

TV offers a distraction from the daily grind of the coronavirus pandemic

Coronavirus Report 2021: Video viewing remains at a high level in the second year of the pandemic / TV helps to lighten the “can’t go anywhere” blues

Key findings:

- The numerous restrictions on public life have led to higher overall TV and streaming consumption than before the start of the coronavirus crisis
- Older viewers in particular are watching much more TV for longer times
- Streaming usage rises in all target groups
- News is still high on the list of all target age groups
- Information and entertainment are among the core competencies of linear TV, proving their worth in the midst of the coronavirus pandemic
- Young target groups’ video consumption is selective and differentiated
- Depth-psychology study by rheingold salon shows that TV helps people cope with the daily grind of the coronavirus pandemic
- Advertising should represent normality; it should woo and surprise viewers
- Charts available at aqf.de/service/press

Frankfurt, April 15, 2021. Now in the second year, the coronavirus pandemic continues to cause a state of emergency in public and private life. The restrictions on everyday life necessitated by the coronavirus pandemic have also affected TV and streaming consumption. In its “Coronavirus Report 2021,” AGF presents an update of the report it published in April 2020. Again in collaboration with the rheingold salon institute, it analyzes the “how, what, how much and why” of the effects of the coronavirus pandemic on video usage from a quantitative and qualitative perspective. “We continue to see substantial coronavirus effects: TV usage by the overall audience was again higher than in the pre-pandemic year of 2019 and streaming usage has risen substantially,” said Kerstin Niederauer-Kopf, Executive Management Chairperson of AGF Videoforschung in Frankfurt.

The supplementary depth-psychology study conducted by rheingold salon on behalf of AGF shows that video and especially TV performs the important function of lightening the “can’t go anywhere” blues in the current situation by giving users the chance to still partake of the stories of life. However, the analysis also shows that the high level of TV

and video usage occasioned by the coronavirus pandemic in 2021 has changed from the strong prior-year values, suggesting that an expectable “coronavirus fatigue” has set in. Although the coronavirus pandemic continues to have a far-reaching impact on culture, society and economic activity all around the world, digital processes have reinforced this trend in a variety of ways. The same is happening in the media.

Coronavirus effects on TV: High levels of net reach and viewing duration

In the first quarter of 2021, the net coverage of television (0/1 contact) among adults 14 and older was 76.4 percent per day, above the levels of 2020 and 2019. This means that the percentage of people who had at least one contact with the TV medium in the first three months of the year has increased further.

Not only have more people watched TV, but they have also watched TV for longer periods of time. The average viewing duration of all viewers (aged 3 and older) in the first quarter of 2021 totaled 243 minutes – which is 8 minutes or 3.2 percent more than in Q1 2020 (235 minutes). Thus, the viewing duration was not only longer than last year, but it was also longer than predicted. The Trend Analysis conducted by the data and software specialist DAP on behalf of AGF shows clear, positive coronavirus effects on TV usage in both lockdowns, which have more than offset and continue to offset the longer-term trend of declining TV usage. However, these effects were less pronounced in the second lockdown (beginning on 31/10/2020) than in the first lockdown (by definition: 10/03-15/05/2020) when the coronavirus pandemic drastically changed people’s everyday lives from one day to the next.

However, a closer look at the individual target groups reveals differences between the age categories: “We see a change in linear TV usage particularly in the younger target groups. Younger viewers are more selective in what they watch, using learned formats and viewing times. Besides entertainment, structure-providing elements are still highly popular, driving TV usage also among the younger target groups, despite the supposed oversupply of video alternatives, which are also no longer bound to one device,” said Kerstin Niederauer-Kopf. By contrast, older viewers respectively persons 50 and older are still watching TV much longer than in 2020 or even before the pandemic: “Many older viewers have more limited leisure time options than the younger target groups and are stuck in their homes more than ever. Due to the contact restrictions, they have less interaction with other people. And for that reason, they are especially reliant on TV as a window to the world,” said Kerstin Niederauer-Kopf.

The TV usage of 14-to-49 year-olds was slightly lower than in the previous year when TV usage was extremely high. The average viewing duration in Q1 2021 was 142 minutes, that being 8 minutes or 5.2 percent less than in 2020. “If you consider the fundamentally negative trend in younger target groups, however, this decline was much less than expected,” Niederauer-Kopf said.

Rarely was so much time spent on TV and video usage as in 2020. “We currently expect that the coronavirus effects on TV usage and streaming usage to some extent will fade especially as the situation progressively normalizes as a result of diminishing infections, also as the weather improves and people can engage in outdoor activities without restrictions again – although we are still a ways off from this scenario.” When that happens, catch-up effects are not to be ruled out, although it has been shown that linear TV is particularly appealing, especially in the categories of information programs, live broadcasts and entertainment programs, precisely in times of an extremely fast and extensively growing offering of non-linear video content.

Streaming usage driven by the coronavirus pandemic and digitalization

Not only TV usage, but also the streaming usage of broadcast content has risen substantially in the past months. This is a general reflection of the already positive trend of video usage, which has been reinforced by the coronavirus pandemic.

The net coverage of video content subject to AGF measurement, which mostly belongs to broadcasters, in the total audience rose by almost 62 percent in Q1 2021 over Q1 2020 – representing a substantial jump to 4.004 million per day, albeit from a comparatively low level. The viewing volume also increased substantially, namely by 69.7 percent to around 19,056 million seconds (as of 12/04/2021).

Moreover, the heightened interest in streaming content is reflected in the AGF surveys, which provide information about the usage of Netflix & Co, including in the [Platform Study 2020-II](#), for example.

Decrease in out-of-home viewing: Welcome to “Chez Nous”

The effects of stay-at-home orders in especially hard hit regions and districts and the temporarily imposed restrictions on the number of persons allowed in gatherings of friends and families are also reflected in the TV data: Out-of-home viewing by the total audience was below the level of the previous year in the months from March 2020 and substantially lower from August 2020 onward. A significant increase was only observed over Christmas. This trend is likely to continue, depending on the restrictions in effect.

The far-reaching impact of contact restrictions at the end of 2020 was especially evident in TV usage on Christmas Eve and New Year’s Eve. The average viewing participation of the total viewers in the prime time hours from 8 to 11 p.m. hit a ten-year high of 21.568 million viewers on 24/12/2020. This was 10.1 percent or 1.984 million higher than the corresponding value on 24/12/2019.

The coronavirus pandemic also clearly impacted TV usage on New Year’s Eve in the hours from 8 p.m. to 1:00 a.m. The restrictions on personal gatherings in effect at the turn of the year were reflected in noticeably higher TV usage: The viewing participation of 26.464 million viewers was likewise the highest in the last ten years. Compared to 2019, 4.117 million or 18.4 percent more viewers watched TV during this time.

Depth-psychology study: TV calms the nerves in the time of lockdowns

The depth-psychology analysis of rheingold salon in Cologne reveals how the importance of video content has changed over the course of the pandemic. In the second half of March, rheingold salon conducted 16 one-hour depth interviews in different age groups. Four respondents each in the age groups of 14 to 19, 20 to 29, 30 to 49, 50 and older provided information about their video usage, their reasons for watching, and their attitude towards advertisements. These results delivered helpful qualitative insights into the changed use of video content, which can be quantified by AGF’s analysis.

A basic theme of the depth interviews is that the respondents have increasingly grown accustomed to more intensive TV viewing. This trend is reinforced by the tie to the home environment, which has become the center of life as well as often a place of work. According to all respondents, video usage is not only more intensive, but is also somewhat less specific at times.

Well-established TV formats that lend structure to people's everyday lives, including popular early evening series, for example, but also news programs, are playing a special role these days. Ines Imdahl, Founder and Managing Director of rheingold salon, described the increasingly prevalent attitude of respondents as follows: "The never-ending lockdown has made a dreary monotony of everyday life. Due to the lack of highlights, people have lost their sense of time and therefore their orientation; however, these are necessary. TV helps many people distract themselves and keeps them from getting upset or sad or thinking too much about the current situation." Other people attempt to counteract the emotional side effects of the pandemic by relativizing it with intellectual arguments. They take a lighthouse perspective as a means of creating distance between them and what is happening around them.

What everyone is missing is genuine life experiences they could talk about with others. "In the first lockdown, people mostly missed dining in restaurants, shopping, going out and dating. Now it is becoming clear that what people are really missing are stories they can tell about their own experiences because they are no longer experiencing anything themselves," Imdahl said. Whereas reality shows served as a substitute for reality in the first lockdown, they are now an important option for sharing in the life stories of others. "Factual entertainment/reality shows and even entertainment shows are giving people the stories they badly need for their inner satisfaction."

The function of news has also changed somewhat during the pandemic. While serious, well-researched information programs are still an important source for a regular reality check, the news programs of public-sector and private-sector TV stations provide topics of conversation and lively debate.

Genres: Information and entertainment are especially popular

AGF's quantitative analysis also shows that factual entertainment/reality shows, entertainment shows and news were especially popular genres in 2020. "People want to be well-informed but they also want to be distracted, cheered up or even surprised," Niederauer-Kopf said.

Among viewers 14 and older, the viewing duration of reality shows and factual entertainment increased by 22.6 percent from 2019 to 10,792 minutes in 2020. The top 20 (total viewers) is dominated by shows like "Ich bin ein Star – Holt mich hier raus" and "Bauer sucht Frau" (both RTL). However, even pet and gardening shows like "Martin Rütter – Die Welpen kommen" and "Ab ins Beet!" had also been very popular in 2020 and "Die Welpen kommen" (RTL) actually topped the top-20 hit list for factual entertainment/reality in the first quarter of 2021. "This correlates with reports of growing pet ownership and the currently strong enthusiasm of Germans for home improvement projects and gardening," Niederauer-Kopf said.

Compared to 2019, the viewing duration of entertainment shows among viewers 14 and older increased by 6.9 percent in 2020. From a psychological standpoint, entertainment shows are also highly diverting and surprising and they lend a framework, a structure to everyday life and stimulate conversation. Formats like "The Masked Singer," "Germany's Next Topmodel," (both Pro Sieben), "Let's Dance" (RTL) and the like are leading the rankings especially among younger target groups. Even quiz shows like "Klein gegen Groß" on Ersten and "heute-show" on ZDF are highly popular among all viewers.

It can be deduced from the depth-psychology analysis that formats that have changed little during the coronavirus pandemic are more popular. “This is not a good time to experiment with proven programming concepts: These days, viewers prefer familiar structures and formats,” Imdahl advised.

Although serial formats have seen viewing duration growth of 5.1 percent in 2020, they have not benefitted as much from the effects of the coronavirus pandemic. Especially in younger target groups, the viewing duration of linear programming has declined. In the category of high-quality serial formats, streaming services like Netflix, Amazon Prime and the broadcasters’ media libraries are competing with linear content. “The finding that linear TV series are not benefitting as much as other genres from increased TV usage in the coronavirus pandemic correlates with this trend,” Niederauer-Kopf said.

This is also reflected in the analysis of rheingold salon: Especially Netflix series are highly popular among respondents due to the broad and international selection. “They make it possible to flee from reality to the parallel universe of Netflix, which helps people forget about the coronavirus,” Imdahl said. Whereas people enjoy repeatedly watching known series, they are also quicker to stop watching new series. Some people are withdrawing completely into a parallel streaming universe, living withing a fan community with no link to the real world.

Due to the coronavirus pandemic, sports viewing declined considerably among adults 14 and older in 2020, with the viewing duration falling by 26.2 percent to 3,816 minutes. This decline is not surprising if one considers that many tournaments were cancelled in 2020. Major sports events like the Olympics and the EURO 2020 European Soccer Championship were postponed in 2020 and even broadcasts of so-called ghost matches in front of empty stadium seats contributed to the viewing duration decline in all target groups. However, viewing durations began to recover in the first quarter of 2021.

News programs help people get through the day amid the coronavirus pandemic

Since the start of the coronavirus pandemic, news programs have been firmly established in the relevant set of viewers in all age groups. The competent news programs of the big public-sector broadcasters ARD and ZDF, as well as the private-sector broadcasters, are an indispensable part of people’s daily routine. Even dedicated news channels like WELT, N-TV, Tagesschau24 and Phoenix increased their market shares considerably in 2020. From 2019 to 2020, news channel Phoenix increased its total audience share by 8.0 percent to 1.1 percent, N-TV by 26.9 percent to 1.2 percent, and Welt by 22.7 percent to 1.0 percent. News watching was especially high in March 2020, for example. In this month, the audience share of Welt reached 1.2 percent, N-TV 1.6 percent and Phoenix 1.2 percent.

However, the function of news has changed over the last 13 months. Whereas news stilled served as a bracket for the day and helped viewers cope with the general sense of panic in the first lockdown, it now performs additional psychological functions, including as an umbilical cord to the world and therefore a reality check and as a reason to be outraged in the course of an otherwise uneventful day. It also provides reassurance: “Whereas in the first lockdown, people were still hoping for a miracle in the form of a vaccine, news programs are now being watched to confirm that the situation today is just as sobering as yesterday, according to the depth-psychology analysis,” Ines Imdahl noted.

AGF’s usage numbers reveal an impressively clear correlation between the course of the pandemic and the use of news programs: News viewing increases in direct proportion to the number of infections and the scope of restrictive measures ordered by the federal and state governments. This pattern has been evident among all age groups since March 2020.

That being said, some degree of attrition can be observed in news viewing after more than a year of the pandemic. The cumulative net coverage among adults aged 14 and older was 95.2 percent in the first quarter of 2021, nearly on the same level as in 2019. It had been 96.5 percent in the first quarter of 2020. This pattern shows up in all age groups. However, the cumulative net coverage among 14-to-29 year-olds is still very high, at 85.0 percent. “Young viewers watch news more selectively and more occasionally than older viewers,” said Kerstin Niederauer-Kopf. “Well-known news programs like “Tagesschau,” “heute” and even “RTL aktuell” are actively sought. This suggests that trust in established media brands remains high also among the social media generation.” The viewer participation of the main news programs of the public-sector and private-sector broadcasters was significantly higher in the first quarter of 2021 than in the comparative period in 2020 and even 2019.

Advertising: Enjoyment of the here and now, confidence in a future free of the coronavirus

As in last year’s Coronavirus Report of AGF, rheingold salon also studied the perception of advertising in video media this year. Whereas advertising served as an indicator of normality in the first lockdown, people now have a somewhat more distanced attitude, although they are still open to advertising. In the meantime, coronavirus-adapted advertising in particular is perceived as irritating and thought-provoking. “The perception oscillates between a genuine expression of solidarity and a phony attitude of caring,” said Ines Imdahl.

However, advertising still serves to awaken and sustain dreams and wishes for the future. For example, advertising whets the appetite for quality of life and well-being: These days, eating and drinking are the most enjoyable activities in people’s everyday lives. Advertising can also instill and convey dreams for the future, as in the case of advertising for travel, for example. Although the respondents know that they are not allowed to travel, advertising nurtures the hope that it will soon be possible again. Especially younger target groups have remarked that TV advertising is less targeted and can therefore be more surprising, creating small highlights during the day. Many younger people are experiencing brand stories on TV for the first time this year – even one year after the beginning of the first lockdown.

About AGF Videoforschung GmbH (www.agf.de)

AGF Videoforschung GmbH specializes in impartial video research. AGF continuously tracks the use of video content in Germany on a quantitative basis and analyses the data collected. It invests many millions of euros per year to continuously refine its instruments in order to deliver reliable data on the use of video content to the market on a daily basis. AGF consults closely with all market partners, including licensed TV stations, advertisers and media agencies.

Press contact:

Juliane Paperlein

Head of Corporate Communications | AGF Videoforschung GmbH |
T +49 69 95 52 60 55 | presse@agf.de | www.agf.de