



## MEMORANDUM

**TO:** Interested parties  
**FROM:** Corey Mull, Deep Root Analytics  
**DATE:** June 9, 2020  
**RE:** TV viewership among Millennials and Gen-Z during COVID-19 lockdown

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### Executive Summary

The COVID-19 lockdowns present an opportunity to observe how viewership trends are affected with millions staying at home.

Using a unique dataset of set-top box data provided to us by TiVo and matched with demographic data through a third-party, Deep Root Analytics studied the viewership behavior, in March 2020, of over 120,000 households consisting solely of people under the age of 40.

We found that, on the whole, this age group watched more linear television programming as March 2020 progressed. While the median household watched less than 5 hours of televised programming (across the TiVo population) on March 3, by the end of the month this had jumped by nearly two and a half hours, an improvement of about 50%. Further, this jump occurred despite the cancellation of live sports – an important television draw for young people.

However, this increase in consumption was driven by a relatively small segment of households under 40. This group increased its TV consumption by about 45 hours and 42 minutes in March 2020 relative to March 2019. This group is disproportionately well educated and high income, and is concentrated in mid-sized cities such as Salt Lake City, Milwaukee, and Columbus, Ohio.

These findings are tentative evidence of an influx of younger, well-off, and well-educated viewers into traditional television across March 2020. This doesn't appear to have come at the expense of streaming video – in fact, there is [good evidence that time with streaming platforms has increased](#), as well. The increase in TV viewership across all mediums during COVID-19 lockdowns illustrates that linear television is still uniquely valuable in live or breaking news situations.



## Background

The move among younger consumers away from linear television is one of the most well-documented consumer shifts of the past ten years. In a 2018 study, entertainment consulting and analytics firm Magid found that while 8% of pay TV subscribers overall were “extremely likely” to cancel their service in the coming year, this number rose to 12% among respondents 21-40 years old<sup>1</sup>. Further, the number of cord-cutting households has nearly doubled since 2017.

When polled, most cord cutters say they don’t miss anything about cable or satellite TV. However, 23% say they miss live events, and 22% say they miss local and national news<sup>2</sup>. When the coronavirus lockdowns started in March – and live events and news became a much more important part of the nation’s media diet - Deep Root Analytics saw a natural opportunity to test how resilient the move away from traditional television truly is.

## Methodology

Starting with a nationwide database of about 2.6 million<sup>3</sup> TiVo households active in March 2020, we narrowed down the list to households who met the following criteria:

- Active television viewers in both March 2019 and March 2020
- No one in the household is over the age of 40

Approximately 120,000 households<sup>4</sup> nationwide met these criteria. From here we draw conclusions by comparing the television consumption of these households in March 2019 to their consumption in March 2020.

To do this, for each day in March 2020, we matched each household’s total television consumption (in minutes) to their total television consumption from one year prior. To account for seasonal patterns, both by weekday and across the month, we match ordinal weekdays to one another – e.g. viewership from the first Friday in March 2020 (3/6) is matched to viewership from the first Friday in March 2019 (3/1). Doing this allows us to get an apples-to-apples comparison between equivalent weekdays.

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<sup>1</sup> [USA Today report](#)

<sup>2</sup> <https://www.emarketer.com/content/most-cord-cutters-aren-t-missing-cable-tv>

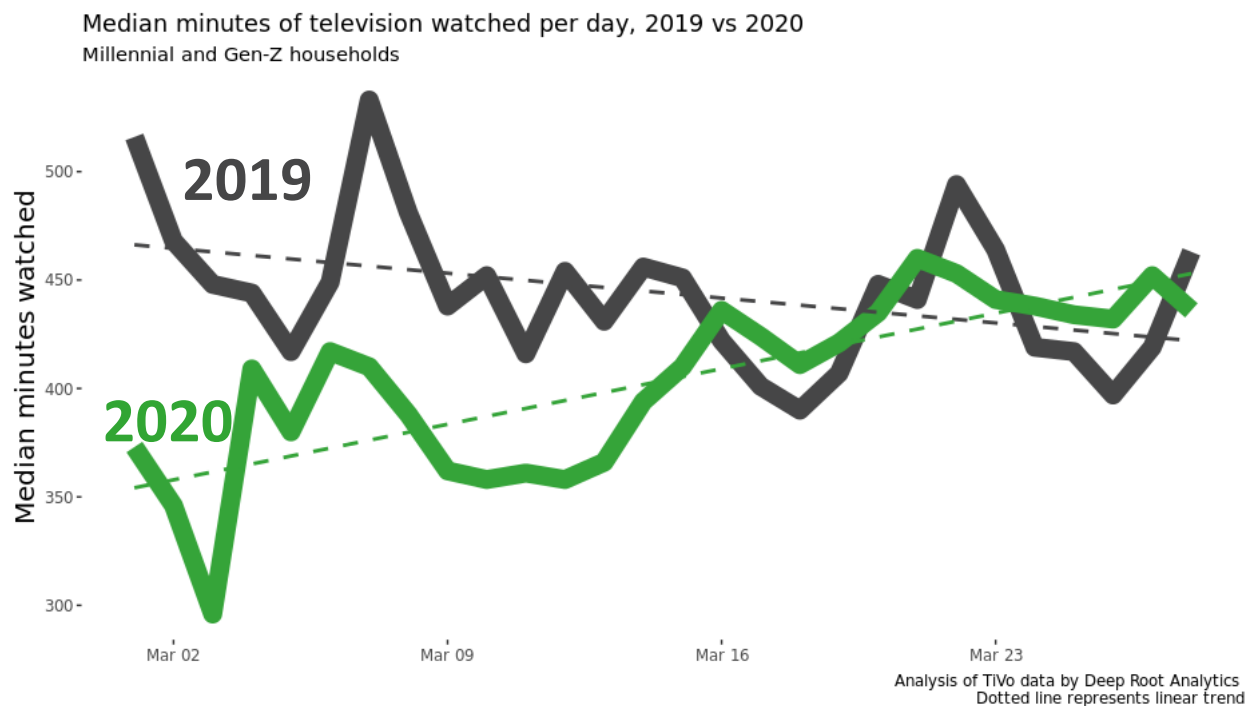
<sup>3</sup> 2,620,764 households, exactly.

<sup>4</sup> 121,319 households

## Findings

*The median household under 40 watched more television as March 2020 progressed*

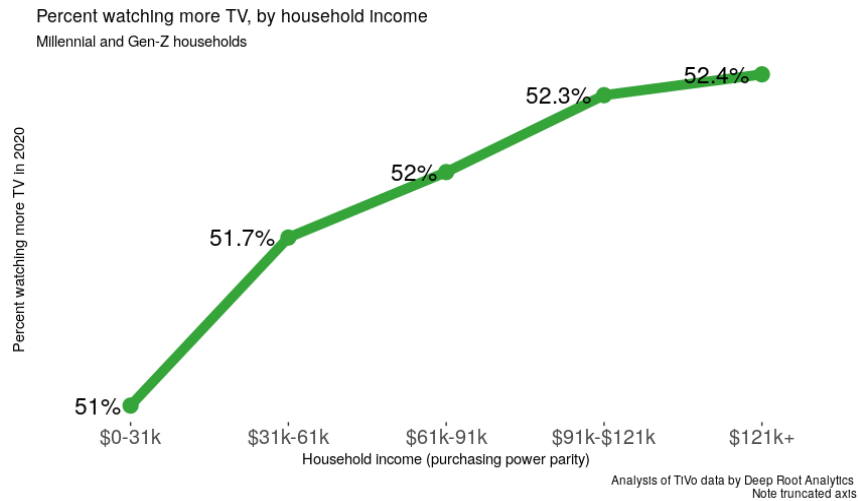
While Millennial and Gen-Z households started off the month watching less TV year over year, they consumed more as the month wore on, and by mid-month were consuming as much television as they had one year prior.



This is remarkable amidst a backdrop of growing streaming options, as well as the fact that almost all professional and college sports had suspended their seasons by mid-March. These moves removed important viewership events, including the NCAA basketball tournament, playoff races in the NHL and NBA, and early season MLB, from the broadcast schedule.

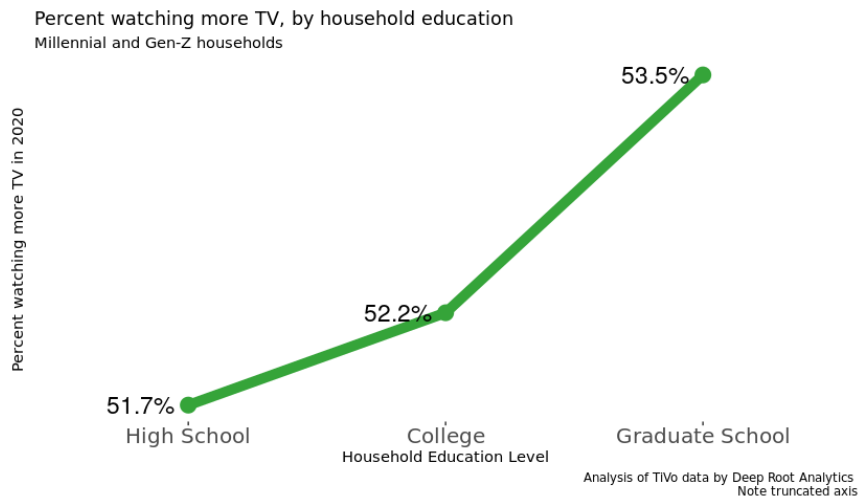
Further, this shift was fairly widespread. 56% of Millennial and Gen-Z households in our sample watched more television in the last week of March 2020 than they did in the first week.

*Younger households who watched more TV in March 2020 skew higher income and more educated*



Across the board, we saw that Millennial and Gen-Z households with higher incomes watched more television in March 2020 than in March 2019.

Similarly, households who turned in more often in March 2020 skewed significantly more educated:



*Gains in Millennial and Gen-Z viewership were stronger in a few markets*

We saw large gains in a few markets around the country, concentrated among mid-sized cities in the South and Midwest:



Market	Percent watching more TV
West Palm Beach, FL	59.0%
Salt Lake City, UT	58.6%
Charlotte, NC	57.5%
Milwaukee, WI	57.5%
Columbus, OH	57.4%

Increases in TV time were less prevalent in a range of rural areas, again in the South and Midwest:

Market	Percent watching more TV
Champaign, IL	41.4%
Paducah, KY	42.7%
Cedar Rapids, IA	43.1%
Albany, GA	43.9%
Des Moines, IA	44.3%

### Conclusion

Our analysis shows that the median Millennial/Gen-Z household watched more television as the month of March 2020 continued, likely reflecting the growing premium on live news as the epidemic unfolded.

However, these changes were strongly driven by a relatively small segment of the under-40 population, characterized by higher incomes, higher educations, and residence in mid-sized cities. Our findings illustrate that live and breaking news situations may present an opportunity to reach this group at scale.

The shift doesn't appear to have come at the expense of streaming video, [which is serving record volumes of content](#). Rather, younger consumers appear to be adding traditional television to their video content diet.

It is still unclear how the pandemic and resulting lockdowns might change how linear television is consumed in the United States. It's possible that this disruption represents a momentary blip in the ongoing move to streaming video. However, what these results do make clear is that the landscape can change at any time, and by forgoing television advertising, brands lose the opportunity for the type of scaled impact that only TV can provide.