

Generation STREAM

GLOBAL EDITION

Presented by Disney Advertising



The Human-Tech Touch



As algorithmic recommendations evolve across streaming platforms, so too does the desire for content discovery via friends and family. Recommendation ‘engines’ of the future will need to combine high tech and human touch to help streamers navigate the expanding world of streaming content, without losing connection to one another.

We asked global audiences to document their TV and movie experiences over two weeks, including how they discovered the content that they streamed. What we found was that their discovery process often included a mix of social media and streaming algorithms alongside recommendations from friends, family, colleagues, and IRL (in real life) communities. Globally, our survey supported this finding: audiences reported a near 50-50 split in their preference for recommendations from people vs. platforms (51% prefer people; 49% prefer platforms), further underscoring the importance of both.

▷ **51%**

of global audiences prefer TV and movie streaming recommendations from people; 49% prefer these recommendations from platforms.



Jack, 40, of London, England, for example, found the movie *Poor Things* through a combination of digital sources and the people around him. He first saw the trailer on YouTube and then heard some of his friends from work talking about the film after they saw it in theaters. Finally, it appeared in his streaming recommendations. “I was pleased to see *Poor Things* pop up on Disney Plus’s “recently added” section as it doesn’t seem very long ago when it was in cinemas.” The result, according to Jack, was a Sunday night with “a little more substance” than his typical end-of-weekend reality TV binge.

Joaquin, 35, of Mexico City, Mexico, admits he prefers recommendations from friends and family, but those recommendations often lead to related content on streaming platforms. “I have a particular interest in thrillers, mystery films, dramas and film noir,” he told us. “After [having seen] several film classics with my aunts, like Hitchcock’s *Shadow of a Doubt* from the forties, I wanted to see something a little more recent from similar directors. Our streaming service took us to Brian De Palma’s *Carrie*.” Joaquin noted that from there he was recommended *Matilda*—not exactly a Hitchcock film (it was directed by Danny DeVito) nor a movie Joaquin would have thought of watching, but he loved it, nonetheless. Peggy’s journey is a simpler one. A Gen Z from Sydney, Australia, Peggy turns to TikTok as a jumping off point for recommendations, and then she and her friends weigh in and they collectively take it from there. “Streaming a show that we’ve heard good reviews about on TikTok and through other friends is really nice because we invested in something together.”

Regardless of which path audiences take to discover new content, they typically toggle back and forth between people and platforms, with their final choices reflecting the best of both worlds.





▶ Nearly half (44%) of global audiences spend as much time searching for what to watch as watching it (56%).

The Choice Paradox

Figuring out what to stream is what Jack calls “one of my girlfriend and I’s first world problems.” He likes watching UFC boxing and science fiction, neither of which his girlfriend is interested in. Oftentimes they settle on reality TV series, such as their recent favorite, *Love Triangle Australia*, which he describes as “a good middle ground in terms of our taste.” However, sometimes after scrolling through streaming options, they come up empty handed. “It’s sometimes a case of ‘water, water everywhere but not a drop to drink.’”

This echoes what we heard from others around the world: nearly half (44%) of global respondents say they spend more time searching for what to watch than spending time watching it (56%). According to *Fortune*, time spent searching for TV and movies on streaming platforms amounts to 110 hours a year on average.¹ This translates to about 18 minutes a day, a figure consistent with what we heard from those we interviewed.

For example, Danielle, 38, of Hobart, Australia, says she and her husband struggle to find shows they are both interested in, particularly as they’ve gotten older and their tastes have diverged. “We honestly lose about 20 minutes browsing all our streaming services trying to find something we both want to watch,” adding that, “this happens to us all the time.” Tove, 38, of Berlin, Germany, agrees with Danielle, and says that finding what to watch is harder to do with her boyfriend than it is to do alone. “If I’m alone, I can choose quickly. If I’m with my boyfriend, it’s a long selection process. He wants to keep looking for options, even if we’ve found something we both agree on.”

Matt Hill, Director of Research and Planning at Thinkbox, says part of the reason people scroll so long to find what to watch is because when searching for streaming shows to watch, audiences have greater anticipation for the content than when they're scrolling for content like on social media. In other words, audiences *intentionally* take time to search for something they truly want to watch—they aren't just aimlessly scrolling (see Intentional TV). The more intentional audiences are in finding what they want to watch, and the more time they spend looking for it, the more pressure there is for their selection to pay off. "With TikTok, it's easy to move on from one thing to another. With TV, if you spend 20 minutes trying to find and get into a show, the [time invested] matters more," Hill explains. "You don't like wasting an hour of your precious time on something that's not good."

Falk, 28, of Lippstadt, Germany often experiences a disappointing return on his investment of time, which is why he shies away from algorithmic recommendations. "It's difficult for me to find what to watch because I'm often disappointed from experiences in the past when I started something new, after scrolling through all the libraries, only to be disappointed."

Top Streaming Tensions

94% of Global Audiences say there's at least one tension they face when streaming. Topping their list is choice, which has opened up their options but can also feel endless and overwhelming.

Q:

Below are some tensions that you may or may not face when it comes to watching TV or other content.

► Please select all that apply to you and your family.

39% **The Choice Paradox:** Choice is a good thing, but there is so much content to choose from I/we often spend a lot of time trying to decide what to watch.

34% **Me Time vs. We Time:** Sometimes TV and other content brings me together with my family, friends, or community—but other times, it pulls us apart because everyone is watching something different. It's hard to find the right balance.

30% **Balancing Act:** It's hard to know what the right amount of screen time is, either for myself (how much is healthy to binge?) or my kids (what's an appropriate amount of screen time for children?).

27% **Remote Control:** It's hard to decide what to watch because people in my family or household have different tastes in content and argue over what to watch.

25% **Over-Exposure:** I feel that TV and other content exposes me or my family to things that are inappropriate, negative, or that I just don't want to see my family watch.

23% **Ad Relevancy:** I feel that the ads are targeted in a way that isn't relevant to me.

20% **Algorithm Bias:** Personalized recommendations can limit exposures to diverse viewpoints.

18% **Pressure to Keep Up/Stay Current:** I often feel pressure to stay informed about popular content.

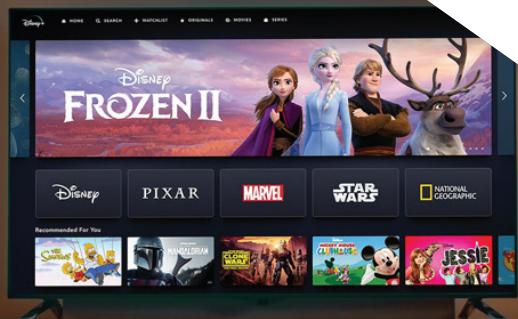
6% **None of the Above.**

▷ 69%

of global respondents say having more streaming choices is “fun” rather than “frustrating” (31%).

Falk’s experience is an example of “The Choice Paradox,” or the trade-off between the benefits and drawbacks of having access to an infinite sea of streaming options. While this may be a “first world problem,” as Jack described it, navigating seemingly infinite content choices has become a burden in people’s day-to-day lives. When we surveyed global audiences about their biggest frustrations with streaming—which included answer choices that ranged from the cost of streaming services to sharing the remote control—their top answer choice was “The Choice Paradox,” or the difficulty of deciding what to watch when there’s so much content available (see full results in Top Streaming Tensions).

However, less choice isn’t the way forward either. 69% of global audiences say having lots of choice is “fun” rather than “frustrating” (31%), and most people appreciate the diversity of content they now have access to. Tove, for example, doesn’t want to go back to a time with fewer choices, even though she gets frustrated sifting through the options with her boyfriend. In fact, she expects *more* options, and *more* variety from streaming platforms. “It’s important for me that the provider has diverse content, and a variety of genres and formats to satisfy different moods and tastes depending on who’s watching.” She added, “I’d also like to [have] Swedish subtitles.” Like Tove, audiences aren’t looking for less choice; they’re just looking for better ways to navigate it.





The Algorithmic Challenge

Ask any Gen Z about their experiences on social media and they'll likely talk about "my algorithm" as if it is an omnipresent, digital best friend that knows their style, tastes, preferences, and what they want to read, buy, watch, or experience, even before they do. Naturally, their algorithm plays a large part in what they stream. And while older generations may not refer to algorithmic recommendations quite so colloquially, they acknowledge the influence it has on their content choices. "My social media algorithm" and "Streaming service recommendations" (which are powered by algorithms) are top sources of influence of what the world watches, right behind friends, family and mood (see full breakout in Deconstructing Discovery). Algorithms often get it right – 61% of global audiences say what is recommended to them through their algorithms and video streaming services is accurate.

▶ **61%**

of global audiences say what is recommended through their algorithms is accurate.

Deconstructing Discovery

Q:

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



32% My family and friends



31% My mood



27% Streaming service recommendations



22% My social media algorithm



21% TV guides, magazines, promotions, or marketing campaigns



20% Reviews and ratings sites



20% General word of mouth



20% A specific community with similar tastes as mine



20% Pop culture



17% Influencers I follow



However, sometimes algorithms get it wrong, too—after all, if 61% say algorithms are accurate, then 39% feel they aren't. Jack said he lucked out with the recommendation for *Poor Things* but generally describes finding what to watch “a real modern-day chore.”

He, for one, misses the days when programs were presented by genre, and in chronological order. He also points out that algorithms can be *too* exacting, or literal, taking into consideration every show or movie he's watched, even if he was just in a particular mood on a given day. “I quite often try an episode or two to see if I like [a show], but then I find my algorithm will throw me loads of similar things even though I was literally just trying a show out. I wish it would realize that one day I might want to watch a wildlife show, but that doesn't mean I want to watch loads of wildlife shows. It's just how I felt on that particular day.” He also misses the days of finite, curated selections rather than endless algorithmic ones, and feels he experienced more content with less choice (a feeling consistent with “The Choice Paradox”).

“Weirdly having access to ‘everything’ makes me probably watch less as I just get irritated scrolling through thousands of shows trying to find something. I was thinking I might be interested in a curated service with loads of surreal and weird content from around the world. It would remind me of going to an independent video rental shop where you used to find things that were off the beaten track. I do really miss the experience of going to a video shop or a record store to buy physical media.” While Jack's nostalgia could be brushed off as niche, it's not. Many people—and particularly Gen Z—are nostalgic for the pre-digital days when life seemed simpler, a topic many media outlets have covered.²



A more curated approach to perusing streaming options may be around the corner. Philippe Bailly, Entrepreneur and Chairman of NPA Conseil SAS, believes that streaming platforms and the algorithms that power them will become more streamlined, not more complex. “There were 5 to 10 incredible years from the mid 2010s until now, in which there was a new platform, a new service nearly everyday. Even if you just take the acronyms—SVOD, HVOD, AVOD, BVOD, fast channels, etc.—there was a profusion of new services. But also, a complexification of the game. I think that we will be now in a moment of reconvergence and resimplification.” Based on audience demand, future streaming platform interfaces will likely soften technological edges with a decidedly human touch to simplify algorithmic recommendations.



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The Human Touch

While global audiences discover what to stream through a mix of people and platforms, qualitatively they were the most passionate about the shows and films they found out about through their friends, family, and real-world communities.

Part of this has to do with the high level of trust they have in people they know, but an equal if not greater part has to do with being able to share what they watch with others—rather than stream in a silo. Take Jessica, 41, of Seoul, Korea, for instance. She's tech-savvy and keeps up with the latest trends, but when it comes to what to watch, she prefers human “search engines” to algorithmic ones. “I know that the recommendation algorithms from [streaming services] are really powerful, but I don't always trust them. I also enjoy being able to gossip about TV with my friends, so I take their recommendations much more seriously than any recommendations, algorithm or ad that I see. *Super Rich in Korea*, *Poor Things*, and *SNL Korea* were [shows and films] I watched so that I could have discussion points with my friends. It's just nice to not be the only one NOT watching something.”

To Jessica's point, streaming algorithms don't take into consideration how many other people in your network are watching the same shows and movies—at least at present. Instead, they focus on audiences' historical streaming experiences, along with other personal observations they've collected. However, with so many streamers eager to “gossip about TV”, as Jessica put it, this seems to be a current miss, and a potential future opportunity.





Ellie, 26, of London, England, recently connected with her sister over a book-turned-TV-series they both loved so they could share their thoughts. “I read the book *Queenie* in 2019, and my sister read it a few years later. She sent me a text message asking if I had watched the show “to compare notes.” I was curious to see her perspective. Watching the show fulfilled the relationship with my sister, comparing and discussing a book we had both read and loved.”

Similarly, Facundo, 24, of Buenos Aires, Argentina, recalled connecting with his brother over *The Bear*. “It was first recommended to me by my brother. Generally, we never take each other seriously when one recommends a series or movies to the other. We always throw down the recommendation and say that what we are seeing is better,” he recalled. “I gave it a chance. I regret not having started watching it sooner!” Nerissa, 34, of Madrid, Spain, bonded with friends over *Broad City*. “We couldn’t stop laughing. We could see elements of each other in both the main characters, so we were also chatting a lot and making jokes during the series rather than just watching in silence.”





Enzy, 20, of Los Angeles, California, sees a future where algorithms and human recommendations come together. Rather than toggling between platforms and people, they believe people could be incorporated into recommendation platforms, not unlike social media.³ “Something I would like to see in streaming platforms would be to link accounts to friends and family, just to see what they’re watching, and what they’re engaging in. It creates more of a conversation—a community sharing experience.”

For Gabriel, 31, of São Paulo, Brazil, this would be ideal, particularly because he’s willing to trade off his personal preferences to be in the company of friends and family—something an algorithm alone would have a difficult time gauging. “Streaming allows us to connect with people,” Gabriel explains. “You’re on the sofa in your living room, a common environment for everyone, and not just with a computer screen alone. Even if at some point you lose a little excitement, you see your relatives and you are happy.”

When algorithms can deliver on connection or the feelings of happiness and togetherness, such as when on a sofa in a living room, they’ve cracked the code on recommendations.



Advertiser Takeaways



Leverage the power of micro peer influencers on social platforms to encourage trusted viewership of featured content. The algorithm they trust most (after peer recs) is in their social feeds.



Content that is part of the social zeitgeist will bring audiences together. Keep a pulse on what's capturing culture's attention and sparking social conversations.



Consider ways to prioritize this audience desire for hosting and screening as a form of peer cultural engagement and signaling.



Anticipate a future where recommendations from friends and family are included in streaming algorithms. By adding a human touch to digital recommendations, audiences will get the best of both worlds. There is an opportunity for brands/advertisers to help bring a “human touch” and connect with viewers in new ways.

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

[1] *Fortune*, December 2024. Note: This is based on a sample of 2,000 American respondents.

[2] *PRNews*, February 2025

[3] Enzy uses the pronoun “they”

