

Generation STREAM

GLOBAL EDITION

Presented by Disney Advertising



Global Streaming Snapshot

Disney Advertising and Culture Co-Op,
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Disney Advertising

With access to content transcending borders and platforms creating more parity across regions, global streaming has officially become mainstream.

It's become a universal truth that streaming has unlocked content for anyone, anytime and anywhere. Today's 'prime time' can be at 9:00 am on a phone while commuting to work (a trend we cover in **The Daytime Zone**) or at 2:00 am on a laptop in bed.

Now, streaming is breaking even more barriers by expanding access to long-form content in any language, from any country. 96% of Global Streamers¹ say that they watch at least some content from other countries, and a majority (55%) say they regularly or always stream internationally. There are commonalities in why viewers stream, signaling that moods, emotions, and motivations behind streaming are not limited by geography.

The result? A new generation of borderless streaming that's reshaping audiences' connections to content, culture, and one another. "This is a pivotal and exciting time for us to redefine the impact streaming has on the global entertainment industry, rethink consumer marketing strategies and amplify the power of storytelling from APAC," says Sally Sunah Baek, Executive Director, Integrated Marketing, Korea. "With streaming being inherently cross-border, the possibilities are limitless, and great stories have the power to resonate globally."

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Sally Sunah Baek
Executive Director, Integrated Marketing, Korea

The Cross-Cultural Tipping Point

Jessica, 41, of Seoul, Korea, recognizes how influential Korean content has become, yet Korean shows and movies represent less than a third of what she watches. The majority of her entertainment lineup includes a mix of French, Spanish, and English language shows from the U.S. and the U.K. And Jessica isn't alone. Globally, this cross-cultural streaming mix, which tips international, has become more common than not. 56% of Global Streamers² say they prefer to watch a mix of content from multiple countries compared to content primarily from their own country (44%).

These Cross-Cultural Streamers³ represent over half of streamers not just globally, but also across most major geographic regions (68% of LATAM audiences are Cross-Cultural Streamers, as are 59% of audiences in EMEA, 50% in the U.S., and 47% across select APAC markets⁴) and 11 of the 14 countries we surveyed (see box).

▷ **56%**

of Global Streamers say they prefer a mix of content from multiple countries to content primarily from their own country (44%).

Q:

Which of the following best describes how you stream video content most often?

▶ *Results among total Global Respondents*

Country	I watch a mix of content from various countries and cultures	I mainly watch content from the country I currently live in
United States	50%	50%
United Kingdom	58%	42%
France	59%	41%
Germany	57%	43%
Spain	59%	41%
Italy	63%	37%
Mexico	62%	38%
Colombia	65%	35%
Brazil	72%	28%
Argentina	73%	27%
Chile	67%	33%
Korea	50%	50%
Japan	42%	58%
Australia	59%	41%
Global Total	56%	44%

Global streaming is not just increasing access to audiences' favorite content but changing the range of programming audiences consume altogether.

David, 27, of Guadalajara, Mexico, estimates that 60% of what he watches is "international" content, which he considers to be shows that aren't Mexican or American. In David's case, what he seeks out internationally differs from what he watches locally. Outside of sports, his favorite international shows are fictional stories that bring to life the everyday culture of a particular region (such as fashion, food, music, architecture, and aesthetics). David explains, "I like to see what life is like in other places." However, when it comes to Mexican content, he prefers watching documentaries to fictional stories.

Interestingly, and similar to David, many of the Global Streamers we spoke with sought out content from other cultures that was different from what they could stream, or wanted to stream, in their own country. Global streaming is not just increasing access to audiences' favorite content but changing the range of programming audiences consume altogether.



Key Insight

A majority of people are streaming content from a mix of countries rather than from just their own, changing not only the amount of programming audiences have access to, but also the range of what the world watches.

Cross-Cultural Content Genres

Q:

What types of content from other countries do you watch?

► *Percentages among audiences who watch content from countries other than their own.*



60% Movies



43% Scripted TV



35% Anime/Cartoons



31% Sports



31% Docs/Educational Content



29% Reality TV



23% News & Talk Shows



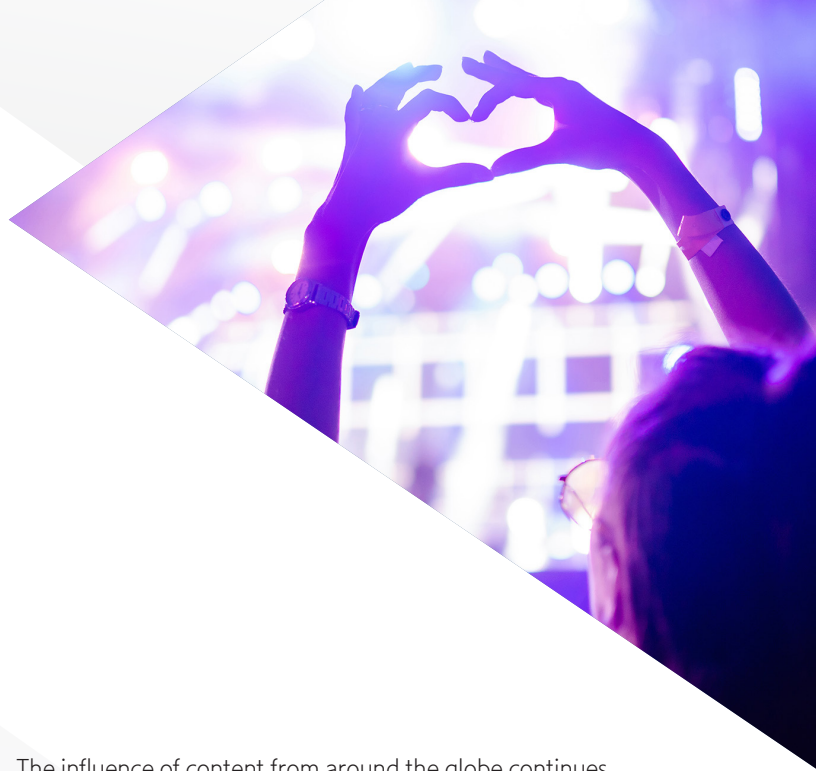
20% Special Events & Concerts

International Influence

In some cases, global content's tipping point has been a generational one. Simon, 50, of London, for example, doesn't stream many TV shows or movies from outside of the U.K., but his 12-year-old son, Otto, does. Otto's favorite genre is Japanese anime. Simon says anime has inspired his son's interest in Japanese food and culture, adding that Otto talks about wanting to live in Tokyo one day. "Obviously [streaming anime] is not like actually being [in Japan] and engaging in the culture, but it can spark an interest."

Enzy, 22, of Los Angeles, California, shares Otto's love for anime, and sees the genre as a bridge to Japanese culture in the U.S. "It helps with representation," Enzy explains. "People from [Japan] in the U.S. can connect to others through it."

◀ As streaming expands access to storytelling across the globe, anime continues to foster a community where audiences connect with diverse perspectives and cultures. Underscoring the broad popularity of anime, particularly among younger generations, nearly one-fifth of Global Streamers (19%), and one-quarter of Gen Z Global Streamers (23%), say they have watched anime in the past three months alone making it the third most popular genre of content streamed internationally (see box). **Anime is just one type of cross-cultural content gaining global popularity. Movies, scripted TV, sports, and documentaries are also increasingly being streamed across cultures and in multiple languages.**



Locally, Korea's pop culture power is referred to as the "Hallyu wave," or the "soft power of Korean culture."

The influence of content from around the globe continues to drive consumption patterns. Jessica, 41, has witnessed Korea's growing global influence through not only anime, but also the popularization of K-dramas. "I've seen it with my own eyes. There's more access to Korean content globally, and it has impacted people in the US and in Europe and in Latin America." Locally, Korea's pop culture power is referred to as the "Hallyu wave," or the "soft power of Korean culture." It includes shows like K-dramas alongside other popular Korean exports, like beauty products and K-pop music.

According to Jessica, part of what makes K-dramas so influential is how frequently they are produced. "Western artists demand much more privacy. They won't let themselves be filmed 24 hours a day the way that Korean stars will." As a result, Korea has an endless stream of K-drama content. "The frequency with which Korea can release content cannot be matched. Every day when you wake up, you have new Korean content on your phone."



An ocean away in Guadalajara, Mexico, David, 27, recently streamed the Lakers vs. the Miami Heat game. Basketball is a passion he shares with his older brother, telling us, “We watch [games] at his barbershop while he does hair.” David doesn’t have a favorite team—although he admits he likes watching the Welsh—and, like most Gen Z sports fans, he is less committed to a team from a specific geographic location. “I just like the sport,” he explains. But even beyond the digitally native Gen Z generation, sports fans these days are as likely to be faithful to their local team as they are to one in a different city, country, or even continent, thanks to new access through streaming. Cross-cultural sports viewing has created a **New Wide World of Sports**, a trend we explore in detail later, which has not only extended who we root for, but what sports we follow and how we experience them.

Global Sports Fandom

Q:

Which of the following best describes your interest in your most watched sport?

► *Percentages among audiences who watch sports.*

- 18%** **No team:** I am interested in the sport; I don’t root for any one team
- 17%** **Not a local or hometown team:** I consider myself an exclusive fan to a team that’s not geographically close to me now, nor where I grew up
- 16%** **Local teams:** I consider myself an exclusive fan to the team that’s geographically closest to where I live now
- 16%** **Hometown team:** I consider myself an exclusive fan to the team that was geographically closest to where I grew up
- 16%** **Local and non-local teams:** I am both a fan of a team geographically close to me now as well as a team that is not
- 16%** **Multiple teams:** I consider myself a fan of several teams and don’t prefer one team



Key Insight

As audiences encounter and stream more global content, they experience new languages, aesthetics, characters, and cultures. As content expands, the world expands.



The Universal Language of Streaming

Tove, 38, of Berlin, Germany, is also an avid streamer of global content, and looks for shows that can expose her daughter to other languages, countries, and her own family's cultural roots. "Nina is growing up with four languages. Watching streamed content has been a way for her to be exposed to these languages in a different way," she explains.

Like Tove, Rie, 38, of Tokyo, Japan, also uses streaming to engage with cultures and languages for her two daughters, ages 2 and 4. Her husband is British, so she mixes Japanese and English shows, like the family favorite *Peppa Pig*, occasionally dubbing English shows in Japanese, but more often leaving them in English with Japanese subtitles (see Streaming Fluency). "By allowing the younger generation to watch foreign video content, they can see and experience various cultures without having to go there," Rie explains. This marks a rise in what we call **Culturetainment**—or experiencing and learning about other cultures through streaming TV and movies—which is the natural evolution of Edutainment, a trend we explore in more detail later.

Streaming Fluency

▶ **87%**

of Global Streamers report they watch content that is dubbed or has subtitles (often or sometimes), and a majority say they'd prefer to stream content *not* in their own language (55%) than to only watching content in their own language (45%).



“I think that my generation is one of the first generations to be so connected with the world and sharing so many practices that are global. It’s like the borders are blurring a bit.”

Vicky, 19
Córdoba, Argentina

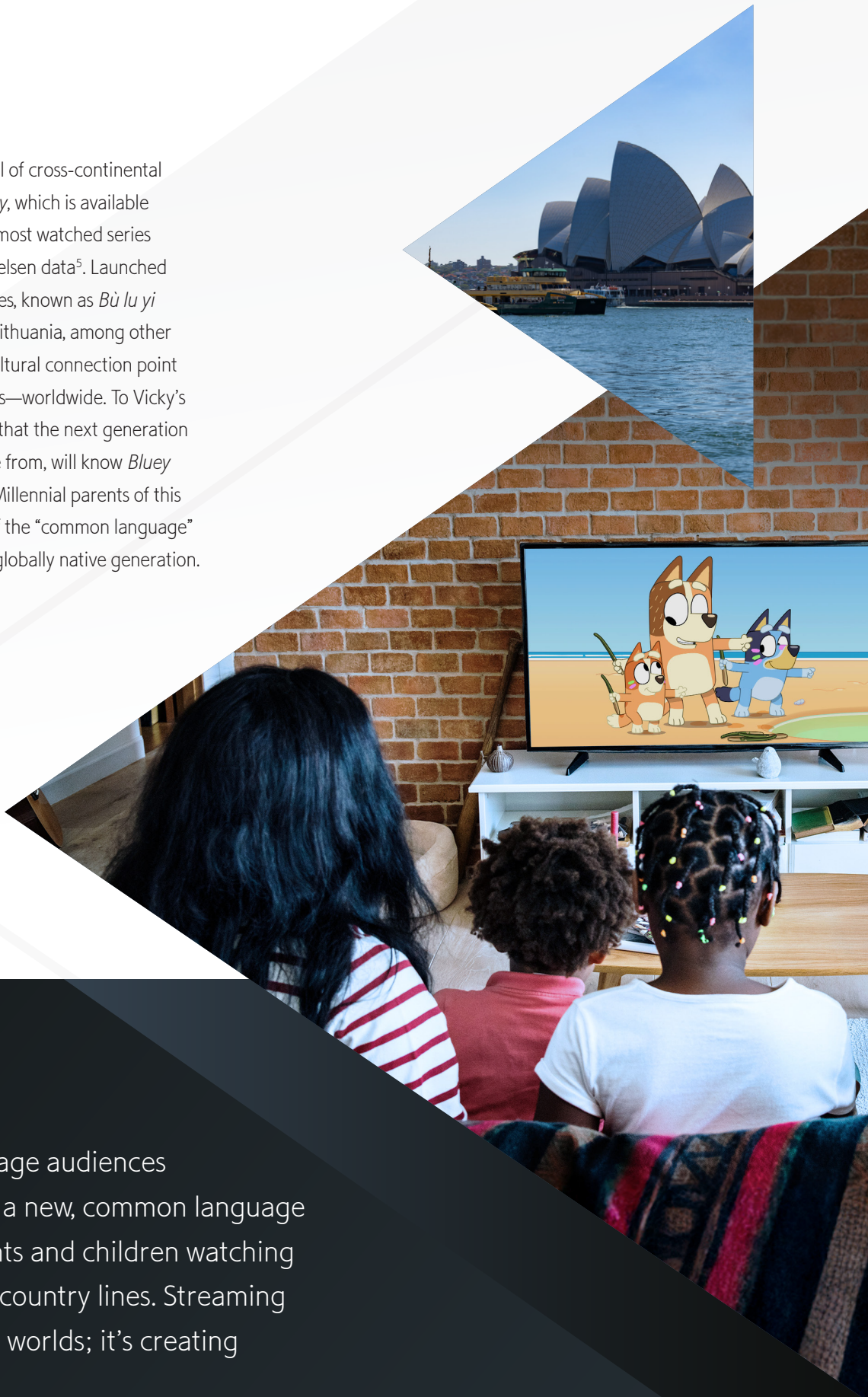


Both Tove’s and Rie’s children are part of Gen Alpha, arguably the first generation of global natives. Rie feels that there’s “a common language developing among children and parents” of younger generations that is not only global-first, but also unprecedented. “The younger generation is the first generation of global citizens,” Rie says.

While a rise in multicultural marriages and partnerships like Tove’s and Rie’s has organically given rise to more globally minded youth, streaming has also played a key role in connecting the cultural dots. Case in point: Simon’s family is not multicultural, nor is Simon particularly interested in streaming global content. Nevertheless, Japanese anime has found its way into his family’s entertainment lineup, thanks to his Gen Alpha son. **In this way, the next generation acts as a gateway into global content and culture that applies to older generations, too.**

While Gen Alphas are considered the first global natives, Gen Z, the generation immediately before Gen Alpha and known as ‘digital natives,’ no doubt paved the way. “I think that my generation is one of the first generations to be so connected with the world and sharing so many practices that are global,” Vicky, 19, of Córdoba reflects. “It’s like the borders [between cultures] are blurring a bit.” **In essence, Gen Zs pioneered cross-cultural connectivity, and Gen Alphas have the technology to more seamlessly share content, further blending borders.**

One of the best examples of the appeal of cross-continental content for the next generation is *Bluey*, which is available in over 140 countries and was 2024's most watched series in the U.S. on Disney+, according to Nielsen data⁵. Launched in Australia in 2018, the preschool series, known as *Bù lu yi* in China, *Blæja* in Iceland, and *Bluji* in Lithuania, among other titles, is a global phenomenon and a cultural connection point for 5-to-7-year-olds—and their parents—worldwide. To Vicky's point about borders blurring, it's likely that the next generation of streamers, no matter where they are from, will know *Bluey* (or *Bù lu yi*, *Blæja*, or *Bluji*), as will the Millennial parents of this generation. *Bluey* is a great example of the "common language" Rie referred to that is fostering a new, globally native generation.



Key Insight

Regardless of what language audiences are streaming content in, a new, common language is forming between parents and children watching shows and movies across country lines. Streaming is not only expanding our worlds; it's creating shared experiences.



The Emotion Quotient

Connectivity across cultures is as technological and generational as it is emotional. The emotions audiences look for and experience while streaming TV and movies—laughter, nostalgia, intrigue, discovery, and comfort, among others—are universal, with very few differences across countries and regions.

Outside of passing the time, or distracting themselves from everyday life, laughter topped Global Streamers' lists of the emotion they seek out most when streaming, with 38% of Global Streamers saying it's what they look for in a TV show or movie. Other key emotional chords that resonated around the world include decompression (34%)—an emotion we fully unpack in *Intentional TV*—learning and thinking (both 26%), getting inspired (25%), feeling love (24%), empathizing (22%), and, of course, what Disney is perhaps known best for—escaping to other worlds (20%). As Dave Powell, VP DTC GM Japan and DTC OPS APAC explains, “At Disney, storytelling empowers people to reimagine their world, inspiring them to imagine new possibilities.”

In fact, 78% of Global Streamers say that they love to stream content that makes them feel deeply emotional. While there were some regional and generational differences in the specific emotions audiences sought most, emotional fulfillment was the common denominator in why they streamed, and a universal language that doesn't need to be dubbed, subtitled, or translated.

▷ **78%**

of Global Streamers say that they love to stream content that makes them feel deeply emotional.



Mood Metrics

Streaming TV and movies is how we change and match our moods most, and 2X more effective than scrolling social media, according to audiences around the world.

Q:

When you want to change or match your mood, which of the following helps you most?

► Percentages are among all Global Streamers

With emotions being a key driver of why we stream, it's not surprising that our moods and a 'human touch' often help us navigate what we want to watch as much as the algorithms that inform content recommendations and 'For You' pages (see ***The Human-Tech Touch***) on streaming platforms. In fact, 83% agree or somewhat agree that the video content they watch greatly depends upon their mood, and as many people say they choose what to watch based on their mood (48%) as they do based on their favorite genres (52%).

What's more, streaming TV and movies is the number one way respondents say they change their mood, or achieve their desired mood—more so than listening to music, sleeping, exercising, or hanging out with friends and family, and 2X more effective than scrolling social media, according to Global Streamers (see Mood Metrics).



31% Watch TV or a Movie

28% Listen to Music

19% Sleep

17% Exercise

17% Hang with Friends or Family

17% Play Video Games

16% Eat

15% Go Outside and Get Fresh Air



15% Scroll Social Media

12% Read

11% Cook

11% Text

9% Work or Study

9% Party or Go Out

9% Do Something Artistic

9% Change my Surroundings

9% Meditate

Enzy turns to retro game shows, like *Family Feud*, to feel comforted; Hollywood documentaries when feeling voyeuristic (or, as Enzy put it, “nosy”); and action-packed anime series for pure escapism. They⁶ particularly love that **streaming delivers not just what they want to watch, when they want to watch it, but how they want to feel, when they want to feel it.** “Sometimes when I feel sad or lonely it’s good to be able to pick a show that I know is going to make me feel comforted as opposed to cable TV where I have to wait until 6:00 pm to watch this show to feel this type of comfort,” Enzy explained. **Streaming uniquely allows audiences to dial up—or dial down—their emotions, which allows them to connect to themselves, others, and the world on a deep, meaningful, and universal level, when and where they want to.**

With emotional fulfillment so central to the streaming experience, this edition of Generation Stream identifies four, distinct segments of Global Streamers (**Global Streaming 360**), largely determined by the emotions they seek from streaming content, as well as the needs that streaming fulfills - on both a cultural and social level.



“At Disney, storytelling empowers people to reimagine their world, inspiring them to imagine new possibilities.”

Dave Powell
Disney+ VP DTC GM Japan and DTC OPS APAC



Key Insight

Streaming strikes an emotional chord that transcends language and culture, and connects global audiences on an instinctual and more profound human level.

For more information on Generation Stream: Global Edition, please visit <https://insights.disneyadvertising.com/generation-stream/global-edition/>

- [1] Global Streamers include all respondents who stream shows and movies at least sometimes. Only 4% of respondents globally reported that they do not stream content.
- [2] Streamers were surveyed in 14 countries: United States, United Kingdom, France, Germany, Italy, Spain, Mexico, Brazil, Argentina, Colombia, Chile, Australia, Korea, Japan
- [3] Cross-Cultural Streamers are defined as the 56% of Global Streamers who say they prefer streaming a mix of content from different countries to content primarily from their own country
- [4] LATAM countries include Mexico, Brazil, Argentina, Colombia, and Chile. EMEA includes the United Kingdom, Germany, France, Spain, and Italy. APAC includes Japan, Korea, and Australia.
- [5] Source: Nielsen. Interval: 01/01/2024-12/29/2024 Rank based on Persons 2+ minutes viewed In billions
- [6] Enzy uses the gender nonbinary pronoun “they”

