GLOBAL BAROMETER WAVE 5

# Media and Entertainment

toluna harris interactive KURUNDATA

# About this study

ITWP companies Toluna, Harris Interactive and KuRunData have developed an ongoing study to understand the impact that the Coronavirus has on daily life.

The study will be conducted **every 2 weeks** and started on March 31.

**This report covers 19 markets.**

Findings highlight the importance of consumer insights for brands and businesses as they consider *'The Next Normal.'*

**We've created a series first focused on the immediate impact and disruption, and embarked on a second chapter in our series which looks at how people feel as they move out of quarantine.**

# Wave 5: Markets studied and field schedule

Below is the field schedule and number of completed interviews by market included in this wave of research. Data has been weighted by age, gender and region to be Census representative in all markets (except UAE and the Philippines where regions are not weighted, and India where we're Internet representative). In France, data is also weighted to reflect social grade.

| MARKET | COMPLETED INTERVIEWS | FIELDWORK DATES |
|---|---|---|
| UK | 1,379 | 26th – 28th May 2020 |
| France | 1,088 | 27th – 29th May 2020 |
| Germany | 1,083 | 27th – 28th May 2020 |
| Italy | 1,097 | 27th – 28th May 2020 |
| Spain | 1,116 | 27th – 29th May 2020 |

| MARKET | COMPLETED INTERVIEWS | FIELDWORK DATES |
|---|---|---|
| Australia | 1,096 | 26th – 28th May 2020 |
| Singapore | 536 | 26th – 28th May 2020 |
| Malaysia | 540 | 28th May – 1st June 2020 |
| Indonesia | 533 | 28th – 29th May 2020 |
| Philippines | 533 | 28th – 29th May 2020 |
| Thailand | 541 | 27th – 29th May 2020 |
| Japan | 1,158 | 27th – 28th May 2020 |
| Korea | 1,104 | 27th – 28th May 2020 |
| China | 1,049 | 27th May – 1st June 2020 |
| Hong Kong | 545 | 28th May – 1st June 2020 |
| India | 1,076 | 26th – 28th May 2020 |
| UAE | 521 | 28th May – 1st June 2020 |

| MARKET | COMPLETED INTERVIEWS | FIELDWORK DATES |
|---|---|---|
| United States | 1,055 | 26th – 28th May 2020 |
| Brazil | 1,065 | 27th – 29th May 2020 |

# Contents

# Content Viewing

- We are starting to see a drop-off in regular TV viewing but paid subscription VOD services are now even more popular than at the start of lockdown, in all regions.
- Movies and TV subscription services have been most popular during lockdown but look likely to lose subscribers post-lockdown whereas consumers are relatively more likely to stick with their sports subscription services.

# Content viewing (any) in past two weeks

Overview by region

| | Europe | Americas | Asia |
|---|---|---|---|
| Watching broadcast TV | 94% | 86% | 92% |
| **vs. Wave 1** | - | -2 | -2 |
| Watching catch up TV using an online streaming service | 72% | 73% | 77% |
| **vs. Wave 1** | +1 | +1 | +1 |
| Watching a paid subscription video on demand service | 60% | 74% | 64% |
| **vs. Wave 1** | +4 | +4 | +2 |
| Buying/renting TV shows or movies | 47% | 58% | 59% |
| **vs. Wave 1** | +4 | - | +2 |

- Broadcast TV remains the most viewed content format but there are signs of a drop-off since the start of lockdown in the Americas and Asia.
- Viewership of paid subscription VOD services has remained higher than at the start of the pandemic in Europe and Americas in particular.
- Europe and Asia have also maintained higher levels of buying or renting of TV shows or movies, although this has levelled off in the Americas.

toluna harris interactive KURUNDATA

# Content viewing (any) in past two weeks

Broadcast TV remains the most viewed content format across most markets. Online streaming services are also now used by over 80% of consumers in UK, China as well as markets across Southeast Asia and the Middle East, while paid subscriptions to VOD services have also surged in UK, Malaysia and Brazil compared with the start of the pandemic.

| | EUROPE | | | | | AMERICAS | | ASIA | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Watching broadcast TV** | 91% | 96% | 92% | 97% | 96% | 82% | 89% | 90% | 87% | 91% | 96% | 93% | 95% | 91% | 94% | 89% | 93% | 94% | 89% |
| **vs. Wave 1** | - | +2 | +2 | - | - | -3 | -1 | -1 | +1 | -3 | -2 | -3 | - | - | - | -4 | -3 | -2 | - |
| **Watching catch up TV using an online streaming service** | 82% | 67% | 65% | 75% | 68% | 73% | 72% | 70% | 78% | 86% | 79% | 84% | 83% | 48% | 77% | 83% | 68% | 91% | 92% |
| **vs. Wave 1** | +6 | +1 | +2 | -2 | -2 | +2 | - | +5 | -1 | +8 | +2 | +5 | - | -1 | +3 | -4 | -5 | -2 | +4 |
| **Watching a paid subscription video on demand service** | 69% | 47% | 49% | 60% | 72% | 65% | 83% | 64% | 65% | 70% | 64% | 71% | 61% | 42% | 48% | 71% | 50% | 89% | 80% |
| **vs. Wave 1** | +10 | +4 | +2 | +3 | - | - | +7 | +4 | -5 | +11 | -3 | +4 | +1 | -1 | +2 | +3 | +3 | +2 | +2 |
| **Buying/renting TV shows or movies** | 49% | 35% | 46% | 52% | 54% | 55% | 60% | 47% | 50% | 59% | 59% | 53% | 58% | 47% | 68% | 66% | 46% | 82% | 72% |
| **vs. Wave 1** | +7 | +3 | +2 | +3 | +1 | -3 | +3 | +6 | +1 | +14 | +2 | +4 | +3 | +2 | +1 | +2 | -5 | +1 | +5 |

# Subscription-based video streaming – *before and **after Covid-19 usage

Overview by region

| | Europe | | Americas | | Asia | |
|---|---|---|---|---|---|---|
| | Before | After | Before | After | Before | After |
| Movies | 52% | 47% | 63% | 57% | 56% | 45% |
| TV Shows | 42% | 39% | 63% | 56% | 55% | 43% |
| Documentaries | 34% | 32% | 52% | 47% | 41% | 32% |
| Children/ family shows | 29% | 27% | 47% | 43% | 39% | 31% |
| Sport | 28% | 27% | 39% | 35% | 37% | 31% |

** % already subscribed + % started a subscription after Covid-19*

*** % will keep services for this type of content*

- Movies have been the most popular subscription-based streaming services across all regions during Covid-19 lockdown followed closely by TV shows in the Americas and Asia.
- Consumers are, however, indicating that subscriptions will decline in the post-Covid world, particularly for Movies and TV shows and particularly in Asia.
- Sport subscriptions are much less likely to be impacted moving forward.

# Subscription-based video streaming – *before and **after Covid-19 usage

Unsurprisingly, not all consumers will continue to subscribe to streaming services post-Covid and this is generally most likely to impact movies and TV shows. Any decline of 5% or greater is shown thus below and this highlights that decline will be sharpest across many Asian markets and less so in Europe.

| | | EUROPE | | | | | AMERICAS | | ASIA | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| TV Shows | Before | 54% | 34% | 17% | 35% | 65% | 62% | 64% | 54% | 59% | 71% | 62% | 65% | 55% | 24% | 40% | 60% | 47% | 77% | 68% |
| | After | 51% | 31% | 16% | 37% | 58% | 53% | 59% | 49% | 49% | 48% | 51% | 57% | 40% | 20% | 33% | 37% | 40% | 54% | 56% |
| Movies | Before | 51% | 42% | 40% | 56% | 69% | 62% | 64% | 56% | 56% | 64% | 62% | 73% | 56% | 28% | 50% | 53% | 45% | 77% | 74% |
| | After | 46% | 37% | 35% | 53% | 62% | 55% | 59% | 48% | 48% | 44% | 51% | 65% | 44% | 25% | 42% | 35% | 39% | 57% | 61% |
| Documentaries | Before | 40% | 22% | 23% | 34% | 47% | 43% | 61% | 39% | 45% | 54% | 43% | 51% | 46% | 16% | 32% | 41% | 31% | 58% | 56% |
| | After | 38% | 19% | 20% | 34% | 45% | 38% | 55% | 36% | 36% | 39% | 35% | 48% | 32% | 15% | 28% | 27% | 28% | 39% | 44% |
| Children/ family shows | Before | 31% | 21% | 20% | 29% | 42% | 39% | 55% | 34% | 42% | 58% | 54% | 57% | 43% | 12% | 18% | 35% | 25% | 68% | 58% |
| | After | 28% | 19% | 19% | 29% | 41% | 35% | 51% | 32% | 33% | 37% | 49% | 53% | 36% | 10% | 15% | 23% | 20% | 51% | 51% |
| Sport | Before | 29% | 21% | 20% | 30% | 36% | 30% | 48% | 29% | 35% | 46% | 48% | 38% | 39% | 13% | 29% | 41% | 33% | 62% | 55% |
| | After | 28% | 18% | 19% | 32% | 36% | 27% | 43% | 28% | 30% | 34% | 44% | 34% | 32% | 11% | 26% | 28% | 27% | 51% | 47% |

** % already subscribed + % started a subscription after Covid-19*

*** % will keep services for this type of content*

# Reading & Listening

- Reading and listening levels are still largely at the same (elevated) levels they enjoyed at the start of lockdown and some activities are seeing growth in Europe e.g. podcasts and audiobook use.
- Looking forward, future levels of book reading/listening are likely to remain higher than pre-lockdown levels in the Americas and Asia but return to 'normal' in Europe due to Europeans believing that they will have less free time generally.



# Reading and listening in past two weeks

## Overview by region

| | Europe | Americas | Asia |
|---|---|---|---|
| Reading online news sites | 88% | 87% | 92% |
| **vs. Wave 1** | +1 | -1 | -1 |
| Listening to broadcast radio | 83% | 72% | 71% |
| **vs. Wave 1** | -1 | -4 | - |
| Reading printed books | 79% | 76% | 75% |
| **vs. Wave 1** | -2 | -1 | +1 |
| Reading printed newspapers | 67% | 55% | 67% |
| **vs. Wave 1** | +3 | -2 | - |
| Reading eBooks | 47% | 57% | 63% |
| **vs. Wave 1** | +1 | - | +1 |
| Listening to podcasts | 45% | 56% | 56% |
| **vs. Wave 1** | +2 | -1 | +1 |
| Listening to audiobooks | 36% | 45% | 50% |
| **vs. Wave 1** | +2 | - | - |

- Reading and listening activities have so far remained at broadly similar levels to where they were at the start of lockdown with a couple of exceptions …
- Radio listening has started to decline in the Americas.
- Reading of print newspapers has begun to turn the corner in Europe as more people are again able to pick up a daily copy with no restrictions.
- Consumers continue to increase the amount of time spent listening to podcasts and audiobooks in Europe.

# Reading and listening (any) in past two weeks

Online news is still most accessed of these activities across most markets, with broadcast radio and printed books following. eBooks, podcasts and audiobooks are more used by consumers in Malaysia, while readership has dropped in certain markets (e.g. US, Japan and Hong Kong) compared with the start of the pandemic.

| | EUROPE | | | | | AMERICAS | | ASIA | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Reading online news sites | 83% | 84% | 86% | 97% | 93% | 78% | 95% | 81% | 96% | 95% | 98% | 97% | 95% | 87% | 91% | 96% | 92% | 95% | 97% |
| vs. Wave 1 | -1 | +6 | - | +1 | -1 | -3 | +1 | -2 | - | +5 | +3 | -1 | -3 | - | - | - | -4 | -1 | +1 |
| Listening to broadcast radio | 74% | 83% | 87% | 89% | 85% | 68% | 77% | 72% | 75% | 83% | 69% | 77% | 72% | 53% | 62% | 71% | 68% | 80% | 82% |
| vs. Wave 1 | - | +3 | - | - | - | -5 | -1 | -3 | - | +4 | +1 | -4 | +1 | -4 | -3 | +1 | - | -1 | +3 |
| Reading printed books | 73% | 78% | 79% | 83% | 82% | 70% | 81% | 69% | 72% | 72% | 78% | 72% | 71% | 70% | 67% | 80% | 72% | 89% | 80% |
| vs. Wave 1 | -3 | +5 | - | -1 | - | -4 | - | -2 | -1 | +5 | +2 | +2 | +2 | - | +1 | -3 | -1 | -1 | -2 |
| Reading printed newspapers | 60% | 62% | 72% | 76% | 67% | 56% | 53% | 58% | 73% | 65% | 71% | 65% | 63% | 61% | 49% | 68% | 71% | 91% | 75% |
| vs. Wave 1 | +2 | +6 | - | +4 | +1 | -6 | +1 | -1 | -5 | +3 | +8 | -6 | -2 | -2 | -4 | +1 | -4 | -1 | +4 |
| Reading eBooks | 48% | 34% | 41% | 51% | 60% | 48% | 66% | 42% | 63% | 65% | 74% | 61% | 72% | 40% | 52% | 81% | 51% | 87% | 81% |
| vs. Wave 1 | +4 | +5 | -1 | -1 | -2 | -5 | +1 | +1 | +2 | +13 | +6 | +3 | -4 | -3 | +2 | -3 | -3 | +1 | +2 |
| Listening to podcasts | 45% | 39% | 41% | 43% | 57% | 49% | 62% | 44% | 59% | 74% | 67% | 60% | 65% | 28% | 45% | 60% | 41% | 79% | 76% |
| vs. Wave 1 | +8 | +5 | +1 | -4 | -1 | -2 | - | +3 | +1 | +12 | +2 | +1 | +5 | -1 | +1 | -2 | -1 | - | +4 |
| Listening to audiobooks | 37% | 26% | 38% | 38% | 41% | 40% | 49% | 33% | 50% | 49% | 52% | 49% | 53% | 27% | 37% | 69% | 37% | 78% | 71% |
| vs. Wave 1 | +7 | +2 | -1 | -1 | -1 | -5 | +5 | +3 | -2 | +11 | -1 | +1 | +5 | -4 | - | -1 | - | +2 | +2 |

# Reading and listening – *anticipated future change versus **change since lockdown usage

## Overview by region

| | Europe | | Americas | | Asia | |
|---|---|---|---|---|---|---|
| | Anticipated Net Growth | *Pre-lockdown* | Anticipated Net Growth | *Pre-lockdown* | Anticipated Net Growth | *Pre-lockdown* |
| **Reading eBooks** | -8% | *8%* | -3% | *20%* | -4% | *17%* |
| **Reading printed books** | -9% | *13%* | 0% | *16%* | -9% | *9%* |
| **Listening to audiobooks** | -9% | *4%* | -3% | *11%* | -6% | *11%* |
| **Reading printed newspapers** | -9% | *-3%* | -7% | *0%* | -9% | *5%* |
| **Reading printed magazines** | -10% | *N/A* | -7% | *N/A* | -12% | *N/A* |
| **Reading digital magazines/online publications** | -11% | *N/A* | -3% | *N/A* | 0% | *N/A* |

** % anticipated future net change = doing more minus doing less/stop reading*

*** % net change since start of lockdown*

- We see very different trends across regions.
- In Europe, consumers generally forecast returning to pre-Covid lockdown patterns for most reading and listening activities.
- In the Americas and Asia, future levels of book reading/listening are likely to remain higher than pre-Covid.
- For print newspapers and magazines, the story is less positive across all three regions and significant intervention will be required to turn this forecast around.

toluna harris interactive KURUNDATA

# Reading and listening – *anticipated future change versus **change since lockdown usage

The pattern of these activities having increased since lockdown and forecast to return to pre-lockdown levels is broadly consistent across markets.

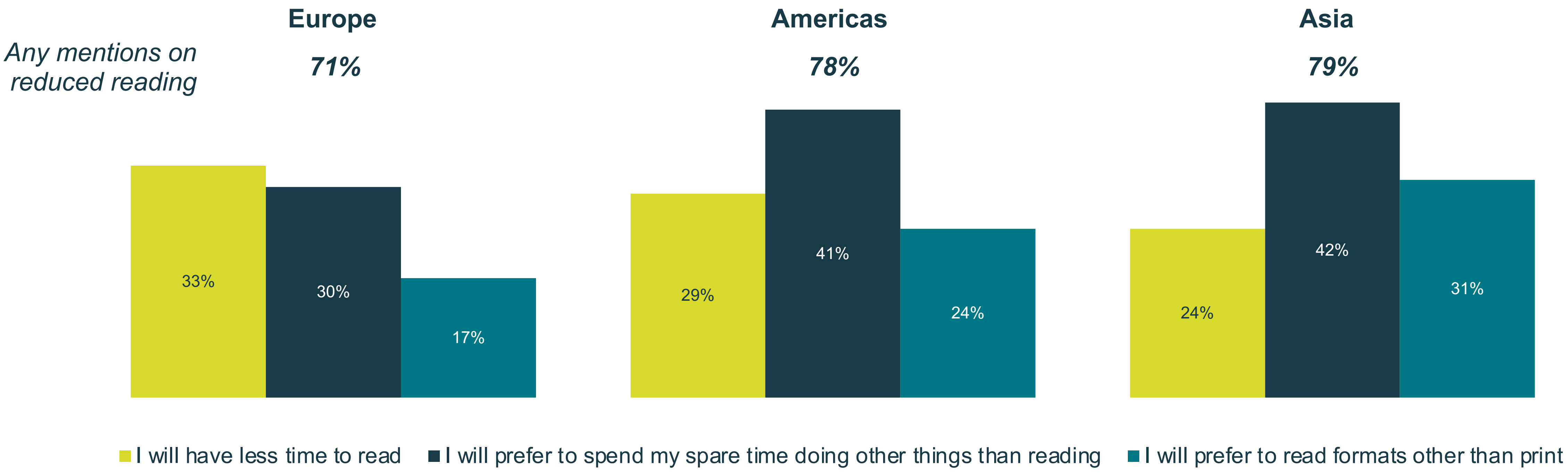
| | EUROPE | | | | | AMERICAS | | ASIA | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | | | | | | | | | | |
| **Reading printed books** | -6% | -8% | -10% | -9% | -11% | -2% | 2% | -7% | -12% | -8% | -15% | -9% | -14% | -5% | -10% | -15% | -14% | 1% | -8% |
| *vs. pre-lockdown* | 16% | 11% | 14% | 10% | 14% | 15% | 18% | 11% | 10% | 10% | 3% | 0% | -3% | 8% | 3% | 4% | 6% | 31% | 14% |
| **Reading eBooks** | -7% | -7% | -8% | -12% | -7% | -2% | -3% | -4% | 1% | 2% | -1% | -11% | -7% | -3% | -9% | -1% | -7% | 3% | -12% |
| *vs. pre-lockdown* | 11% | 6% | 6% | 6% | 13% | 13% | 26% | 9% | 24% | 19% | 13% | 2% | 21% | 12% | 8% | 22% | 10% | 39% | 20% |
| **Listening to audiobooks** | -7% | -6% | -9% | -13% | -8% | -5% | -2% | -5% | -6% | -7% | -8% | -13% | -4% | -4% | -10% | -6% | -9% | 4% | -9% |
| *vs. pre-lockdown* | 7% | 2% | 5% | 1% | 6% | 10% | 12% | 7% | 13% | 11% | 5% | 3% | 14% | 3% | 5% | 17% | 11% | 28% | 14% |
| **Reading printed newspapers** | -9% | -9% | -9% | -12% | -8% | -5% | -9% | -9% | -8% | -4% | -14% | -11% | -14% | -5% | -12% | -19% | -13% | 7% | -13% |
| *vs. pre-lockdown* | -3% | -4% | 4% | -6% | -5% | 6% | -5% | 1% | 13% | 4% | -7% | -8% | 3% | 9% | 3% | -6% | 7% | 24% | 1% |
| **Read digital magazines/ online publications** | -9% | -11% | -12% | -11% | -13% | -3% | -2% | -6% | 3% | 13% | 11% | 0% | 7% | -5% | -9% | -4% | -1% | 7% | -5% |
| *vs. pre-lockdown* | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| **Reading printed magazines** | -12% | -11% | -10% | -10% | -10% | -5% | -9% | -8% | -15% | -15% | -18% | -17% | -19% | -6% | -12% | -17% | -10% | -2% | -20% |
| *vs. pre-lockdown* | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |

** % anticipated future net change = doing more minus doing less/stop reading*

*** % net change since start of lockdown*

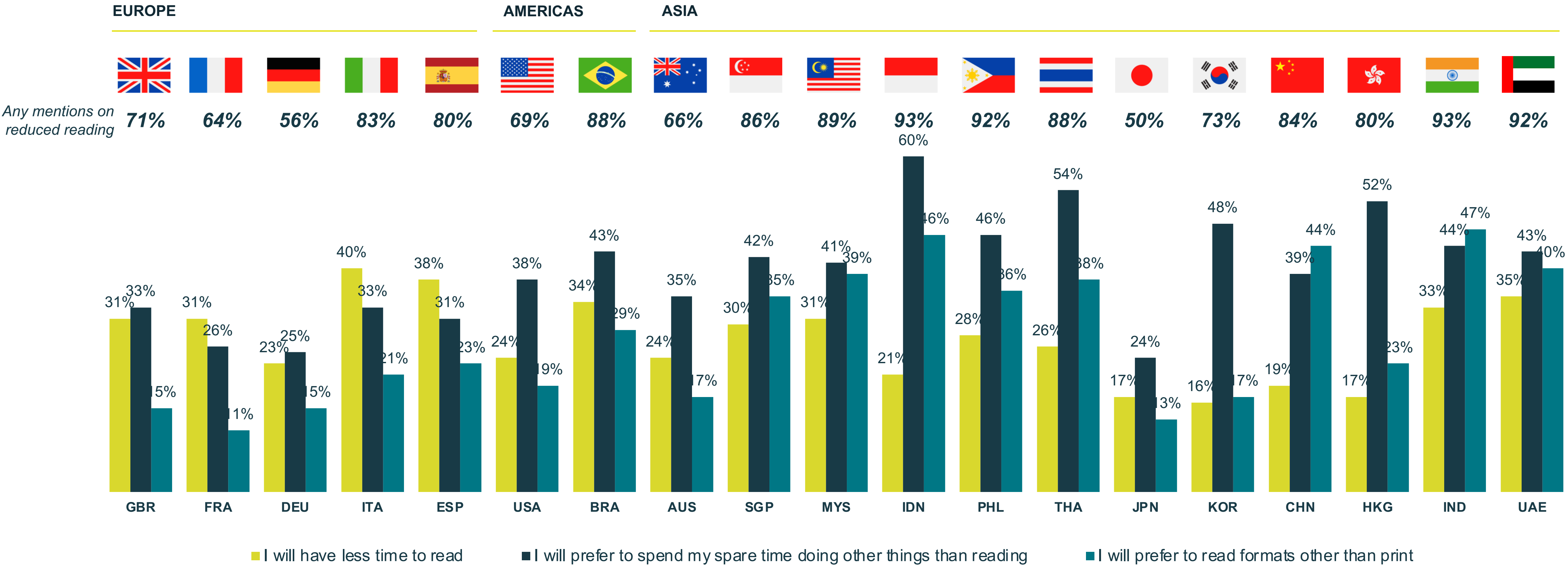
# Likely post-pandemic reading habits

Asked more directly, it's clear that most consumers will generally reduce the amount of time the spend reading (compared with lockdown levels) but for slightly different reasons. In Europe, people feel that they will have less time for reading, whereas in the Americas and Asia this forecast is driven more by a preference for other 'spare time' activities.



# Likely post-pandemic reading habits

The regional pattern outlined on the previous slide largely holds true at country level with Europeans feeling that they will have less time for reading post-Covid, whereas in the Americas and Asia this feeling is driven more by a preference for other ‘spare time’ activities.

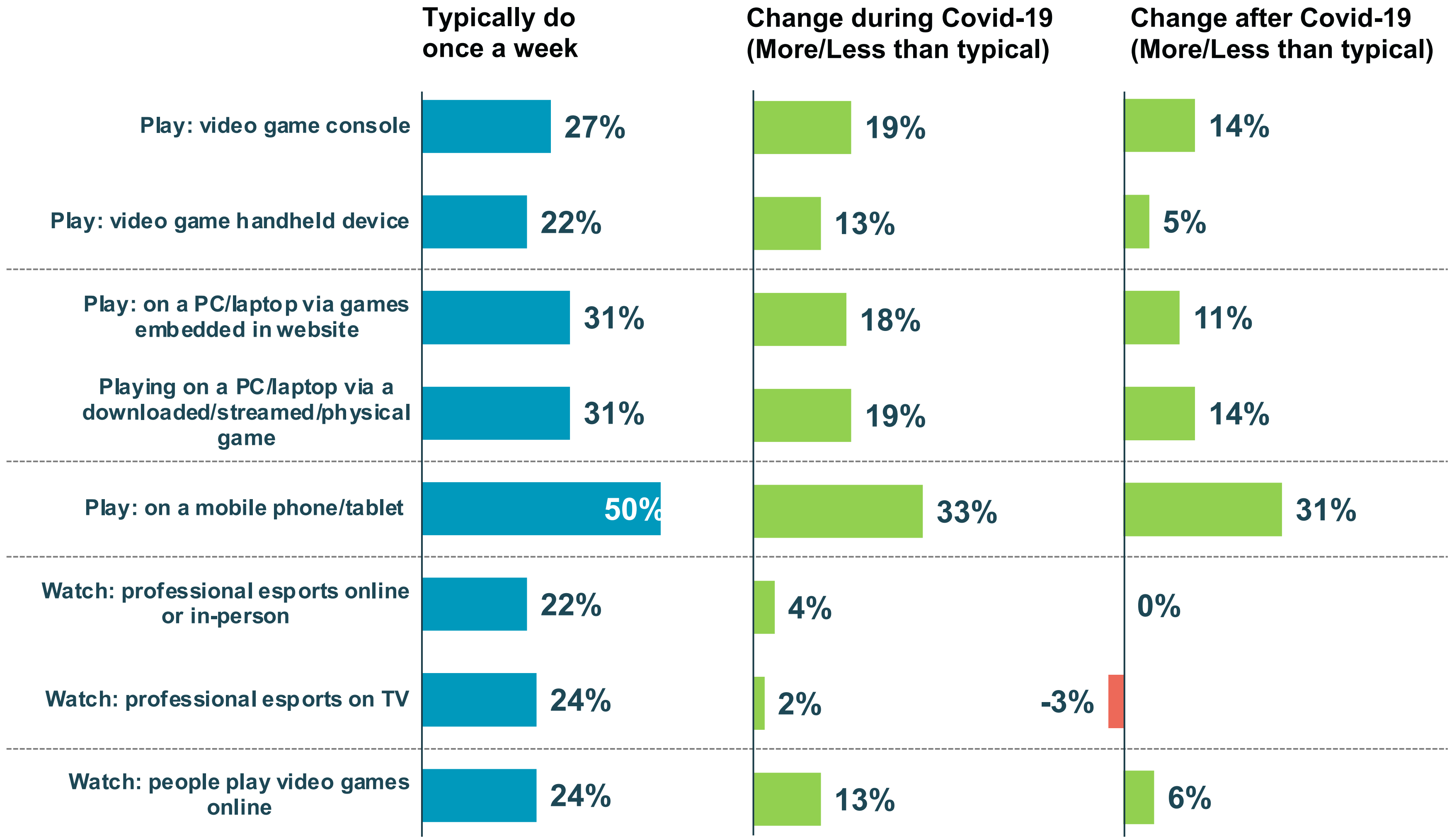


# Gaming

- Video game playing (both the absolute number of players and the amount of time played) has increased significantly across all platforms during lockdown and, in particular, on mobile phones and tablets.
- This uptick in gaming is likely to be maintained in future meaning that gaming will likely see longer-term benefits from lockdown.
- Results are consistent across regions with only Europe seeing a decline is eSport viewing.

# Time typically spent playing video games - pre, during and post Covid-19

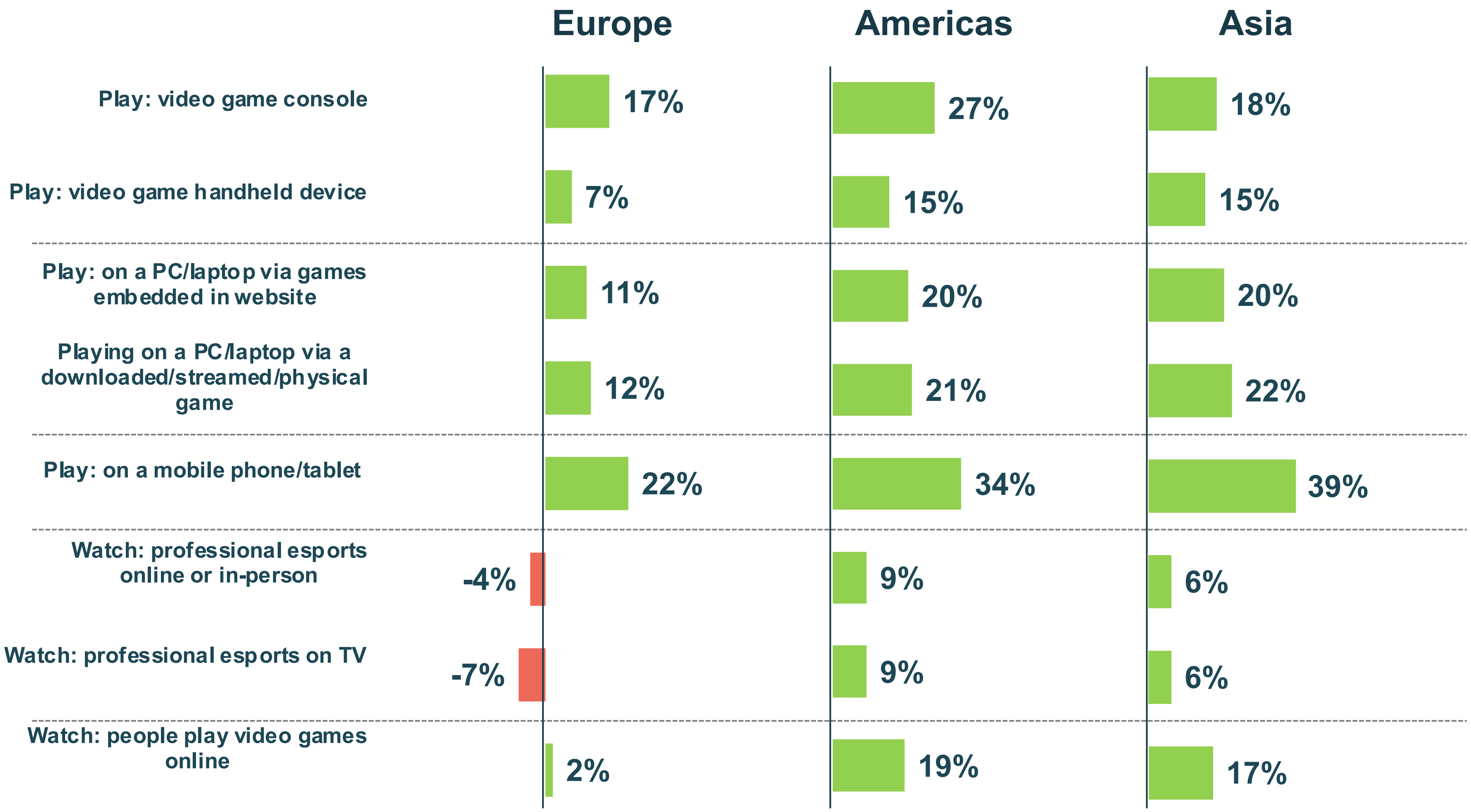
## Global overview




- Overall, there has been a significant uptick in people *playing* video games during Covid-19 lockdown, and this increase looks set to be maintained, for many, beyond lockdown.
- This uptick is most evident for mobile device gaming.
- By contract, esports viewership has remained relatively unchanged.

# Time typically spent playing video games – DURING Covid-19

Overview by region




- All individual gaming activities have increased significantly across all three regions during lockdown.
- The greatest increases have been for mobile phone/tablet gaming.
- There has been an increase in viewing of eSports and professional gaming in the Americas and Asia but a decline in Europe.

**Net change = more/less vs. pre-Covid-19**

# Time typically spent playing video games – <u>DURING</u> Covid-19

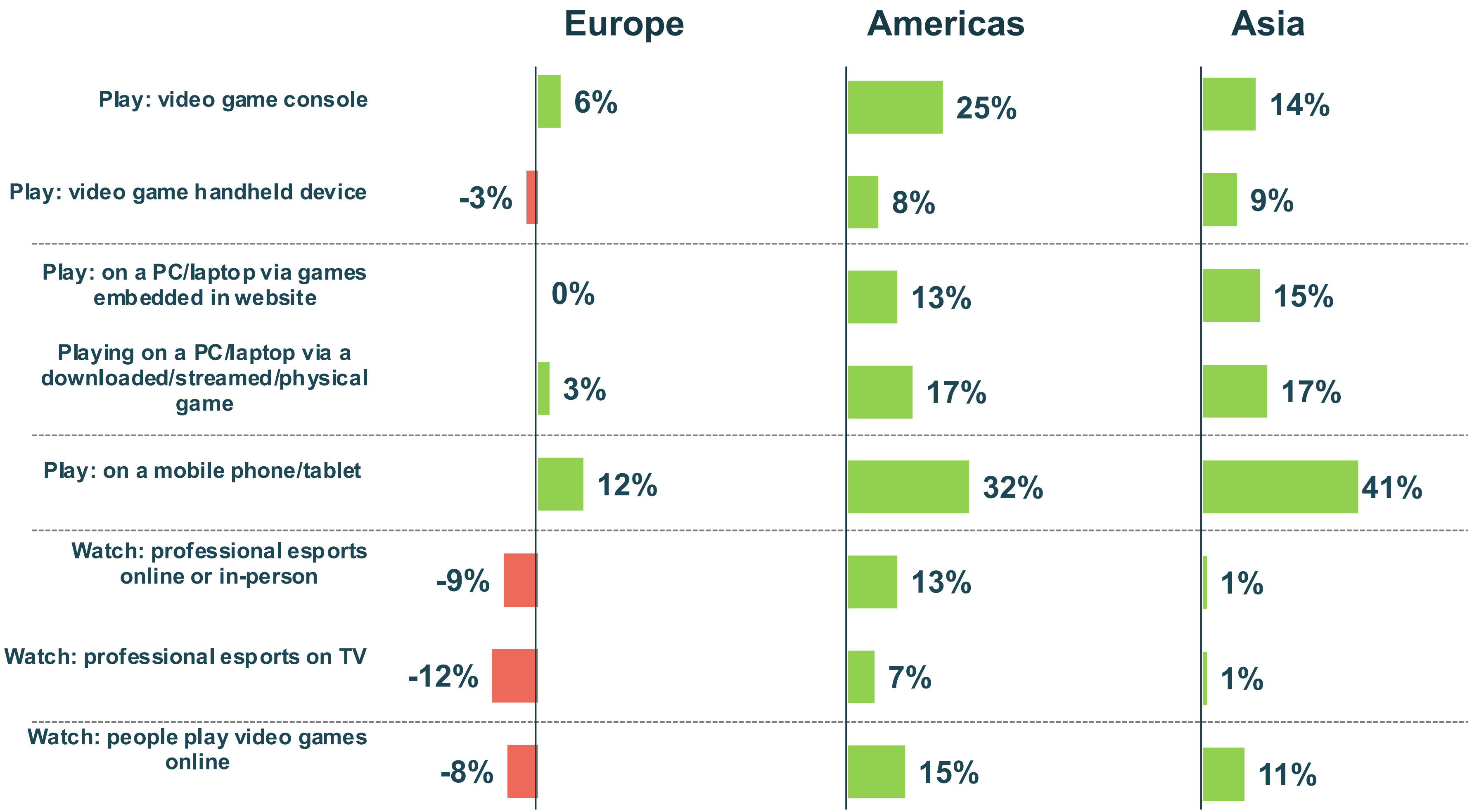
There has been a general increase in gaming across all markets during Covid-19, and significantly so for mobile/tablet gaming. However, a decrease in esports viewership can be seen across the majority of European markets, as well as some Asian markets.

| | EUROPE | | | | | AMERICAS | | ASIA | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Play: video game console | 21% | 16% | 7% | 16% | 21% | 25% | 28% | 22% | 24% | 27% | 16% | 7% | 20% | 19% | 14% | 12% | 12% | 26% | 19% |
| Play: video game handheld device | 9% | -1% | 3% | 10% | 13% | 13% | 17% | 15% | 21% | 25% | 20% | 6% | 18% | 15% | 8% | 10% | -2% | 24% | 16% |
| Play: on a PC/laptop via games embedded in website | 10% | 9% | 6% | 12% | 16% | 17% | 22% | 17% | 22% | 31% | 29% | 20% | 19% | 15% | 10% | 22% | -2% | 31% | 18% |
| Playing on a PC/laptop via a downloaded/streamed/physical game | 15% | 6% | 9% | 10% | 16% | 17% | 25% | 17% | 27% | 38% | 30% | 20% | 21% | 16% | 13% | 20% | 7% | 29% | 26% |
| Play: on a mobile phone/tablet | 24% | 17% | 12% | 22% | 29% | 25% | 40% | 21% | 40% | 52% | 52% | 50% | 56% | 31% | 29% | 36% | 28% | 41% | 36% |
| Watch: professional esports online or in-person | 0% | 1% | -3% | -12% | -2% | 11% | 7% | 10% | 10% | 3% | 1% | -6% | 5% | 3% | 0% | 2% | -7% | 18% | 11% |
| Watch: professional esports on TV | -4% | -8% | -11% | -12% | -2% | 7% | 10% | 3% | 14% | -4% | 6% | -2% | 5% | -3% | -1% | 10% | -9% | 18% | 6% |
| Watch: people play video games online | 2% | 3% | -3% | 0% | 6% | 17% | 20% | 15% | 23% | 18% | 18% | 13% | 23% | 12% | 11% | 12% | 0% | 23% | 18% |

**Net change = more/less vs. pre-Covid-19**

# Time typically spent playing video games – POST Covid-19

## Overview by region




**Net change = more/less vs. pre-Covid-19**

- All individual gaming activities are likely to see post-lockdown participation levels remain higher than pre-Covid in Asia and the Americas whereas play levels will return to closer to pre-lockdown levels in Europe.
- Mobile device gaming, in particular, will have benefitted enormously in the long-term from lockdown habits.

# Time typically spent playing video games – POST Covid-19

All markets anticipate the uplift in mobile/tablet gaming to be carried into the post Covid-19 era. The US, Brazil, India and UAE have especially positive outlooks towards all gaming. However, across Europe and many Asian markets, there is potential for a decrease in esports consumption post-Covid-19.

| | EUROPE | | | | | AMERICAS | | ASIA | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Play: video game console** | 16% | 6% | 0% | -5% | 9% | 29% | 22% | 23% | 15% | 22% | 7% | -16% | 27% | 16% | 11% | 3% | 6% | 33% | 12% |
| **Play: video game handheld device** | 4% | -15% | -5% | -4% | 0% | 12% | 6% | 20% | 9% | 15% | 8% | -22% | 28% | 14% | 1% | -5% | -9% | 27% | 7% |
| **Play: on a PC/laptop via games embedded in website** | -1% | 3% | 2% | -7% | 4% | 20% | 6% | 12% | 13% | 28% | 25% | -1% | 31% | 14% | 3% | 13% | -16% | 32% | 10% |
| **Playing on a PC/laptop via a downloaded/streamed/physical game** | 10% | -2% | 5% | -3% | 6% | 16% | 17% | 16% | 15% | 34% | 26% | 1% | 22% | 15% | 7% | 7% | -1% | 35% | 23% |
| **Play: on a mobile phone/tablet** | 18% | 8% | 6% | 4% | 19% | 27% | 33% | 11% | 32% | 60% | 56% | 42% | 87% | 33% | 26% | 36% | 24% | 55% | 31% |
| **Watch: professional esports online or in-person** | -5% | -2% | -10% | -16% | -12% | 22% | 6% | 14% | 4% | -7% | -9% | -29% | 9% | -1% | -12% | -10% | -17% | 24% | 12% |
| **Watch: professional esports on TV** | -8% | -13% | -17% | -15% | -12% | 10% | 5% | 0% | 7% | -13% | 2% | -24% | 11% | -9% | -11% | 0% | -20% | 22% | 2% |
| **Watch: people play video games online** | -5% | -3% | -11% | -14% | -8% | 18% | 12% | 12% | 22% | -1% | 13% | -5% | 30% | 1% | 5% | -1% | -13% | 24% | 12% |

**Net change = more/less vs. pre-Covid-19**

# Social Media

- YouTube and Facebook continue to be the most popular social platforms and both are still benefitting from higher engagement than at the start of lockdown.
- TikTok has broken through as a major platform in Europe and Instagram has also seen significant lockdown growth in this region.
- In Asia, Twitter and Instagram are both still seeing higher engagement than pre-lockdown.
- Twitter and TikTok are now back at levels they achieved at the start of lockdown in the Americas.

# Social media use in past two weeks

Overview by region

| | Europe | Americas | Asia |
|---|---|---|---|
| Watching videos on YouTube | 82% | 90% | 91% |
| **vs. Wave 1** | +2 | +6 | +4 |
| Using Facebook | 78% | 86% | 82% |
| **vs. Wave 1** | +2 | +1 | +3 |
| Social site excl. Facebook, Twitter, Instagram & TikTok | 57% | 66% | 73% |
| **vs. Wave 1** | +1 | -2 | - |
| Using Instagram | 54% | 71% | 69% |
| **vs. Wave 1** | +5 | +2 | +3 |
| Using Twitter | 45% | 52% | 60% |
| **vs. Wave 1** | +3 | - | +4 |
| Using TikTok | 28% | 41% | 45% |
| **vs. Wave 1** | +6 | -1 | +3 |

- YouTube and Facebook remain the two most popular social platforms across all three regions with YouTube, in particular, continuing to be used more than at the start of lockdown.
- Europe has maintained significantly increased use of other platforms, in particular TikTok and Instagram, and Asian consumers continue to be more likely to Tweet than pre-lockdown.
- In the Americas, however, only YouTube continues to benefit from much higher engagement than when lockdown was implemented.

# Social media use in past two weeks

YouTube and Facebook remain the most popular social media channels across most markets (except China). TikTok dominates in China, while it has also seen higher adoption in other markets like Malaysia and Thailand compared with the start of the pandemic. Twitter is used more extensively in the UK and Malaysia than at the start of the outbreak.

| | EUROPE | | | | | AMERICAS | | ASIA | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Watching videos on YouTube** | 80% | 74% | 76% | 89% | 91% | 82% | 98% | 77% | 94% | 97% | 99% | 99% | 98% | 80% | 90% | N/A | 95% | 98% | 98% |
| **vs. Wave 1*** | +8 | +3 | +2 | -2 | -2 | +8 | +3 | +5 | -2 | +3 | +4 | - | +1 | +2 | - | N/A | +1 | -1 | -2 |
| **Using Facebook** | 75% | 77% | 67% | 85% | 87% | 80% | 91% | 82% | 90% | 93% | 93% | 98% | 96% | 44% | 66% | N/A | 94% | 95% | 94% |
| **vs. Wave 1*** | +3 | - | +3 | +3 | +3 | - | +1 | +4 | -2 | - | +1 | - | -1 | -1 | - | N/A | - | -1 | -1 |
| **Social site excl. Facebook, Twitter, Instagram & Tik Tok** | 58% | 52% | 52% | 58% | 64% | 60% | 71% | 56% | 78% | 87% | 90% | 81% | 90% | 52% | 57% | 74% | 81% | 91% | 85% |
| **vs. Wave 1*** | +8 | +4 | +2 | -2 | -3 | +1 | -2 | +4 | -5 | +1 | +1 | -5 | +4 | +3 | - | +4 | +3 | -2 | -3 |
| **Using Twitter** | 50% | 36% | 33% | 44% | 58% | 47% | 58% | 38% | 57% | 63% | 73% | 69% | 73% | 54% | 48% | N/A | 47% | 81% | 76% |
| **vs. Wave 1*** | +11 | +4 | +3 | - | +1 | -2 | +3 | +5 | -4 | +13 | +6 | +3 | +5 | +1 | +5 | N/A | +7 | -2 | +1 |
| **Using Instagram** | 49% | 45% | 44% | 64% | 66% | 55% | 87% | 51% | 76% | 79% | 87% | 76% | 79% | 46% | 63% | N/A | 67% | 88% | 85% |
| **vs. Wave 1*** | +6 | +6 | +2 | +1 | -1 | +2 | +2 | +6 | -1 | +8 | +2 | +4 | +1 | +5 | +2 | N/A | +1 | -1 | -1 |
| **Using TikTok** | 30% | 23% | 24% | 28% | 33% | 33% | 49% | 27% | 46% | 44% | 46% | 44% | 60% | 19% | 30% | 83% | 33% | 62% | 62% |
| **vs. Wave 1*** | +9 | +4 | +3 | +3 | +4 | -5 | +8 | +6 | +2 | +20 | +6 | +1 | +11 | -2 | +1 | -3 | +8 | -6 | +3 |

# Gambling

- Any uptick in online gambling during lockdown is now beginning to level off, particularly in Europe.
- Online poker looks set to be the biggest (and only) long-term beneficiary of lockdown in this gaming category and particularly in the Americas.

# Net growth in gambling in past two weeks

Overview by region

| | Europe | Americas | Asia |
|---|---|---|---|
| Online poker | 1% | 5% | 2% |
| Online casino | 0% | 4% | 1% |
| Online slots | 0% | 4% | 1% |
| Online bingo | -1% | 4% | 1% |
| Online betting | -4% | 4% | 1% |
| Lotto/lottery | -4% | 1% | -1% |

- As with many online activities, we are starting to see any uptick during lockdown begin to level off and gambling is another example of this.
- This is the case for Europe in particular where there has been a net decline in the last couple of weeks in online betting and lottery play.
- Online poker continues to see the biggest lockdown benefit in the Americas in particular.

# Net growth in gambling in past two weeks

India, US and Brazil stand out as the three markets where online gambling activity has continued to increase in recent weeks. Elsewhere, in Spain, Italy and Philippines, for example, levels of participation are now beginning to decline.

| | EUROPE | | | | | AMERICAS | | ASIA | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Online slots | 3% | 0% | 1% | -2% | -2% | 4% | 4% | 3% | -1% | -1% | 2% | -5% | 2% | 0% | 0% | 2% | 1% | 7% | 1% |
| Online bingo | 3% | 0% | 0% | -5% | -2% | 4% | 4% | 1% | -1% | 3% | -2% | -6% | -3% | 1% | -1% | 5% | 2% | 8% | -1% |
| Lotto / lottery | 3% | -4% | 4% | -9% | -12% | 1% | 1% | -1% | -7% | 2% | 2% | -11% | -4% | -3% | 2% | -1% | -6% | 8% | 6% |
| Online poker | 2% | 1% | 2% | 0% | 1% | 6% | 3% | 3% | -3% | 1% | 2% | -4% | -5% | 1% | 2% | 8% | 3% | 9% | 0% |
| Online casino | 2% | -1% | 2% | -4% | 1% | 4% | 4% | 2% | -1% | 1% | 2% | -6% | 1% | 1% | 0% | -1% | 1% | 7% | -2% |
| Online betting | -3% | -4% | 1% | -7% | -6% | 4% | 5% | 2% | -2% | 3% | 1% | -5% | 1% | 0% | 0% | 2% | 3% | 7% | -2% |

**Net growth = doing more minus doing less**

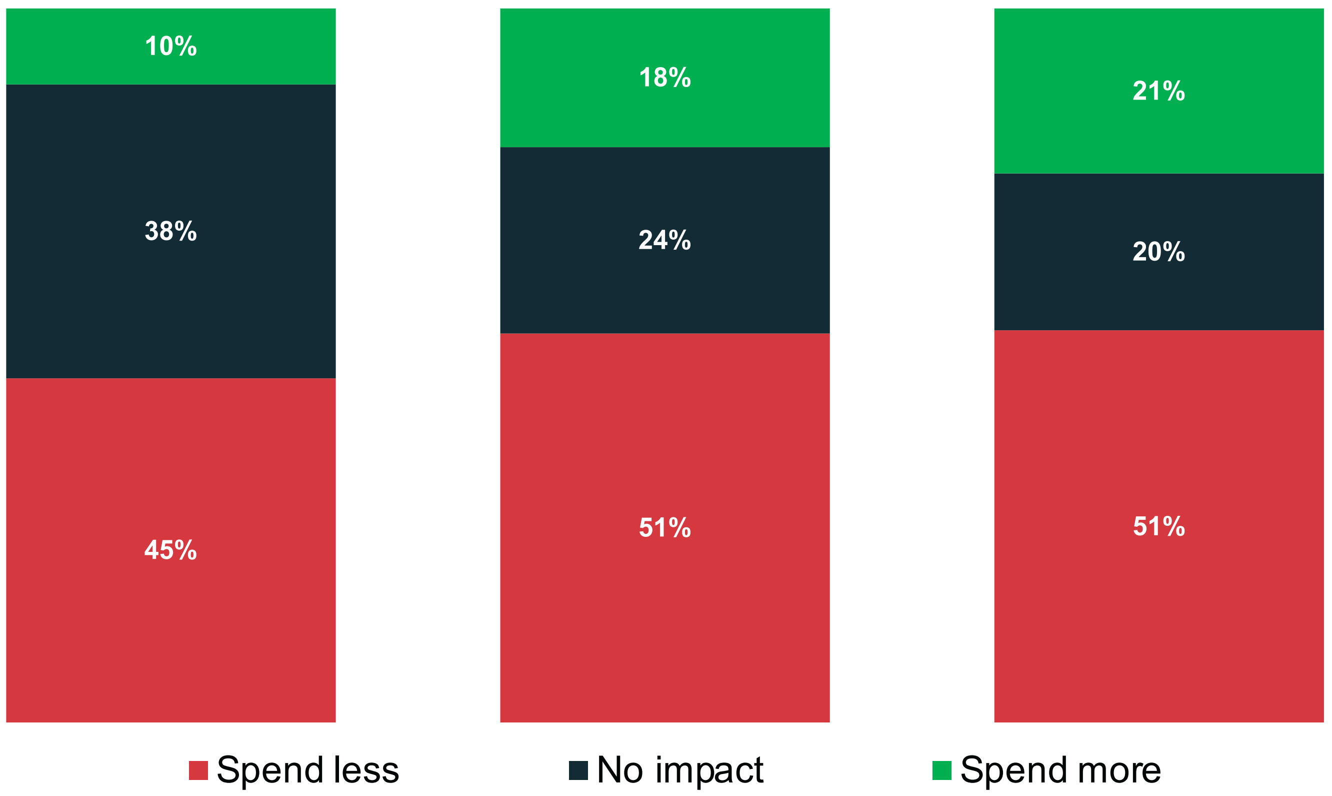
# The New Normal

- **Whilst there are some positive signs, consumers are cautious about how they will engage with entertainment in the new normal:**
- Around half think they will initially spend less money on entertainment than they did pre-Covid.
- A significant minority (around 1 in 3 in each region) are reluctant to return to live venues until they can be absolutely certain there is no risk.
- Limiting the number of attendees, use of sanitiser and face masks are the special measures most likely to encourage people back to live events.
- Even with these measures in place, event organisers should still expect significant levels of concern, in particular for indoor events and activities

# Likely impact of Covid-19 on entertainment spending

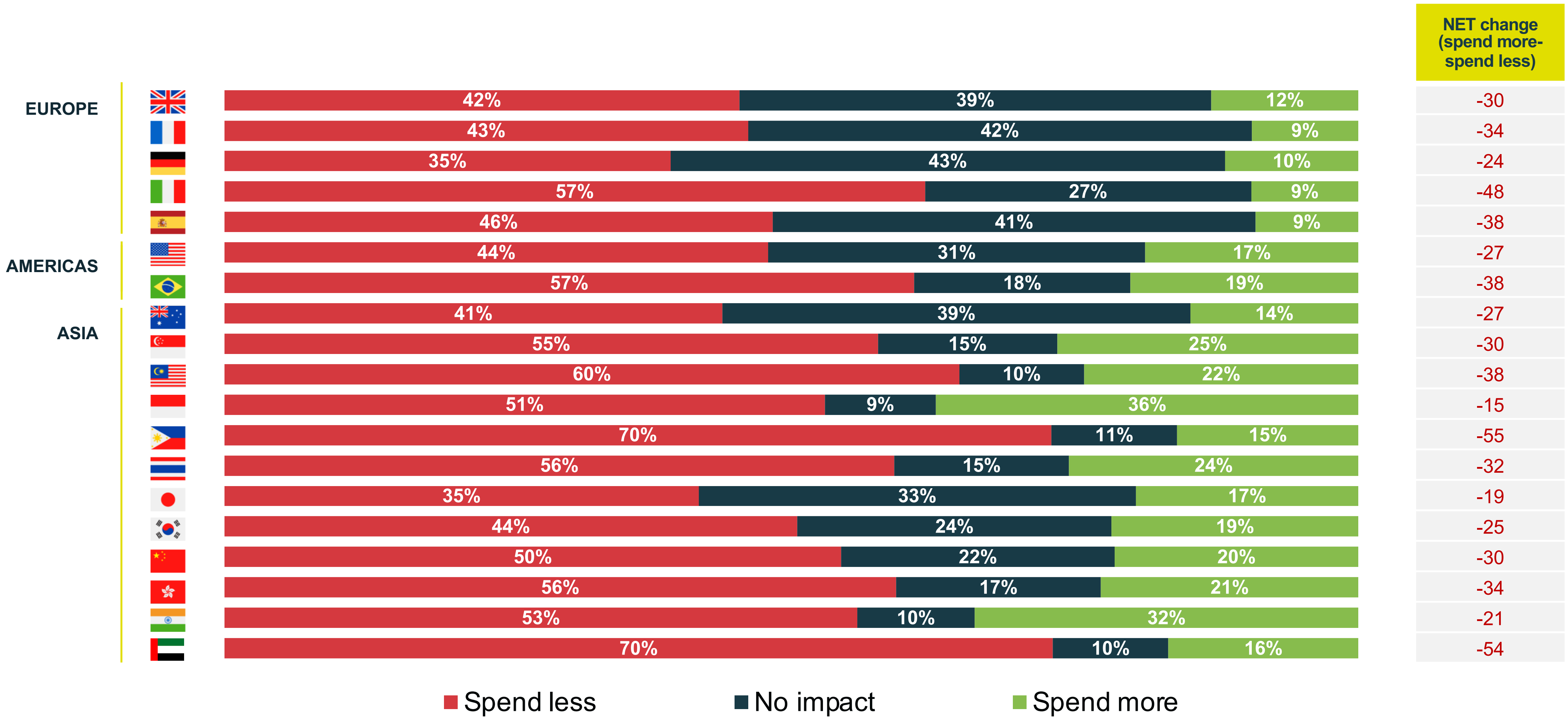
Perhaps unsurprisingly, consumers across all three regions remain cautious about their post-lockdown spend on entertainment with roughly half indicating that they will spend less money than prior to lockdown.

| | Europe | Americas | Asia |
|---|---|---|---|
| **NET change** (spend more – spend less) | -35 | -33 | -29 |



# Likely impact of Covid-19 on entertainment spending

Consumers across the world expect to reduce their spending on entertainment after Covid-19 – as many as 70% of those in the Philippines and UAE say they will be reducing the amount they spend.



# Events / venues visited regularly before Covid-19

Overview by region

| | Europe | Americas | Asia |
|---|---|---|---|
| Restaurants | 68% | 74% | 68% |
| Cinemas/movie theatres | 50% | 58% | 52% |
| Pubs/bars/clubs | 43% | 38% | 23% |
| Live music events (e.g. concerts, gigs, festivals) | 26% | 34% | 23% |
| Live shows e.g. plays and musicals | 24% | 32% | 18% |
| Live sports events (e.g. rugby, football, tennis, cricket) | 20% | 24% | 19% |
| Casinos | 6% | 10% | 5% |

- Restaurants and cinemas were the two most popular activity venues before Covid-19 across all three regions.
- Other regional patterns also emerge with pubs etc. more popular in Europe and live music and shows more popular in the Americas.
- Live events generally were relatively less popular across Asia.

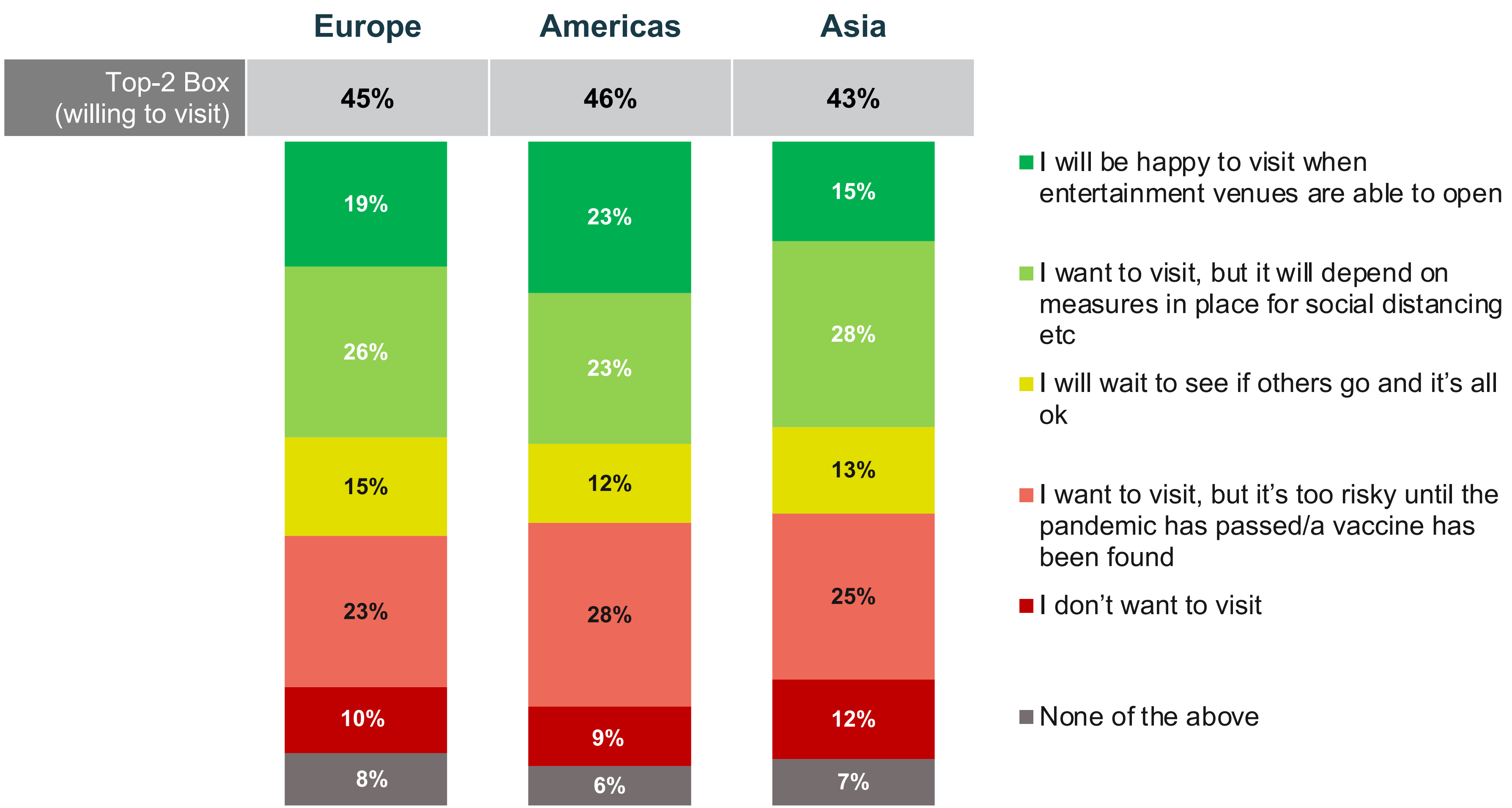
# Events / venues visited regularly before Covid-19

Restaurants were the most visited venues before Covid-19 across all markets. Cinemas were next on the list across all markets except UK, while pubs/bars/clubs were also high on the list across most European markets and Australia.

| | EUROPE | | | | | AMERICAS | | ASIA | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Restaurants | 63% | 66% | 61% | 74% | 75% | 68% | 79% | 65% | 73% | 84% | 67% | 83% | 77% | 51% | 65% | 71% | 73% | 66% | 77% |
| Pubs/bars/clubs | 50% | 21% | 32% | 59% | 51% | 27% | 48% | 42% | 25% | 13% | 15% | 24% | 27% | 8% | 22% | 18% | 15% | 29% | 32% |
| Cinemas/movie theatres | 44% | 50% | 38% | 62% | 54% | 42% | 73% | 49% | 59% | 50% | 49% | 62% | 47% | 31% | 56% | 60% | 42% | 63% | 65% |
| Live music events (e.g. concerts, gigs, festivals) | 23% | 22% | 25% | 35% | 28% | 26% | 42% | 21% | 24% | 22% | 25% | 23% | 29% | 15% | 18% | 23% | 20% | 34% | 32% |
| Live shows e.g. plays and musicals | 21% | 20% | 20% | 33% | 29% | 20% | 43% | 19% | 19% | 17% | 12% | 13% | 19% | 6% | 14% | 20% | 14% | 31% | 25% |
| Live sports events (e.g. rugby, football, tennis, cricket) | 20% | 18% | 15% | 23% | 25% | 23% | 26% | 23% | 17% | 23% | 23% | 8% | 20% | 9% | 14% | 18% | 14% | 34% | 27% |
| Casinos | 6% | 6% | 4% | 5% | 7% | 17% | 2% | 11% | 11% | 5% | 4% | 5% | 7% | 1% | 1% | 1% | 4% | 9% | 6% |

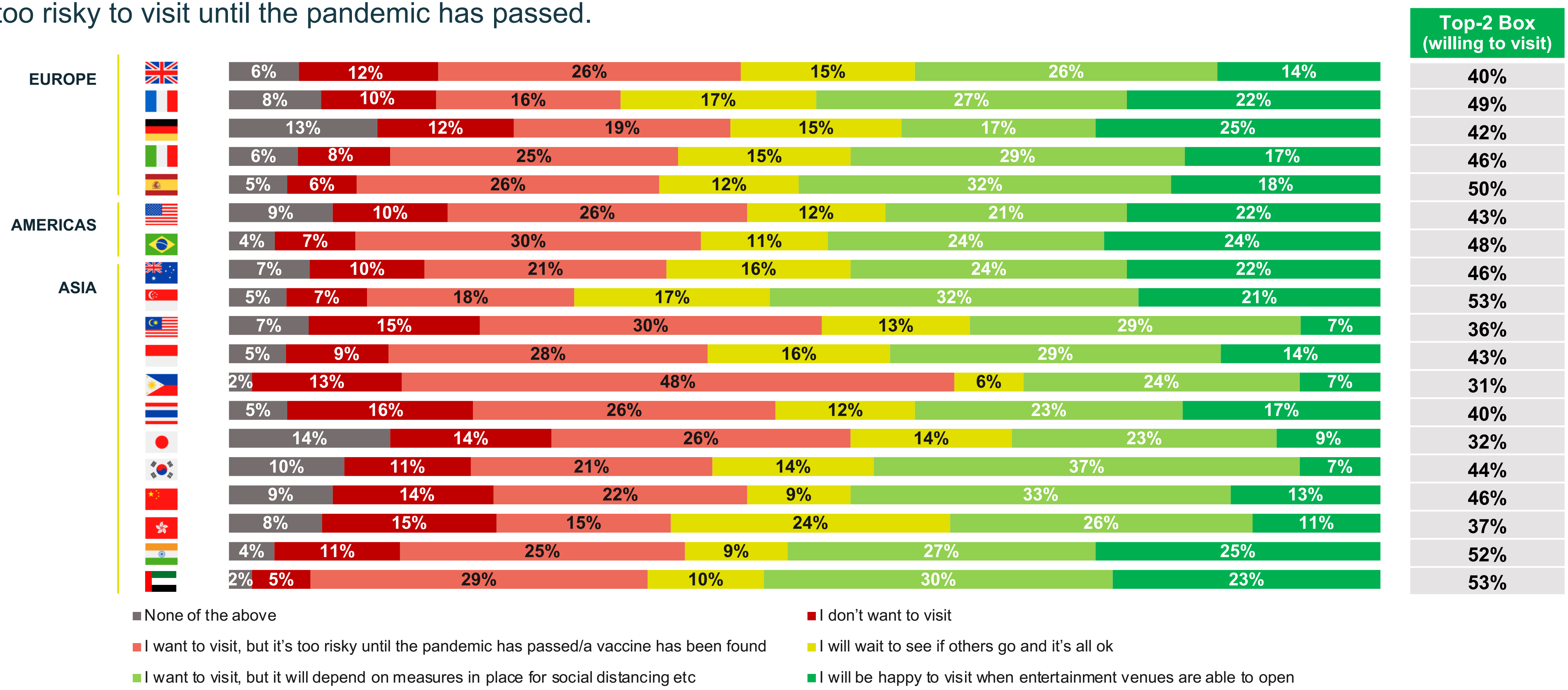
# Likelihood of visiting entertainment venues when they re-open

As with projected spend on entertainment, consumers across the three regions are broadly aligned in their willingness to visit entertainment venues post-lockdown. Whilst most are at least open to returning, a significant minority will be tough to bring back at least in the initial period of the new era.



# Likelihood of visiting entertainment venues when they re-open

Half or more of those from Spain, Singapore, India and UAE would like to visit entertainment venues again when they re-open. Consumers in the Philippines and Japan are relatively more cautious – for example, 48% of Filipinos think it is too risky to visit until the pandemic has passed.



# Impact of special measures on likelihood of visiting entertainment venues when they re-open

Overview by region

| | Europe | Americas | Asia |
|---|---|---|---|
| Limited numbers allowing social distancing | 43% | 51% | 32% |
| Hand sanitiser and masks provided | 42% | 53% | 41% |
| Outdoor areas only | 37% | 40% | 17% |
| Temperature checks prior to allowing people into the venue (to check for fever) | 30% | 43% | 32% |
| Perspex screens between people (where possible) | 22% | 28% | 19% |
| Bring your own food and drink | 2% | 15% | 13% |

**Net intention to visit = more likely to visit minus it would put me off**

- Consumers across the three regions respond differently to the potential special measures that may be used to tempt them back.
- In Europe and the Americas, limiting numbers and hand sanitizer/mask are the top two measures whereas temperature checks are just as popular as limiting numbers in Asia.
- Bringing ones own food is extremely unpopular in Europe whereas outdoor areas only resonates less positively with Asians.
- It would seem that no single measure will be successful and different combinations will have different levels of success.

# Impact of special measures on likelihood of visiting entertainment venues when they re-open

Social distancing measures and hand sanitiser/masks are considered most effective in persuading people back to entertainment venues across Europe and Americas. Temperature checks are more important in Thailand and other Asian markets. Consumers in Italy, Spain, Japan and Hong Kong are less welcoming of the requirement to bring their own food and drinks to venues.

| | EUROPE | | | | | AMERICAS | | ASIA | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Limited numbers allowing social distancing | 43% | 46% | 24% | 50% | 51% | 41% | 60% | 38% | 45% | 26% | 37% | 43% | 18% | 18% | 23% | 27% | 28% | 45% | 47% |
| Hand sanitiser and masks provided | 42% | 44% | 21% | 54% | 50% | 44% | 63% | 38% | 51% | 43% | 44% | 50% | 32% | 23% | 31% | 42% | 37% | 57% | 60% |
| Temperature checks prior to allowing people into the venue (to check for fever) | 35% | 26% | 2% | 46% | 40% | 27% | 57% | 33% | 44% | 37% | 36% | 40% | 38% | 13% | 17% | 29% | 31% | 44% | 54% |
| Perspex screens between people (where possible) | 30% | 24% | 5% | 25% | 24% | 20% | 35% | 17% | 27% | 7% | 21% | 18% | 20% | 15% | 13% | 9% | 22% | 32% | 33% |
| Bring your own food and drink | 9% | 9% | 6% | -14% | -3% | 14% | 16% | 4% | 7% | 10% | 31% | 22% | 22% | -2% | 1% | 10% | -5% | 40% | 34% |
| Outdoor areas only | 34% | 39% | 17% | 53% | 41% | 35% | 44% | 24% | 23% | 9% | 17% | 15% | 19% | 11% | 9% | 18% | 12% | 21% | 36% |

**Net intention to visit = more likely to visit minus it would put me off**

toluna harris interactive KURUNDATA

# Pre and post Covid-19 intentions

## Overview by region

| | Europe | Americas | Asia |
|---|---|---|---|
| Attend live sports events | -15% | -12% | -13% |
| Go to live music events | -22% | -15% | -18% |
| Watch plays/musicals | -22% | -16% | -17% |
| Visit pubs/bars | -25% | -15% | -17% |
| Go out to watch movies | -25% | -15% | -18% |
| Eat in restaurants | -28% | -17% | -16% |

**Net change = more often minus less often**

- Whilst all entertainment activities are likely to be negatively impacted for a while, some will suffer more than others.
- Attending live sport is least likely to be impacted in all three regions – possibly due to its (mainly) outdoor nature.
- Other activities that (usually) take place more indoors than outside – eating in restaurants or movie watching – are more likely to be negatively impacted at least initially, particularly in Europe.

# Pre and post Covid-19 intentions

The trend of pre to post Covid entertainment visits is overwhelmingly negative and some markets stand out more than others as being impacted e.g. Philippines and Malaysia in Asia and Italy and Spain in Europe. The US will be generally less impacted than other markets.

| | EUROPE | | | | | AMERICAS | | ASIA | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Attend live sports events | -16% | -12% | -6% | -23% | -21% | -9% | -14% | -10% | -7% | -16% | -14% | -24% | -12% | -11% | -11% | -14% | -13% | -14% | -17% |
| Go to live music events | -20% | -19% | -10% | -31% | -31% | -11% | -19% | -13% | -15% | -26% | -20% | -36% | -16% | -16% | -16% | -19% | -16% | -17% | -21% |
| Watch plays/musicals | -21% | -17% | -14% | -29% | -30% | -11% | -21% | -11% | -12% | -26% | -23% | -28% | -16% | -15% | -19% | -17% | -15% | -10% | -18% |
| Go out to watch movies | -24% | -23% | -15% | -33% | -29% | -13% | -16% | -12% | -17% | -31% | -25% | -47% | -15% | -17% | -15% | -13% | -15% | -13% | -20% |
| Visit pubs/bars | -26% | -17% | -13% | -36% | -31% | -12% | -18% | -14% | -12% | -20% | -17% | -37% | -12% | -14% | -15% | -21% | -15% | -13% | -21% |
| Eat in restaurants | -30% | -25% | -14% | -38% | -30% | -16% | -19% | -14% | -10% | -36% | -25% | -48% | -14% | -11% | -7% | -14% | 4% | -17% | -20% |

**Net change = more often minus less often**

# Video content subscriptions / season tickets before Covid-19

Overview by region

| | Europe | Americas | Asia |
|---|---|---|---|
| A subscription to an online streaming provider | 43% | 59% | 41% |
| A subscription to a TV movie channel | 17% | 28% | 31% |
| A subscription to a TV sports channel | 17% | 22% | 24% |
| A season ticket to a sports event | 9% | 10% | 12% |
| A season ticket to watch movies | 8% | 10% | 18% |
| A membership to watch live shows | 6% | 10% | 12% |
| None of these | 40% | 25% | 35% |

- The most popular subscriptions / season tickets pre-Covid were with online streaming providers (particularly common in the Americas) followed by TV movie channels and TV sports channels.
- Season tickers were generally less common.
- And in fact as many as 40% of households across Europe did not subscribe to or hold any of these pre-Covid lockdown.

# Video content subscriptions / season tickets before Covid-19

Before Covid-19, subscriptions to video content and season tickets were relatively high in Brazil, India and UAE but lowest in Japan, France and Germany. Online streaming is among the most subscribed channel across most markets except Malaysia and China, where movie channels are more commonly subscribed.

| | EUROPE | | | | | AMERICAS | | ASIA | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| A subscription to an online streaming provider | 49% | 31% | 34% | 42% | 55% | 53% | 65% | 47% | 42% | 37% | 40% | 59% | 46% | 25% | 33% | 32% | 33% | 58% | 55% |
| A subscription to a TV sports channel | 21% | 12% | 12% | 19% | 22% | 14% | 30% | 20% | 23% | 31% | 30% | 15% | 23% | 10% | 16% | 27% | 17% | 44% | 31% |
| A subscription to a TV movie channel | 20% | 12% | 13% | 14% | 23% | 18% | 39% | 18% | 33% | 40% | 34% | 30% | 29% | 11% | 27% | 41% | 26% | 52% | 37% |
| A season ticket to a sports event | 9% | 7% | 7% | 10% | 12% | 9% | 11% | 10% | 13% | 12% | 10% | 6% | 15% | 6% | 10% | 12% | 8% | 23% | 16% |
| A season ticket to watch movies | 8% | 9% | 6% | 8% | 10% | 9% | 12% | 7% | 16% | 14% | 18% | 15% | 20% | 7% | 22% | 31% | 11% | 27% | 24% |
| A membership to watch live shows | 5% | 4% | 5% | 8% | 5% | 7% | 13% | 5% | 12% | 13% | 11% | 8% | 17% | 5% | 8% | 20% | 11% | 24% | 16% |
| None of these | 31% | 52% | 51% | 39% | 29% | 33% | 17% | 38% | 36% | 28% | 35% | 25% | 33% | 61% | 41% | 35% | 44% | 14% | 15% |

# Retention / renewal of video content subscriptions / season tickets after lockdown lifted

Overview by region

| | Europe | Americas | Asia |
|---|---|---|---|
| A subscription to an online streaming provider | 75% | 81% | 63% |
| A subscription to a TV sports channel | 55% | 59% | 45% |
| A subscription to a TV movie channel | 43% | 59% | 48% |
| A season ticket to a sports event | 29% | 21% | 13% |
| A season ticket to watch movies | 12% | 30% | 12% |
| A membership to watch live shows | 8% | 22% | 16% |

- The majority of subscribers have got used to using/increasing use of their online streaming service and will keep paying and similarly TV sports and movie channels are likely to be renewed.
- However, events out of the home that require membership or a season ticket are likely to see a negative trend in the short term at least.
- The pattern is broadly consistent across the three regions (although movie channel subscriptions have relatively greater traction in the Americas).

**Net change = renew minus cancel/not renew**

# Retention / renewal of video content subscriptions / season tickets after lockdown lifted

Retention of online streaming subscriptions is high across most markets, while many would also retain their sports and movie channels after lockdown. However, subscriptions to out-of-home entertainment may well suffer decline in some markets – more of those in Italy, Malaysia and Hong Kong are likely to withdraw after lockdown.

| | EUROPE | | | | | AMERICAS | | ASIA | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| A subscription to an online streaming provider | 68% | 84% | 72% | 75% | 80% | 77% | 84% | 74% | 65% | 53% | 57% | 69% | 77% | 67% | 51% | 38% | 49% | 69% | 67% |
| A subscription to a TV sports channel | 52% | 63% | 58% | 49% | 58% | 54% | 61% | 50% | 46% | 45% | 64% | 40% | 57% | 48% | 24% | 42% | 30% | 45% | 44% |
| A subscription to a TV movie channel | 40% | 57% | 32% | 38% | 50% | 48% | 64% | 43% | 43% | 37% | 57% | 50% | 55% | 48% | 33% | 49% | 37% | 57% | 58% |
| A season ticket to a sports event | 28% | 35% | 32% | 15% | 38% | 23% | 19% | 19% | 13% | -6% | 29% | -10% | 19% | 4% | 8% | 18% | 0% | 19% | 13% |
| A season ticket to watch movies | 2% | 36% | 11% | -12% | 21% | 12% | 45% | 5% | 21% | -17% | 24% | 18% | 28% | 5% | 7% | 17% | -17% | 7% | 20% |
| A membership to watch live shows | 0% | 23% | 10% | 7% | 8% | 36% | 13% | 22% | 30% | 4% | 16% | -11% | 13% | 29% | 9% | 10% | -9% | 31% | 16% |

**Net change = renew minus cancel/not renew**

# Thank you.

toluna harris interactive KURUNDATA