



## **PRESS RELEASE**

### **AGF analysis of the coronavirus effect: Younger target groups are coming back to TV**

**More people are watching TV and for longer times amidst the coronavirus crisis**

#### **Key findings:**

- **Much more TV is being watched and more people are tuning in**
- **TV is experiencing a renaissance especially in the younger target group**
- **Substantial increase in streaming usage also, from a lower level**
- **News is becoming a frame of reference for daily life and TV is becoming the window to the world**
- **Advertising is perceived as the mirror image of normality**
- **Good time for brand education**

**Frankfurt, 8 April 2020.** The coronavirus crisis is keeping the world on edge. In this uncertain time when many people are forced to stay home, there is a heightened need for information and distraction. The current exceptional situation is clearly reflected in TV usage, which increased substantially in March 2020. Younger target groups in particular are returning to linear TV in their search for high-quality information. The long-term downward trend that saw young target groups migrate to other media channels has been halted for now.

The biggest driver of the return to TV is the news: “It conveys relevant information and is becoming a frame of reference for daily life and a guide for people’s actions. TV is becoming the window to the world,” said Kerstin Niederauer-Kopf, CEO of AGF Videoforschung. Entertaining TV formats, and especially reality shows, are being perceived as a substitute for reality. In these days, advertising is also performing a special function: It conveys a sense of normality, establishes trust in the future, and is being watched with particular attention at a time when buying groceries is one of the few chances to leave the house. Once more, online shopping is serving as a virtual substitute for real shopping. These are the key findings of an extensive, two-part analysis by AGF Videoforschung. It is based on the TV usage data of AGF and a depth-psychology analysis conducted by the Institute Rheingold Salon on behalf of AGF. By combining qualitative and quantitative research, this approach is meant to explain the “how” and “why” and quantify it sustainably in the form of “what” and “how much”.

To this end, 16 one-hour depth interviews were conducted with respondents in different age groups in the time from 30 March to 3 April of this year and then evaluated. The phenomena

were quantified on the basis of conventional AGF data. In a further step, AGF together with the data and software specialists of DAP conducted an extensive analysis on the basis of AGF usage data for the years 2017 and thereafter in order to develop a trend model. This analysis makes it possible to evaluate the current coronavirus effect in the context of general trends.

“Young target groups that have led the negative trend in TV usage in the last few years are currently coming back to TV. This is clearly shown in AGF’s usage data. This is a one-of-a-kind opportunity for programming producers and advertisers to reach people that are otherwise hard to reach in large numbers due to their fragmented media usage”, said Kerstin Niederauer-Kopf. “Now is the time for brand education”, said Ines Imdahl, CEO and founder of Rheingold Salon.

Detailed findings:

### **SUBSTANTIAL CORONAVIRUS EFFECT: DEVELOPMENT OF NET REACH VALUES AND VIEWING TIMES IN MARCH 2020**

The coronavirus crisis had a tremendous impact on TV usage in March. Net reach, meaning the percentage of people who had at least one contact with this medium in March 2020, increased substantially from 72.0 percent in February to 75.0 percent in March 2020. In a direct year-on-year comparison, the increase was even more substantial, from 70.9 percent. TV has therefore reached substantially more people. The year-on-year comparison of the target group of 14-to-49 year-olds shows an increase of 3.5 percentage points from 60.5 to 64.0 percent.

Streaming usage of the offerings measured by AGF has also increased: Among 14-to-49 year-olds, net reach in March 2020 increased by 9.8 percent from January 2020.

However, not only have more people tuned in to TV, but the German-speaking population aged 3 and older, who form the basis of AGF’s survey, has also watched much more TV and more intensively. In March, that being the month when drastic measures were taken in Germany to contain the epidemic, the average viewing time for the overall audience was 244 minutes or a full 18 minutes or 7.9 percent more than March of last year and at a record level. This is the month with the eleventh-highest usage since the start of reach measurement by AGF Videoforschung in 1988. The comparison with February 2020 also shows substantial effects: Within one month, the viewing time increased by 6.5 percent, corresponding to a gain of 15 minutes.

“Especially the younger target group is watching more TV again now”, said Kerstin Niederauer-Kopf. Among 14-to-49 year-olds, the viewing time in March was 157 minutes – 10 percent more than in February 2020. The increase among 14-to-19 year-olds was 8 minutes or 15.2 percent. Among 20-to-29 year-olds, the viewing time was 12 minutes more than in February. Thus, precisely the numbers for the younger target groups represent a divergence from the downward trend.

### **TREND ANALYSIS: TV USAGE DIVERGES FROM THE LONG-TERM TREND**

The current trend of increasing viewing times and net reach values is remarkable insofar as TV usage values had been declining in the last few years. If you consider the negative trend

of the years 2017 and after and project it forward, the coronavirus effects are even more apparent and therefore more conspicuous.

Beginning on 10 March, the day when all of Italy was put on lockdown, TV usage by all target groups diverges substantially from the long-term trend. “This trend accelerates dramatically beginning on 16 March, the first day of the Germany-wide closure of schools and day care centres”, Niederauer-Kopf explained. Instead of the ‘expected’ 132 minutes, the viewing time particularly in the younger target group of 14-to-49 year-olds increased by nearly 28 percent to an average of around 168 minutes per day beginning at this time. These effects are also clearly visible in other target groups. “This increase shows that people turn to more media and journalistic media brands they trust in uncertain times”, Niederauer-Kopf said.

With regard to the development of net reach, the first effects are evident from 13 March, that being the weekend before the school closures. And the divergence from the long-term trend becomes substantial beginning on 16 March. Average net reach among 14-to-49 year-olds is 11.9 percent higher than expected based on the negative trend and came to 22,243 million between 16 and 31 March. The overall audience increase was 8.8 percent.

## **NEWS IS BECOMING A FRAME OF REFERENCE FOR DAILY LIFE**

Particularly news is a driver of the increased TV usage by the younger target groups. In March 2020, the accumulated net reach<sup>1</sup> across all news formats for 14-to-49 year-olds increased by 5.4 percent over March of last year to 88.1 percent. Three quarters of 14-to-19 year-olds sought information in the public and private news channels at fixed viewing times. That corresponds to a remarkable increase of 17.4 percent. Reach also increased substantially among 20-to-29 year-olds so that in total, 79.9 percent of 14-to-29 year-olds watched TV news at least once in March. That is 10.4 percent more than in the same period of last year and 6.5 percent more than February 2020.

“Particularly in tough times, up-to-date, serious and well-researched information is sought and appreciated by all age groups and for that reason we also reach many more viewers in younger age segments with a traditional mass medium. This is all the more remarkable when you consider that the usage increase is being driven by news channels with many years of reporting expertise, which appeal to a rather older target audience”, said Niederauer-Kopf.

If you look particularly at the individual calendar weeks of March, you will notice a change in news usage over the course of the month: In calendar week 12, when the shutdown began with school closures and restrictions on daily life, usage of news formats by both adults aged 14 and older and by 14-to-49 year-olds was the highest to date, with viewing times of 222 and 127 minutes, respectively. The same goes for talk shows and news features.

“In this time of crisis, news provides a frame of reference for people – even very young people. They look for facts in the morning and evening of every day. For many viewers under 20 years old, this is the first time they are regularly watching news formats. This gives structure to their everyday lives, as well as a guide to action, also for many older viewers: Where am I still allowed to go and with whom? Do I need a facemask?”, said Rheingold-Salon proprietor Ines Imdahl. Other core motives for watching news are to process one’s

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<sup>1</sup> Cumulation and frequency analysis (p-values), programme coding light: 110, all broadcasters, Mon-Sun, 3 a.m. to 3 p.m.

“inner panic” with properly researched information and the secret “hope for an unforeseen miracle, that a vaccine will be available or a medicine will work sooner than expected”.

## **DISTRACTION FROM CORONAVIRUS FEARS**

However, there is also a counterpoint to the great need for up-to-date information: People are looking for distraction. The depth-psychology interviews yield indications that viewers are tuning in to programs that deal with topics of normal life such as cooking, shopping, dating and travelling. “Such formats offer the chance to do things that are no longer possible right now: lots of shopping, meeting others, patronizing restaurants, and travelling. They are a kind of substitute for reality”, said Kerstin Niederauer-Kopf. “And then there is the second motive: the “wish for reassurance” that despite the coronavirus, the world outside still exists, you can participate in it, and there is something wonderful out there that you will be able to enjoy later”, Imdahl explained.

This is also reflected in AGF’s data. In the factual entertainment/reality genre, the viewing time among 14-to-49 year-olds in March 2020 rose by 29.7 percent to 743 minutes, among 14-to-29 year-olds by 21.4 percent to 497 minutes, and among adults aged 14 and older by an impressive 33.9 percent to 1,021 minutes, compared to March of last year. Compared to February 2020, the increases in all three target groups were likewise well above 10 percent.

Many have also been tuning in to reality shows recently. Also in this category, younger viewers are driving the increase in usage. In March 2020, 14-to-49 year-olds watched shows like Let’s Dance, The Masked Singer, Kitchen Impossible and Germany’s Next Topmodel for 579 minutes, representing an increase of 20.2 percent over March of last year. Among 14-to-29 year-olds, the year-over-year increase was 11.1 percent. Among adults aged 14 and older, the increase was 1.8 percent. Compared to February 2020, 14-to-29 year-olds increased their usage by 32.8 percent, the most of all the target groups considered here.

Compared to March of last year, usage of TV series remained constant at a high level in the target group of adults aged 14 and older. In the younger target groups, however, usage was slightly down compared to March of last year. This development could be attributable to the fact that TV series are increasingly being watched on video platforms like Netflix, Amazon Prime, TV Now, and Joyn. However, usage of TV series increased over February 2020. “This suggests that the coronavirus effect is also impacting linearly broadcast TV series”, Niederauer-Kopf said.

On the other hand, sports usage is lower. The cancellation of matches and tournaments and therefore also broadcasts has inevitably caused a substantial decline in TV usage. Overall, sports viewing times fell by roughly half in March 2020 compared to both March 2019 and February 2020. “The sharp increase in reality shows and the decrease in sports programming once more reveals that live events and live reporting are core competencies of TV”, Niederauer-Kopf said.

## **ADVERTISING SATISFIES THE LONGING FOR NORMALITY**

In her depth-psychology interviews conducted on behalf of AGF, Ines Imdahl also investigated the question of how advertising is currently being received and perceived by people. More precisely: What is the perception of non-adapted advertising? What is the

perception of advertising that has been adapted to the current situation? And how would a suspension of advertising messages be understood?

At first glance, the results are surprising: Precisely younger viewers, whom advertisers have mainly sought to reach digitally in the last few years, have an open and very positive attitude towards advertising also in the midst of the coronavirus crisis. Some of them are seeing brand and image campaigns for the first time and are positively surprised by them because they did not expect them to be as they are. For all age groups, advertising was the 'mirror image of a normal world' – meaning that people do not only want advertising that is adapted to the current situation, but also non-adapted advertising. Product innovations that now enrich everyday life – precisely also for younger people – are especially appreciated and even actively sought in advertising. "Young people are clearly saying that they can still participate in real life only by consuming and buying these products and that gives them some sense of normality", the psychologist said.

"Advertising also conveys necessary information – not only about the product itself, but also about where and how to get it. This is particularly important in times when people – and especially young people – feel a need and even a desire to buy products, but are unable to do so now because of government restrictions", Niederauer-Kopf said. "The Instagram generation are even wondering why they cannot obtain shopping recommendations on looks and products directly in TV", Ines Imdahl said.

Situation-adapted advertising – mainly image advertising – is also appreciated. "The initiatives of some companies demonstrate collective spirit and a sense of togetherness that is consistently seen as positive. But in this regard, moderation is important because people are longing for normality in these times", said Kerstin Niederauer-Kopf.

On the other hand, a suspension of advertising is perceived as downright scary. Precisely TV advertising is the unconscious gauge of hope and perseverance! "If companies no longer advertise, that would be a signal that they have given up" – said nearly all respondents in the depth-psychology study.

"In the current situation, advertising spreads confidence and hope and presents an opportunity now to deliver brand education also to young target groups", explained Ines Imdahl. "Advertisers now have the chance to address target groups that are normally very hard to reach. The high reach values and also an openness to advertising messages are present now. That is a good message both for the advertising business and for advertisers", Niederauer-Kopf said.

## **CONCLUSIONS**

"In an extreme situation of the kind we are currently experiencing as a result of the coronavirus epidemic, the core competencies of TV take centre stage again: TV reaches the masses and can disseminate information more quickly than other media. It is the campfire everyone gathers around", Kerstin Niederauer-Kopf said.

## IN-DEPTH ANALYSIS AND GRAPHS

### HOME OFFICE: TV USAGE DURING WORK HOURS

Many workers have been working from home for several weeks now. One question that AGF wants to have answered is: How has working from home affected TV usage? Viewed by calendar weeks, the average viewing time of “full-time workers” from Monday to Friday between 9 a.m. and 5 p.m. increased over the prior-year comparison periods beginning in calendar week 12. It was longest in CW 13, that being the week after the nationwide school closures in which more and more companies sent employees home to work. Strong drivers were news channels and TV stations that carry fiction programming aimed at children and adolescents.

“The data suggest that even people working from home are adapting to the current circumstances: According to our analysis, news channels are constantly running in the background delivering up-to-date information, while children’s programs are being turned on for the children remaining at home. But there were also significant changes for workers in the evening: This suggests that TV is becoming a scheduled meeting time in a daily routine that now takes place largely at home”, said Niederauer-Kopf. Thus, the viewing time for full-time workers in the early evening between 5 p.m. and 8 p.m. increased from 39 minutes in early March to 49 minutes in the last full week of March (CW 13) – and by nearly 40 percent compared to the same period last year.

In prime time, the increase in viewing time was 25 percent and thus 15 minutes over the same period last year.

### INFORMATION: NEWS HAS THE MOST RELEVANCE

The coronavirus has put the world in an exceptional situation. And similarly as with other events of this magnitude, such as the attacks of 11 September 2001 on the World Trade Center in New York, channels and formats with a high degree of news competence are the first to be watched more, initially.

This is clearly reflected in the development of the audience shares of news channels in the aggregate. Viewership of N-TV and Welt, but also Tagesschau24 increased tremendously, particularly in the younger audience (adults aged 14-49). Compared to February, N-TV increased its audience share more than doubled its audience share in this target group to 2.1 percent. Welt increased its audience share by two thirds to 1.5 percent. The audience share of Tagesschau24 grew by more than half to 0.5 percent.

Among total viewers, the audience share of N-TV increased by two thirds to 1.6 percent from February to March. Welt increased by almost 60 percent to 1.2 percent, Tagesschau24 by nearly a third to 0.4 percent.

“In a time when everyone is looking for the most up-to-date information possible, the demand for news stations and news formats is especially high”, said Niederauer-Kopf.

Overall, adults aged 14 and older are watching much more news. Whereas the viewing time was 439 minutes in March 2019, it was already 760 minutes in March 2020 – an increase of

almost three quarters. Among 14-to-49 year-olds, the viewing time more than doubled from 162 minutes in March 2019 to 381 minutes in March 2020. There were also strong increases over February 2020, corresponding to the worsening situation in Germany. Strong increases were also registered for the genres of news magazines, talk shows and news features. High interest was particularly shown in calendar week 12 from 16 to 22 March, during which drastic measures like school closures and a further tightening of contact restrictions occurred.

As a result, news is being watched not only for longer times, but also by more people. Net reach values have increased substantially since 10 March.

## **NEWS AS A FIXED VIEWING TIME**

Despite the ubiquitous availability of new information, news has also become a fixed viewing time at which people obtain information. The news provides structure and stability in uncertain times. This is also a reflection of the great trust that Germans place in established media brands with a high degree of news and reporting competence. “Despite all the talk of the ‘lying press’ and the diminishing importance of media, people are currently turning to the major public media brands ARD and ZDF”, said Kerstin Niederauer-Kopf.

News formats of the major public stations are dominating the hitlists for viewers aged 3 and older and also for 14-to-49 year-olds. Tagesschau at the 8 p.m. time slot leads the field. The Tagesschau broadcast of 22 March 2020 had the biggest-ever viewership of all news formats in March, with 12.402 million viewers aged 3 and older and 3.583 million viewers aged 14 to 49. By comparison, the most-watched prime-time broadcast in 2019 was the Tatort episode “Spieglein, Spieglein” in Das Erste, with 14.008 million viewers.

The national address by German Federal Chancellor Angela Merkel on 18 March made it clear that people are focused on government: If you include all distribution channels, offerings and terminal devices tracked by AGF, the Federal Chancellor’s address was seen by more than 36 million persons. That corresponds to a cumulative net reach of 46.4 percent according to the 0/1 method.<sup>2</sup> Most usage was on conventional linear TV.

The broadcast in ZDF alone reached an average of 9.002 million viewers in the overall audience. By comparison, the Christmas address by Federal President Frank-Walter Steinmeier on 25 December 2019 reached a total of 7.333 million viewers on ARD and ZDF.

“These high values show that people have a strong need for information. They want to know what measures will be taken next and what to make of them – and therefore they are looking for well-researched information and serious sources”, said Niederauer-Kopf.

## **CORONAVIRUS IS ALSO BOOSTING STREAMING USE**

It is very likely that platforms such as Amazon, Netflix and YouTube are also benefiting substantially from the changed situation. That is the result of a special technical analysis

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<sup>2</sup> Source: AGF Videoforschung in collaboration with GfK, DAP, Nielsen, ANKORDATA; VIDEOSCOPE 1.3, 18/03/2020-21/03/2020, Market Standard: Video, performance values for mobile data are based exclusively on users aged 18 and older, Data Package 2594 of 06/04/2020.

conducted by AGF. AGF extensively measures video usage on a number of devices and its measurement tools are capable of measuring potential streaming use even though the providers are not actively under AGF measurement. Although it is not yet possible to precisely attribute aggregate usage to the individual platforms, it is possible to attribute usage to individual reception sources (streaming box/stick, IP decoder, etc.) by determining the location of so-called technical entries. This makes it possible to anticipate streaming usage at a highly aggregated level. For the time being, this assessment exclusively serves the purpose of quality assurance. This usage is attributed not to traditional TV usage, but screen usage. This includes, for instance, usage of the US platforms Amazon, Netflix, YouTube, and all other offerings that are not under AGF measurement. These so-called technical entries have also changed substantially since the middle of March. The average viewing time in seconds has increased dramatically. However, because the analysis cannot attribute the data to individual providers, it cannot be determined how much the launch of the Disney+ streaming service on 24 March (for example) influenced the data.

AGF also examined the development trend of these usage components – thus compared with the development that would have occurred without the coronavirus outbreak. Unlike the case with TV usage, a positive trend as opposed to a negative trend is assumed in this case. Also for this analysis, usage has increased substantially more than assumed in the trend forecast since the worsening of the coronavirus crisis. “We also see a strong effect here that is comparable to the TV effect in terms of intensity, although at a much lower usage level”, Kerstin Niederauer-Kopf said.

This effect also shows up in the usage analysis of the streaming offerings of the broadcasters under AGF measurement, such as the media libraries of the public broadcasters and the platforms of the private broadcasters. Net reach in the target group of 14-to-49 year-olds increased by almost 10 percent from January 2020 to March 2020.

#### **About AGF Videoforschung GmbH ([www.agf.de](http://www.agf.de))**

*AGF Videoforschung GmbH is a firm that engages in impartial video research. AGF continually and quantitatively measures the usage of video content in Germany and analyses the data collected. Every year, it invests many millions to continuously refine its toolkit in order to provide reliable data on the use of video content to the market on a daily basis. AGF consults closely with all market partners, including non-member stations that pay a license fee, as well as advertisers and media agencies.*

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