

Generation STREAM

GLOBAL EDITION

Presented by Disney Advertising



Streaming 360: Global Segmentation





▶ Streaming habits vary widely from one household to the next, and even more so across countries and cultures.

So when we set out to understand the common behaviors of global streamers, we focused on a key unifier of culture and entertainment: emotional fulfillment. Combined with audiences' global viewing preferences, these emotional throughlines helped us to identify four segments—Empathetic Escapists, Social Shapers, Reflective Explorers, and Comfort Connectors.

Each segment captures the common threads of why global audiences stream and how these streaming experiences are uniquely fulfilling.

When Simon, 50, of London, UK, sits down to stream, he's choosing more than a show—he's dialing into his emotions. "There are many emotional needs that are met by the type of show we stream: humour, dark humour, anxiety, tension and release, intellectual stimulation, comfort and security of the familiar, aesthetic stimulation, and inspiration, being chief among them."

Modern Family was "an automatic choice" for him when he recently streamed with his son, Otto. The series is familiar, family-friendly, and nostalgic—Simon had watched it with his older son years ago. On his own, however, Simon opts for shows that pique his curiosity, help him learn or reflect, and provide more than just comic relief. "I do want to switch off the outside world, but I also want to bring something back. And I want to learn something that's outside of my everyday experience." Recently, he tuned into *Camden*, a historical look at London's counterculture music scene. "The best part was going back in time with some of the musical history of a really interesting part of London," he explained, adding that it offered a dose of nostalgia, too. "It triggered many memories of my own experiences of going to gigs and clubs, and record shopping when I was younger, which were really fun to relive. Being a musician myself, I'm always interested in seeing where bands got their break, especially when it's an area that I'm familiar with."

Simon, along with one-fifth (21%) of streamers globally, falls into the Reflective Explorer segment—a group that seeks out shows and movies that are stimulating, educational/informative, and nostalgic, allowing them to explore and reflect upon their own lives and the lives of those around them.



"There are many emotional needs that are met by the type of show we stream; humour, dark humour, anxiety, tension and release, intellectual stimulation, comfort and security of the familiar, aesthetic stimulation, and inspiration being chief among them."

Simon, 50
London, UK





“It is important to study streaming to highlight the diversification that streaming has allowed in terms of content, production, distribution and consumption. Now, we have more fragmented possibilities.”

Juan Piñón, Ph.D

Associate Professor of Media, Culture, and Communication,
New York University



On the opposite side of the streaming spectrum is Jessica, 41, of Seoul, Korea, who is a Social Shaper—the largest segment of global audiences (36% fit this group globally). Jessica watches pop culture-oriented content, event TV, and anything that’s likely to become fodder on social media. Unlike Simon, who is looking for inner reflection, Jessica streams for social connection. “I love watching live events and sports with friends. It’s more fun to scream at the TV, have big reactions, and talk and comment during the show. I do really love the social aspect of it.”

For Jessica, this social aspect spans the globe. Whereas Simon watches shows and movies primarily from the UK (save for the occasional football match), Jessica streams content from different cultures, countries and in different time zones. “I like to see how different cultures live. I always look at ‘what does their apartment look like?’ or ‘what are they eating?’ or ‘what do their bars and nightlife look like?’ I zoom in on specific cultural details.” This checks with the Social Shaper segment, 87% of whom say they enjoy streaming shows from other countries as compared to 81% of global streamers overall who say the same.

Taken together, emotional fulfillment and cross-cultural sensibility combine to create four, distinct global streaming segments—Empathetic Escapists, Social Shapers, Reflective Explorers, and Comfort Connectors. These segments highlight not only the differences between streamers, but also what brings them together, no matter where in the world they reside.

The Emotion Quotient

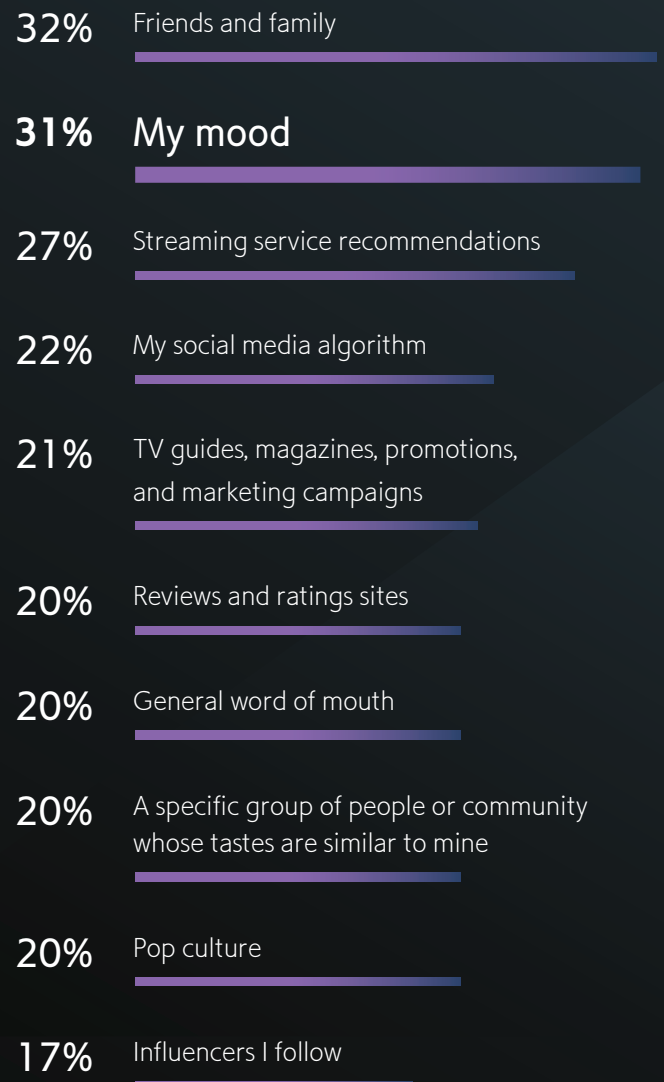
As content has diversified, so too has the emotions audiences experience through what they watch. Today, niche sports documentaries, mockumentaries, concert films, anime/manga, dramedies, rom-drams, video podcasts, and more, have diversified entertainment - broadening and deepening audiences' emotional connections to content. As such, 'the emotion quotient'—the moods that direct what we choose to watch and the feelings and emotions we hope to satisfy through streaming—play a larger role than ever before in influencing content choices (see box). As Carmen, 40, of Xàbia, Spain, puts it: "The best aspects of my streaming experiences include access to a wide array of content that gives me the ability to tailor my viewing to my mood and interests."

▶ **78%**
of global streamers love content that makes them feel deeply emotional.

Mood influences audiences' content choices more than recommendation engines, social media algorithms, ratings and reviews, word of mouth, or pop culture.

Q:

Which of the following sources influence you most when it comes to the TV, movies, and video content that you decide to stream?



Top Global Emotional Chords

Q:

How often do you stream TV, TV series, movies, or other video content when you're in the following moods?

► Percentages reflect "Always watch something" or "Usually watch something" when respondents are in each of the below moods.

71% Relaxed

60% Nostalgic

69% Happy

57% Social

67% Comforted

56% Disconnected

67% Bored

55% Sad

66% Myself

55% Stressed

65% Curious

54% Tired

65% Lonely

54% Anxious

64% Excited

52% Indifferent

63% Motivated

48% Angry

63% Inspired

While the emotions audiences experience when streaming range from relaxed and curious to social and sad, there is a pecking order to the feelings we feel, or hope to feel, most. Not surprisingly, positive emotions, like 'relaxed,' 'happy,' and 'comforted' are at the top of the list. However, as many people stream content when they are lonely as when they are excited. And audiences stream as much when they are feeling social as when they are feeling disconnected. These emotional chords are both what differentiate streamers from one another, and also what ties them together across countries and cultures.



"The best aspects of my streaming experiences include access to a wide array of content that gives me the ability to tailor my viewing to my mood and interests."

Carmen, 40
Xàbia, Spain



Cross-Cultural Comfort

Beyond ‘the emotion quotient’, global audiences differed in their interest in, and comfort with, cross-cultural content. While 56% of global streamers prefer a mix of content from many countries/cultures to content primarily from their own country (44%), there were differences in how comfortable respondents were with subtitles, dubbed content, or content from a country other than their own.

For example, Reflective Explorers were less likely to say they seek out international content than were Comfort Connectors: 48% of Reflective Explorers say they regularly or often watch content from other countries vs. 59% of Comfort Connectors. Empathetic Escapists also report watching a good deal of global content (see International Exposure), but their global mix is largely anime: 58% name anime as a favorite genre vs. just 23% of respondents overall. Social Shapers fall in the middle—their outgoing, social disposition naturally makes them curious about what’s popping around the world, not just in their own corner of it. At the same time, their desire to socialize and talk about what they watch, either IRL (in real life) or digitally, suggests they lean into content that’s in the same language as their peers: they are the least likely of any segment to have recently watched content that is subtitled or dubbed.

International Exposure

Q:

How often do you watch content that was made in a different country from where you currently live?

► Percentages reflect “Always or Regularly watch content made in a different country than where respondents live.”

Always/Regularly:

59%

Comfort
Connectors



56%

Empathetic
Escapists



54%

Social
Shapers



48%

Reflective
Explorers



Empathetic Escapists

▶ **22%**
of global streamers

Key Drivers to Stream

Solo Streamers:

50% stream by themselves vs. 44% of global audiences

Escapist:

25% stream to escape vs. 20% of global audiences

Empathetic:

27% stream to empathize vs. 22% of global audiences

Summary

Empathetic Escapists see streaming as a time to escape from reality and recharge on their own. For this group, streaming is quality “me time.” They particularly love anime, superhero flicks, and fully immersing themselves in storylines where they can empathize with characters’ journeys, struggles, and emotions.

Decompressing and unwinding is a key part of Empathetic Escapists’ lives—48% say “Downtime: relaxing, TV time, rejuvenating” is their most important part of life outside of school and work vs. 39% of global respondents who feel the same. This need for decompression drives their interest in escapist and fantastical content. They are more likely than global streamers overall to stream anime (32% vs. 19% overall), animated movies (31% vs. 22%), science fiction & fantasy (27% vs. 22%), superhero content (23% vs. 17%) and adult animated content (24% vs. 14%)—and the least likely to tune into documentaries (13% vs. 18%). Edutainment also falls lower on their list as a favorite (11% vs. 19%). Simply put, the more removed their streaming is from reality, the better!

For this group, decompression is about disconnecting not just from reality, but also from people. In an average week, 50% of their TV streaming time is done alone (vs. 44% among global streamers). Furthermore, more Empathetic Escapists (at 18%) say they *only* stream solo, compared with just 12% of streamers overall.



However, just because they enjoy disconnecting from their everyday life doesn't mean they are disconnected from their emotions. In fact, Empathetic Escapists are more likely than other segments to appreciate content that stirs up emotions on *multiple* levels, from appreciating a show or movie that makes them laugh out loud (47% of Empathetic Escapists vs. 38% of global streamers) to those that help them empathize (27% vs. 22%) and escape (25% vs. 20%).

While Empathetic Escapists are not the most enthusiastic about advertisements, they are also not advertising-adverse - making them ad agnostic, in general. They acknowledge commercials as part of the TV experience, but they are less likely than respondents overall to get excited about personalized ads (50% vs. 57% overall), having a variety of ad experiences (46% vs. 56% overall), or being able to interact and engage with ads (also 46% vs. 56% overall). That said, they do respond more favorably to product placement (52% vs. 48% overall), perhaps because the seamless integration of brands into TV shows and movies allows them to stay fully immersed in the storylines.

Like other segments, Empathetic Escapists prefer a mix of content from other countries to content largely from their own country and, after Comfort Connectors, are the most global streamers. Notably, they are the segment most open to content that is in other languages, dubbed, or subtitled. And as mentioned previously, their love of anime makes them natural cross-cultural streamers.

▷ **48%**

of Empathetic Escapists say downtime, including intentional TV time, is an important part of their life as compared to 39% of global streamers.



Empathetic Escapists



Cross-Cultural Streaming Mix

57% prefer a mix of content from different countries

43% prefer content primarily from their own country



Key Demographics

Female: **48%**

Male: **51%**

Parents: **44%**

Non-parents: **56%**

Gen Z: **50%**

Millennial: **41%**

Gen X: **9%**



Streaming Profile

30%

Stream Only: I only use video streaming services to watch content

53%

Stream Most: I watch content on both streaming services and traditional TV, but tend to use streaming services most often

17%

Stream Also: I watch content on both streaming services and traditional TV, but tend to use traditional TV/cable most of the time



Regional Representation

US: **23%**

LATAM: **25%**

EMEA: **23%**

APAC: **29%**



Empathetic Escapists are Probably...

Streaming: *Demon Slayer: Kimetsu no Yaiba*

Eating: DoorDash takeout

Wearing: Graphic tee

Doing: Gaming

Following: K-pop and A-pop (AI pop)



Standout Streaming Stat

Biggest Bingers

36% describe themselves as a "Big Binger: I regularly binge watch content" vs. 31% of global respondents



Social Shapers

▶ **36%**

of global streamers

Summary

Social Shapers prioritize connecting with friends, family, and broader culture through streaming. They are the segment that is most engaged and excited about streaming and gravitate to pop-culture oriented content—event TV, season finales, and anything that is trending on social media—as a way to stay connected to the pop cultural zeitgeist. These streamers want to be a part of the larger cultural conversation.

Connection is what drives Social Shapers' to stream TV and movies; they want to know about the shows everyone is talking about and, equally, become part of that cultural conversation. They are highly influential, both because they are the largest of the four segments and the most digitally and socially connected: 55% say they stream "event TV" at least monthly, as compared to just 35% of global streamers, making them natural connectors of culture. While they may not always seek out content from different countries as often as the other segments, their naturally social disposition means that if certain content is trending worldwide, they'll likely be tuned into it.

Key Drivers to Stream

Social:

77% stream when they feel social
vs. 57% of global audiences

Inspired:

72% stream when they feel inspired
vs. 63% of global audiences

Excited:

72% stream when they feel excited
vs. 64% of global audiences



▶ **86%**

of Social Shapers love big event content, where people from around the country or around the world all watch at the same time, as compared to 78% of global streamers overall.

Social Shapers are the most enthusiastic about, and most receptive, to advertisements and brands among the four segments. 31% have posted on social media about products they've seen advertised vs. 25% of global respondents. Unlike Empathetic Escapists, who prefer seamless product placement, Social Shapers want advertisers to tell them about their brands products and services directly (58% of Social Shapers vs. 52% of global respondents). While they are ad-receptive, they do have a high bar for advertisements: on all markers, Social Shapers outpace other segments on their expectations for ads, reporting that it's "very important" (an 8, 9, or 10 on a 10-point scale) for ads to be fun (67% of Social Shapers vs. 59% of global respondents), easy to understand (67% vs. 58%), helpful (68% vs. 57%), creative (67% vs. 56%), and tailored to their needs (66% vs. 56%).

Like Empathetic Escapists, Social Shapers watch content that makes them feel deeply—they want to "scream at the TV, and have big reactions" as Jessica, 41, of Korea, told us. As testament to this, 85% want to watch shows that make them feel deeply emotional vs. 78% of respondents overall.



Social Shapers



Cross-Cultural Streaming Mix

50% prefer a mix of content from different countries

50% content primarily from their own country



Key Demographics

Female: **46%**

Male: **54%**

Parents: **48%**

Non-parents: **52%**

Gen Z: **52%**

Millennial: **40%**

Gen X: **8%**



Streaming Profile

25%

Stream Only: I only use video streaming services to watch content

58%

Stream Most: I watch content on both streaming services and traditional TV, but tend to use streaming services most often

17%

Stream Also: I watch content on both streaming services and traditional TV, but tend to use traditional TV/cable most of the time



Regional Representation

US: **28%**

LATAM: **21%**

EMEA: **24%**

APAC: **26%**



Social Shapers are Probably...

Streaming: *The White Lotus*

Eating: Dubai Chocolate

Wearing: Y2K revival fashion

Doing: Posting on social

Following: Khaby Lame



Standout Streaming Stat

Most engaged with social media & brands

84% have watched a TV series or movie on TikTok in the past 6 months vs. 74% of global audiences—and 31% have posted about a product or service on social media vs. 25% of global audiences.



Reflective Explorers

▶ **21%**

of global streamers

Key Drivers to Stream

Nostalgic:

73% stream when they feel (or want to feel) nostalgic vs. 60% of global audiences

Curious:

71% stream when they are curious vs. 65% of global audiences

Engaged:

51% stream when they are engaged vs. 29% of global audiences

Summary

Reflective Explorers are the deepest and most intellectual of the streaming segments. More than just streaming to escape, they tend to be highly engaged in what they are watching and see TV as a way to enrich their lives and learn. Nostalgic content that strikes a deep emotional chord, or culturally intriguing shows that challenge them intellectually, pique their interest.

Unlike Empathetic Escapists who stream to decompress, Reflective Explorers stream to engage. For them, TV serves two purposes: relaxation and life reflection. Notably, life reflection happens on multiple levels for this segment. They are looking for content that either covers culturally relevant topics and is intellectually engaging, or they are looking for nostalgic content that strikes a deep emotional chord. Even though this segment could be considered “thinkers”, they watch a variety of content beyond just documentaries and edutainment, from Romantic-Dramas and sports documentaries to international reality TV and video podcasts. Their curious nature makes them want to experience “all the feels” and explore various emotions rather than tune into one genre or seek out a singular emotional experience.



Reflective Explorers, like Empathetic Escapists and unlike Social Shapers and Comfort Connectors, are more individualistic in their content choices than group-oriented. They are the least likely of the segments to tune into event TV—only 29% say they do so regularly or monthly, as compared to 35% of the global total—and, after Empathetic Escapists, are the most likely to watch content by themselves vs. with others.

Nostalgic content strikes a key emotional chord for Reflective Explorers, who otherwise tend to match the global average in the emotions they seek to fulfill when watching content (save for curiosity, which also ranks high). As Simon explained, even a new series can be an opportunity for Reflective Explorers to take a walk down memory lane: “The best part [of *Camden*] was going back in time with some of the musical history of a really interesting part of London. It triggered many memories of my own experiences of going to gigs and clubs, and record shopping when I was younger, which were really fun to relive.”

Cross-cultural content isn’t a key driver of their TV viewing, but it’s also not a deterrent. Instead, Reflective Explorers remain open to watching whatever piques their mood; for some, that may be culturally diverse content, for others, not. They have the same middle-of-the-road impression of advertisements—like Empathetic Escapists, they aren’t particularly enthusiastic about ads, but they are also accepting of them. What do they respond to in advertisements? Nostalgic ads. As Simon told us, “I remember the golden age of TV ads in the UK in the 80s where there were so many original and memorable ads.”

▶ **73%**

of Reflective Explorers stream when they are feeling nostalgic vs. 60% of global streamers.



Reflective Explorers



Cross-Cultural Streaming Mix

55% prefer a mix of content from different countries

45% content primarily from their own country



Key Demographics

Female: **51%**

Male: **49%**

Parents: **47%**

Non-parents: **53%**

Gen Z: **52%**

Millennial: **38%**

Gen X: **10%**



Streaming Profile

26%

Stream Only: I only use video streaming services to watch content

54%

Stream Most: I watch content on both streaming services and traditional TV, but tend to use streaming services most often

20%

Stream Also: I watch content on both streaming services and traditional TV, but tend to use traditional TV/cable most of the time



Regional Representation

US: **23%**

LATAM: **22%**

EMEA: **29%**

APAC: **27%**



Reflective Explorers are Probably...

Streaming: *Sly Lives*

Eating: Poke bowl

Wearing: Their favorite cardigan

Doing: Perusing their vinyl collection

Following: A podcast host



Standout Streaming Stat

Most reflective of global streamers overall

Reflective Explorer's streaming behaviors and preferences often matched the global total, indicating that they are a good proxy for streaming behavior overall.



Comfort Connectors

▶ **21%**
of global streamers

Summary

Comfort Connectors want to sit back, relax, and connect with their family and friends through streaming. They typically stream with others in the evening and look for lighthearted, family-friendly content, like movies and Rom-Coms, that deliver cozy, feel-good vibes. While they are traditional streamers in many ways, they are also the most likely to stream content from other countries and cultures.

Comfort Connectors are classic TV viewers with a global twist. While their TV experiences are traditional—evening viewing of relaxing content with family—they are the most likely of any segment to stream global content. 65% of Comfort Connectors say they prefer to watch a mix of content from other countries rather than content primarily from their own as compared to 56% of global streamers. Movies top their list of what they stream globally, with 72% naming it as their favorite international content vs. 55% of global streamers overall. Comfort Connectors are also disproportionate streamers of international scripted TV (46% vs. 38%). They are also at ease with watching content that is subtitled, or dubbed: one-third (33%) say they have watched subtitled or dubbed content within the past 3 months vs. 24% of global streamers overall.

Key Drivers to Stream

Relaxed:

86% stream when they are feeling (or want to feel) relaxed vs. 71% of global audiences

Comforted:

78% stream when they are feeling (or want to feel) comforted vs. 67% of global audiences

Happy:

76% stream when they are feeling (or want to feel) happy vs. 69% of global audiences



▷ **55%**

of Comfort Connectors consider a movie or show to be good if it makes them laugh vs. 38% of global streamers.

True to their laidback nature, Comfort Connectors prefer long-form content, like movies and TV series, to short form videos: 64% prefer longform content vs. 56% of global streamers. They are also the most likely of any segment to describe themselves as “Family streamers” or those who stream most with their partner, kids, or others in their household (40% vs. 34% of global streamers). Comfort Connectors are also far less likely than other segments to stream outside of their home, with only 52% saying they like streaming on-the-go vs. 67% of global respondents.

Comic relief is high on Comfort Connectors’ lists of what they consider to be “good” content. 55% say they think a movie or show is good if it makes them laugh vs. 38% of global streamers. They also index much higher on shows that help them relax (48% vs. 34%); pass the time (40% vs. 30%); and distract themselves (42% vs. 28%). But that doesn’t mean they don’t also want to fulfill a variety of emotions: they are also more likely than the global average to like content that makes them think (32% vs. 26%); feel love (29% vs. 24%); and get motivated (32% vs. 25%).

Comfort Connectors are less likely than other segments to be enthusiastic about advertisements, likely because they don’t want to be pulled out of their “comfort zone.” However, they are more likely than all other segments to appreciate thematic ads that align with the theme of the content they are watching (58% vs. 53% overall). In other words, they want to stay in the (comfort) zone and therefore appreciate ads that feel thematically seamless with the content that surrounds them.



Comfort Connectors



Cross-Cultural Streaming Mix

65% prefer a mix of content from different countries

35% content primarily from their own country



Key Demographics

Female: **57%**

Male: **43%**

Parents: **50%**

Non-parents: **50%**

Gen Z: **44%**

Millennial: **46%**

Gen X: **10%**



Streaming Profile

28%

Stream Only: I only use video streaming services to watch content

53%

Stream Most: I watch content on both streaming services and traditional TV, but tend to use streaming services most often

19%

Stream Also: I watch content on both streaming services and traditional TV, but tend to use traditional TV/cable most of the time



Regional Representation

US: **24%**

LATAM: **34%**

EMEA: **26%**

APAC: **17%**



Comfort Connectors are Probably...

Streaming: *Grey's Anatomy*

Eating: Popcorn & ice cream

Wearing: Pajamas

Doing: Bedtime routine

Following: Their family



Standout Streaming Stat

Most cross-cultural streamers

65% prefer a mix of content from different countries vs. 56% of global audiences overall

Advertiser Takeaways



Emotional fulfillment is a common denominator of entertainment experiences. Tap into key emotions, like laughter, relaxation, inspiration, and nostalgia, to bring streamers from all corners of culture together.



Empathetic Escapists need to recharge and leave their day behind. Keep advertisements imaginative, immersive, and seamless—product placement integrated into their favorite shows will resonate.



Social Shapers are a key segment because of their size and connectivity. Amplify your brand's presence with this group with content that is informative and, importantly, culturally on trend.



Reflective Explorers are the most emotionally and intellectually engaged audience. They will respond to deeper messaging, nostalgic ads, and products and services that pique their curiosity.



Comfort Connectors are the perfect segment to reach for brands aiming to resonate with audiences globally. They are natural cross-pollinators of content as they are watching TV and movies from various countries and in multiple languages. Content that makes them laugh, relax, and enjoy quality time together will appeal strongly with this group.

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