

BUSINESS OF TELEVISION

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BROADCASTING & CABLE

THE  
MILLENNIALS  
ISSUE

# Generation Now

Inside our first cover-to-cover look at millennials:

- Programming takes a dark, dramatic turn
- Syndicators share, like and tweet to big ratings
- An MTV researcher offers exclusive insights
- Our breakdown of the latest tech trends
- Ratings Intelligence charts the top shows and networks

's *Pretty Little Liars*

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Media

# Chaos Theory

Themes of uncertainty permeate the millennial demo's choices of television programming



By R. Thomas Umstead, *Multichannel News*

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YOU MIGHT THINK by now that the whole zombie craze is exhausted on TV, that fickle younger adults have moved on from apocalyptic stories involving the flesh-eating undead.

But you would be wrong. The demographic that's powering the ratings muscle of AMC's *The Walking Dead* is squarely in the millennial camp. The show is the most watched by the 18-to-34-year-old demographic, a group that's drawn to darker sides of the drama genre. These shows are often set in bleak, futuristic worlds and depict ambivalent heroes.

"These millennials have come of age in absolute chaos, so it's natural that the programming they are attracted to [is even edgier] than we're used to seeing," said Jane Gould, MTV senior VP of research. "The lines that used to be so firmly cemented so as to not cross have been easily crossed now, because as humans we like to escape and think our lives are better than the one that we're watching, and that's easy to imagine when you're watching *The Walking Dead*." (For more on Gould's take on millennials programming, see page 15.)

Indeed, the post-apocalyptic zombie series as well as HBO's fantasy-driven series *Game of Thrones*, FX's horror anthology series *American Horror Story* and the network's *Sons of Anarchy* all ranked among the top five most-watched cable shows for millennials in 2014 av-

## WHY THIS MATTERS

Millennials are tuning into TV shows that reflect the chaos and uncertainty of the world they have come of age in.

eraging a combined 15 rating according to Ratings Intelligence. (ESPN's *'Monday Night Football'* rounds out the list; see chart on page 12).

The closest non-scripted drama series among millennials is VH1's *Love & Hip Hop Atlanta*, with a 2.76 rating.

Millennials—living in a world filled with threats of terrorism, a stagnant economy, high unemployment and crippling student-loan debt—are not as optimistic about the state of the world as baby boomers were when they moved into adulthood, said Kent Rees, general manager of millennial-targeted network Pivot.

"Millennials are more realistic—they look around the world and see that the world is screwed up," said Rees. In January, Pivot debuted *Fortitude*, a dark drama with climate change overtones in which a small Arctic town is rocked by a grisly murder.

The darker shows of today are a drastic change from the dramas of 20 years ago. Such shows as *The West Wing*, *Hill Street Blues* and *NYPD Blue* were considered edgy, but look tame by today's standards.

## Fewer Happy Endings

Back then, boomers saw the world as their oyster and everything was about optimism,

**"Millennials are more realistic—they look around the world and see that the world is screwed up."**

—Kent Rees, general manager, Pivot



ABC Family's *Pretty Little Liars*, which follows four teen girls and a murderer, has generated the top five most-tweeted telecasts ever.

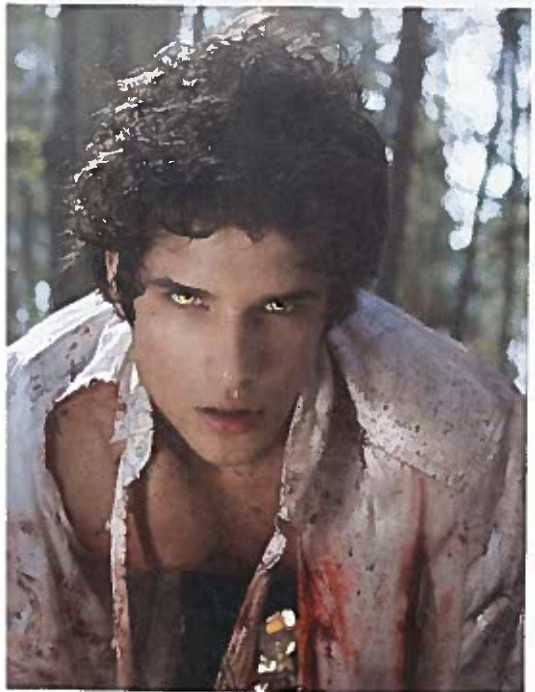
happy endings, comfort, certainty, and law, order and justice, according to Don Micallef, VP of research for Discovery Communications, which recently commissioned "The Dark Side," a report on the viewer appeal of dark dramas. On the other hand, today's millennials see the world as a dangerous place, filled with uncertainty, consequences, betrayal and fear, Micallef said.

"Certainly, when you look at the history of millennials and what they were exposed to early in their lifetime, starting with the dot-com bubble bursting through 9/11, the world has really turned upside down," he said. "So, they are used to seeing the world in a much darker perspective than the boomers or the [generation Xers] did."

And today's darker-themed shows are influencing the development of programs aimed at baby boomers, Micallef added. Shows such as NBC's *The Blacklist* and ABC's *How to Get Away With Murder* are successfully reaching older audiences with intense plot twists, murder and mayhem.

"Five years ago, the networks wouldn't have tried shows like that for their broader audience because they would have come across as too dark," Micallef said. "But now—in order to compete with what's on cable, which offers much darker content—the broadcast networks have had to adapt."

But it's not all about the doom and gloom.



Millennials seek out shows that feature non-traditional family bonds, such as the friendships on MTV's *Teen Wolf*.

Pivot's Rees said shows that feature chaos but also provide a sliver of hope for the future and depict characters who are willing to pull together for the greater good have big appeal to millennials.

*Fortitude's* climate change theme is supported by a show-related website that pro-

vides information and recommendations to counter the phenomenon. Rees said the series and its companion website give millennials a more informative view of the subject.

"[The website] highlights the real science behind the show, and I think we're making that extra commitment and layer to the show," he said. "[Viewers] can be involved in the vibe of the show and get involved in the mystery and story and then go online and engage deeper."

MTV's Gould pointed to recent network research on the TV viewing habits of millennials



Millennial-targeted Pivot's drama series *Fortitude* is backed by a companion website with information on climate change.

that revealed the group is driven by complicated story lines in which millennials work together to create a better world for themselves and build unique, non-traditional family bonds, similar to the relationship between the human survivors in *The Walking Dead* and the bond between friends within MTV's horror-themed series *Teen Wolf*, the network's most-watched scripted drama series among millennials.

Millennials also want programming that doesn't adhere to traditional stereotypes or follow a formula, but rather shows that have fluid boundaries. "What we see from millennials in this lean-in TV world is a desire for chaos, but then for people to work together against that something that is threatening them," Gould added.

The tie between scripted dramas and social media is also strong for millennials, and more often than not, millennials are talking about these shows on social media platforms like Twitter, Facebook and Instagram.

ABC Family's *Pretty Little Liars*, which follows four teen girls tormented by a mysterious murderer known as "A," has generated

the top five most-tweeted telecasts in television history over its five seasons, according to Karey Burke, executive VP of programming and development.

The show is currently the most-followed scripted television series on Instagram, generating close to 2 million fans per episode, according to ABC Family.

### Social Media Appeal

"Social media has become the modern water cooler, and these shows in particular have these very big stakes and surprises," Burke said. "I think they love the suspension of disbelief, and they can't predict what's going to happen. Being on those virtual roller-coaster rides for them is thrilling."

Dave Quinn, editor-in-chief for website Beamy, which bills itself as a social discovery platform for TV, said the networks have done a good job of using social media to attract millennials who want to discuss the latest murder or the unexpected plot twists by creating hashtags within the show to drive online discussions.

"People like pulling apart all of the conflict and mystery involved in those shows," he said.

Millennial-targeted networks will look to continue its walk on the dark side with its viewers. MTV is creating a TV version of the hit theatrical horror franchise *Scream* and is developing the miniseries *Shannara*, based on Terry Brooks' fantasy-themed novels of the same name that chronicle a land of magic nearly 2000 years after Earth's demon-induced demise.

ABC Family is developing a procedural drama called *Stitchers*, set to air this fall, in which a woman hacks into the minds of dead bodies to help solve murders.

Pivot is also looking at a number of drama series to potentially add to its lineup, while upstart El Rey Network has begun production on a second season of its horror series *From Dusk Till Dawn: The Series*.

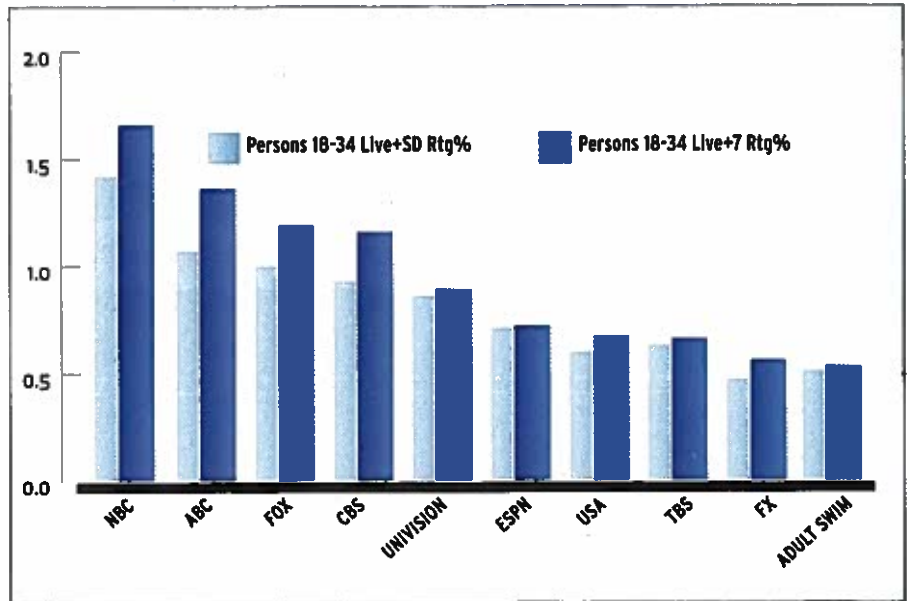
Discovery's Micallef said he expects TV will see even darker dramas in the future as millennials continue to look to entertainment for an escape from reality.

"We haven't seen a pushback yet from audiences so I think it can get even darker," he said. "I think we'll see more of it, rather than less of it." ■

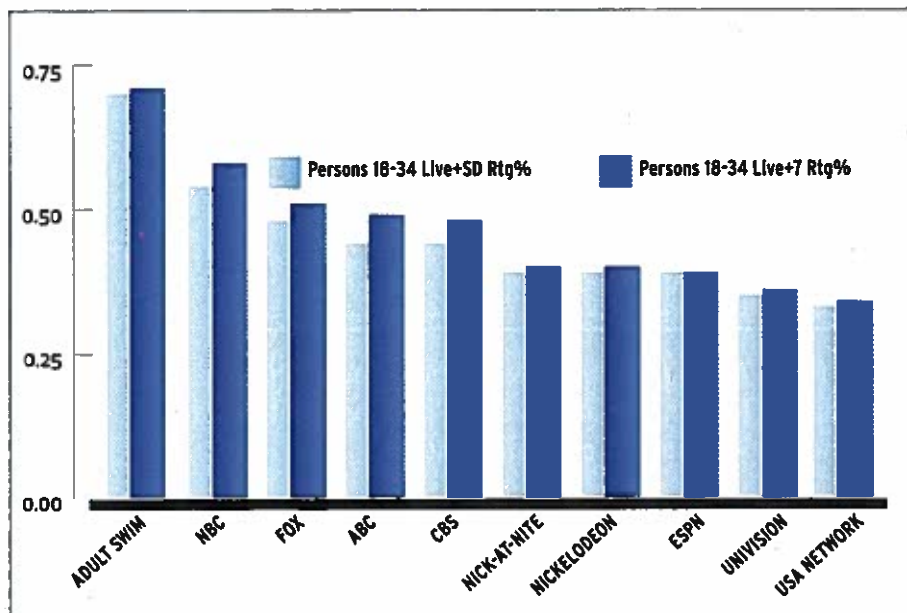
## THE TOP NETWORKS OF 2014 IN PRIMETIME AMONG MILLENNIALS

LED BY *Sunday Night Football*, *The Voice* and *The Blacklist*, NBC was the top network in primetime last year among millennials. ABC, Fox, CBS and Univision rounded out the top 5, per Ratings Intelligence analysis of Nielsen data.

ESPN was the top-rated primetime cable network among millennials, averaging a 0.71 rating in the demo (live-plus-same-day) and a 0.72 average after live-plus-seven-day data. ESPN's low ratings boost from time-shifted data makes sense, considering most people who watch sports tend to do so in real time. TBS finished No. 2 with millennial live+SD viewers (0.63), anchored by reruns of *The Big Bang Theory* in primetime. But USA, home to millennial favorites including *Monday Night Raw* and *Suits*, moved past TBS for the second spot among the cable nets after Live+7 viewing. Adult Swim's primetime telecasts of *American Dad* pushed it into the top 10. FX, home to millennial favorites *American Horror Story*, and formerly *Sons of Anarchy*, also earned a spot. —AJK



## AROUND THE CLOCK, MILLENNIALS ARE IN THE POOL WITH ADULT SWIM



MILLENNIALS LOVED NBC and ESPN in primetime last year, but which network was best able to average millions of millennial viewers across a 24-hour span? Here are the top 10 millennial networks of 2014 in total-day (Monday-Sunday, 6 a.m.-6 a.m.) numbers, per Ratings Intelligence analysis of Nielsen data.

Adult Swim was the de facto millennial network for 2014 because it dominated both cable and broadcast competition last year in total day, averaging a 0.70 18-34 Live+SD rating and a 0.71 18-34 Live+7 rating. NBC, Fox, ABC and CBS (and their affiliates) rounded out the top 5. Nick At Nite and Nickelodeon drew similar numbers in both data streams; the dynamic duo was followed by ESPN, Spanish-language broadcaster Univision and USA Network. —AJK

# Television Fare for Millennials: Shows To Entertain, Engage...and Transport

An MTV executive explains how a chaotic world makes creating content for young people complex



By Jane Gould

Senior VP of Insights for MTV

THE WORLD IS CHANGING FAST. With the framework of society shifting swipe by swipe, ever-adaptive younger millennials and the

leading edge of post-millennials are navigating a social media sharing culture, which has exponentially increased their exposure to new ideas, world events, injustices and justices. Even for these hyper-connected individuals, it's overwhelming to process the constant influx of news, information and viewpoints that cycle through their daily feeds.

Last August marked an inflection point with many young people commenting on how their social media was inundated with stories of social chaos and change. As one 22-year-old explained, "[50%] of my feed is about the Ferguson shooting, 25% are friends 'coming

shifted on its axis from the week prior.

In fact, a new MTV study of 2,400 14-30-year-olds revealed that 70% agree, "the world is so chaotic it's hard to know who or what to follow." Even more poignant is that an overwhelming 8 in 10 (81%) agree, "it's a challenge to know what's real or fake in social media," and almost 3 in 4 (74%) say, "there are just so many conflicting perspectives that it's hard to know what to believe in today's world."

But while some might perceive it as a frustrating time in history to be trying to make sense of the world, young people are still finding ways to manage the onslaught of information, decipher real from fake and speak the truth.

They are busy playing the roles of detective and journalist simultaneously in a phenomenon we call REAL-searching. This generation, who has finely tuned "BS-ometers" does not take what they see in their feeds at face value. For them, everything has the potential to be a scam or staged. They cross-reference sources to evaluate whether "Alex from Target" was truly organic or a marketing ploy, and scrutinize elevator footage to determine if Jay-Z and Solange's fight was real or fake.

So now the question is, how do content creators and programmers respond?

It's no secret that the most popular TV programs in history have projected an alternate version of what is occurring in society at that moment in time. And that's even truer today, especially for exhausted young people seeking respite from the constant churn of debate, opinions and information shared.

What we've found is that for this cohort and for the population at large, an escapism threshold has been crossed. In fact, the most popular programs today are pushing the boundaries of what's considered real, fantasy



The new thriller *Eye Candy* on MTV centers on a young woman who uses her hacking talents to find her kidnapped sister and help families find missing relatives.

and edgy in order to trump the chaos the audience is experiencing in everyday life. Young people need their entertainment to create distance and deliver overcomplicated worlds that can be safely deciphered.

At MTV, we've already delivered series that run parallel to this reality, but with completely unexpected twists. For example, in our hit show *Finding Carter* the lead character is forced to reconcile the paradox of a mother who kidnapped her, but went on to raise her in a very loving environment. Another example is our latest thriller, *Eye Candy*, that features a female lead who subverts the system using her hacking skills—inherently bad—to help find her kidnapped sister and assist families to find missing loved ones, a truly altruistic motive.

Given this audience is living in a world on warp speed, it's no surprise that the shows driving the most connection to the youth audience today feature compelling characters and worlds that offer a safe distance to escape. ☑

Jane Gould oversees and manages all research efforts for MTV, MTV2, mtvU and MTV's digital and mobile properties, including all consumer studies, qualitative and quantitative analyses. She also identifies and forecasts trends that inform the brand's development, programming and marketing on all screens including television, online and mobile.



MTV's *Finding Carter* explores the close but complicated relationship of a mother who abducted her daughter.

out' about their mental health issues in light of Robin Williams' death and 25% is the ALS challenge." From serious race conversations to highly personal mental health revelations, and a revolutionary marketing campaign prompting an entire nation to dump ice water over people's heads, their world seemed to have

# Series Find Millennials Where They Live

Programming distributors say social media is key to luring in next generation of syndication viewers



By Paige Albinak

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SYNDICATION—WHETHER IN daytime, access or late-fringe—tends to be watched by older viewers, but the sheer size and buying

power of the millennial demographic means they are a group that syndicators and TV stations can't afford to ignore.

"Millennials are the largest generation out there and they have the most purchasing power," says Michael Teicher, executive VP media sales, Twentieth Television.

And many suggest it's best to reach the demo where it lives most—on Facebook, Twitter and elsewhere. "The most important thing for that audience is to reach them via social media," says Stephen Brown, Fox Television Stations executive VP, programming and development.

Most syndicated shows skew 50-plus, with off-net sitcoms—and particularly animated sitcoms—skewing by far the youngest. A few talk shows appeal to the younger set, including Warner Bros.' *The Real*, Debmar-Mercury's *Wendy Williams* and NBCUniversal's conflict talkers *Maurry*, *Jerry Springer* and *Steve Wilkos*.

The household talk leaders—CBS Television Distribution's *Dr. Phil*, Disney-ABC's *Live With Kelly and Michael* and Warner Bros.' *Ellen DeGeneres*—all tend to be watched by older audiences, with *Phil*'s median age 61.6, *Live*'s 61.1 and *Ellen*'s 59.4, marking a four-year jump this year from last. The conflict talkers all come in about ten years younger, while *The Real* is by far the youngest talker with a median age of 46.4.

"We're always looking to do balanced shows that attract audiences that span the 18-54 demographics," says Ken Werner, president of Warner Bros. Domestic Television Distribution.

While syndicators are working to attract younger audiences, there are certain realities that must be faced—younger people tend not

## WHY THIS MATTERS

Syndicated TV tends to skew older; to build for the future, producers need to offer younger viewers a way in.

to be available to watch daytime TV, and if they are, they aren't watching it in the same way their parents did, while it's older people who are available to watch in daytime.

"We aren't looking to be young, but balanced. Otherwise, you end up alienating your existing audience," says Werner.

*Wendy Williams* is a good example of that. Now in its sixth season, *Wendy* broke the 2.0 household barrier in the week ended Feb. 22 to hit a series high. Compared to last year, *Wendy* is up 14% in households, 11% among women 18-49 and 9% among women 25-54. Interestingly, though, the show is down 13% among younger women 18-34.

Part of *Wendy*'s appeal is her authenticity, something to which millennials in particular seem to respond. "Does it get any more authentic than *Wendy*?" says Teicher, who heads ad sales for both Twentieth and Debmar-Mercury's produced and distributed programs. "She's relatable, real and she doesn't take herself too seriously."

All of the entertainment mags are active on social media, but Twentieth's *Dish Nation* and Warner Bros.' *TMZ* are the youngest, with median ages of 47.9 and 48.1, respectively. Tri-fecta's *OK! TV*, averaging a 0.2 in households season to date, is the third-youngest-skewing magazine with a median age of 53.2.

What these younger shows have in common are robust presences on social media that keep fans constantly engaged. For example, during the Grammys, *Dish Nation* followed singer Austin Mahone on the red carpet, live-tweeting his actions. Those tweets were retweeted frequently by Mahone's followers, pushing traffic to *Dish Nation*'s website and raising awareness about the show.

*Dish Nation*'s talent, which are drive-time radio disc jockeys from around the country, also tweet and post on social media during pop-culture events, such as Wednesday night airings of Fox's new hit, *Empire*.

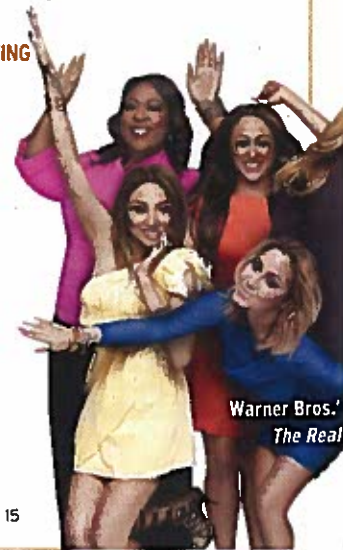
"That's how we reach a new younger audience," says Brown. "We develop relationships with YouTube stars, Vine stars and other young artists and do Web exclusives with them that we can put on *Dish Nation* and elsewhere." ■

## WHAT YOUNG WOMEN WATCH

Below are the current syndicated talk shows ranked in order of audience composition of women 18-34. These shows have the largest audiences—although not necessarily the highest ratings—among this key young demographic.

SHOW	MEDIAN AGE	AUDIENCE COMP	AVG. HH RATING
Warner Bros.' <i>The Real</i>	46	23%	1.0
NBCU's <i>Maurry</i>	50	19%	2.0
NBCU's <i>Jerry Springer</i>	51	16%	1.3
Debmar Mercury's <i>Wendy Williams</i>	53	16%	1.6
NBCU's <i>Steve Wilkos</i>	52	15%	1.5
SPT's <i>Queen Latifah</i>	58	10%	1.0
CTD's <i>Rachael Ray</i>	59	10%	1.4
Warner Bros.' <i>Ellen DeGeneres</i>	59	10%	2.8
CTD's <i>The Doctors</i>	62	10%	1.0
SPT's <i>Dr. Oz</i>	59	9%	1.5
NBCU's <i>Steve Harvey</i>	60	9%	1.9
NBCU's <i>Meredith Vieira</i>	61	8%	1.2
CTD's <i>Dr. Phil</i>	62	8%	3.2
Disney-ABC's <i>Live With Kelly and Michael</i>	61	7%	3.1

Source: NSS, Galaxy Explorer, Live-plus same-day AA ratings, season to date through Feb. 15



Warner Bros.' *The Real*

By Jessika Walsten

# Millennials Quest Recalls TV's Focus on Young and Restless

Since the dawn of television, advertisers and programmers have zoomed in on elusive and fickle teenagers and young adults



## ◀ RWD

◀ Nielsen began measuring TV audiences in the 1950s. The early data opened the door for advertisers to target specific viewer demographics, including the coveted 18-to-34-year-old set. The company took ratings a step further in the 1980s with the "people meter," which provided more precise measurement.

◀ Music has long played a role in bringing younger viewers in. Series such as *The Ed Sullivan Show* (1948-71) and *American Bandstand* (1952-89 in various forms) were appointment viewing. A staggering 73 million



*American Bandstand*, hosted by Dick Clark, brought the brightest stars of music's Top 40 to young television viewers for almost 40 years.

## FF ▶

▶ The "what they want, when they want" TV ment has been a hallmark of millennials. With multiple view options, they can customize their experience. The advent of YouTube in 2005 gave millennials the chance to not only watch clips whenever they wanted, but to create their own content as well.



▶ Apple's iPhone burst onto the scene in 2007, completely changing how the group watched content. With smartphones and tablets in the generation's pockets, brands have to find innovative ways to target millennials and break through the clutter.

▶ "I've had a conversation with my own child where she didn't even know what one of the major television networks was because she watches everything on tablet," DAWN OSTROFF, president Condé Nast Entertainment, told moderator and B&C editor-in-chief MELIS: GREGO during NYC Television We last November. "She didn't know what I was." Before joining CNE, Ostroff helmed the young adult-skew network The CW, helping launch shows including *Gossip Girl* and *90210*.

Apple's helped TV Ever a rea



people (60% of American televisions) turned on *Ed Sullivan* in February 1964 to watch *The Beatles'* U.S. TV debut.

▶ Creativity in the TV advertising landscape, especially targeted at brand- and government-wary youth, ramped up in the 1960s. Companies including Pepsi ("Think Young" and "Pepsi Generation") and Coca-Cola ("I'd like to teach the world to sing") came up with catchy slogans targeting young adults.

▶ MTV launched on Aug. 1, 1981, the same year the first millennials were born. (Researchers generally define millennials as those born between '81 and 2000.) The cabler put the music video front and center and used in-your-face graphics and major musician endorsements to get young adults to say, "I want my MTV." MTV's popularity with adolescents continues today, though the brand has shifted away from music videos and *Total Request Live* to programming such as *Teen Wolf* and *Catfish*.



MTV's iconic Moonman made his first giant leap in 1981.

▶ Advertisers and programmers alike have done tremendous amounts of research to try to find out what makes millennials tick. In January, ZenithOptimedia suggested five ways to help companies reach the generation: humanize your brand; create meaningful assets; create purposeful value exchange; orient to user experience; and share customers' stories.

▶ "While millennials might seem a very carefree audience, obsessed with social media and celebrities, scratch below the surface and you will discover very savvy discerning and astute consumers," LINDA TAN, strategic insights director, worldwide, ZenithOptimedia, told B&C in January.



Pepsi spent millions telling youngsters they were part of the "Pepsi Generation."



▶ In 1999, when the first millennials turned 18, TiVo came along, giving viewers the ability to pause and rewind live television. "Consumers can watch what they want, when they want and never miss a minute of the action."

—Mike Ramsay, former TiVo CEO, describing the service upon its debut

# Youth Will Be Served, But 'How' Remains In Question

Latest data on video usage shows rapidly changing but complex habits for the 18-34 set



By George Winslow

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IT IS ARGUABLY one of the most important issues facing the future of TV—the way swiftly evolving viewing options have placed millennials at the content crossroads. One road leads to connected multichannel TV viewing, the other to a stream of unconnected digital options.

Many press accounts see millennials taking the newer route, tagging their embrace of over-the-top video as long-term trouble for the \$150 billion TV industry. Others argue that young people have always been slower to subscribe, and that once they get out of school and start families, they'll return to multichannel TV, and all will be well. The reality, as usual, is far more complex, as new key data points suggest (see charts, opposite page).

Despite widespread predictions of an imminent collapse, total multichannel TV subs fell by only 0.2% in 2013, and only 0.1% in 2014, according to research from MoffettNathanson, with similar small declines being reported by SNL Kagan and Magna Global.

That prompted Magna Global to revise upwards its estimates of U.S. multichannel TV subs. It is now predicting that the number will fall from 103.6 million in 2014 to 103.4 million in 2015 and 102.9 million in 2018. That would still be above the 101.1 million subs reported in 2005 but below the peak of 104.3 million U.S. subs in 2009.

It has long been known that younger people have lower levels of multichannel subscriptions than the general population, and some data suggests that their higher usage of streaming video makes them even less likely to subscribe. "Their penetration rates have been declining," said Dounia Turrill, Nielsen senior VP, Insights.

## WHY THIS MATTERS

TV players will have to adapt to the habits of the millennial generation if they hope to prosper in coming years.

Overall, the number of people aged 18-34 with a multichannel subscription fell about 2.3% between the fourth quarter of 2013 and the fourth quarter of 2014 to 57.8 million, Nielsen reports. Interestingly, declines are also occurring in the number of millennials in broadcast-only homes and among those with only broadcast and broadband, two categories that tend to include cord-cutters and cord-nevers.

## Tech and TV

There is little doubt that younger age groups such as millennials have embraced smartphones and streaming video devices much faster than the general population. A recent survey by Frank N. Magid Associates, for example, found they spend about 32% of their video viewing time with streaming video, nearly as much as their live TV viewing (34%), notes Maryann Baldwin, VP at the firm.

Nielsen meanwhile is reporting a precipitous decline in their traditional TV viewing. Between the fourth quarter of 2011 and the fourth quarter of 2014, the amount of live and on-demand TV viewing fell by nearly five hours a week by those aged 25-34 and nearly seven hours for those aged 18-24.

Those figures are, however, contested. Programmers contend these declines reflect the fact that TV viewing on mobile phones and other devices is not being measured.

While the number of multichannel subs is relatively flat, Magna Global estimates that the number of homes that primarily access

video content over the Internet will grow from 7.3 million in 2014 to 9.4 million this year, and to 15.9 million in 2018.

At the same time, pay-TV subs have not kept the same pace, noted MoffettNathanson in a recent report. "It appears that 1.4 million homes [in 2014] have cut [or never had] the cord, the highest 12-month total yet," the analysts noted.

A variety of surveys have also found that millennials are much more likely to cut the cord

## MILLENNIAL MULTIPLATFORM VIEWERS

A glimpse at the future of TV viewing can be found in the habits of millennials (18-to-34-year-olds) who watch at least one hour of video a day and spend 20% of their viewing time streaming TV or video programming. Data shows what percentage of their total viewing time is spent in each area.

Live TV.....	29%
Computer.....	20%
Stream to TV.....	19%
Mobile.....	17%
DVR.....	10%
VOD.....	5%

Source: Horowitz Research study, *Multichannel and SVOD Services in a Multiplatform Environment*.



and rely on over-the-top video, noted Paula Minardi, digital TV marketing manager, Ooyala, who authored a recent report on the subject.

But recent surveys from Magid and Horowitz research also highlight widespread interest in TV programming. Horowitz Research, for example, found that over three quarters of those aged 18-34 cited the value of having a large variety of channels as one of the key advantages of a multichannel subscription. "Millennials are an opportunity wrapped in a challenge," said Howard Horowitz, president of the firm, who believes that networks and operators have an opportunity to thrive in the emerging OTT landscape if they craft offerings and services targeted to the habits of millennials. ■

## KEEPING WATCH

For more on how the viewing habits of millennials are continually shifting the TV industry, go to [broadcastingcable.com/March9](http://broadcastingcable.com/March9).