



An Introduction to Streamers in EMEA:

As streaming rises, it's reshaping viewing behaviors across regions.

98%

Say they watch at least some content from other countries.

82%

Say they watch (either often or sometimes) content that is dubbed or has subtitles.

Audiences seek authentic cultural connections through stories told in their original voices.

76%

Like having the option of watching content in the original language it was created in.

Anytime is a good time to stream, thanks to a seamless experience.

77%

Like streaming during downtime in the day.

The perfect mix of content discovery is smart and personal.

76%

Agree with, "I wish video recommendations included shows and movies that my family and friends are watching."

What They're Saying:

"We look forward to settling down on the couch every night, there's so much good content, and watching together being in close physical proximity though not necessarily needing to talk really fulfills a daily need."

- Simon, 50 | London, United Kingdom 

"[Streaming] eases my anxiety and gives me a break from stressful thoughts. **After watching a series, I feel more relaxed and positive.**"

- Silvia, 24 | Bari, Italy 

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EMEA Audience Segments

Four viewing segments emerged from this proprietary research study, further knitting the common thread of why global audiences stream and what these experiences uniquely fulfill for them.

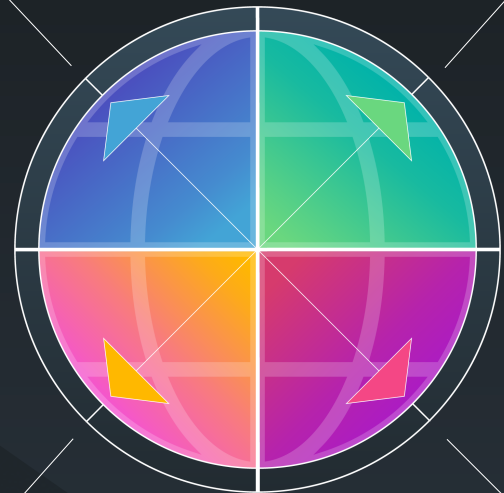
► The below percentages represent the composition of the segments in EMEA:

21% Empathetic Escapists

Stream TV shows for some quality alone time, where they can **fully escape and find empathy through the characters and storylines** they immerse themselves in.

34% Social Shapers

Are all about **connecting with each other and pop culture**. They stream for connection, inspiration, and excitement. They also stream when they feel disconnected, presumably to find the connection they are lacking.



24% Reflective Explorers

Want to engage more thoughtfully when they stream and **like to experience all the feelings**. They are driven to stream for nostalgia, curiosity, and a desire to feel engaged.

22% Comfort Connectors

Seek to sit back, relax, connect, and laugh. They stream TV shows and movies when they want to **feel at ease, happy, and comforted**.



An Introduction to Streamers in Italy:

As streaming rises, it's reshaping viewing behaviors across regions.

83% Say they "enjoy streaming shows and movies from other countries."

Audiences seek authentic cultural connections through stories told in their original voices.

73% Like having the option of watching content in the original language it was created in.

Primetime is all the time, thanks to a seamless streaming experience.

78% Like streaming during downtime in the day.

The perfect mix of content discovery is smart and personal.

72% Agree with, "I wish video recommendations included shows and movies that my family and friends are watching."

Storytelling and sports go hand-in-hand.

63% Want to watch storytelling and documentaries about players, teams and coaches.

What They're Saying:

"[Streaming] eases my anxiety and gives me a break from stressful thoughts. **After watching a series, I feel more relaxed and positive.**"

- Silvia, 24 | Bari, Italy 

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Source: Disney Advertising and Culture Co-Op, 2024

Italy Audience Segments

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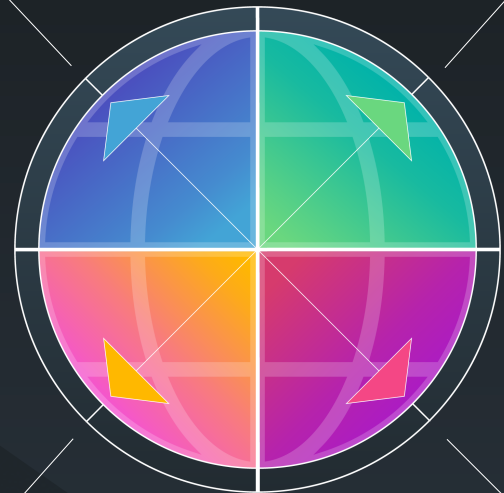
► The below percentages represent the composition of the segments in Italy:

25% Empathetic Escapists

Stream TV shows for some quality alone time, where they can **fully escape and find empathy through the characters and storylines** they immerse themselves in.

32% Social Shapers

Are all about **connecting with each other and pop culture**. They stream for connection, inspiration, and excitement. They also stream when they feel disconnected, presumably to find the connection they are lacking.



24% Reflective Explorers

Want to engage more thoughtfully when they stream and **like to experience all the feelings**. They are driven to stream for nostalgia, curiosity, and a desire to feel engaged.

20% Comfort Connectors

Seek to sit back, relax, connect, and laugh. They stream TV shows and movies when they want to **feel at ease, happy, and comforted**.



An Introduction to Streamers in Spain:

As streaming rises, it's reshaping viewing behaviors across regions.

83% Say they "enjoy streaming shows and movies from other countries."

Audiences seek authentic cultural connections through stories told in their original voices.

77% Like having the option of watching content in the original language it was created in.

Primetime is all the time, thanks to a seamless streaming experience.

78% Like streaming during downtime in the day.

The perfect mix of content discovery is smart and personal.

78% Agree with, "I wish video recommendations included shows and movies that my family and friends are watching."

Storytelling and sports go hand-in-hand.

68% Want to watch storytelling and documentaries about players, teams and coaches.

What They're Saying:

"My streaming habits are a blend of routine and intentional choices driven by recommendations, personal interests, and social interactions."

- Carmen, 40 | Spain 🇪🇸

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Source: Disney Advertising and Culture Co.-Op, 2024

Spain Audience Segments

Four viewing segments emerged from this proprietary research study, further knitting the common thread of why global audiences stream and what these experiences uniquely fulfill for them.

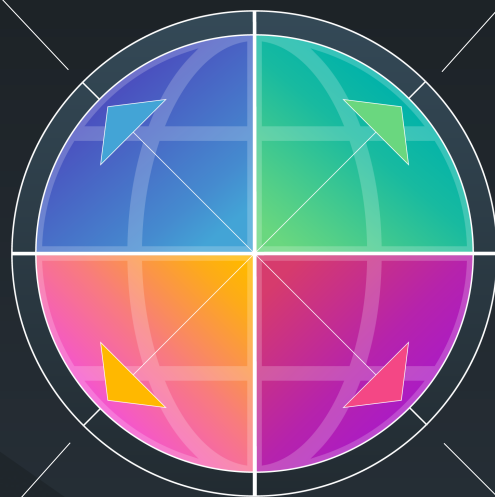
► The below percentages represent the composition of the segments in Spain:

21% Empathetic Escapists

Stream TV shows for some quality alone time, where they can **fully escape and find empathy through the characters and storylines** they immerse themselves in.

29% Social Shapers

Are all about **connecting with each other and pop culture**. They stream for connection, inspiration, and excitement. They also stream when they feel disconnected, presumably to find the connection they are lacking.



27% Reflective Explorers

Want to engage more thoughtfully when they stream and **like to experience all the feelings**. They are driven to stream for nostalgia, curiosity, and a desire to feel engaged.

23% Comfort Connectors

Seek to sit back, relax, connect, and laugh. They stream TV shows and movies when they want to **feel at ease, happy, and comforted**.



An Introduction to Streamers in Germany:

As streaming rises, it's reshaping viewing behaviors across regions.

78% Say they "enjoy streaming shows and movies from other countries."

Audiences seek authentic cultural connections through stories told in their original voices.

70% Like having the option of watching content in the original language it was created in.

Primetime is all the time, thanks to a seamless streaming experience.

74% Like streaming during downtime in the day.

The perfect mix of content discovery is smart and personal.

71% Agree with, "I wish video recommendations included shows and movies that my family and friends are watching."

Storytelling and sports go hand-in-hand.

59% Want to watch storytelling and documentaries about players, teams and coaches.

What They're Saying:

"When I have an early work shift, I get up much earlier than my family. I **like to watch something while eating breakfast.**"

- Tove, 40 | Germany

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Source: Disney Advertising and Culture Co-Op, 2024

Germany Audience Segments

Four viewing segments emerged from this proprietary research study, further knitting the common thread of why global audiences stream and what these experiences uniquely fulfill for them.

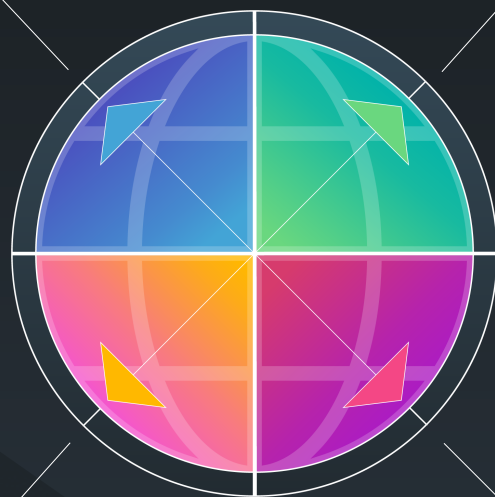
► The below percentages represent the composition of the segments in Germany:

20% Empathetic Escapists

Stream TV shows for some quality alone time, where they can **fully escape and find empathy through the characters and storylines** they immerse themselves in.

34% Social Shapers

Are all about **connecting with each other and pop culture**. They stream for connection, inspiration, and excitement. They also stream when they feel disconnected, presumably to find the connection they are lacking.



23% Reflective Explorers

Want to engage more thoughtfully when they stream and **like to experience all the feelings**. They are driven to stream for nostalgia, curiosity, and a desire to feel engaged.

23% Comfort Connectors

Seek to sit back, relax, connect, and laugh. They stream TV shows and movies when they want to **feel at ease, happy, and comforted**.



An Introduction to Streamers in France:

As streaming rises, it's reshaping viewing behaviors across regions.

83% Say they "enjoy streaming shows and movies from other countries."

Audiences seek authentic cultural connections through stories told in their original voices.

75% Like having the option of watching content in the original language it was created in.

Primetime is all the time, thanks to a seamless streaming experience.

74% Like streaming during downtime in the day.

The perfect mix of content discovery is smart and personal.

76% Agree with, "I wish video recommendations included shows and movies that my family and friends are watching."

Storytelling and sports go hand-in-hand.

64% Want to watch storytelling and documentaries about players, teams and coaches.

What They're Saying:

"Today I was home alone, my roommates weren't there, I had spent the morning working. **I ordered a pizza, wanted to watch a long video while I ate.**"

- Valentin, 22 | France 

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Source: Disney Advertising and Culture Co-Op, Q1 2024

France Audience Segments

Four viewing segments emerged from this proprietary research study, further knitting the common thread of why global audiences stream and what these experiences uniquely fulfill for them.

► The below percentages represent the composition of the segments in France:

23% Empathetic Escapists

Stream TV shows for some quality alone time, where they can **fully escape and find empathy through the characters and storylines** they immerse themselves in.

36% Social Shapers

Are all about **connecting with each other and pop culture**. They stream for connection, inspiration, and excitement. They also stream when they feel disconnected, presumably to find the connection they are lacking.



25% Reflective Explorers

Want to engage more thoughtfully when they stream and **like to experience all the feelings**. They are driven to stream for nostalgia, curiosity, and a desire to feel engaged.

16% Comfort Connectors

Seek to sit back, relax, connect, and laugh. They stream TV shows and movies when they want to **feel at ease, happy, and comforted**.



Generation
STREAM

GLOBAL EDITION
Presented by Disney Advertising

An Introduction to Streamers in the United Kingdom:

As streaming rises, it's reshaping viewing behaviors across regions.

86% Say they "enjoy streaming shows and movies from other countries."

Audiences seek authentic cultural connections through stories told in their original voices.

84% Like having the option of watching content in the original language it was created in.

Primetime is all the time, thanks to a seamless streaming experience.

84% Like streaming during downtime in the day.

The perfect mix of content discovery is smart *and* personal.

82% Agree with, "I wish video recommendations included shows and movies that my family and friends are watching."

Storytelling and sports go hand-in-hand.

73% Want to watch storytelling and documentaries about players, teams and coaches.

What They're Saying:

"We look forward to settling down on the couch every night, there's so much good content, and watching together being in close physical proximity though not necessarily needing to talk really fulfills a daily need."

- Simon, 50 | London, United Kingdom 

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Source: Disney Advertising and Culture Co-Op, 2024

UK Audience Segments

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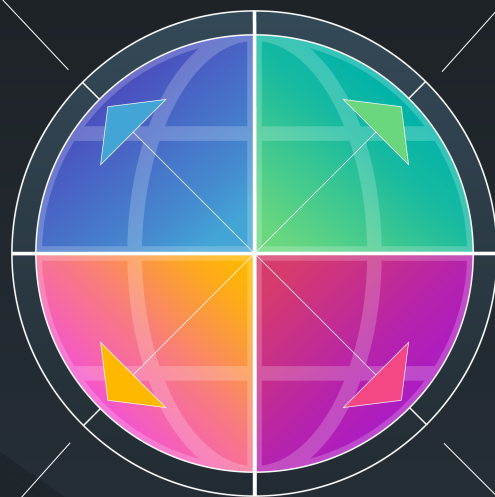
► The below percentages represent the composition of the segments in the United Kingdom:

16% Empathetic Escapists

Stream TV shows for some quality alone time, where they can **fully escape and find empathy through the characters and storylines** they immerse themselves in.

38% Social Shapers

Are all about **connecting with each other and pop culture**. They stream for connection, inspiration, and excitement. They also stream when they feel disconnected, presumably to find the connection they are lacking.



20% Reflective Explorers

Want to engage more thoughtfully when they stream and **like to experience all the feelings**. They are driven to stream for nostalgia, curiosity, and a desire to feel engaged.

26% Comfort Connectors

Seek to sit back, relax, connect, and laugh. They stream TV shows and movies when they want to **feel at ease, happy, and comforted**.

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