



Generation STREAM

GLOBAL EDITION

Presented by Disney Advertising



The Daytime Zone



It's no surprise that audiences today stream on their own time – and outside of the standard nightly ritual, primetime is now all the time. What stands out today is the rise of longform viewing during daylight hours, fueled by flexible routines, increased connectivity, and a desire for entertainment beyond social media.



Like over one-quarter of the global workforce today,¹ Paola, 35, of Bogotá, Colombia, works flexibly, and often from home. She breaks up her workday—and some of the loneliness that comes with it—by watching TV. “Streaming serves the purpose of taking me off my job. Sometimes it is overwhelming to be in the same space without colleagues next to me. Streaming makes me feel like I’m in another place and lets me change my reality for a couple of hours. It makes me feel less alone.”

For many like Paola, a rise in remote work arrangements has created a new cadence of entertainment rituals—and with this new flexibility, TV is no longer limited to the end of the day but can fill the midday moments in-between. Ellie, 26, of London, UK, caught an episode of *Love Island UK* while working from home one day; Holly, 35, of Boston, MA, bonded with her husband over a TV show during “unexpected downtime together” during their workday; and college student Enzy, 20, of Los Angeles, CA, caught a movie midday on their laptop “as I usually do,” they told us. More than three-quarters of streamers (79%) say they enjoy streaming content during downtime in the day, like when they are having lunch.



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Paola, 35
Bogotá, Colombia



Micro Moments of Joy

Beyond just watching a show at lunch, many people told us that streaming TV and movies added a moment of joy to their day, particularly during otherwise monotonous routines—such as during their commute. This is the case for Jessica, 41, of Seoul, Korea, who often finds herself wanting to escape from her surroundings when in transit. “Sometimes when I’m going to a meeting that I don’t want to go to, and it’s hot and crowded on the train, and I’m miserable—packed in like a sardine—I just want to take my mind off my surroundings for the next 13 minutes,” she told us. “So for me, streaming [a show] is a way to keep my mind occupied.” Like Jessica, 37% of Global Streamers report watching longform content during their daily commute. And while being bored during a commute is nothing new, being able to stream a TV show while commuting is.





Today, Wi-Fi and high speed internet connection on public transportation is more the norm than not, and entertainment has followed suit.

“Korea has incredible 4G connection, and free Wi-Fi is available everywhere. I can watch a video anywhere, anytime. Most Koreans I know are watching dramas, broadcasts, anything, on their phones, non-stop,” Jessica confirmed. Rie, 41, of Tokyo, Japan, specifically chooses shows that fit her 45-minute commute, allowing her to turn the journey into some concentrated “me time” away from her two young children. “The show I’m watching now is uplifting and funny, but it involves a lot of details and different scripts. To properly follow it, I needed to focus on my own, on the phone. I want to watch it without interruption.” For Vicky, a Gen Z in Córdoba, Argentina, the benefit of streaming on public transit is simple: “It makes the trip go by much faster.”

In fact, two-thirds of global streamers (67%) say they actually stream more video content on the go than they do at home, marking a seismic shift in not just *when* audiences are watching, but—thanks to the portability of phones and tablets—*where* they are watching. **As audiences stream from more diverse locations throughout the day, brands have a new opportunity to intersect audiences’ lives more often and with messaging that makes sense in a daytime context, rather than just nighttime.**

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of global streamers say they stream more video content on the go than they do at home.



“People are using moments of their own to enjoy media in a way that they have never before. In the past, you needed to stay at home or in a place, now people are watching when they are commuting on the train or are working.”

Professor Juan Piñón
Media, Communication & Culture, New York University



In addition to commutes, audiences are discovering micro moments of joy in their life by streaming as they go about their day. “Sometimes I continue watching [TV] while brushing my teeth, until the very last minute when I have to leave for work,” Tove, 39, of Berlin, Germany told us, adding, “the portability and size of my phone make it perfect for multitasking.” Enzy streams while they are cooking, doing household chores, eating, and getting ready for the day.² Beyond bringing a spark of joy to their day and “lightening the mood,” one of Enzy’s motives for streaming during in-between moments is creating efficiency and balance. “I feel productive, and also like I am creating work-life balance,” they explained. “I’m watching a show as I’m doing the things that need to be done for the day.” This is something Silvia, 24, of Bari, Italy, mentioned as well. “I watch films and TV series while carrying out other activities to optimize my time,” she told us.



Complement to the Social Scroll

Daytime streaming not only marks a shift in when and where audiences are watching TV and movies, but also in *what* type of content they are consuming during daytime hours. While social media scrolling is a default activity for many during downtime in the day, streaming TV and movies offers a different, deeper, entertainment experience to break up social media scrolling. Dr. Lauhona Ganguly, Associate Professor of Global Media Studies at New School, India, explains the connection with TV shows and movies is more intimate, offering a complement to the quick discovery and connection of social media. “Streaming content, even if it’s short form, has a more complete narrative arc that allows for more emotional engagement, if not catharsis,” Ganguly says.



“45-minute [shows] are a pretty good length for me to find little time slots [to watch TV] throughout my busy lifestyle.”

Rie, 41
Tokyo, Japan



▶ When asked to choose all the times they stream movies and TV, 55% of respondents say they stream content mid-day (during work or school hours) or in the afternoons, immediately after work or school—nearly as many who report streaming in the evenings (65%).





The deeper emotional connection to content that Ganguly describes was supported by our survey findings. When global audiences were asked what helps them change their mood, “watching TV or movies” topped their list and was two times more likely to be their go-to for a mood booster than social media (31% vs. 15%). But the mood that audiences are in during the day—and the emotion they are looking to achieve—often differs from their moods and emotions at night. In the same way that daytime viewing unlocks new places to stream TV, which creates opportunities for brands and advertisers to intersect with audiences in new ways, it also creates a new emotional context.

In particular, Ganguly feels streaming TV offers “more moments to make more choices, and the ability to pause and return.” This further differentiates the entertainment experience from social media—and creates complementary advertising opportunities for brands. But as Sally Sunah Baek, Executive Director, Integrated Marketing, Disney, Korea points out, it’s important to modify both the content and advertising to match the moment. “Most streamers are consuming content on the go (while they are waiting for their friends, in the workplace, or in the hallways), so content needs to be engaging and have a simple storyline. If it’s too complicated, they just say forget it - life itself is so complicated, I don’t want it to be further complicated by the content I consume.”



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Executive Director, Integrated Marketing, Disney, Korea

Form Fits Function

As more audiences watch content during daytime hours, new formats are emerging to fit into “little time slots” of the day, as Rie described them. Yusuke, 35, of Tokyo, Japan, uses faster speed settings to squeeze in an hour-long show during his 45-minute lunch.

“I watched the *Full Keynote: Satya Nadella at Microsoft Build 2024* at my desk. The automatic Japanese subtitles and 1.5x viewing speed setting supported an experience that was perfect for watching a 60-minute video while having lunch,” he explained, adding, “It was an excellent viewing experience.”

This speed watching trend will likely continue as streamers, like Yusuke, not only try to fit more content into more efficient, daytime slots, but also as audiences become accustomed to these faster speeds. Faster speed video is something Gen Z are accustomed to—and, demanding more of. As more platforms have started offering a variety of playback speeds in recent years, audiences have grown used to watching at 1.25x, 1.5x, and even 2x speeds. Already, the neurodiverse community, particularly those with ADHD, prefer faster content. The r/ADHD subreddit is filled with posts about how neurodiverse people are able to concentrate more fully when content is sped up.





Microdramas are another format set to surge with a rise in daytime streaming. Already taking off in some parts of the world—like China, where they generated \$6.9 billion last year alone—microdramas are like soap operas or telenovelas divided into 50-100 tiny chapters, each of which is just a few minutes long. Audiences can unlock new episodes by watching ads, paying per clip or signing up for unlimited viewing. Jessica, who recently watched an 80-episode microdrama, has already seen the format gain popularity in Korea. “When I’m commuting in Seoul, a lot of people are watching vertical dramas or microdramas. I’m seeing a lot of people swiping vertically through these micro dramas on the train,” noting that it’s a trend she’s only noticed in the past year or so. This micro format fits neatly into commutes and in-between daytime hours, serving up those previously mentioned “micro moments of joy”

Speed and microformats aside, certain genres of content—like anime—also seem to work better during the daytime for many fans. Anfernee AnimeBae® Robinson, Mangaka artist and writer, and owner of Anime Bae Studios, says this is because anime is highly immersive—**anime lovers are consuming it throughout the day because it is a lifestyle, not just a series. There’s also just so much content to consume that it can’t all be done in the evenings.** “With how much Anime multimedia we are given, people will watch over and over, especially the most franchisable anime. These will be the shows watched throughout the day because there’s so much more material. Audiences come up with fan theories, there are T-shirts, toys, and video games,” Robinson says. “Anime is a lifestyle.” His point is powerful for content creators and brands alike: daytime streaming allows audiences to interact with their favorite franchises throughout the day, creating even more opportunities to strengthen relationships with fans.

In the (Time) Zone

Another key driver of daytime streaming is the desire to watch live, global content from other countries airing in different time zones. As reported in the Global Streaming Snapshot, 96% of Global Streamers say they watch “at least some content” from other countries, and 55% say they “regularly or always” stream international content. If they want to stream international content live, it means streaming it during daytime hours.

Erin, 35, of Sydney, Australia, is an avid sports fan and likes to keep up with U.S. based sports like basketball. “We have a pretty big time difference in terms of international sports. We often find that we’ll be watching [games] during the day,” Erin explains. Jessica likes to keep up with content when it’s happening, rather than wait for the evening. “If there’s an event, or something happening in a different time zone, I will stream that during the day,” she tells us, saying that the U.S. presidential debates were something she prioritized streaming during the day when it aired.

Taken together, the shift towards streaming throughout the day will change not just when audiences stream, but where they stream and what they watch. It will **push the innovation of new formats and genres, transform how and when entertainment intersects with audiences’ lives—and the messaging they will respond to—and break down time barriers, further bringing the world together through streaming.**



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Advertiser Takeaways



Streaming moments are brand moments. These newer occasions for streaming unlock new opportunities for advertisers to reach viewers throughout their day, in different mindsets and situations.



Make daytime streaming work harder. Develop advertising experiences that enhance a daytime streamer's viewing moments like at breakfast hour, during a lunch break, or when decompressing on the way home from the daily grind.



Think beyond the screen. Consider the physical environments of streamers when developing campaigns. Brand messaging can speak to these commute streamers in specific and paradoxical ways.



Pair streaming with social for deeper impact. Position daytime ads on streaming platforms as a complement to ads on social media by offering more immersive messaging that resonates with a deeper, emotional experience.



Global audiences stream around the clock during live events. Live content, such as sports and politics, drives global streaming at all hours of the day. As more audiences watch content across countries and continents, advertisers will need to consider how ads resonate differently in multiple time zones.

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

[1] Statista, June 2024

[2] Enzy uses the pronouns they/them

