



JOSH GORDON
— GROUP —

What Do Younger Viewers Want From Local TV News?

Comparisons between the four age groups comprising the US local TV news audience

 ONE Media 3.0
SINCLAIR
BROADCAST GROUP

Conducted by:
Josh Gordon, President
The Josh Gordon Group

Sponsored by One Media 3.0,
a Division of Sinclair Broadcast Group

Introduction

As a business, local TV is profitable with strong audience support. But there is growing evidence that younger Americans are watching local broadcast TV news less frequently than older Americans. With an eye toward the future, this project looked for strategies to bring back younger viewers.

This survey asked Americans about their attitudes and behaviors regarding local TV news and compared their responses across the four main age categories of the adult US television-viewing audience:

- Generation Z: Age 18-21 (adults only)
- Millennials: Age 22-37
- Generation X: Age 38-53
- (Baby) Boomers: Age 54-72

Through these comparisons, we found areas of strength and weakness, as well as ideas for improvement.

This survey was developed by The Josh Gordon Group and sponsored by the ONE Media division of Sinclair Broadcast Group. Results are based on 2,067 completed questionnaires which were sent to a list designed to match the US population based on US Census data.

Special Thanks

The following people helped make this project possible:

Mark Aitken, President of One Media, a division of Sinclair Broadcast Group, greenlighted this project and offered sage advice and guidance throughout the entire process

In addition, four local TV news experts shared their knowledge, helped guide the design of the questionnaire, and contributed insightful commentary included in this final report. They are:

Andrew Heyward, former President of CBS News for nearly a decade, who now leads a research project on local TV news innovation at the Walter Cronkite School of Journalism at Arizona State University

Dan Shelley, Executive Director of the Radio and TV Digital News Association (RTDNA). Previously he had been VP Digital Content Strategy at I Heart Media, and Director of Digital Media at WCBS-TV.

Scott Livingston, VP of News at Sinclair Broadcast Group

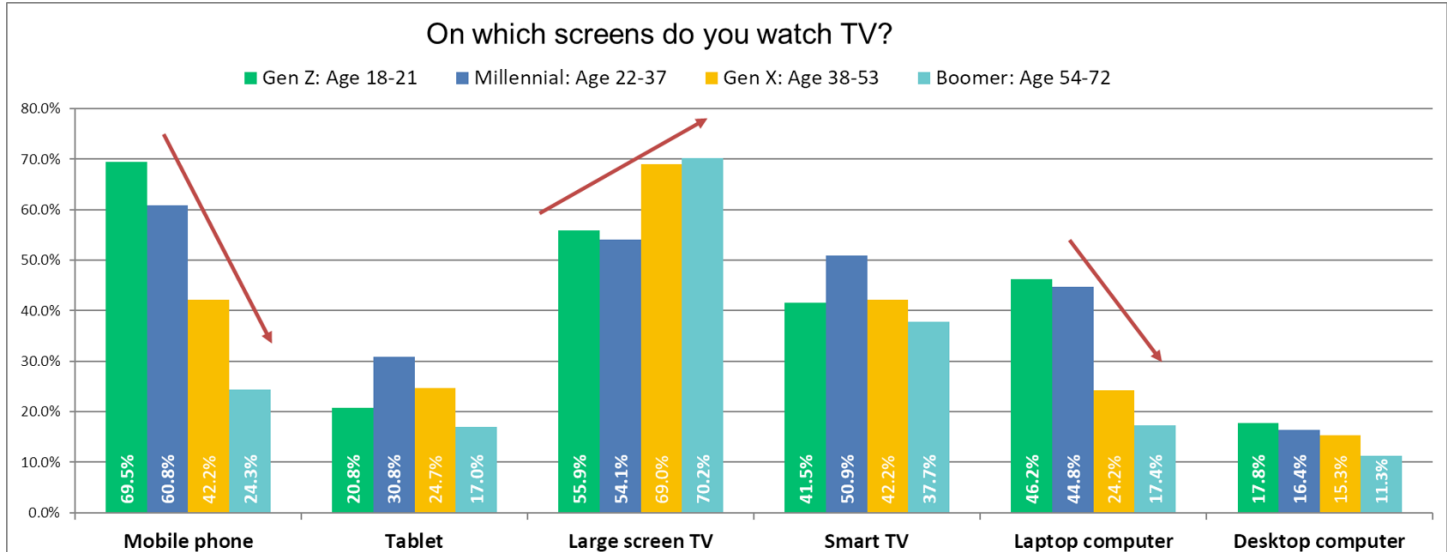
Geoffrey Roth, News Director at KMTV, Scripps TV Station Group, Omaha, Nebraska

Thanks to you all,

Josh Gordon, President
The Josh Gordon Group

Finding #1:

Younger viewers watch a majority of TV on mobile devices, while older viewers watch on large screen TVs



When we asked which screens different age groups use to view television, we found significant differences between the two younger and two older age groups. The most frequently used screens for Gen Z and Millennials were mobile phones, while large-screen TVs were the most frequently used screens for Gen X and Boomers. The younger age groups also significantly preferred viewing TV on laptop computers. These behaviors amount to a “mobile cliff” where many local broadcast news organizations are simply losing younger viewers through lack of easy mobile access.

Commented Dan Shelley, Executive Director of the Radio and TV Digital News Association (RTDNA), “If you want to hit the Gen-Zs and the Millennials, you have to go mobile. Not to be Captain Obvious, but that just sticks out like the proverbial sore thumb.” Scott Livingston, VP of News at Sinclair Broadcasting Group agreed, “You need to meet the consumer where they are. If they are on a mobile platform then that must be our challenge moving forward. We do a great job providing breaking news on mobile. The next step is to produce even more content with a different style and tone for mobile platforms.”

Geoffrey Roth, News Director at KMTV, Scripps TV Station Group, added a personal observation and a cautionary note: “I have two teenage sons, and they very rarely turn the TV on. Their heads are buried in their phones, iPads, and laptop computers. But we cannot put all our news on digital and mobile devices. A lot of people in older demographics either don’t have access to, don’t know how to use, or don’t want to use them. We know that mobile and digital are where the eyeballs are shifting, but they all have not shifted there yet. It’s a balancing act and you have to do both.”

Most local TV stations now offer multiple ways to access their mobile news either through a mobile app, or through streaming channel aggregators like Roku.

Finding #2:

As respondents ranked news stories on how they impact them, “Make me better informed” and “Report something I did not know” earned top scores. “Help me prepare for my day” trailed behind.

Some local TV news stories are more relevant to you than others. Which of the following describe news stories that you find relevant?

Check all that apply.

Local TV news stories that...

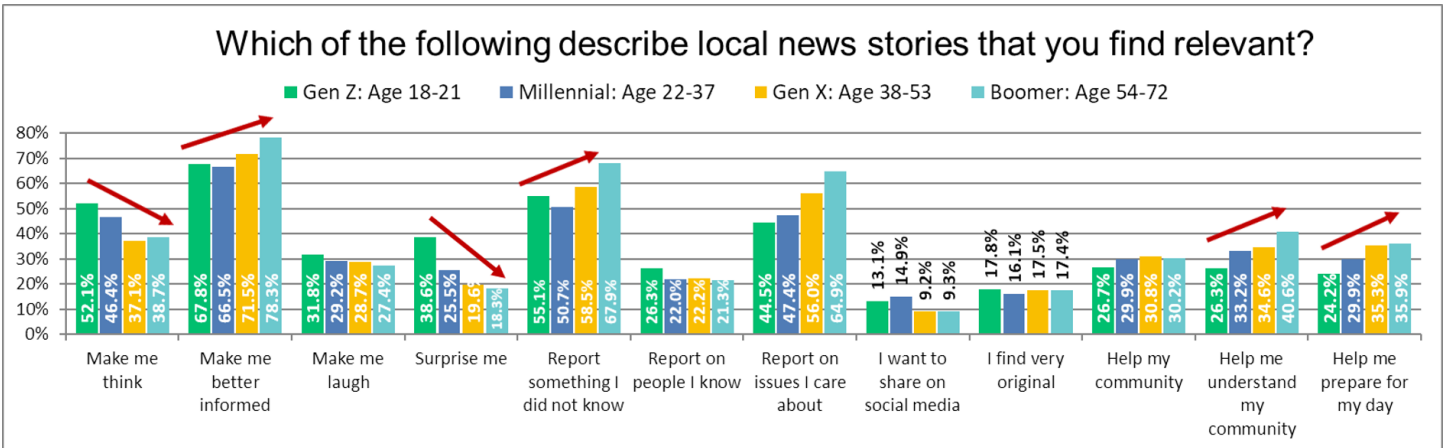
- | | |
|---|--|
| 1. Make me better informed, 71.5% | 7. Help my community, 29.7% |
| 2. Report something I did not know, 58.4% | 8. Make me laugh, 28.7% |
| 3. Report on issues I care about, 55.0% | 9. Surprise me, 23.1% |
| 4. Make me think, 41.9% | 10. Report on people I know 22.5% |
| 5. Help me understand my community, 34.9% | 11. I find very original, 16.7% |
| 6. Help me prepare for my day, 31.9% | 12. I want to share on social media, 11.2% |

To measure how different news stories impact viewers of different ages. We developed a list of twelve descriptions of news stories that describe how they impact a viewer and asked respondents to pick the ones they found most relevant. Not surprisingly the highest score went to “Make me better informed” which is what news does. But the second choice, “Report on something I did not know,” was a surprise, considering it topped all other options including “help me prepare for my day,” which is how local TV news has been promoted for decades.

Finding #3:

Older viewers prefer local TV news stories that “report on issues I care about” “help me understand my community” and “help me prepare for my day.”

Younger viewers want stories that “surprise me” and “make me think.”



The results indicate different mindsets, not only by the preferences the age groups showed, but by the preferences they did not show. For example 38.6% of Gen Z respondents want news stories that surprise them, while only 18.3% of Boomers do. Imagine two individuals sitting in a room beside you who responded to these questions in the way contrasted above. How would you shape a local TV news story for each? How would you tell the same story for each?

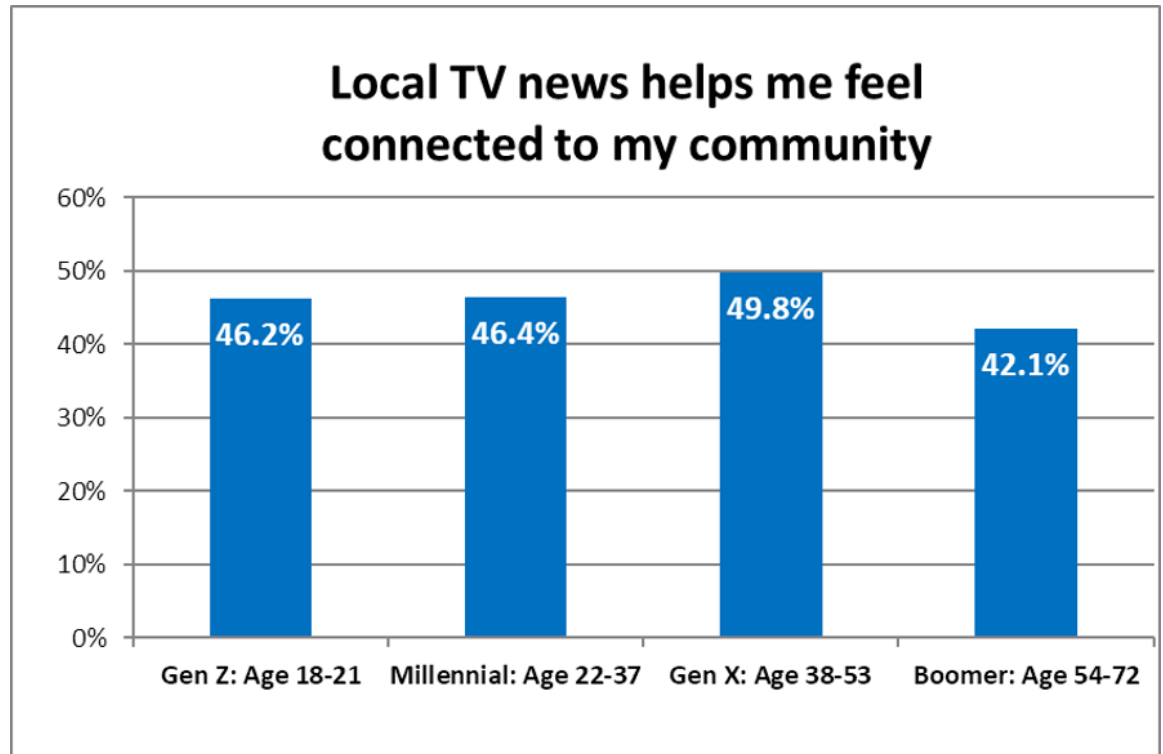
Dan Shelley saw synergy between the results of two local news story characteristics: “The combination of scores for “Surprise me” and “Report something I did not know” indicate a desire for better journalism. Put those two numbers together and that is a critical takeaway. When I was running newsrooms, I would tell reporters and producers to find stories that people don’t know about but when they hear them they say, “Wow, I’m really glad I know that now.” Andrew Heyward saw a similar relationship: “Report on something that I didn’t know” strikes me as almost a proxy for originality.”

Heyward also noticed that some news categories we expected to perform well did not: “‘Help me prepare for my day’ and ‘Help me understand my community’ are not blockbusters here, and both do better among older viewers than younger ones. Based on this, news departments need to find new ways to promote the value of local TV news to younger people, because that value is not now being recognized.”

Scott Livingston saw an indication of the importance of investigative journalism: “Since the goal of investigative journalism is to dig up information not seen before, it is truly ‘Tell me something I did not know before’ content.” Said Livingston, “A project we launched that focused on the Baltimore public education system produced 220 stories over a period of 25 months. The stories were not found anywhere else, made a positive impact on our public schools, and helped our ratings.”

Finding #4:

Local TV news helps viewers feel connected to their community regardless of their age.



To better understand the basic strength of local TV news we asked two questions in which respondents were asked to place value on local TV news without any reference to what kind of organization created it or on which device it was being viewed. In short, we wanted viewers to place a value on local TV news without reference to local TV broadcast stations.

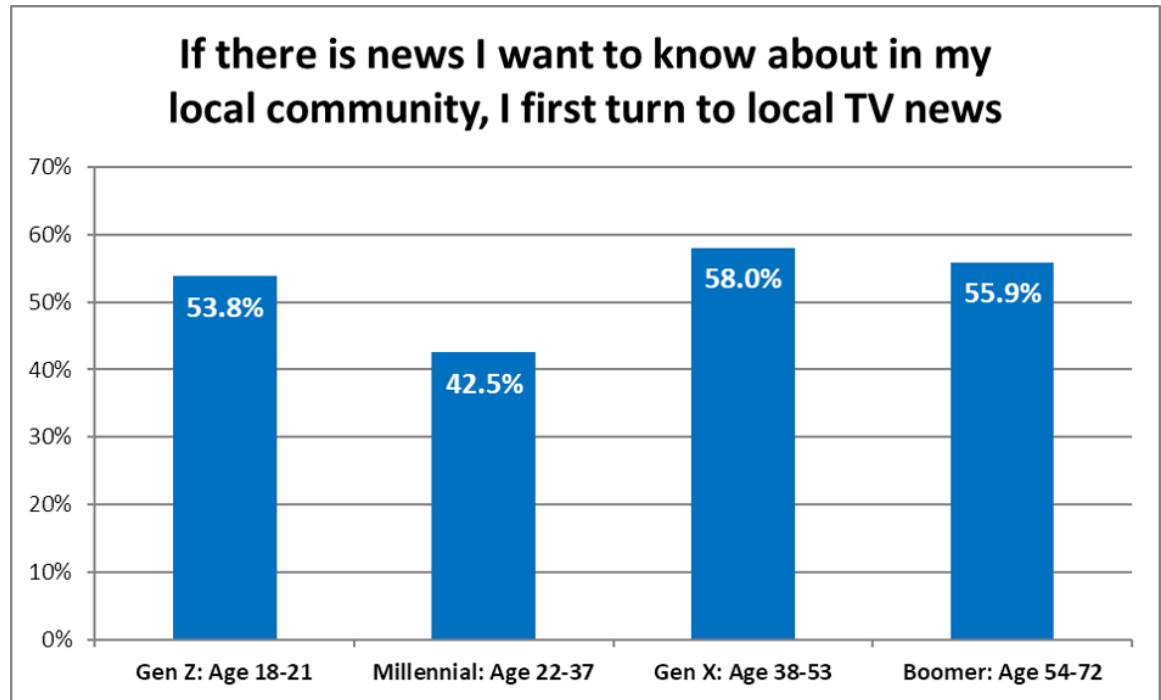
The first question asked if local TV news helped respondents feel connected to their community. Respondents from all four age groups reported almost identical value with no fall-off among younger viewers.

Shelley commented, “This is very encouraging. Across all demographic groups there are at least a plurality of people who believe that local TV news helps them feel connected to their communities, even among Generation Z and Millennials.”

Heyward added, “I find this surprisingly positive. But feeling good about local TV news does not mean that younger viewers are going to run home to watch a linear TV broadcast. There are behaviors that are deeply baked into the lifestyle of younger people.”

Finding #5:

Among all ages, watching local TV news is the first way to find out about local news.



This question asked viewers if local TV news was the first place they turn to for news in their local community. Again, there was even response across all four age groups except for a small dip from Millennials.

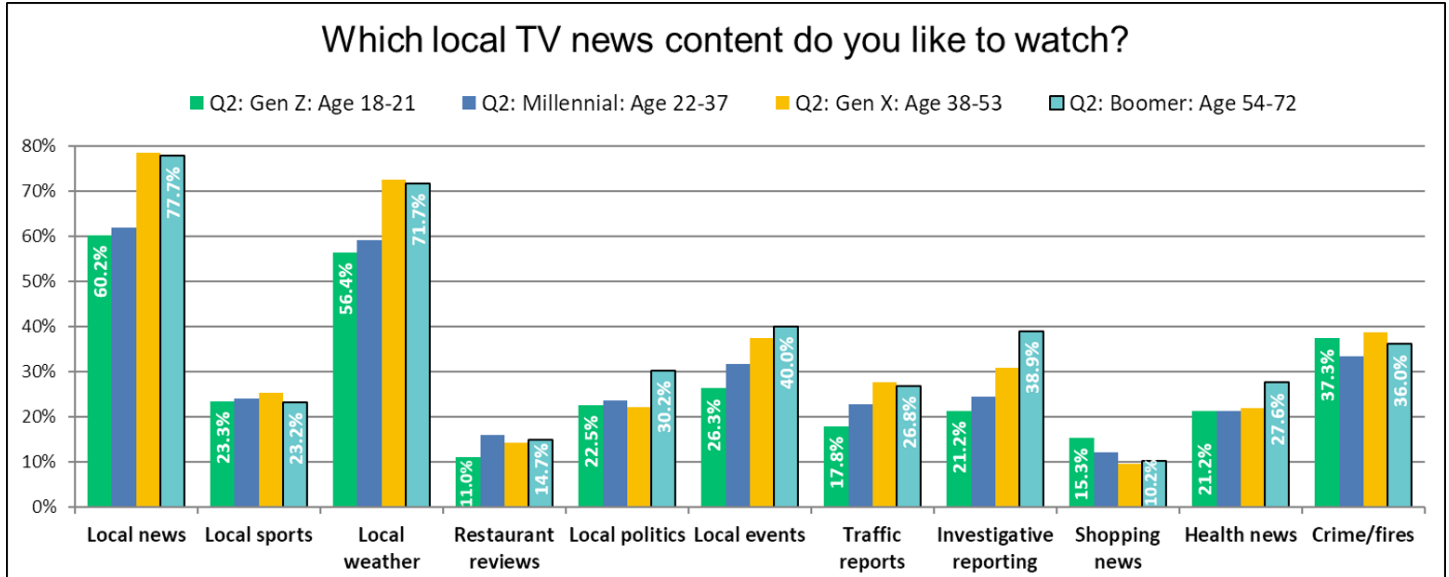
Commented Shelley, “It is not surprising that Millennials lag behind the other demographics, including Gen Z. Millennials, right or wrong, have the reputation as being somewhat disengaged. They lag behind the other groups because it may just be part of who they are.” Livingston, also noticing the Millennial dip added, “I think it is a myth that Millennials are so connected online that they don’t watch local TV newscasts. If we can provide context and perspective, they will see the value. But we have to prove it, night in and night out.”

Roth added, “I was pleasantly surprised to see the number for Gen Z was higher than for Millennials. That gives me hope that what we do is still relevant to people no matter what their age.” Said Heyward, “I would have expected to see social media as the first place younger viewers would go. This finding suggests that there is an appetite for local TV news even among young people that conventional wisdom does not recognize.”

The results of this finding and the one before question indicate there is a basic value placed on the idea of “Local TV News” that is evenly shared across all age groups.

Finding #6:

News and weather dominated viewer preference in traditional local news categories, with greater preference among older viewers than younger ones.



In this question we asked respondents to select all local TV news subject categories they like to watch. This list of categories was designed to be typical for local TV newscasts. The list started out a little longer, but through a pre-test survey we eliminated the following categories that scored very low: “local shopping news”, “local health news”, and “local savings tips.”

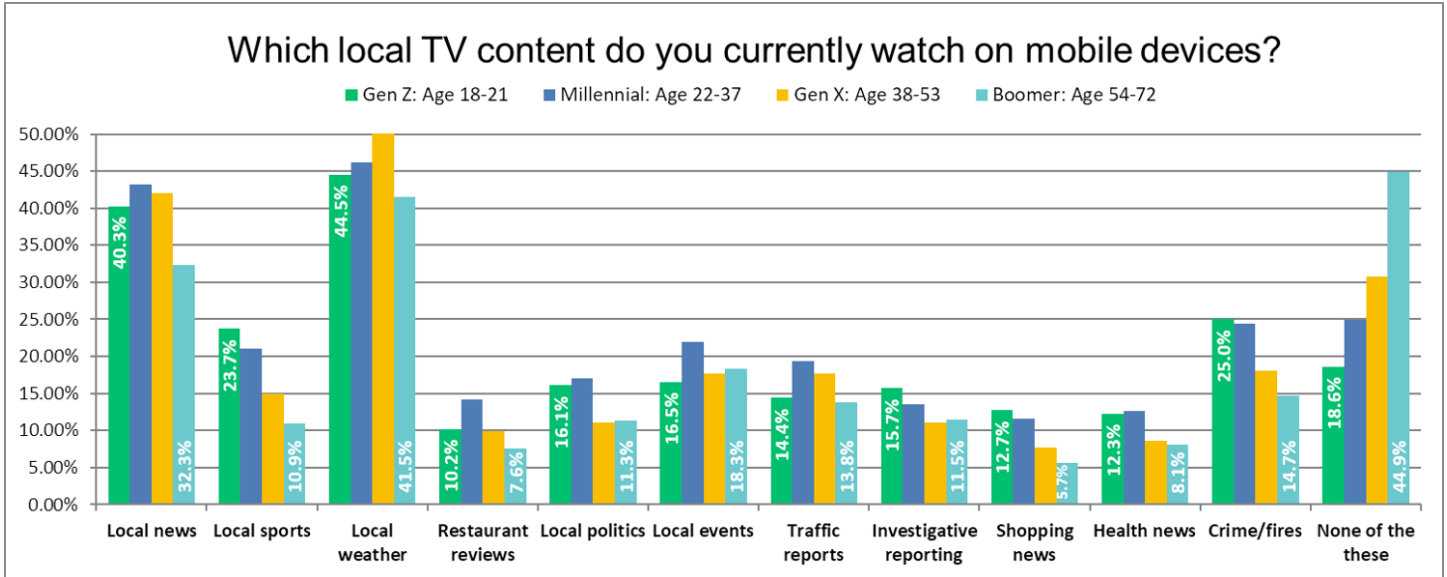
In the final results, local news and weather dominated the responses, followed by crime/fires, local events, and investigative reporting.

Commented Shelley, “The lead categories of local news and local weather across all age groups are consistent with what the industry has known for a long time.” Roth was encouraged by the overall volume of response: “No matter what the age group, viewers still want information. That is very encouraging. Day to day, local news and weather are the main drivers no matter what their age is.” Livingston agreed: “The good news is younger viewers are consuming a ton of video content. That’s good. The onus is on us to provide content that is relevant, and that they care about.”

That said, for most news categories, there were more viewers in the two older age groups than the two younger age groups. Heyward, noting that the news categories were typical for traditional local TV news, suggested there could be non-traditional categories that younger audiences would find more interesting: “More research needs to be done to find out what other sources of news younger viewers are using. There are wonderful websites and apps that skew to the interests of young people that can give us ideas. Younger viewers might want reporting on online gaming, fashion, health, or restaurant reviews that are different from how TV stations now cover those subjects.”

Finding #7

When asked which local TV news categories they watch on mobile, scores for younger viewers were much higher in contrast to older groups, with almost half of Boomers watching no mobile local TV news at all.



In Finding #1 we saw a dramatic shift toward mobile TV viewing for the younger two age groups. Here we looked for an indication of how much younger viewership might increase by just improving local access. We used the same list of local news categories from the previous question about which local TV news content respondents like to watch, but this time asked respondents to select which categories they are now watching on mobile. In contrast to the previous chart, Gen Z and Millennials showed stronger scores than older viewers, suggesting that easier mobile access could increase viewership among younger viewers.

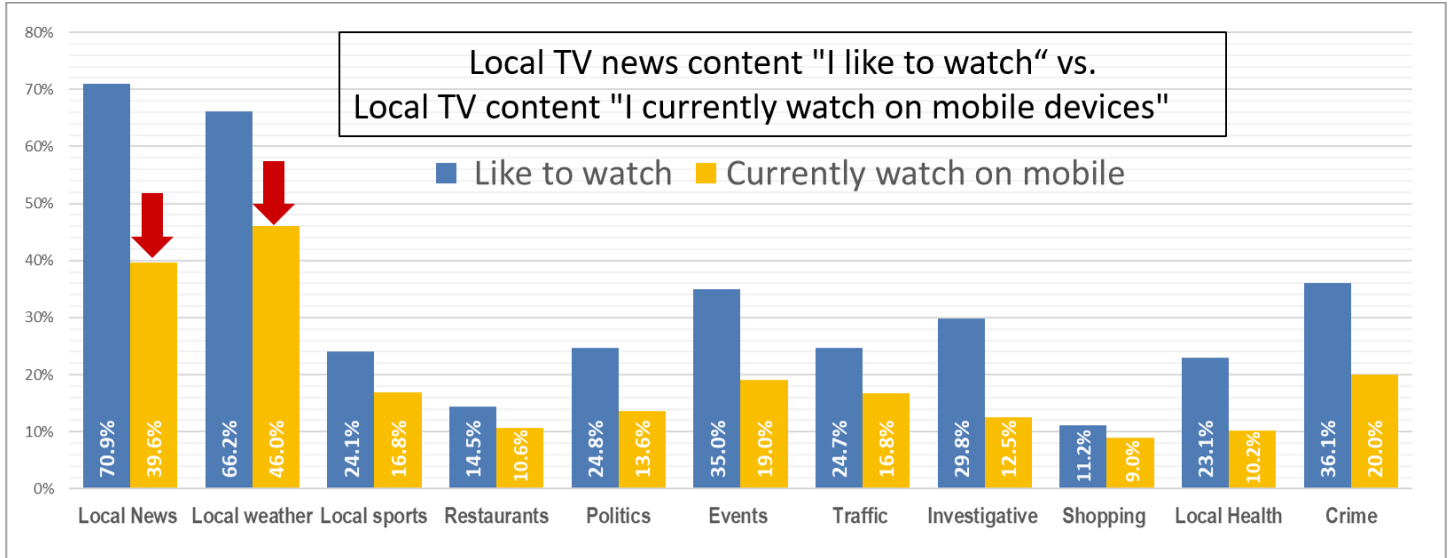
However, the overall scores for mobile TV viewing documented in this question are substantially lower than in the previous question about general TV viewing. For example, the scores for local TV news and weather among viewers who watch them are between 60 to 80%, but the scores are only 40% to 50% for those who watch them on mobile. This suggests that local TV news needs to attract more mobile viewers overall.

Finally, almost half of Boomers selected “none of these” to describe which TV news categories they watch on mobile.

Concluded Heyward, “The value of this survey is that it gives stations areas to dig more deeply into their own markets. If they can find what mobile viewers are consuming in their markets, they can leverage that into more eyeballs and revenue. These findings can be a first step in figuring this out.”

Finding #8:

Local weather coverage could be an opportunity for local stations to improve mobile viewer engagement.



An unexpected flip came from comparing how many respondents said they like to watch local news categories versus how many say they watch the same categories on mobile devices because the two lead categories switched places for the top score. In general, more viewers like to watch general local TV news over local TV weather. But on mobile, local TV weather gets more viewers. Said Shelley, “If you are out driving or at an outdoor event and see a dark cloud, the best way to get weather information used to be radio. Now it’s on mobile devices.”

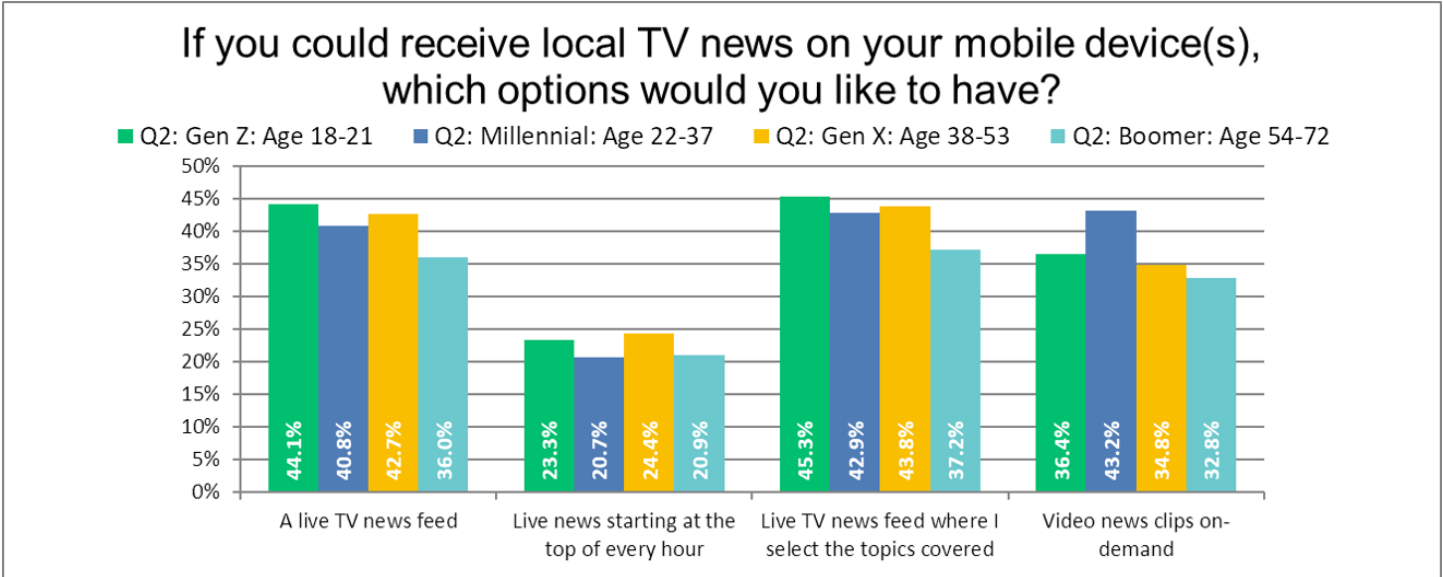
But there is stiff competition in weather on mobile devices from online weather services like WeatherBug or The Weather Channel. How can local TV stations compete with them?

Roth explains how his station does this by focusing on meteorologists, “Weather is a big driver even with lots of weather apps to compete with. But viewers still like to see meteorologists explain what is happening and why. They also like to see timely information as things are happening.” Roth’s station uses Facebook to build a relationship between his meteorologists and viewers: “Four or five times a day our meteorologists do live Facebook weather updates. It is very informal. As they talk though their weather charts, viewers type in questions, turning the live event into a weather conversation. It’s a great way to connect our audience to our weather team.”

Livingston added an approach his station group uses during extreme weather conditions: “Instead of preempting programming for severe weather conditions, we often drive viewers to digital and mobile platforms where we provide continuous coverage. This becomes moment-driven video as we provide coverage before, during, and after the event.” In short, local TV news competes with services like WeatherBug by offering more than just the temperatures. They can offer a relationship with meteorologists who explain the “how” and “why” of weather.

Finding #9:

When asked which NextGen TV News delivery options they want most, “Live TV News where I select topics covered” was first followed by “Live TV News” among all age groups.

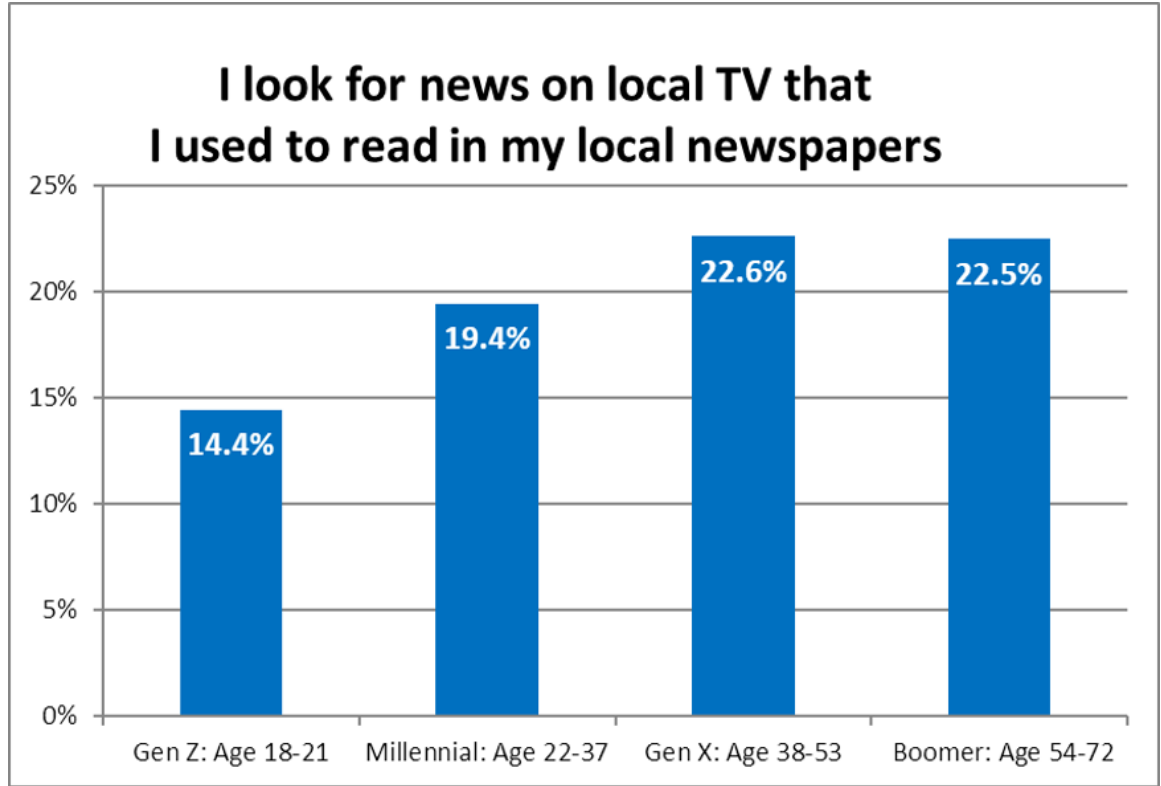


ATSC 3.0 will enable smarter forms of local news delivery. The top option selected “Live TV news feed where I select the topics covered” will be enabled using the new standard.

According to Shelley, “‘Live TV’ is a close second to ‘Live TV news feed where I select the topics covered.’ This is reflective of general consumption habits of the on-demand media economy.” Livingston saw benefit in having viewers select the content categories they are most interested in: “If the viewer selects the content verticals that are important to them, it offers an opportunity for discovery as they dig deeper into content they most want to watch.”

Finding #10:

About 22% of older viewers look for news on local TV that they used to read in local newspapers. This could be an opportunity for local broadcasters.



As local newspapers continue to decline can local TV stations pick up the slack?

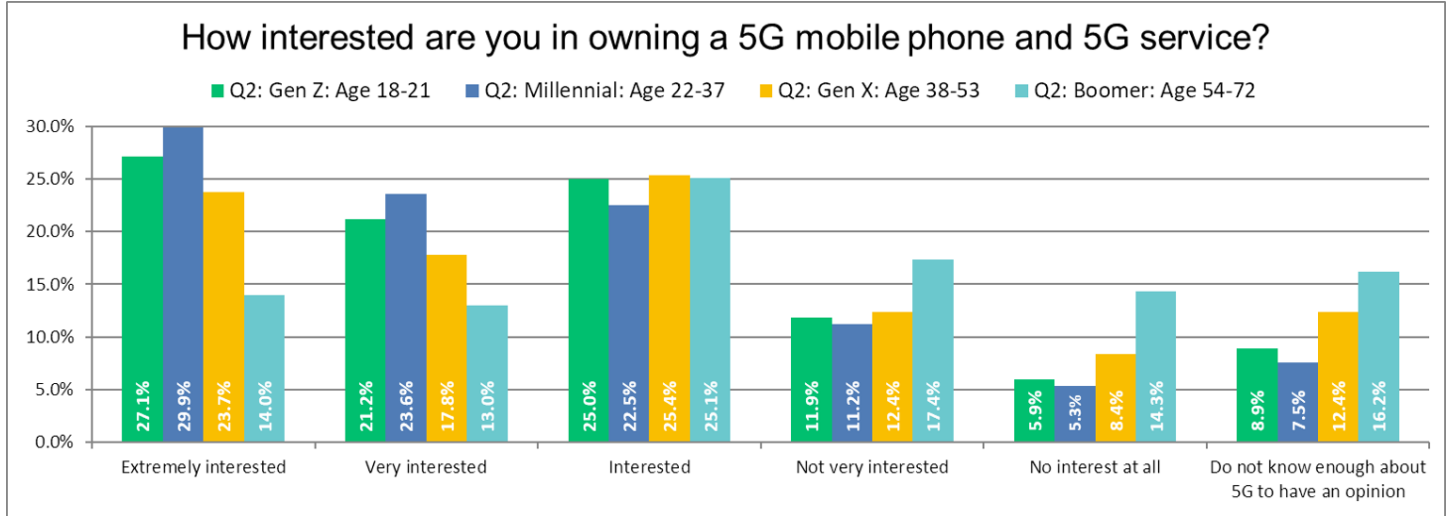
Shelley commented on a finding from an RTDNA study on newsroom staffing levels that his organization had conducted for the past 25 years, “Starting in 2017 our report showed that there are more people employed in local TV newsrooms than in local newspaper newsrooms. This represents an opportunity for TV stations to double down on more local reporting because it is a need that is no longer being met consistently by local newspapers.” Livingston agreed, adding, “The important thing is being the watchdog, an advocate for the taxpayer holding local government accountable. Historically that was always the role of newspapers. Now the onus is on us to be that advocate for the viewer.”

Roth added, “We are doing more enterprise and investigative reporting that used to be the purview of newspapers. Many stations have serious investigative units with staffers hired away from newspapers. In addition, at Scripps we have a national OTT product called Newsy which does serious investigative reporting.”

Both Roth and Heyward were surprised at the high reaction levels of younger viewers to this question. Said Heyward, “I think it is amazing that 19.4% percent of Millennials used to read their local newspaper.” Roth added, “The younger demos are probably are asking, “What’s a newspaper?”

Finding #11:

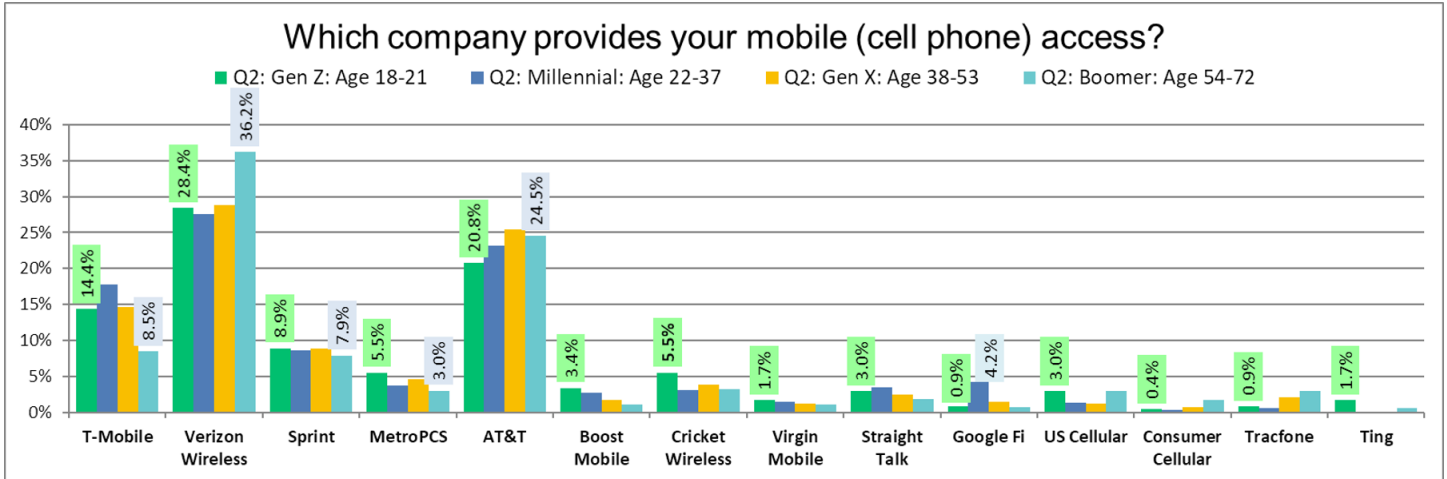
Not surprisingly, younger age groups are more interested in 5G mobile service.



More respondents in the two younger age groups are "Extremely interested" and "Very interested" in 5G than their older counterparts. In contrast, Boomers lead all age groups in the categories "Not very interested," "No interest at all," and "Do not know enough about 5G to have an opinion."

Finding #12:

Verizon is the leading US mobile carrier across all age groups among the larger carriers. Most smaller carriers have their best traction with younger demographics.

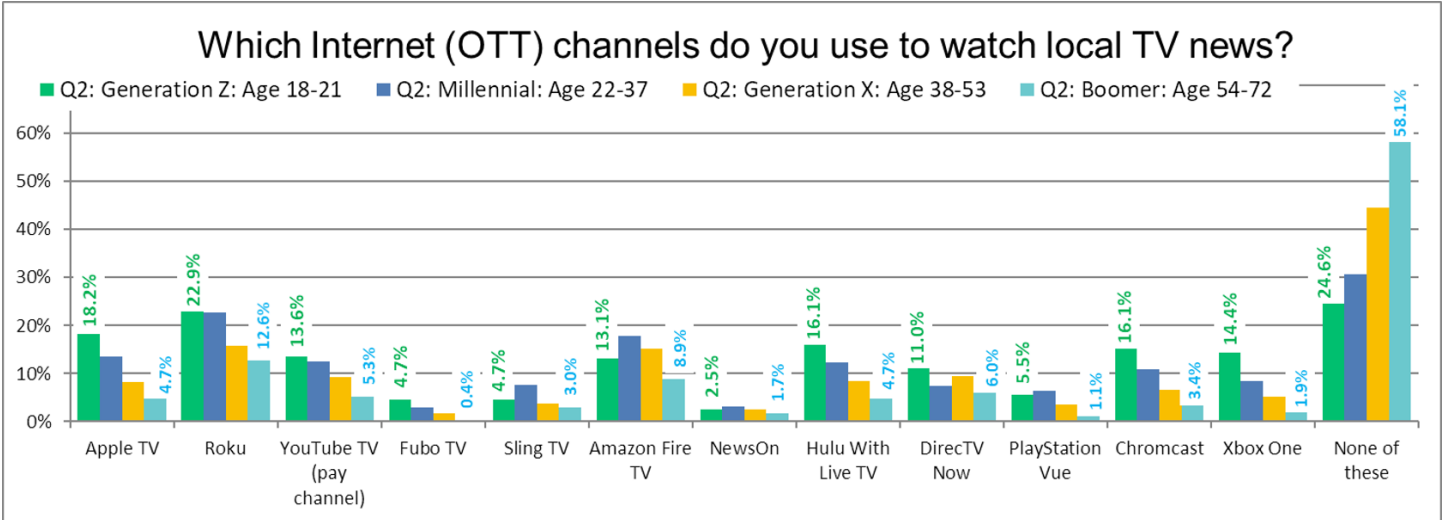


When respondents were asked which carrier provides their mobile service, four carriers dominated, with Verizon and AT&T well ahead of the rest. Looking at this chart it is easy to see why the Sprint and T-Mobile merger made sense, enabling the combined larger company to be better able to compete with Verizon Wireless and AT&T.

Of the smaller carriers, Boost Mobile, Cricket Wireless, Virgin Mobile, and US cellular have their best traction among Generation-Z, likely due to offering lower-cost plans that appeal to younger users. Of the lower tier carriers, only Google Fi has traction with Millennials although Verizon has the most Millennial users overall.

Finding #13:

Internet TV (OTT) content aggregation services are mostly used by the two younger age categories, while a majority of Boomers use none of them.



Right now, OTT Internet TV channels that aggregate content are a highly fragmented market with no clear dominant leader. Roku has the strongest traction with the most subscribers, likely because they are a neutral platform accepting content from any source.

Commented Shelley, “Eventually what you will see is what has happened with virtually every consumer-facing product: These will consolidate into a few large OTT providers.” Roth is also looking to the future: “A lot of us in the industry believe that the eyeballs are shifting to these newer platforms which are being used more by the younger demos. Those are the eyeballs that are going to continue to grow while the older demos will drop off as time goes on.” Least enthusiastic about these OTT aggregators are Boomers, of whom over 58% say they use none of them.

What Do Younger Viewers Want From Local TV News?

This study found that younger Americans are much more likely to watch local TV news on mobile devices as opposed to large screen TVs. We also found that younger viewers have surprisingly different preferences in how they want local TV news stories to impact their lives. Older viewers prefer local TV news stories that “report on issues I care about”, “help me understand my community” and “help me prepare for my day.” Younger viewers want stories that “surprise me” and “make me think.”

We found out that Local TV news viewers on mobile devices have different preferences than the general local TV news audience. On mobile, local TV weather is watched more than Local TV news.

While this study found significant differences in device and content preferences between age groups, it also found that Americans of all ages share a surprisingly consistent value regarding the basic idea of “local TV news.” When asked if local TV news helps them “feel connected to their community” or is where they “turn to first for news in their local community,” respondents of all ages showed surprisingly similar supporting responses.

These findings indicate that there is a basic underlying value in “local TV news” that local TV stations have the opportunity to satisfy. Despite the decline among younger viewers for traditional linear TV news, younger generations see similar value in local TV news, which they may define in their own ways. I see this as an optimistic sign indicating that there is potential for local TV news to come back at TV stations if the reach of local extends to mobile platforms..

Josh Gordon, President

The Josh Gordon Group
www.JoshGordon.com