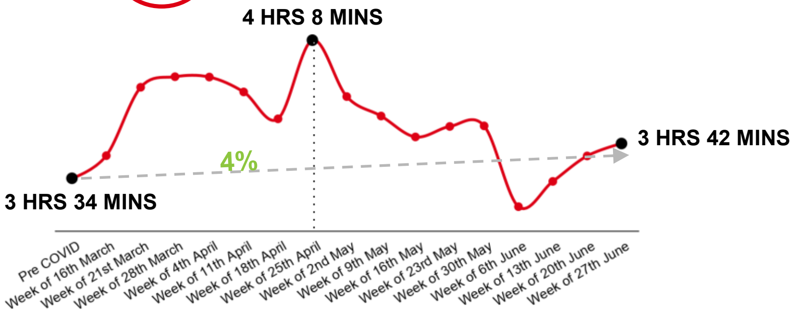
GAMING



SOCIAL NETWORKING



VIDEO STREAMING



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

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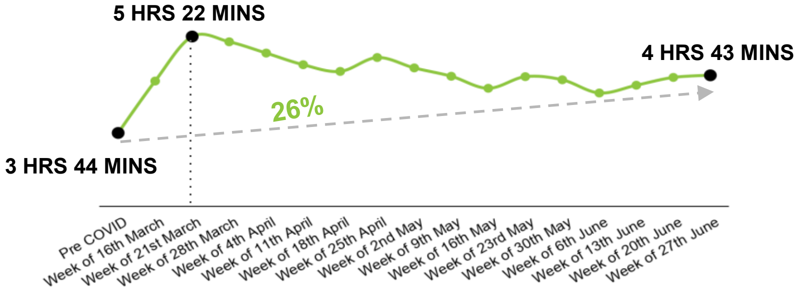
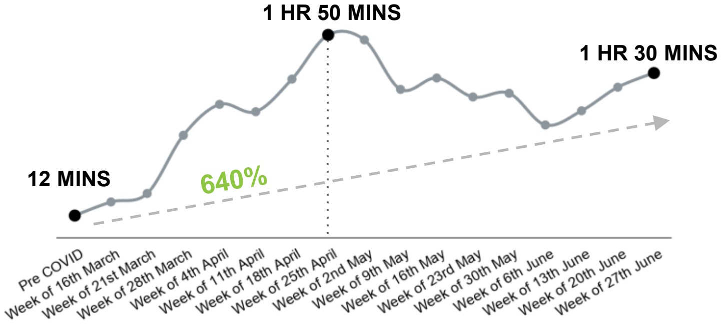
WITH WORK FROM HOME CONTINUING, VIDEO CONFERENCING CONTINUES TO BE SIGNIFICANTLY HIGHER THAN PRE-COVID LEVELS

WEEKLY TIME SPENT

CHAT & VOIP



VIDEO CONFERENCING (34+ YRS)



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

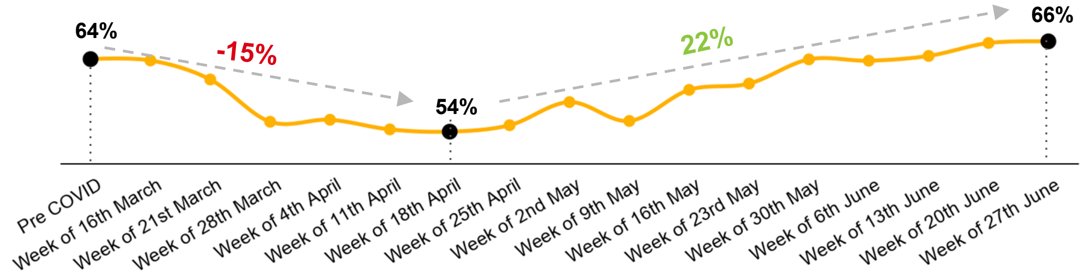
UNLOCK PHASE
THE REVIVAL AND GROWTH STORY

WITH THE COUNTRY OPENING UP GRADUALLY, CATEGORIES LIKE SHOPPING AND MOBILE PAYMENTS SEE A REVIVAL, ESPECIALLY AMONGST 25+ YRS

W-O-W %USERS/WEEK

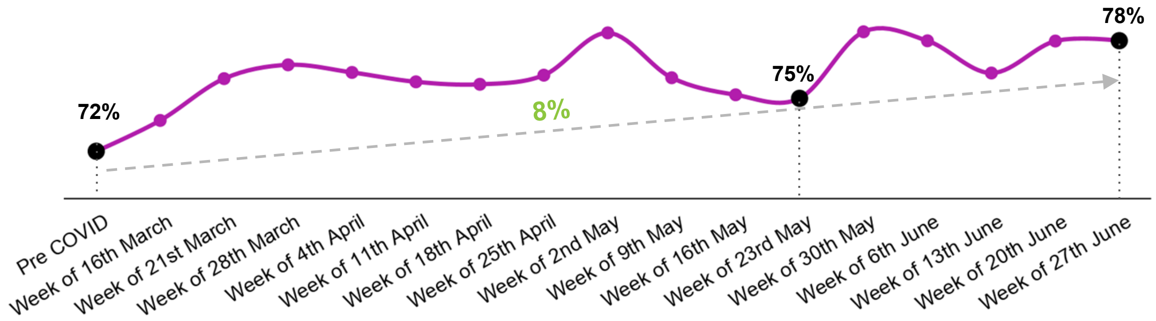
SHOPPING

(Among 25+ yrs)



MOBILE PAYMENTS

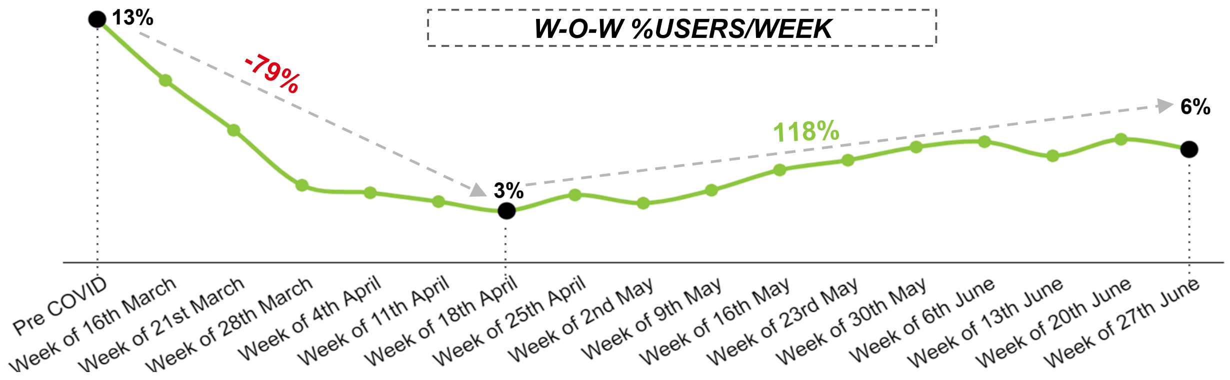
(Among 25+ yrs)



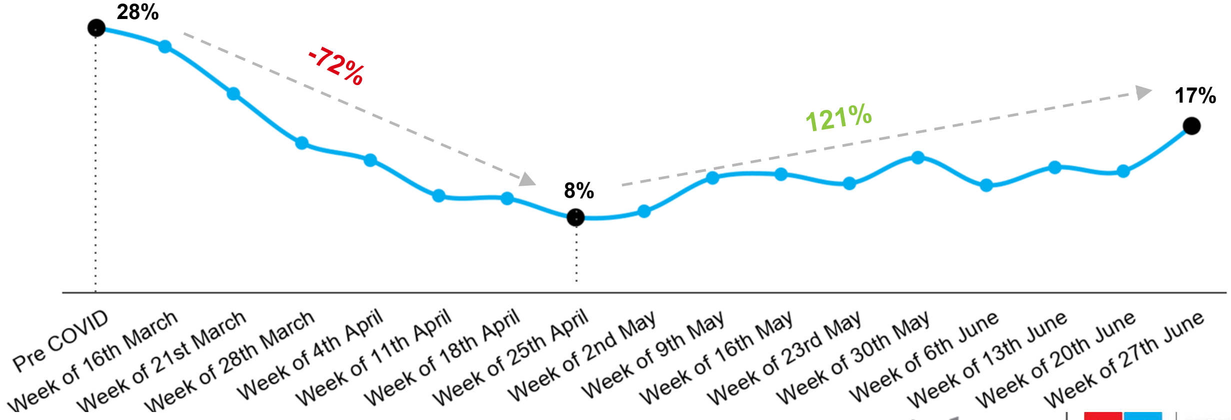
Based on Nielsen Android Smartphone Panel representing 1L+, NCCS ABC, 15-44

AS INTER/INTRA STATE MOVEMENT RESTRICTIONS RELAX, CAB AGGREGATORS AND TRAVEL PLANNERS SEE A GOOD REVIVAL

CAB AGGREGATORS
(In Metros)



TRAVEL PLANNER
(In Tier I Towns)



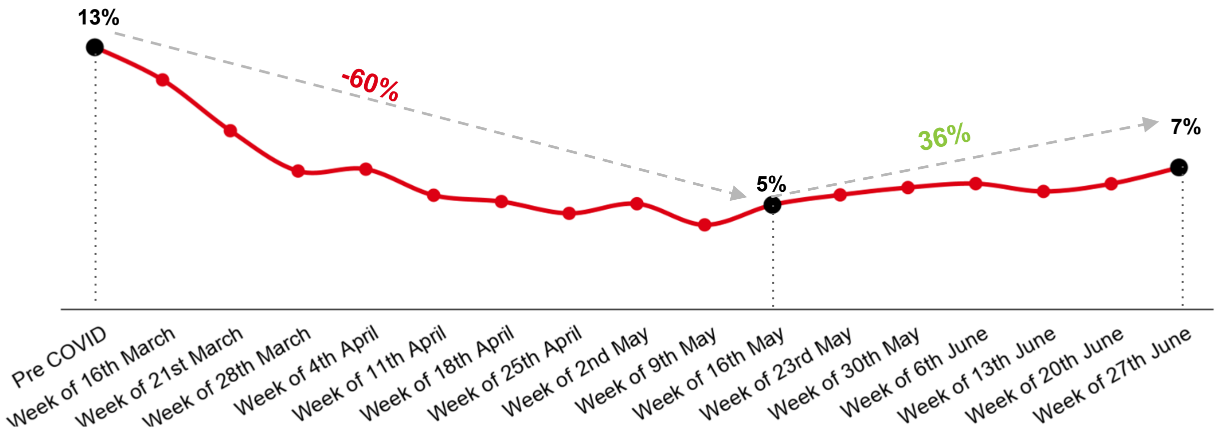
Based on Nielsen Android Smartphone Panel representing 1L+, NCCS ABC, 15-44

WHILE FOOD ORDERING HASN'T COMPLETELY REVIVED, IT HAS **STARTED PICKING UP** TO AT LEAST **HALF OF ITS PRE-COVID LEVELS**, ESP. AMONG THE YOUNGER AUDIENCES. CONSUMERS CONTINUE TO BE CAUTIOUS ABOUT FOOD ORDERING AT LARGE

W-O-W %USERS/WEEK

FOOD ORDERING

(Among 15-24 Yrs)



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

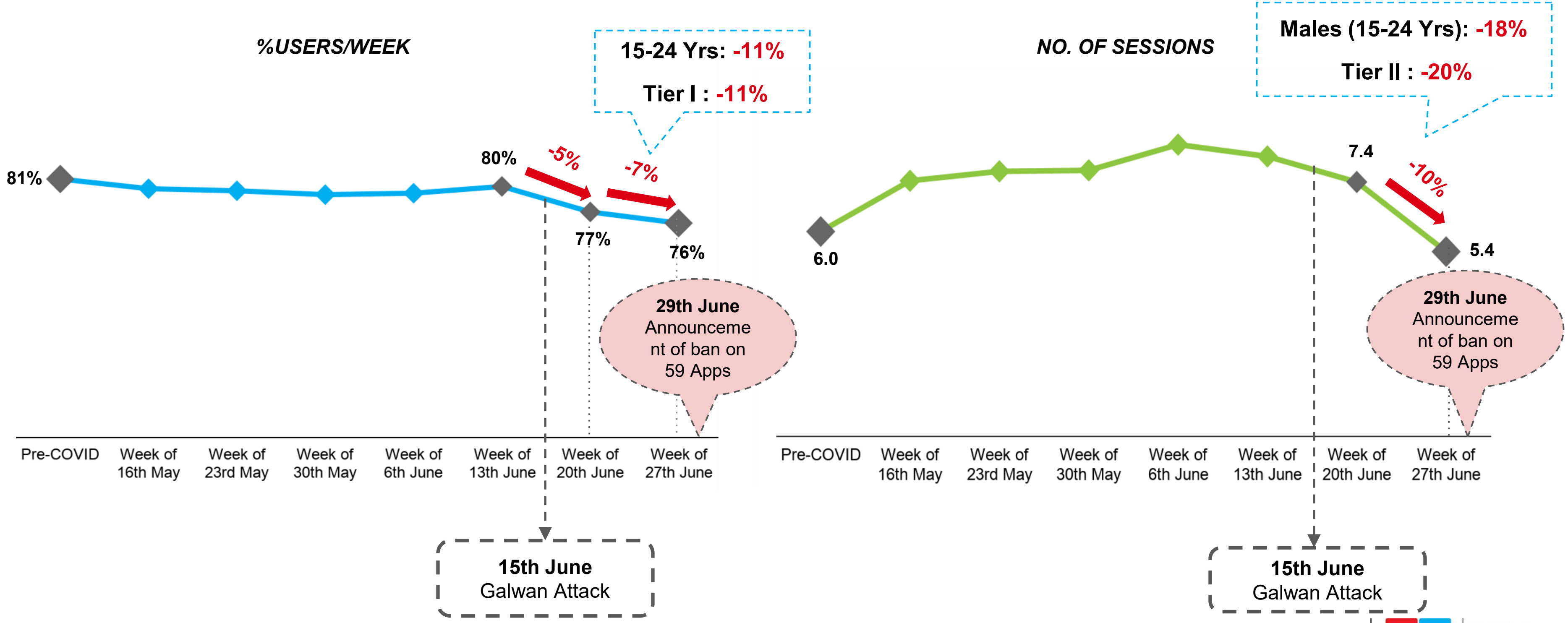
THE FORBIDDEN 59

PLIGHT OF THE 59 BANNED APPS

AN EARLY VIEW

MULTIPLE CHINESE APPS SAW A DROP IN USAGE POST THE GALWAN ATTACK, WITH THE BAN ACTING AS THE LAST NAIL IN THE COFFIN

50+ BANNED APPS - % WEEKLY CHANGE IN %USERS/WEEK AND NO. OF SESSIONS OVER PRE-COVID (LAST 2 MONTHS)



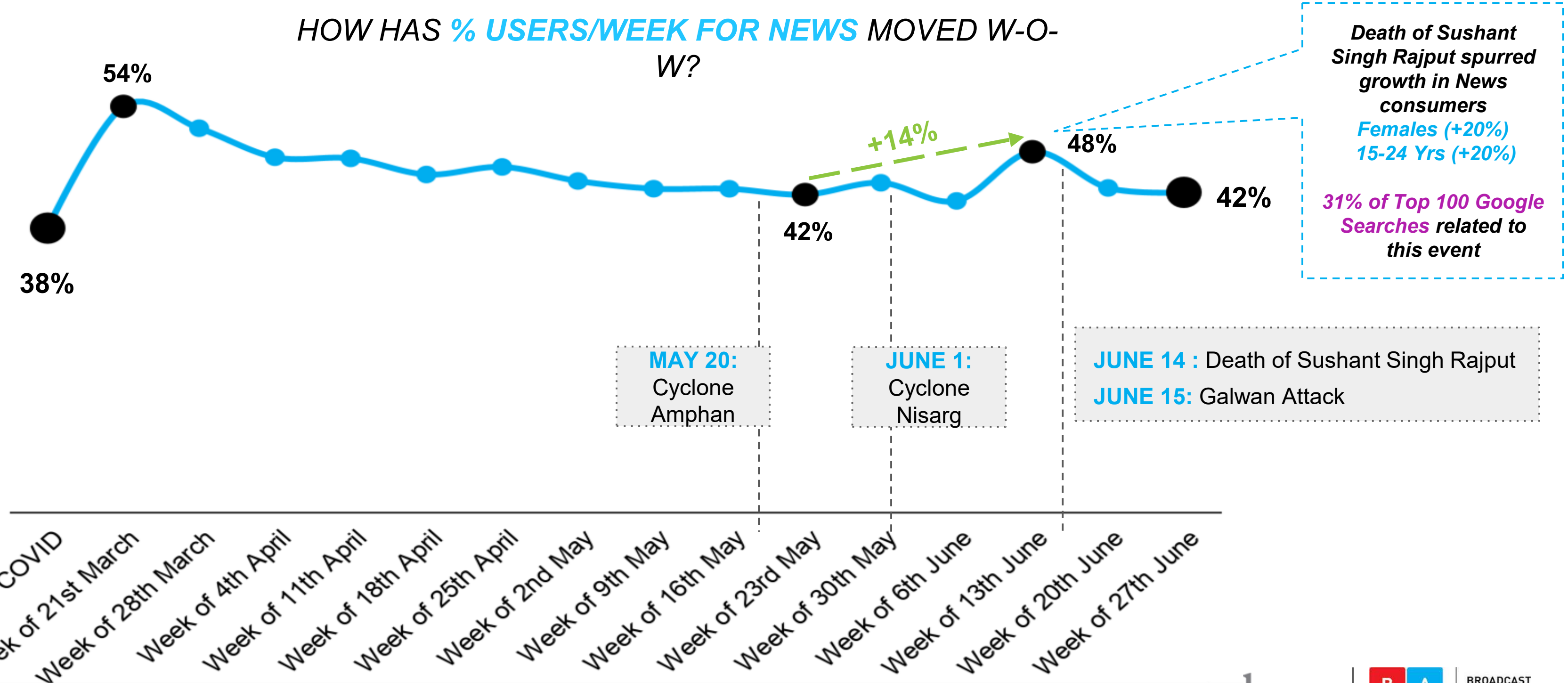
Based on Nielsen Android Smartphone Panel representing 1L+, NCCS ABC, 15-44
COVID Disruption as compared to Pre COVID-19

NEWS CONSUMPTION ON SMARTPHONE

EXPECTEDLY, NEWS CONTINUES TO SHOW A FAIR DEGREE OF SENSITIVITY TO EMERGING EVENTS

	% USERS/WEEK		# OF VIEWS/WEEK/USER	
TOTAL NEWS (APPS+WEBSITES+VIDEO)	42%	+13%	24	+62%

HOW HAS % USERS/WEEK FOR NEWS MOVED W-O-W?



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

COVID Disruption, as compared to Pre COVID-19

TOP VIDEO NEWS CHANNELS IN RECENT TIMES ON SMARTPHONE

VIDEO NEWS 20% +18% 6 -8%

Based on TV news channels streamed From 6th June to 3rd July on YouTube, JioTV, Hotstar, MX Player & Zee5 (Live +Non-Live)

Ranked in order of Unique Audience in '000s

1 Aaj Tak

2 ABP News Hindi

3 India TV

4 ABP News

5 BBC News Hindi

6 Zee News

7 NDTV

8 News Tak

9 TV9 Telugu

10 Aaj Tak HD

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

VIDEO STREAMING BEHAVIOUR ON SMARTPHONE

VIEWERSHIP FOR **MOVIES** AND **ORIGINAL SERIES INCREASED** SINCE PRE-COVID

SHARE OF TIME SPENT BY SUB-CATEGORIES

Content based on: Amazon Prime, Hotstar, MX Player online, Netflix, Voot, Zee5

OVERALL LEVEL

	Pre-COVID *(w/o Sports)*	Weeks 18-21 *(25th April - 22nd May)*	Weeks 24-27 *(6th June - 3rd July)*
Syndicated Series (Others)	74%	40%	54%
Syndicated Series (Mytho)	6%	10%	6%
Movies	12%	27%	**21%**
Original Series	5%	19%	**15%**
Live TV	3%	4%	4%

Syndicated Series - 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 Smartphone Panel representing 1L+, NCCS ABC, 15-44

COVID Disruption from 25th April to 3rd July as compared to Pre COVID-19

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TOP **MOVIES** IN RECENT TIMES ON SMARTPHONE

Based on content from Amazon Prime, Hotstar, MX Player (Online), Netflix, Voot, Zee5 *From 6th June to 3rd July*

Ranked in order of Unique Audience in '000s

1

Gulabo Sitabo,
APV

2

Chhichhore,
Disney+ Hotstar

3

Penguin,
APV

4

365 Days,
Netflix

5

Baaghi 3,
Disney+ Hotstar

6

Ghapa Ghap,
MX Player

7

Ghoomketu,
Zee5

8

Housefull 4,
Disney+ Hotstar

9

Chintu Ka Birthday,
Zee5

10

Crawl,
APV

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

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TOP ORIGINAL SERIES IN RECENT TIMES ON SMARTPHONE

Based on content from Amazon Prime, Hotstar, MX Player (Online), Netflix, Voot, Zee5 *From 6th June to 3rd July*

Ranked in order of Unique Audience in '000s

1

Mastram,
MX Player

2

Pati Patni Aur Woh,
MX Player

3

Aarya,
Disney + Hotstar

4

Raktanchal,
MX Player

5

Dark,
Netflix

6

Paatal Lok,
APV

7

XXX,
Zee5

8

Ek Thi Begum (Hindi),
MX Player

9

Naked,
MX Player

10

Lalbazaar,
Zee5

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

TOP **SYNDICATED SERIES** IN RECENT TIMES ON SMARTPHONE

Based on content from Amazon Prime, Hotstar, MX Player (Online), Netflix, Voot, Zee5 *From 6th June to 3rd July*

Ranked in order of Unique Audience in '000s

1

Mahabharat,
Disney+ Hotstar

2

Size Matters,
MX Player

3

Kavita Bhabhi,
MX Player

4

Yeh Rishta Kya Kehlata Hai,
Disney+ Hotstar

5

Charitraheen,
MX Player

6

Charm Sukh,
MX Player

7

RadhaKrishn,
Disney+ Hotstar

8

Khul Ja Sim Sim,
MX Player

9

Yeh Hai Mohabbatein,
Disney+ Hotstar

10

Kasautii Zindagii Kay ,
Disney+ Hotstar

Syndicated Shows - Includes shows from parent brand, which were not originally created for the OTT platform.

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

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ADVERTISING ON SMARTPHONE

DIGITAL ADVERTISING - A SNAPSHOT OF 3000+ CAMPAIGNS THAT WE MEASURED

Advertisers

H2'19	H1'20
100+	100+

Impressions per Campaign (in Millions)

H2'19		H1'20
33.2	-42% →	19.2

Average On Target %

H2'19	H1'20
73%	73%

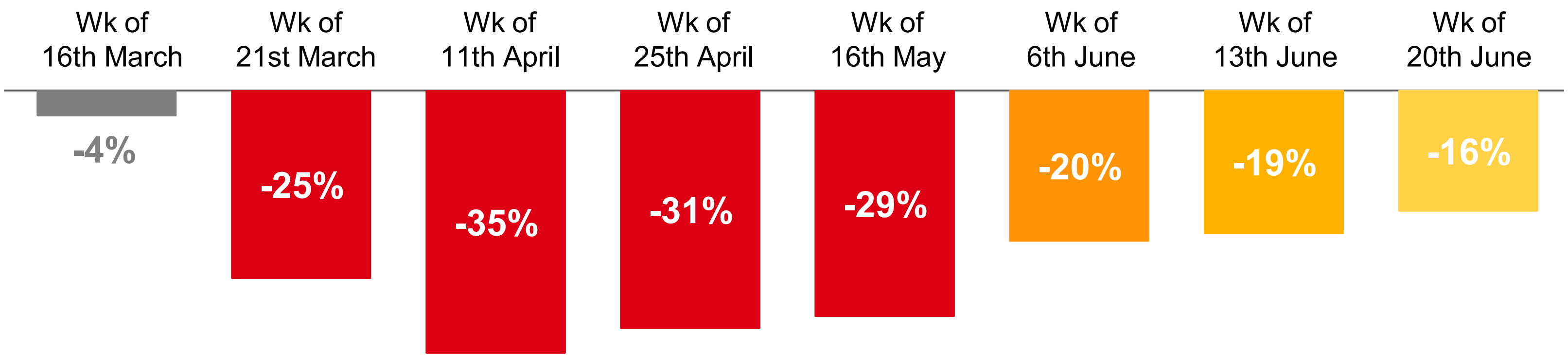
Publishers/Media Vendors

H2'19	H1'20
132	122

Source: Basis 3000+ campaigns measured from Jul'19 to Jun'20 using Nielsen Digital Ad Ratings

DIGITAL ADVERTISING - **A PROMISING MOVEMENT** TOWARDS FURTHER UNLOCK PHASES

% CHANGE IN NUMBER OF CREATIVES OVER PRE-COVID (W-O-W)



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

SUMMARIZING THE KEY POINTS FROM TODAY’S SESSION

SUMMARY : [1/2]

- Total TV viewership in H1 2020 is **9% higher than 2019**
- With the onset of 'unlock' in June 2020, there is revival of Advertising on TV – significant increase in the presence of 'top 10' and 'next 40' in June 2020
- TV viewership share for **Movies, News & Kids** have increased in H1 2020 vs. H1 2019 - share of GEC declined from 49% to 46% due to no original programming during lockdown period
- In week 26 Total TV viewership recorded **1 trillion viewing minutes (15% higher than pre-COVID).** Smartphone consumption, after a peak during Lockdown Phase 2, has gradually dipped to **17.2 Bn minutes but is still 7% higher as compared to Pre-COVID.**
- H1 2020 Advertising volumes **13% lower** than H1 2019 – on account of COVID-19

SUMMARY : [2/2]

- On TV, recent weeks show **growth in primetime viewership** – more pronounced in South than HSM (return of original programming) – however, levels still lower than pre-COVID
- On Smartphones**, Social N/W and Gaming** show higher consumption than Pre-COVID levels, whereas VOD mirrors the pre-lockdown levels
- With the country opening up gradually, categories like **Shopping and Mobile Payments** see revival, especially **amongst 25+ yrs**
- Cab aggregators in Metros, and Travel Planners in Tier I towns show a good revival post Unlock 1
- Chinese Apps saw a drop in usage post the Galwan attack with the ban acting as the last nail in the coffin

THANK YOU

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