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The kids are alright: no tipping point in TV viewing trends for 18-24 year olds



Deloitte Global predicts that traditional TV viewing (see below for definition) among 18-24 year olds will decline by 5 to 15 percent per year in the US, Canada and the UK in both 2018 and 2019. In each market, this would be a rate of decline similar to that of the past seven years. The decline is neither exacerbating nor improving; there is no tipping point, and viewing is not collapsing. We expect 18-24 year olds in all three markets to watch at least 80 to 120 minutes of TV per day in 2018, with variation by season.

Deloitte Global further predicts that through 2023, annual TV viewing drops in the 5 to 15 percent range should continue. However, we think it is possible the rate of decline may be at the lower end of the range as the impact of the forces that have been distracting young people from traditional TV weaken.

In the past five years, all millennials in general and trailing millennials in particular have been lured by smartphones, computers, social media, YouTube and other short-form aggregators, subscription video-on-demand (SVOD) services like Netflix, and video piracy. All these distractions are reaching saturation (perhaps as early as 2018, but very likely by 2020) in these three large English-speaking markets and are showing flattening annual growth in penetration and usage, meaning that the erosion of TV minutes may well slow, even if it does not stop altogether.

The definition of "TV viewing" has evolved over time and varies by country. When current measurement systems were implemented, TV programs were viewed only on TV sets, and almost all viewing was live, so measurement was relatively straightforward. As of 2017, in the US and Canada, TV viewing includes live and time-shifted viewing of TV content on TV sets, connected TV devices, computers, smartphones and tablets. The scope has changed over time, and data from earlier periods may not include viewing on some of those non-TV devices (tablets were added only in the past year, for example). Further, the period included as live and time-shifted has changed over the years. In the UK, it means programs viewed on a TV set, either live or time-shifted by no more than eight days. Viewing, either live or time-shifted, on other devices is not included. In all three markets, TV viewing excludes SVOD services such as Netflix, online video content such as YouTube or pirated content, regardless of viewing device.

Millennials, also known as Gen Y in some countries, are those born between 1981 and 2000, who will be 18 to 37 years old in 2018. Demographers often split them into two groups, leading millennials being older and those 18-24 in 2018 belong to the category of trailing millennials. However, our prediction is not about trailing millennials per se; it is about the media behaviors of 18-24 year olds, considering past behavior, present dynamics and future outlook. The data we analyze looks at measured consumption of 18-24 year-olds from 2011 (whose cohort is now 25 to 31 years old). This prediction is mainly about the age group, not the cohort. That said, when predicting future behavior of 18-24 year olds, it is also important to consider current behaviors among 10-18 year olds today.

In the past five years, all millennials in general and trailing millennials in particular have been lured by smartphones, computers, social media, YouTube and other short-form aggregators, subscription videoon-demand (SVOD) services like Netflix, and video piracy.

- 230.Nielsen: Millennial viewership on the rise across cable news networks, SmartBrief, 17 March 2017: http://www.smartbrief. com/s/2017/03/nielsenmillennial-viewership-riseacross-cable-news-networks.
- 231. US election coverage draws big UK ratings, The Hollywood Reporter,
 11 October 2017: http://www. hollywoodreporter.com/news/ us-election-coverage-draws-biguk-ratings-946085.
- 232. The average mobile gamer spent 24 minutes per day playing across all platforms as of 2016. The average mobile game day, Verto Analytics, 17 August 2016: http://www.vertoanalytics.com/ average-mobile-game-day/.
- 233.Smartphone penetration among Millennials is already near its saturation point, while the oldest users still have room to grow, 2017 US cross-platform future in focus, comScore, 22 March 2017: https://www.comscore. com/Insights/Presentations-and-Whitepapers/2017/2017-US-Cross-Platform-Future-in-Focus (slide 24).
- 234.The results are extracted from Deloitte's Global Mobile Consumer Survey 2017. For UK, see Mobile Consumer Survey, UK cut: State of the Smart, September 2017: www.deloitte. co.uk/mobileuk. For Canada, see Deloitte's Global Mobile Consumer Survey: https:// www2.deloitte.com/global/en/ pages/technology-media-andtelecommunications/articles/gxglobal-mobile-consumer-trends. html.

Figure 21 shows the annual changes in traditional TV viewing for similar youth age groups in the US, UK and Canada from 2011 to the present (the blue box at the end of this prediction provides guidance on interpreting this chart). Traditional TV viewing by 18-24 year olds is in structural decline. This is an enduring trend. In the period from 2011 to 2013, annual declines for this age group varied by quarter but were largely in the range of zero to 10 percent.

As of 2014, there were sharper drops in viewing, and since then, annual declines have tended to be in a range from about four percent to about 11 percent, with 53 of the 76 quarterly data points in the chart falling into that range. As those in other media businesses disrupted by digital can attest, single-digit declines are far preferable to double-digit ones. The trend does not seem to be accelerating. There have been some quarters in which the annual rate of decline has exceeded 15 percent in the UK and in the 20 percent range in the US in two quarters, but these appear to be outliers.

UK declines look stable, and in both Canada and the US, there seems to be a stable-to-moderating trend in annual drops in TV viewing by this youngest age group. That could change, but the worst seems to have passed.

- 235.The Nielsen Total Audience Report, Q1 2017, Nielsen, 12 July 2017, Table 1, pages 14-15: http://www.nielsen.com/content/ dam/corporate/us/en/reportsdownloads/2017-reports/ total-audience-report-q1-2017. pdf; The Nielsen Total Audience Report, Q1 2015, Nielsen, 23 June 2015, Table 1, page 11: http:// www.nielsen.com/us/en/insights/ reports/2015/the-total-audiencereport-q1-2015.html.
- 236.2017 US cross-platform future in focus, comScore, 22 March 2017, slide 28: https://www.comscore. com/Insights/Presentations-and-Whitepapers/2017/2017-US-Cross-Platform-Future-in-Focus.





Sources: Nielsen, Numeris and BARB

It seems likely for the rest of 2017 that we will see more severe viewing declines in the US and the UK. The US presidential election caused a spike in TV news viewing by young people.²³⁰ Even in the UK, the US election TV ratings in 2016 were double those in 2012.²³¹ Therefore, the year-overyear comparisons are likely suffering in 2017 now that the big TV news events are probably over. Young people in the US are still watching over 100 minutes of traditional TV per day as of 2017. We expect smaller declines in 2018 and 2019 than in 2017. The reason is that it seems recent declines in traditional TV viewing by 18-24 year olds were in large part caused by smartphones, SVOD services, social media, piracy and ad-supported online video, all of which have acted as competitors or substitutes for traditional TV. All of these options existed before 2014, when viewing by 18-24 year olds started declining faster, but entered the steep part of adoption and usage curves more recently and collectively diverted 18-24 year old eyeballs away from TV sets. (Video games are also a distraction, but they have been so for decades, at a constant level.)²³²

237. The Nielsen Total Audience Report, Q1 2017, Nielsen, 12 July 2017, Table 1, pages 14-15: http://www.nielsen.com/content/ dam/corporate/us/en/reportsdownloads/2017-reports/ total-audience-report-q1-2017. pdf; The Nielsen Total Audience Report, Q1 2015, Nielsen, 23 June 2015, Table 1, page 11: http:// www.nielsen.com/us/en/insights/ reports/2015/the-total-audiencereport-q1-2015.html. None of these factors should become significantly much less or more important going forward.

Smartphones are near ubiquitous among trailing millennials; penetration cannot grow much further.²³³ Ownership of smartphones among 18-24 year olds in the US surged from 55 percent in 2012 to 94 percent in 2015 but remained unchanged in 2016. UK and Canadian smartphone penetration for this age group is similar in 2017, at 95 percent and 92 percent, respectively.²³⁴

Growth in time spent with smartphones may be about to start slowing. In the US, time spent on apps and the web among 18-24 year olds surged from 90 minutes daily in 2015 to 156 minutes per day in 2017, a 73 percent increase.²³⁵ But 18-24 year olds in the US are already spending more minutes per day with their phones than watching TV (156 minutes versus 124 minutes). We expect smartphone time will continue to increase, and TV time continue to decrease, but given the finite number of media minutes in a day, it seems likely that smartphone

minutes will not increase as quickly in the future

Smartphone screen area is unlikely to

as they have in the past.

continue growing. The larger the smartphone screen, the more viable this device is for watching video. In the US, as of September 2014, there were 60 million phones with screens larger than 4.5 inches. The other 120 million phones were smaller. By December 2016, there were only 40 million of the smaller phones and 160 million larger ones.²³⁶ Given new product launches, over half of all new phones may have screens over 5.5 inches, compared with 5 inches in 2016, which is likely to drive a little more mobile video viewing, but the magnitude will likely be smaller than we saw after the increase from 4.5 inches. Bigger smartphone screens have meant that 18-24 year olds have gone from watching 4.6 minutes of video on their phones daily in 2015 to 11.9 minutes in 2017.²³⁷ But phones are unlikely to get any larger going forward, as it seems we are close to the maximum most people will use, given the size of the average hand, a desire by some for single-handed use and the size of the average pocket.

More young people have SVOD services such

as Netflix and use them more each day. Netflix access among US 18-34 year olds (not just trailing millennials) almost doubled from 28 percent in 2012 to 50 percent by 2015.238 Adding other streaming services to Netflix, SVOD penetration in the trailing millennial demographic is much higher. According to a Deloitte Global 2017 survey (see Figure 22), 89 percent of US 18-24 year olds have a subscription to an SVOD service, while the number in English-speaking Canada is about 90 percent.²³⁹ (SVOD penetration in French-speaking Canada is about 20 percentage points lower.) Daily usage for Netflix globally was about 1.2 hours per subscriber per day in 2012 and 1.8 hours in 2017.240 But that number isn't growing in the way it has in the past. More recent quarters suggest that daily viewing seems to be about flat year-over-year,²⁴¹ which suggests that in 2018, streaming will not be subtracting much more from TV viewing. There are other SVOD services, but as Figure 22 shows, they seem likely to have a weaker effect on TV viewing than Netflix due to lower penetration, especially in English-speaking Canada. In that market, although some respondents had more than one SVOD subscription, all of them had Netflix at a minimum.

Figure 22. SVOD subscriptions for 18-24 years olds in the US and English-speaking Canada, 2017



Weighted base: Deloitte Global survey of 18-24 year olds: US (140) and English-speaking Canada (101), Aug-Oct 2017.

- 238. Netflix content consumption penetration rate among Millennials in the United States in 2012 and 2015, Statista, as accessed on 6 November 2017: https://www. statista.com/statistics/499957/ millennials-netflix-penetrationusa/.
- 239. From Ipsos survey conducted in August/September of 2017. Total survey was over 2,000 respondents, with 264 18-to-24-year-olds across the two countries.
- 240.Netflix quarterly earnings, Netflix, as accessed on 6 November 2017: https://ir.netflix.com/ results.cfm.
- 241. Netflix is hijacking 1 billion hours of our lives each week, CNET, 17 April 2017: https://www.cnet. com/news/netflix-billion-hoursa-week-adam-sandler/.
- 242.Will social media become the new TV for brands? Jayshemenski. com, 8 November 2016: http:// www.jayshemenski.com/blog/ will-social-media-become-thenew-tv-for-brands.

Young people are consuming more streaming video from services such as YouTube.

Streaming video hours weekly for US millennials rose from 1.6 hours in Q4 of 2013 to 5.7 hours in the same quarter of 2015, more than tripling in two years.²⁴² Although we expect the number to continue growing, it seems unlikely that it will triple again in the next two years.

Social media apps are ubiquitous and time-

consuming. As of December 2016, over 60 percent of US 18-34 year olds were on Snapchat, over 75 percent were on Instagram and 95 percent were on Facebook. Daily use of each platform by those aged 18-34 years averaged 14 minutes, 13 minutes and over 30 minutes, respectively - meaning that between the three, total daily social media usage approaches one hour.²⁴³ Snapchat was used by 38 percent of US 18-24 year olds in December 2013 and by 78 percent in December 2016.244 However, time spent by 18-34 year olds on social media is growing more slowly (at 21 percent year-overyear) than it is for 35-49 year olds (29 percent) and for those over 50 (64 percent).²⁴⁵ Social media time for millennials may increase but is unlikely to double again in the near term. Time allocated to social media has been shifting between platforms, and that is likely to continue, but the overall time spent on social media appears to be plateauing at around an hour per day for 18-24 year olds.

Young people may have reached peak piracy

levels. Although millennials are now less likely to download, they are still pirating video content, largely via streaming. Of 18-24 year olds in 2016, 42 percent said they illegally streamed video on their desktop/laptop, and 41 percent said they were streaming illegally on their mobile devices.²⁴⁶ Data for piracy is hard to measure directly, and self-reported surveys are likely to be inaccurate, but based on a series of focus groups with 18-35 year olds in North America, Europe and the Nordics, we believe that although young people are unlikely to pirate less content, it is not the case that piracy levels are accelerating.

243.2017 US cross-platform future in focus, comScore, 22 March 2017, slide 32: https://www.comscore. com/Insights/Presentations-and-Whitepapers/2017/2017-US-Cross-Platform-Future-in-Focus.

244.Ibid., slide 35.

- 245.2016 Nielsen Social Media Report, Nielsen, 17 January 2017, page 6: http://www.nielsen.com/ content/dam/corporate/us/ en/reports-downloads/2017reports/2016-nielsen-socialmedia-report.pdf.
- 246. Study: Millennial piracy trends shifting, Broadcasting & Cable, 20 September 2016: http://www. broadcastingcable.com/news/ news-articles/study-millennialpiracy-trends-shifting/159771.
- 247. The Nielsen Total Audience Report, Q1 2017, Nielsen, 12 July 2017, Table 1, pages 14-15: http://www.nielsen.com/content/ dam/corporate/us/en/reportsdownloads/2017-reports/ total-audience-report-q1-2017. pdf; The Nielsen Total Audience Report, Q1 2015, Nielsen, 23 June 2015, Table 1, page 11: http:// www.nielsen.com/us/en/insights/ reports/2015/the-total-audiencereport-q1-2015.html.
- 248. What millennials are watching: Top 20 broadcast TV shows ranked by ratings, The Wrap, 1 November 2016: https://www. thewrap.com/millennial-tvratings-top-broadcast-showsempire-football-simpsons/.
- 249. Paid OTT Video Services: Research & Insights into Growth Opportunities & Consumer Behaviors, IBB Consulting, as accessed on 6 November 2017, page 4: https://ibbconsulting. com/insights/Paid-OTT-Video-Services.
- 250.lbid., page 7.
- 251. ESPN will count linear, streaming audiences as one, Variety, 22 September 2017: http:// variety.com/2017/tv/news/ espn-nielsen-total-audiencemeasurement-monday-nightfootball-1202566320/.

The bottom line

The traditional TV businesses – broadcasters, distributors and advertisers – should assume that 18-24 year old viewing minutes will continue to see annual declines in the high single digits. But they should not expect sustained double-digit declines. US TV viewing by 18-24 year olds will, depending on the quarter, probably be 90 to 110 minutes daily in 2018, and 80 to 100 minutes daily in 2019, with UK and Canadian minutes declining to roughly the same levels.

Although traditional TV viewing is declining, the relative proportions that are viewing live and time-shifted TV are not changing much over time. In 2017, 90.8 percent of TV viewing by US 18-24 year olds was live, up fractionally from 90.5 percent in the same quarter of 2015.²⁴⁷ This suggests that even as younger viewers change some of their video consumption to streaming services or to non-video alternatives, there is a "core" of TV options they continue to prefer to watch live.

What genres of traditional TV are millennials 18-34 years old watching? In 2017 in the US, sports was still a big draw, with six of the top 20 shows and five of the top 10 being American football. Reality shows were also popular, with three of the top 20 from this category, although none were in the top 10. The other top 20 shows for the year were a mix of comedy, drama, police procedurals and animation.²⁴⁸ It seems likely that these patterns will continue, and TV producers and advertisers will continue to need a balanced mix of genres to reach younger viewers, with no category (except perhaps live sports) dominating.

Although younger viewers may be less likely to watch traditional TV (either through a distributor such as a cable, telco or satellite provider) and over-the-air (OTA) with a digital antenna, they are more likely than other demographics to consume SVOD services. More important, they are more likely to subscribe to multiple services; in a 2017 US study, nearly a quarter of 18-29 year olds who were SVOD subscribers, compared with only 18 percent of the adult subscribing population as a whole, were paying for three or more separate subscriptions.²⁴⁹ That same age group was also the most willing to pay for live SVOD content, with two-thirds of men in the demographic willing to pay for live TV.²⁵⁰

It seems likely the industry should look closely at moving beyond the arbitrary split of watching traditional linear TV (either on a TV or on any device) and watching the same thing but streaming over the internet. Measuring total audience will likely become best practice, with one large US sports network already moving in this direction in late 2017. The shift in measurement is expected to add as much as five to seven percent to younger audiences.²⁵¹

Finally, as mentioned above, it is important to watch the habits of those who are the 18-24 year olds of the future. In both the US and the UK, their traditional TV viewing is declining as well, and often by annual percentages even worse than we have seen from current 18-24 year olds. In the UK, viewing by children (those under 16) has declined by over five percentage points more than viewing by 16-24 year olds since 2010,²⁵² and in the US, the decline in TV viewing by 12-17 year olds has fallen by two percentage points more than 18-24 year old viewing.²⁵³ If the habits of this next generation persist over the next few years, our projections for stable or even less-severe declines could be wrong.

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- 253. The Nielsen Total Audience Report, Q1 2017, Nielsen, 12 July 2017, Table 1, pages 14-15: http://www.nielsen.com/content/ dam/corporate/us/en/reportsdownloads/2017-reports/ total-audience-report-q1-2017. pdf; The Nielsen Total Audience Report, Q1 2015, Nielsen, 23 June 2015, Table 1, page 11: http:// www.nielsen.com/us/en/insights/ reports/2015/the-total-audiencereport-q1-2015.html.
- 254.Number of 18-24-year-olds in the United States, 2000-2050, New Geography, 22 September 2008: http://www.newgeography. com/content/00269-number-18-24-year-olds-unitedstates-2000-2050.
- 255. Population by sex and age group, Statistics Canada, Government of Canada, as accessed on 7 November 2017: http://www. statcan.gc.ca/tables-tableaux/ sum-som/l01/cst01/demo10aeng.htm.
- 256.Special thanks to Toby Syfret at Enders Research for the UK data and to Lisa Eaton and Numeris for Canadian data. All US data was pulled from the various Nielsen Cross Platform and Total Audience reports over the years. Deloitte Global takes all responsibility for the presentation and interpretation of the data.
- 257. BBC iPlayer April 2017 Performance report, BBC, as accessed on 6 November 2017, slide 12: http://downloads.bbc.co.uk/ mediacentre/iplayer/iplayerperformance-apr17.pdf.
- 258.Netflix leads streaming devices in Canada, Pressreader, 21 October 2017: https://www. pressreader.com/canada/theglobe-and-mail-bc-edition /20171021/281788514300856.

Details on interpreting the chart

- 01. Line thickness indicates population size. The age break used in the US and Canada is 18-24 year olds, while the UK age break is 16 -24 year olds.
- 02. In the period measured, there were about 25 million to 27 million 18-24 year olds in the US,²⁵⁴ about 7 million 16-24 year olds in the UK, and over 3 million 18-24 year olds in Canada.²⁵⁵
- 03. Data in each country is sourced from the traditional leaders in TV viewing measurement: Nielsen in the US, BARB in the UK and Numeris in Canada.²⁵⁶
- 04. There are multiple important differences in the measurement methodologies used by the three data providers. These are far too many to enumerate, but they almost certainly matter. Some viewing data includes tablet viewing, while some does not. Some is passively measured, others rely on diaries, and the definition of live is different, etc.
- 05. The Canadian data is annual instead of quarterly.
- 06. There are important country differences. Just a few examples:
 - A. Although used for a small portion of all viewing, BBC iPlayer is a factor in the UK (and appeals to younger viewers), and there is no real equivalent in the North American markets. As of 2017, 44 percent of all iPlayer users were aged 16 to 34, the single largest demographic, and for comparison, that same age group made up only 30 percent of both TV and radio audiences.²⁵⁷
 - B. In Canada, TV habits of English-speaking and French-speaking (about 22 percent of the population) viewers are sharply different, with French speakers watching more traditional TV each day and annual declines being lower. As of 2017, 57 percent of those in English-speaking Canadian homes subscribed to a video-streaming service, but only 38 percent in French-speaking homes had a streaming subscription.²⁵⁸
 - C. In the US market, there are large differences within the population in terms of race, with the average 18-24 year old watching about 151 minutes of live and time-shifted TV per day in Q4 2016, while the average Black American of the same age was watching 246 minutes (63 percent more than the composite average) and the average Asian American was watching only 83 daily minutes (45 percent less than the composite).
- 07. Although younger viewers are moving some of their daily video minutes away from traditional TV comedy and drama, other categories such as sports viewing have remained relatively strong. Therefore, sports viewing now makes up an increasing percentage of total traditional TV viewing for young people. That's great for sports and traditional TV, since it is watched live and with strong ad loads and subscription fees. But it also means that analyzing annual trends is more complicated, volatile and country-specific. Three examples:
 - A. Whether in regards to the football World Cup or the Champions League, strong or weak performance by any of the UK teams has a large positive or negative effect on viewing in the UK market. Although some in North America watch these matches, the effect on viewing numbers is much smaller.

259.TV viewing in the Nordic countries in 2016, NORDICOM, 30 March 2017: http://www. nordicom.gu.se/en/latest/news/ tv-viewing-nordic-countries-2016.

- B. Meanwhile, NFL (football) is the dominant TV sport in the US. A period of slightly declining ratings (as was seen in the first half of the 2016-17 season) would have a material impact on TV viewing by young people. Assuming they watch on average 120 minutes of TV per day in that fall football quarter, even a six-minute decline in NFL viewing would cause a drop in younger viewing figures.
- C. In Canada, neither kind of football is as important for traditional TV; instead, it is NHL (ice hockey). A playoff year that saw no Canada-based teams perform well would see much smaller audiences than a year when several Canadian teams (especially those based in larger markets) made it through several rounds. A five-to-10-minute per day impact for 18-24 year olds would be a conservative estimate.
- 08. Equally, although Figure 21 shows relatively stable, mainly single-digit, annual declines in the US, UK and Canada over recent years, data from other countries shows a different story. Figure 23 shows annual data over the same time span as Figure 21 for a mix of "younger" demographics from the Nordic countries of Sweden, Denmark, Finland and Norway. These countries tend to have high levels of English fluency, and adoption of streaming services and other international content has been rapid. As can be seen, viewing has tended to decline but with rapid year-over-year changes: Danish millennials went from a 14 percent viewing decline in 2013 to a 0 percent decline in 2014 and then plunged to a nearly 18 percent decline in 2016. And although 2016 viewing declines were in double digits in Sweden, Denmark and Norway, Finnish 15-24 year olds saw a moderating decline in the same year of only 3 percent. 2017 data will be needed, but at this time, it seems impossible to predict Nordic millennial viewing for future years; no clear trend is visible.²⁵⁹



Figure 23. Yearly change in traditional TV viewing by young people, Nordics 2011-16

Sources: Kantar Gallup Denmark, Finnpanel, Kantar TNS Norway, MMS.



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