

## Television viewership in the weeks of the application of special COVID-19 protection measures

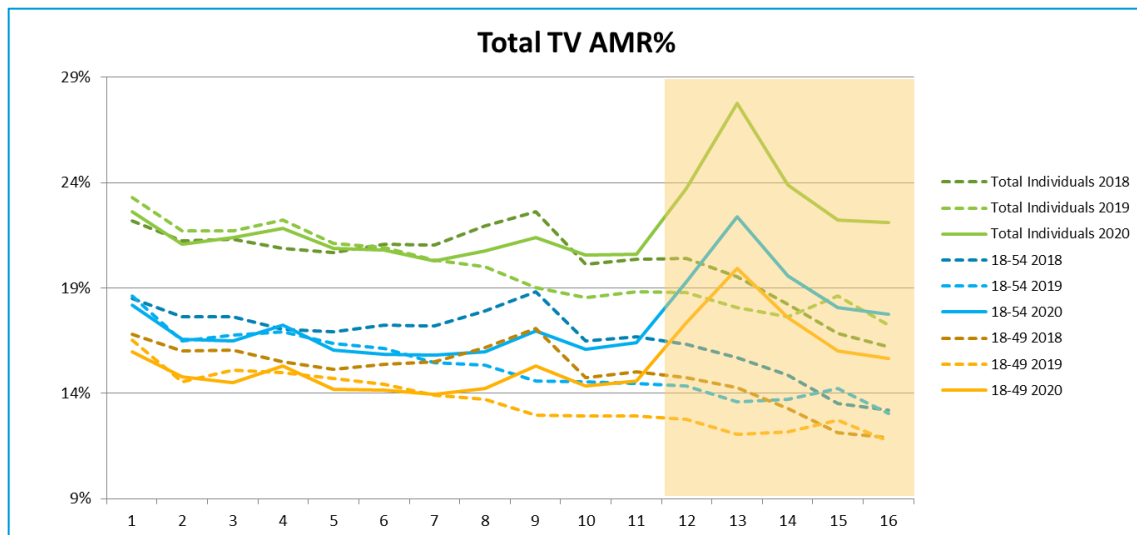
Following the introduction of more stringent precautions regarding the COVID-19 pandemic in Croatia, it is very interesting to see how a changed lifestyle also affects television viewing habits.

For example, on the day the earthquake struck Zagreb (Sunday, March 22, 2020), a record occurred - the highest average daily TV viewing time per individual since TV viewing measurement in Croatia - a total of 7 hours and 12 minutes per viewer.

Here is a summary of recent viewing data captured on AGB Nielsen's nationally representative panel.

The generally higher viewership of linear TV channels in the weeks following the introduction of special measures is also evident through the fact that the AMR% on the two primary commercial targets is actually higher than it was in the previous years for the entire population.

**Graph 1:** YOY AMR% (average minute viewership by population size) of Total TV  
 Period: 1 to 16 weeks in 2018, 2019 and 2020.  
 Live, 4+/18-54/18-49, all day.



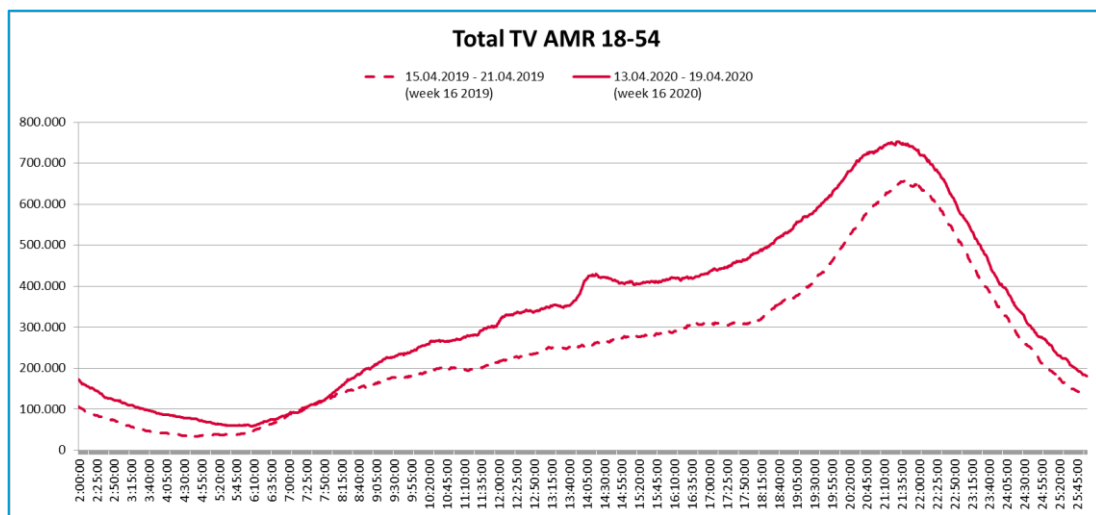
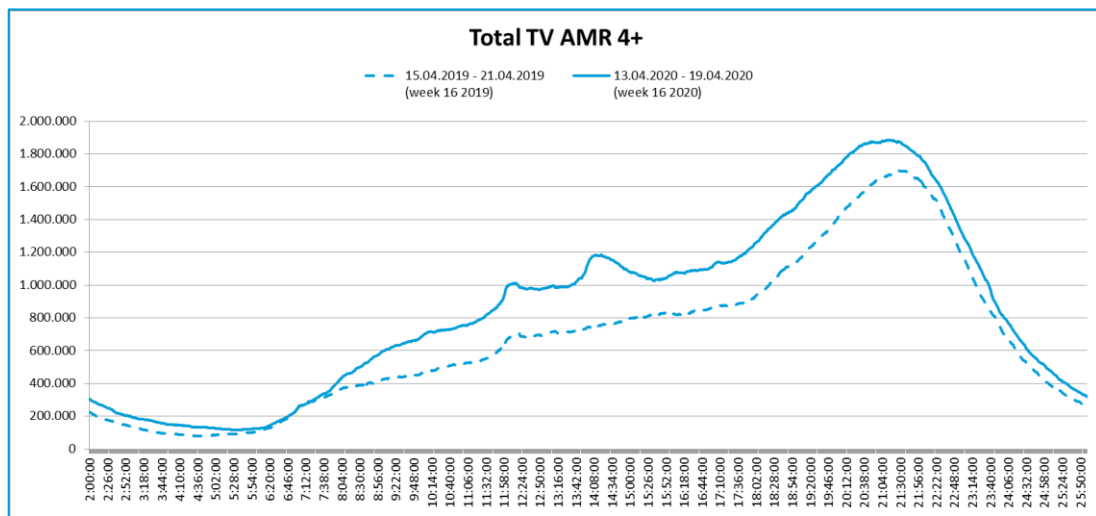
\*COVID-19 pandemic precaution measures have been active from the 12th week onwards.

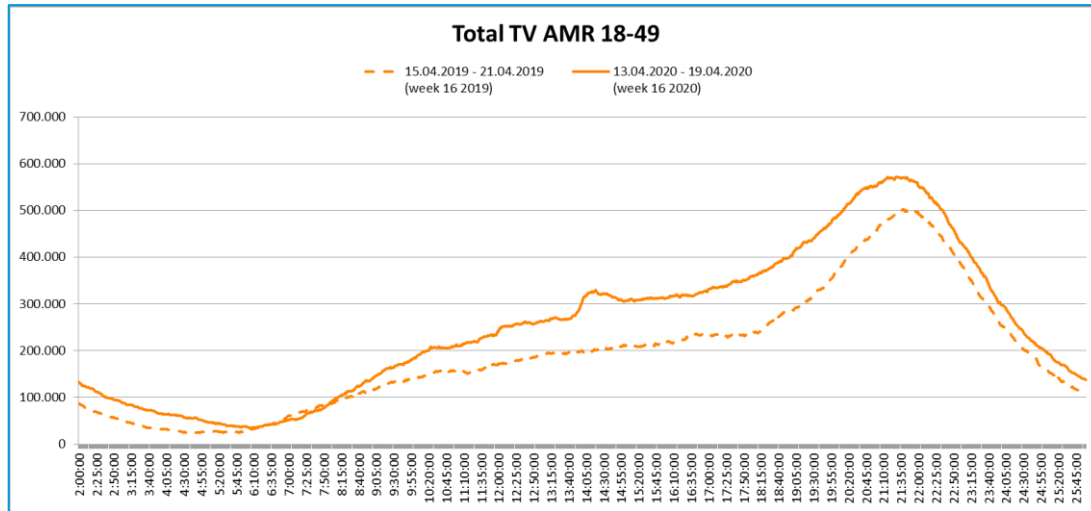
April 13-19 reported television viewership higher than in the same week last year on all three standard targets:

**Graphs 2/3/4:** YOY AMR (average minute viewership) of Total TV

Period: Week 16, 2019 and 2020

Live, 4+/18-54/18-49, all day, minute by minute.





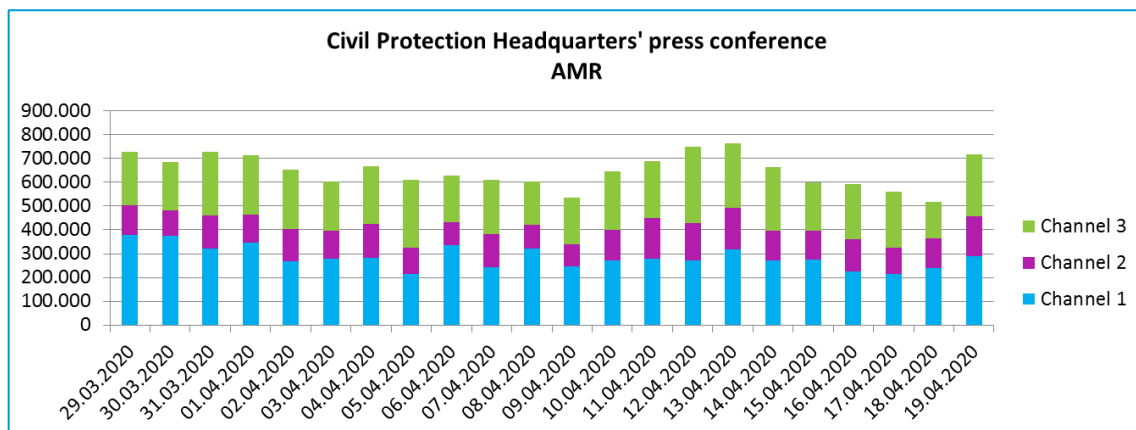
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Special circumstances also affect programmatic decisions and we have a very rare opportunity to watch and observe the same program content at the same time on three national TV channels. From 03/29/2020 the Civil Protection Headquarters broadcasts a press conference every day at 2 pm.

**Graph 5:** AMR (average minute viewership) of the Civil Protection Headquarters' press conference on three national channels.

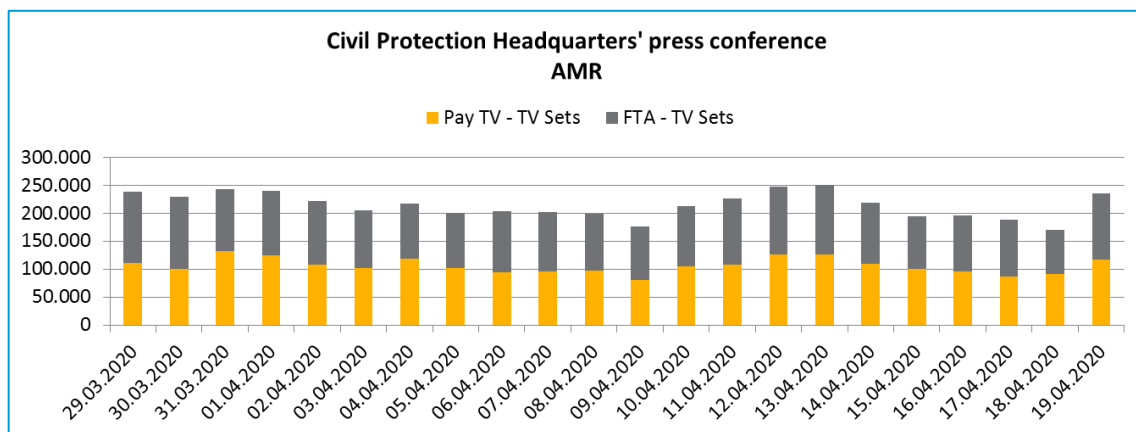
Period: 29.03. – 19.04.2020.

Live + As Live, 4+.



It is extremely important to carefully analyze the viewership of such important content and to understand that almost half of the total viewership is realized by the inhabitants of the Republic of Croatia through land reception, i.e. DVBT technology.

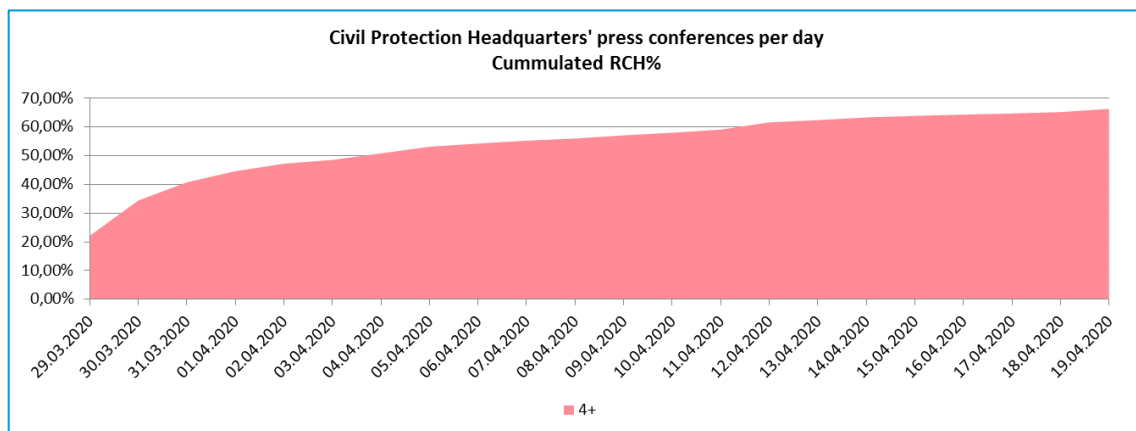
**Graph 6:** AMR (average minute viewership) Civil Protection Headquarters' media conference on three national channels  
 Period: 29.03. – 19.04.2020.  
 Live + As Live.



AGB Nielsen's internal viewing data coming from certain types of TV sets.

In the period from March 29 to April 19, 66% of the population saw at least a minute of the broadcasts of the Civil Protection Headquarters' media conferences on the three largest TV channels.

**Graph 7:** RCH% (reach) of Civil Protection Headquarters' media conferences on the three largest channels; cumulated per day  
 Period: 29.03. – 19.04.2020.  
 Live + As Live, 4+.



In the coming weeks, we believe that there will be a relaxation of special measures and we will monitor how they affect the viewing of TV in general as well as specific content.