

NETFLIX ADS

PRESENTS

STILL WATCHING



2025 Global Report on Streaming Audiences

INTRODUCTION



STRANGER THINGS

In an era where entertainment spans every screen and scroll, genuine engagement – where people pause, reflect, and connect – is rare. But when Gen Z and Millennial audiences really want to settle in, focus, and immerse themselves in an experience, they overwhelmingly pick streaming.

Globally, people average six hours and 40 minutes of screen time per day, and nearly half of that time is spent streaming programmes, films, and videos.¹ With over 2.2 billion subscribers globally, streaming has become the modern default not just for entertainment, but for engagement.²

With members in over 190 countries, Netflix reaches among the largest audiences in streaming. But the real story isn’t size – it’s attention. In fact, Netflix Ads delivers more active attention compared to other platforms – nearly 2x more than online video and close to 3x more than linear TV.³

Still Watching is a new global report from Netflix Ads on why and how Gen Z and Millennial audiences stream today – and what it all means for advertisers. Based on independent research and Netflix’s own viewing data, this report illuminates streaming audiences’ evolving attitudes and behaviours, and shares actionable insights for brands and agencies.

In the 2025 edition, we explore how streaming transforms discovery into emotional connection – turning titles into shared cultural touchstones and streaming services into places of deep personal resonance. For advertisers, this creates opportunities to meet viewers in moments where they’re most engaged. In fact, our research found that 59% of Gen Zs and Millennials say that ads on streaming services stand out more than the same ads they see elsewhere.⁴

When streaming audiences hit “play,” they’re all in – and that’s the cue for brands to become part of the story.

THEME I

EVERY STORY, ANY TIME

Variety is no longer a perk; it’s the expectation.

TRENDS

- Multifaceted audiences**
Audiences today have broader, more diverse tastes than ever.
- Every mood and moment**
Streaming serves viewers’ every interest, impulse, and emotional motivation.

THEME II

FANS RULE THE WORLD

Streaming reshapes how audiences enact their fandom.

TRENDS

- Fandom flywheel**
Streaming scales beloved titles across the globe.
- Living your fandom**
Fans take their passion off-service and into the world.

THEME III

THE AGE OF ENGAGEMENT

Quality is defined by the depth of audience engagement.

TRENDS

- Personal resonance**
Curation helps viewers feel understood – and understand themselves.
- Favourite streaming service**
Audiences feel a powerful connection to the streaming environment itself.

METHODOLOGY



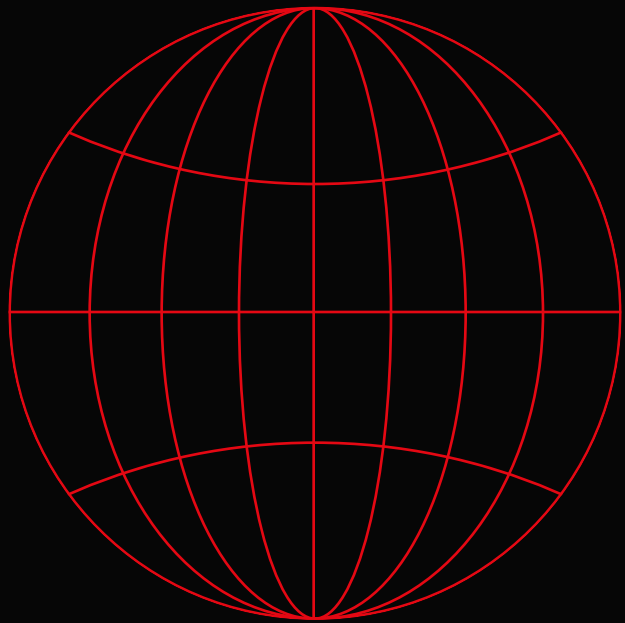
Netflix conducted a combination of qualitative, quantitative, and first-party data analysis that explored distinct segments of Gen Z (18-26) and Millennial (27-42) streaming viewers. First-party data analysis covered all Netflix members, as well as members on our ads plan.

We partnered with youth culture agency Archrival to conduct writing assignments with Gen Zs and Millennials around the globe. Through questions that asked respondents to reflect on their streaming behaviours and expectations – and how brands can best engage with them - we gathered the sentiment of three dozen respondents in 12 markets across North and South America, Europe, and Asia-Pacific.

We also fielded three global quantitative surveys among 9,000 frequent video streaming viewers, aged 18-42 (750 respondents in each of the 12 markets). Surveys were fielded in November 2024, January 2025, and April 2025.

Insights From Every Corner of the Globe

Australia, Brazil, Canada, France, Germany, Italy, Japan, Mexico, South Korea, Spain, the UK, and the U.S.



A Robust Global Sample

9,000 frequent streaming viewers participated in the surveys.

9K

Speaking to the Next Generation of Streamers

Research focused on Gen Z (18–26) and Millennials (27–42).

Gen Z

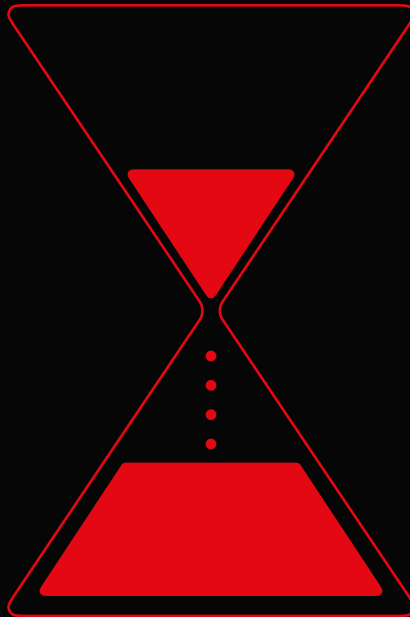
A18-26

Millennials

A27-42

Trends Tracked Over Time

Three survey waves captured shifts in behaviour across late 2024 and early 2025.



THEME I

EVERY

STORY

ANY

TIME

Variety is no longer a perk; it's the expectation.



Streaming services have made endless entertainment accessible, meaning audiences today live in a universe of seemingly infinite choice. Gen Zs and Millennials say they revel in that abundance, citing the “widest selection of content” as the top reason why they pick a streaming service.⁵

The benefit of this wide selection of streaming titles is twofold: first, most viewers (86%) say they feel confident that, with so much variety on streaming services, there’s always something great to watch.⁶ Second, and perhaps more importantly, is the **joy of discovery, which has become core to the streaming experience.** 73% of Gen Zs and Millennials say they love finding the perfect thing to watch, rather than feeling overwhelmed by all of the options.⁷ And 78% of Gen Zs and Millennials say they always or often go to a streaming service to intentionally discover something new.⁸ This promise of discovery is what drives retention: knowing their next favourite is just a click away keeps viewers coming back for more.

As viewers explore, their horizons expand.

Gen Zs and Millennials say a top 2 reason they go to streaming services is to explore genres or subject matter they haven’t seen before.⁹ Over half of viewers say they watch a greater variety of genres (52%) – as well as more programmes and films they’d never have expected to like (54%) – because of streaming.¹⁰

The more viewers discover, the more they push titles to the top of the streaming charts, driving even greater discovery and viewership – including for programmes that are new (instant hit *Adolescence*), old (*Suits*, which first premiered in 2011¹¹), international (Spain’s *Society of the Snow*¹²), and beyond. Gen Zs and Millennials almost universally (92%) agree that streaming entertainment has broadened the content they watch, and 84% say it’s actually broadened their experience of the world too.¹³

“Netflix features a wide range of British sitcoms which is important to me and, I would assume, the majority of British viewers. They feature a good range of genres and moods.”



YASH

18, UK
SURVEY RESPONDENT

Streaming Broadens Worldviews

84% say streaming has broadened their experience of the world.



Streaming as a Discovery Engine

78% of Gen Zs and Millennials say they always or often go to a streaming service to intentionally discover something new.

WHAT IT MEANS FOR MARKETERS



Feed audiences’ desire for novelty. 81% of Gen Zs and Millennials say that when they tune into a streaming service, they’re open to discovering new series and films. Nearly the same majority (79%) also note they love discovering new things in culture – and this includes brands and products.¹⁴ So brands should align with streaming films and series that expand viewers’ horizons, introducing audiences to new titles, genres, or subject matter. For example, Netflix has a range of genres – and releases new programmes and films every month¹⁵ – so there’s always something new for viewers to discover.

International programmes and films that connect audiences to cultures from around the world are especially resonant. 88% of Gen Zs and Millennials say they like when brands introduce them to products or experiences from other countries.¹⁶ With 36% of Gen Zs and Millennials saying they turn to Netflix to explore different cultures or countries, the streaming service is like a passport to the world¹⁷ – especially for Gen Zs, who generally watch more content from cultures other than their own, than any other demo on Netflix’s ads plan.¹⁸ Sponsoring international films and series can be an effective way to expand their worldview. For instance, campaigns positively influence brand awareness and outperform Lucid norms. We recently proved this with a travel brand in the UK: engaging content and active viewer attention led to stronger ad recall (+10pp), ensuring audiences remembered the brand and showed a higher propensity to consider using it (+10pp).¹⁹

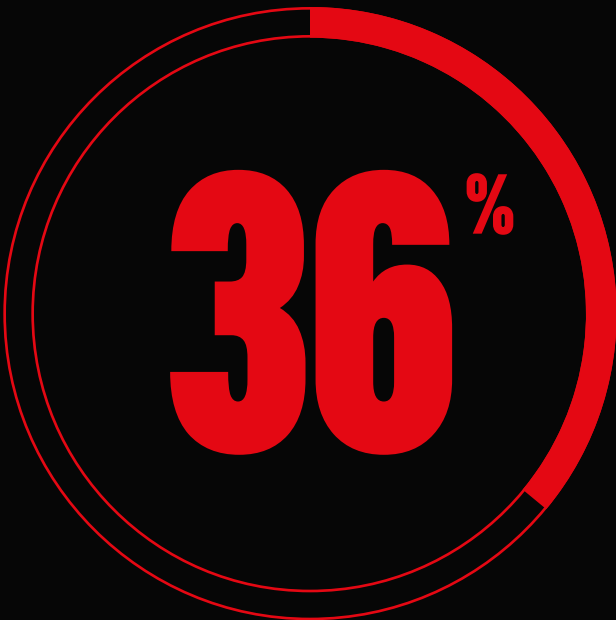
Streaming Audiences Are Primed to Discover

81% of Gen Zs and Millennials say they’re open to discovering new programmes and films when they log into a streaming service — and 79% say they love discovering new things in culture, including brands and products.



Viewers Travel Far and Wide — Without Leaving Netflix

36% Gen Zs and Millennials turn to Netflix to explore different cultures or countries.



Global Stories Spark Global Curiosity

88% of Gen Zs and Millennials say they like when brands introduce them to products or experiences from other countries.



Sponsorships That Stick

Single title sponsorship on Netflix’s ads plan leads to uplifts in ad recall (+10pp) and consideration (+10pp).





LUPIN



MULTI FACETED

TREND

Audiences today have broader,
more diverse tastes than ever.

AUDIENCES

Streaming That Reflects Every Side of You

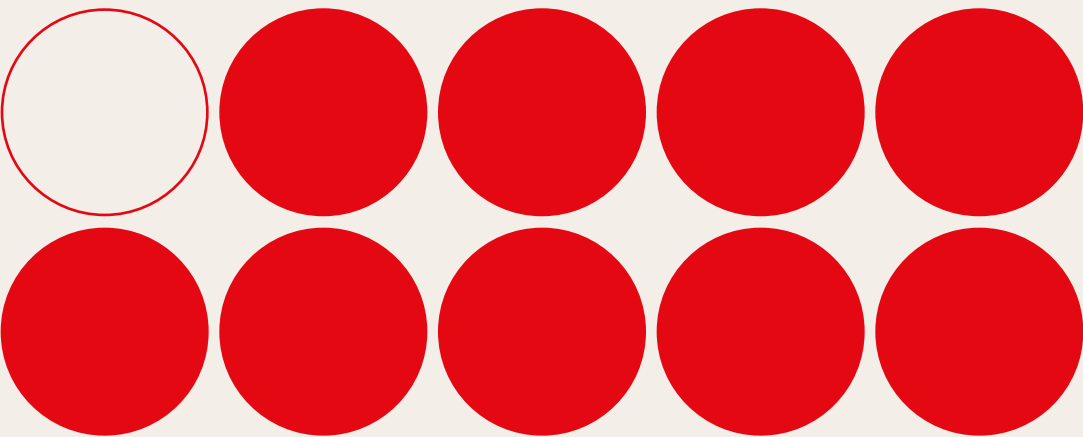


Identity has never been more dynamic. It's shaped by constant exposure to diverse stories, cultures, and ideas from around the world. Today's viewing habits mirror that complexity. Viewers actively seek out titles that reflect their wide-ranging interests and niche appetites. Audiences contain multitudes; what they watch reflects not only who you might expect them to be, but a complex, seemingly contradictory array of tastes and interests that unveils who they are below the surface. For example, across all Netflix members, viewers of drama series like *Adolescence* also watch period romance series like *Bridgerton*.²⁰ Case in point: 78% of Gen Zs and Millennials say they've surprised even *themselves* with the eclectic mix of programmes and films they like.²¹ And a full 94% of Gen Zs and Millennials feel that their personality is reflected in their viewing habits.²²

Streaming services' wide variety of titles lets audiences explore and connect with every side of themselves, no matter how niche or contradictory. In fact, that's part of the draw of streaming: 84% of Gen Zs and Millennials say they expect their favourite streaming services to provide a curated mix of programmes and films, spanning cultural tentpoles and titles for everyday viewing.²³ While blockbuster titles have built-in fans, 68% of Gen Zs and Millennials say they consider themselves fans of at least one programme or film that appeals to a more specific audience.²⁴ For example, the same viewers that look forward to watching the most popular titles like *Ginny & Georgia* may be just as obsessed with titles like *Supacell*. Not only do these distinct programmes give them the opportunity to experience something different, but nearly two thirds (65%) say being a fan of one can feel like a unique part of their identity.²⁵

Audiences Are What They Watch

More than 9 in 10 Gen Zs and Millennials feel that their personality is reflected in their viewing habits.



Audiences Contain Multitudes

78% of Gen Zs and Millennials say they've surprised even themselves with the eclectic mix of programmes and films they like.



“ WATCHING A WIDE VARIETY

**OF CONTENT MAKES ME LESS
ONE-DIMENSIONAL. IT FEEDS
MY INQUISITIVE MIND. ”**



REBECCA

41, UK
SURVEY RESPONDENT

WHAT IT MEANS FOR MARKETERS



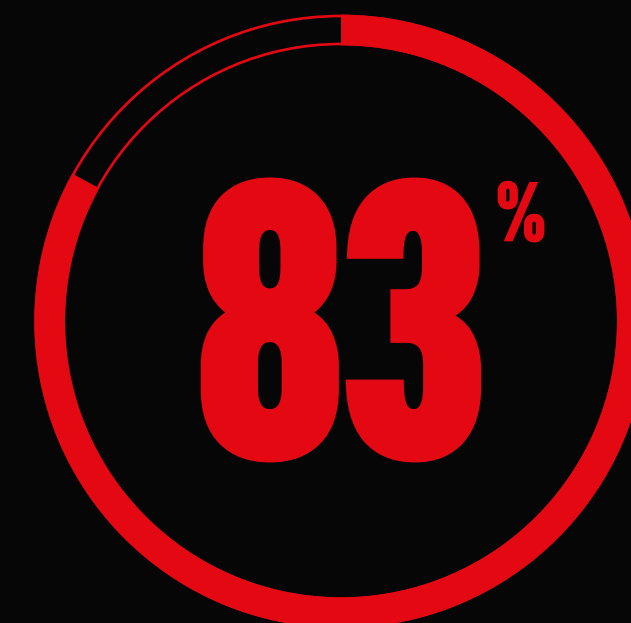
STRANGER THINGS

Connect with viewers across diverse titles. While it's a sure bet to capture audience attention by advertising on the biggest blockbuster titles, 83% of Gen Zs and Millennials agree: "Ads that are attuned to my niche interests are more likely to capture my attention."²⁶ Streaming services are able to match entertainment with specific interests like no other media before. On Netflix, over 3,000 content tags ("campy," "gritty," "cerebral")²⁷ and 36,000 secret category codes ("Family Film Night," "Action with a Side of Romance")³⁰ help audiences find whatever title feels just right to them at any given moment – and help advertisers capture their attention in the most relevant ways.

The landscape of streaming titles will only grow more diverse. A solid majority of Gen Zs and Millennials say that in the coming year they plan to stream more popular programmes and films (75%) and more new releases (77%) – as well as more programmes and films that are made by small indie filmmakers (63%), introduce them to talent they've never heard of (70%), are under-appreciated by mainstream audiences (57%), or even that are "unique, quirky, or weird" (61%).²⁹ Be fluid enough to evolve alongside your audience. Tastes in programmes and films – as well as brands – tend to change over time, and 76% of Gen Zs and Millennials say their favourite brands are those that stick with them as they change and grow.³⁰

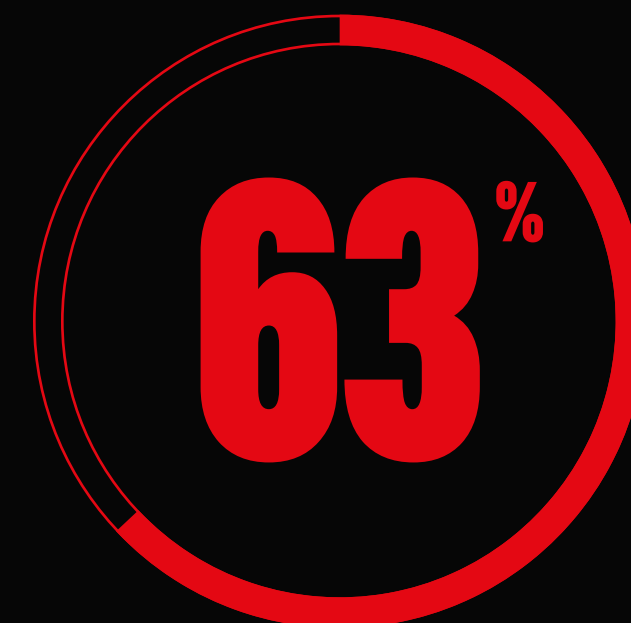
Make It Personal

83% of Gen Zs and Millennials agree that ads attuned to their niche interests are more likely to capture their attention.



Indie Content Is Rising

63% plan to watch more programmes and films made by small indie filmmakers.



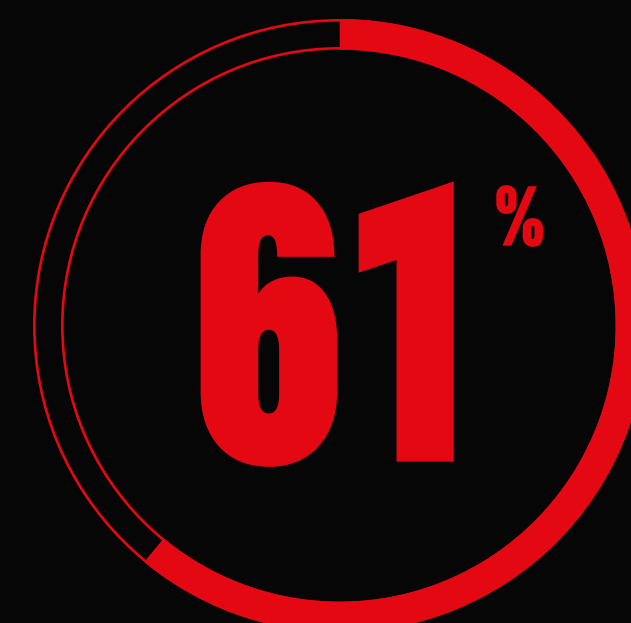
Grow Together, Stay Together

76% say their favourite brands are those that stick with them as they change and grow.



Audiences Seek the Unusual

61% plan to stream more programmes and films that are "unique, quirky, or weird" in the coming year.





EVERY MOOD & MOMENT

TREND Streaming serves viewers' every interest, impulse, and emotional motivation.

Streaming That Fits Your Life



“Having a huge variety of genres and TV programmes can help fulfill my needs and desires, whatever mood I’m in.”



OBRUCHE
24, UK
SURVEY RESPONDENT

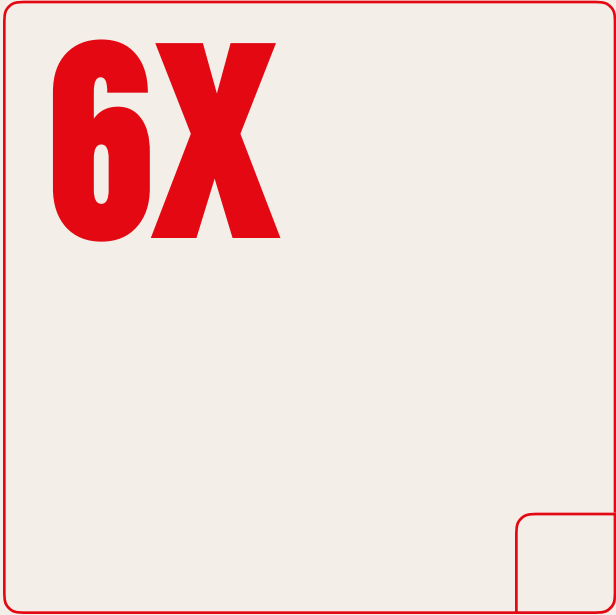
Not only are there countless options of titles available on streaming services, there are also countless reasons why viewers tune in. From escapism and comfort to thrill or self-reflection, audiences choose what to watch based on deeply personal needs. Nearly 40% of Gen Zs and Millennials say that, just in the past month, they’ve picked a programme or film to watch purely based on their mood.³¹

The titles audiences love are as fluid and multifaceted as their motivations: the majority (66%) of Gen Zs and Millennials say the programme they consider their “favourite” changes very often³² – based on their mood or what’s happening in their life (70%), or simply what’s available to stream (67%).³³ They might watch a popular thriller to avoid feeling fear of missing out, tune into a cooking programme to relax, or check out a documentary to learn about a specific topic. Meanwhile, shifting macrosocial moods (i.e., what’s happening in society around viewers) are mirrored in seasonal spikes of films and series about learning in January, horror in October, and the holidays at year’s end.³⁴ 84% of young audiences feel that, when it comes to streaming entertainment, no matter what they need, what mood they’re in, there will be a programme that fits.³⁵

No matter the mood, moment, or craving, the wide variety of titles on streaming services delivers what viewers want, when they want it. Audiences overwhelmingly say (87%) they feel confident that their favourite streaming service has something they’d enjoy watching any day of the week.³⁶ **But beyond keeping them satisfied, this level of variety keeps them coming back for more.** Gen Zs and Millennials cite “range” and “abundance” as the top reasons they subscribe to their top streaming service (Netflix ranks number one).³⁷ And it’s why they’re 6x more likely to tune into Netflix to find something new to watch rather than its closest competitor.³⁸

When Choice Matters, They Choose Netflix

Gen Z and Millennial audiences are 6x more likely to pick Netflix vs its closest competitor because of range and abundance of its programming.



Favourites Are Fluid

66% say the programme they consider their “favourite” changes very often — influenced by mood, life events, or what’s available to stream.



WHAT IT MEANS FOR MARKETERS



Speak to viewers’ diverse set of moods, tastes, emotional desires, and interests. While there are a wide range of reasons a viewer might tune into a film or series, this much is certain: Brands are a welcome part of the experience. The vast majority of Gen Zs and Millennials say they’re open to discovering a new brand or product from the latest action flick (87%), a soothing cooking programme (83%), a light rom-com (91%), or even an educational documentary (90%).³⁹ In fact, 75% of Gen Zs and Millennials say they like when brands advertise across a wide range of streaming content, including different genres and narratives.⁴⁰ Streaming services can provide insights into those audience preferences. With Netflix, for example, advertisers can target audiences according to unique viewing moods and interests, based on the service’s deep and nuanced insights into members’ complex streaming habits. By using these types of audience targeting tools, you can reach audiences with precision, no matter what they’re watching.

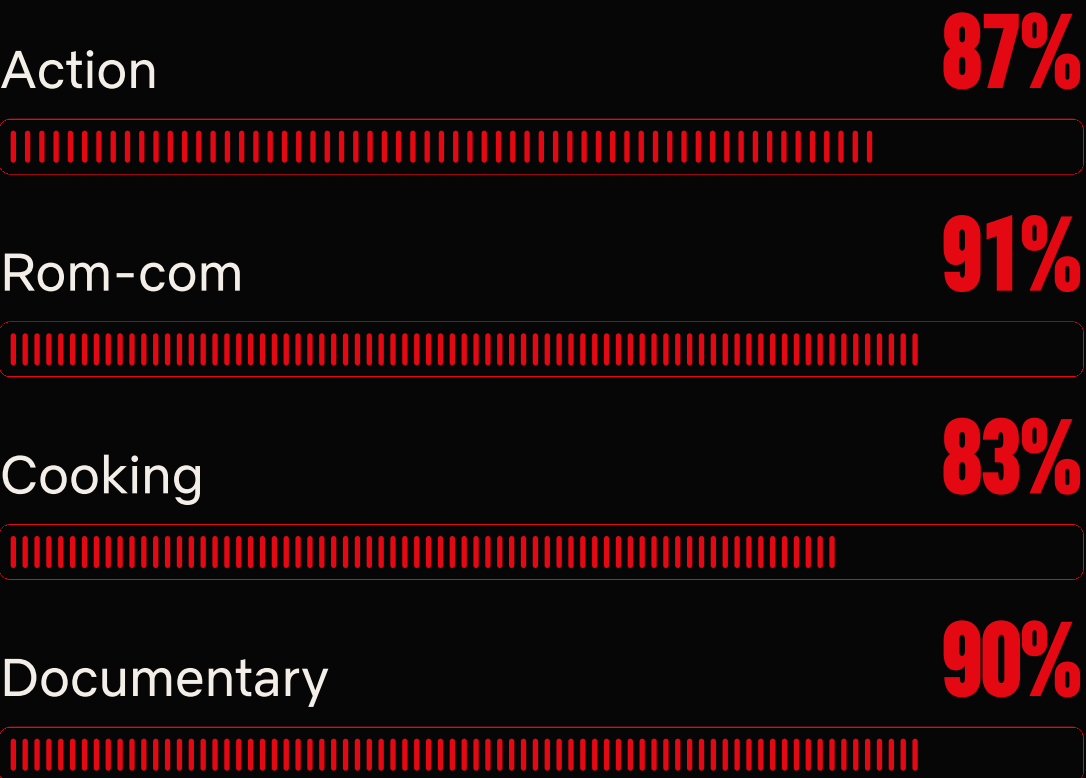
Brands Fit Every Genre

75% of Gen Zs and Millennials like when brands advertise across a wide range of streaming content, including different genres and narratives.



Across Genres, Ads Are Welcome

Whether it’s an action flick, rom-com, cooking programme, or documentary, viewers are open to discovering new brands in any mood.



Match My Mood

With Netflix, advertisers can target audiences based on moods and interests drawn from their viewing habits.



THEME II

FANS RULE THE WORLD



THE CROWN

Streaming reshapes how audiences enact their fandom.



Fandom has permeated culture. From anime lovers to *Wednesday* devotees, nearly everyone claims allegiance to pop culture passions. **And for Gen Zs and Millennials, streaming is an integral part of their personal pop culture mix: 93% consider themselves a fan of at least one programme.**⁴¹ Streaming services not only inspire fans to connect; they're shaping what fandom looks like – turning audiences into communities that have a bigger personal and collective impact than ever before. For younger audiences, fandom has become so significant, it's even core to who they are: 72% of Gen Zs say that being a fan is an important part of their identity.⁴²

Streaming's ability to unite people through shared passions has become all the more profound given today's polarised world. A full 84% of Gen Zs and Millennials agree: "Streaming breaks down barriers across demographics (e.g., age, culture, geography)."⁴³ Case in point: Programmes like *Stranger Things* and *Gilmore Girls* unify generations, *Squid Game* connects global audiences, and *Never Have I Ever* and *Nobody Wants This* bridge diverse cultural experiences. By sharing what they love, fans' emotional connection to their favourite titles deepens. 79% of Millennials and Gen Zs agree that "being a fan of a programme or film feels like being part of the 'in' crowd".⁴⁴ At the same time, 81% of Millennials say that talking about a programme with fellow fans feels like sharing a secret language (compared to 78% of Gen Zs).⁴⁵ As fans co-create communities for all who "get it," they cultivate a deep sense of connection and belonging.

In a world where niche identity rules, fandoms of various kinds of streaming titles have become equally, if not more, influential than fans of the biggest tentpoles. Of the Gen Zs and Millennials who say they're fans of more titles besides blockbusters, most feel that smaller fan communities feel more personal and connected (70%), are more exclusive (73%),⁴⁶ and have more loyal fans, which makes the community stronger (73%). All these factors combined are what drives them to get in on the ground floor as entertainment-based communities form: 74% say it's exciting to watch a small fan base grow and gain recognition,⁴⁷ and 57% say they plan to watch more programmes and films with cult fandoms in the coming year.⁴⁸

Only the Real Ones Get It

78% of Gen Zs say that talking about a programme with fellow fans feels like sharing a secret language.



Fandom Runs Deep

72% of Gen Zs say being a fan is an important part of their identity.



**“ WE ALL WANT TO FEEL
PART OF SOMETHING.
THAT COULD BE A
SPORTS TEAM,
OR BEING FANS OF A
PARTICULAR BAND**

OR PROGRAMME. ”



REBECCA

41, UK
SURVEY RESPONDENT

WHAT IT MEANS FOR MARKETERS



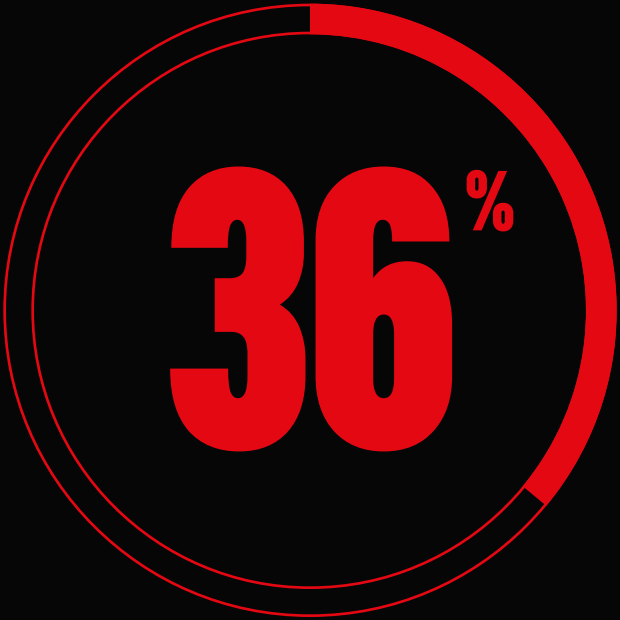
Meet fans where they’re most emotionally engaged and connected. 36% of Gen Zs and Millennials say their perception of a brand improves when it advertises on or sponsors a series or film they love.⁵⁰ By aligning with viewers’ favourite fandoms, brands even increase the chance that they’ll buy them, according to 74% of Gen Zs and Millennials. Meanwhile, 70% of Gen Zs and Millennials say they trust brands that can demonstrate a deep understanding of their favourite fandoms⁵¹, while 79% say that brands that speak the insider language of their favourite programmes and films feel like part of the fandom.⁵²

Streaming’s expansion into live events adds another layer to this cultural connection. 78% of Gen Zs and Millennials say live streams “create a sense of shared excitement that’s missing from today’s fractured media landscape.”⁵³ 82% of Gen Zs and Millennials say it’s exciting to watch and react in real time with others,⁵⁴ and 75% agree that “live programming creates real-time ‘watercooler moments’ to bond with people over.”⁵⁶ Special events streamed live are setting new benchmarks for communal engagement – and creating new opportunities for brands to maximise the big cultural moments that bring people together.⁵⁶

For example, 108 million viewers around the world tuned into the Jake Paul vs Mike Tyson boxing match streamed live on Netflix, which made it the most streamed sporting event ever.⁵⁷ The co-main event, Taylor vs Serrano 2, was the most-watched professional women’s sports event in history, with an estimated 74 million live viewers globally.⁵⁸ 71% of Gen Zs and Millennials agree, “Brands that sponsor live programmes feel more connected to culture-defining moments.”⁵⁹ Meanwhile, 63% of Gen Zs and Millennials say they’re more likely to notice and remember featured brands when watching live-streamed content.⁶⁰

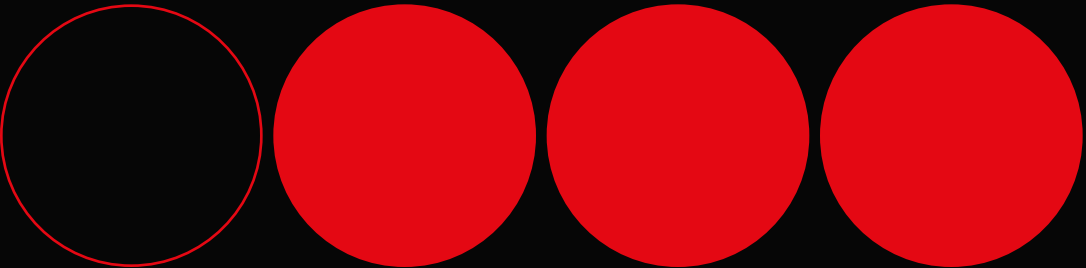
Go Where the Love Is

36% of Gen Zs and Millennials say their perception of a brand improves when it advertises on or sponsors a series or film they love.



Talk Their Talk

Over three-quarters say brands that use the language of their favourite programmes and films feel like part of the fandom.



If You Know, You Know

70% say they trust brands that demonstrate a deep understanding of their favourite fandoms.



Fandom Fuels the Buy Button

74% say they’re more likely to buy from brands aligned with their favourite fandoms.



FANDOM



FLYWHEEL

TREND Streaming scales beloved titles across the globe



From Word-of-Mouth to Worldwide Phenomenon



STRANGER THINGS

“I recommended my friends watch *Baby Reindeer*. When they enjoyed it, it was gratifying. The best part was then being able to bond over it.”

**YASH**18, UK
SURVEY RESPONDENT

Fandom is the ultimate social currency, sparking connections by cueing others into what's worth watching. 87% of Gen Zs and Millennials say that when they discover something new to watch, they recommend it to friends so they can discuss it together.⁶¹ And it works: 85% of Gen Zs and Millennials have introduced a new programme or film to someone in their lives or vice versa,⁶² and 79% say they've actually turned someone they know into a fan of a programme or film.⁶³ In this way, fans build momentum for the titles they love: the more invested they become, the more they share – spreading the word online, in group chats, and everywhere in between. **And each share pulls in more people, fuelling a fandom flywheel that only spins faster over time.**

Streaming has taken that flywheel global, magnifying the potential impact of fan-fuelled conversation. *The Gentlemen* is an example of this. The UK-created and UK-centric series started with a passionate local audience, who shared it with others, sparking a chain reaction of recommendations that turned the programme into a global hit. **Streaming can help titles transcend barriers to turn niche passions and local cultures into worldwide phenomena.** Not only is it more fun to watch a programme when you know millions of people around the world are also watching – but 73% of Gen Zs and Millennials say streaming programmes and films with global fandoms makes them feel part of a large cultural movement.⁶⁴

Of course, social media has an amplifying effect on fandoms: 72% of Gen Zs and Millennials say they've shared content related to a programme or film on social media (or are interested in doing so). But it's streaming that makes unique local stories from anywhere and in any language so widely accessible, triggering the fandom flywheel, and scaling audiences across borders and languages. Streaming's global engine, for example, enabled the UK series *Adolescence* to draw more than 24 million views in its first four days, topping streaming charts in 71 countries. And so far, the program made history by being the first streaming programme to ever top the UK weekly ratings and has been watched by 16.7M people in the UK⁶⁶. In fact, 82% of Gen Zs and Millennials say the global scale of streaming services like Netflix propels the conversation around programmes and films to go global as well; 64% feel streaming helps keep their finger on the pulse of the global zeitgeist.⁶⁷

Recommendations Are Their Love Language

87% of Gen Zs and Millennials say that when they discover something new to watch, they recommend it to friends so they can discuss it together.



What Starts Here, Goes Everywhere

82% say the global reach of streaming makes the conversation around programmes and films go global.



WHAT IT MEANS FOR MARKETERS



NOBODY WANTS THIS

Turn vocal fans into advocates for your brand. Today's global viewers amplify what they see on streaming services, connecting programmes and films – but also brands – to wider audiences than ever before. 76% of Gen Zs and Millennials say that when they love a programme or film, they tell everyone about it, both online and offline.⁶⁸ Organic word of mouth fuels a powerful reciprocal recommendation engine. 86% of Gen Zs and Millennials say discovering they share a love for a programme or film with someone makes them want to recommend other favourites, while 85% say they'll trust recommendations in return.⁶⁹

Audiences expect brands to play a part in the fandom flywheel, too. 60% of Gen Zs and Millennials say they would feel more positively about brands that participate in a conversation happening among fans.⁷⁰ And when brands add value to the conversation, fans will follow for more. 71% of Gen Zs and Millennials have followed or are interested in following brand accounts that partner with a favourite programme or film on social media.⁷¹ Interestingly, Netflix members play a significant role in keeping this social cycle spinning: they say there isn't a week that goes by where they don't hear about a Netflix programme (77%) – or talk about one (69%).⁷² And all Netflix members are more likely than non-members to say they've discussed a programme or film on social media while watching it (47% vs 40%).⁷³

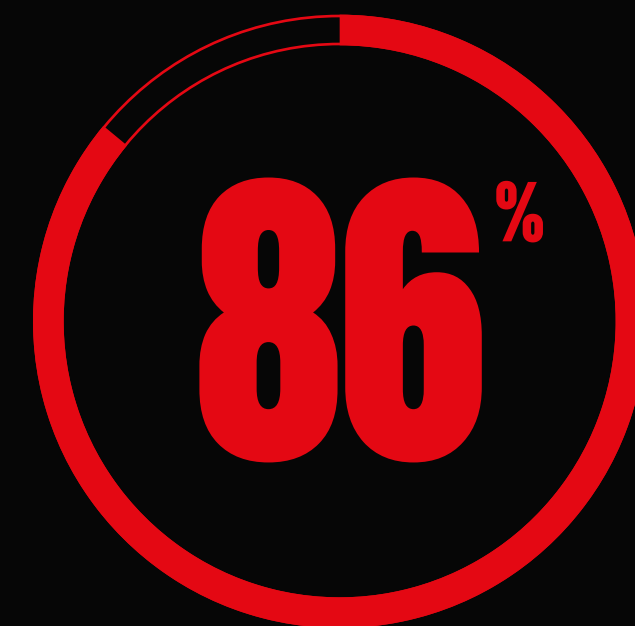
From Screens to Word of Mouth

76% of Gen Zs and Millennials say that when they love something, they tell everyone about it — both online and offline.



Shared Obsessions Create More Sharing

86% say that discovering a shared love for a programme or film makes them want to recommend other favourites.



Partnerships Turn Fans Into Followers

71% have followed or are interested in following brand accounts that partner with a favorite programme or film on social media.



Netflix Is Always in the Conversation

77% of Netflix members say there isn't a week that goes by where they don't hear about a Netflix programme.



LIVING YOUR FAN DOM



TREND

Fans take their passion off-service and into the world.

Beyond the Screen



“*Stranger Things, Friends, Harry Potter and Wednesday* merchandise feature heavily in my house and life.”



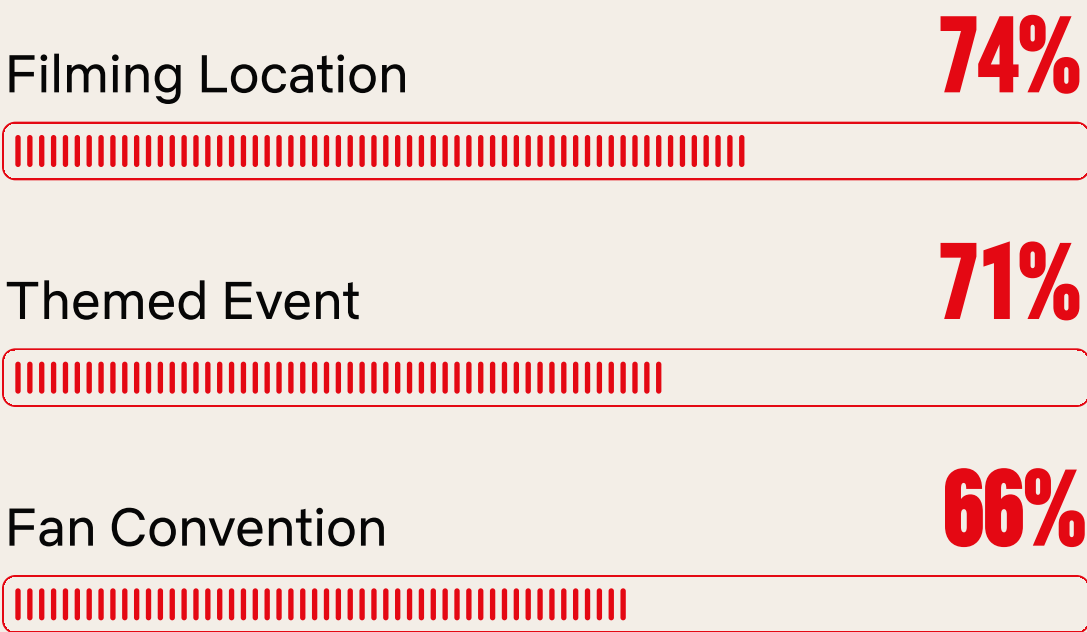
REBECCA
41, UK
SURVEY RESPONDENT

Whether it’s watching *Stranger Things: The First Shadow* play on London’s West End or sampling food at Netflix Bites restaurant in Las Vegas, fans want to experience their favourite titles in living color. The majority of Gen Zs and Millennials say they have already or are interested in visiting a filming location (74%), attending a themed virtual or in-person event (71%), or attending a fan convention or meet-up (66%).⁷⁴ What’s more, 61% say their favourite programme or film has encouraged them to travel to a new place⁷⁵, proving that fandoms take audiences far beyond the screen.

As fans blur the line between fiction and reality, their participatory approach to beloved titles is shaping culture from the ground up. For example, the breakout animated film *KPop Demon Hunters* not only saw its hit song ‘Golden’ land the number 1 spot on the UK’s Official Singles Chart, it also took on a life of its own across social media with fans posting their own videos. All of that fed even more viewership and fandom, resulting in Netflix offering singalong cinema showings for the title in the UK and the US – and making it the most watched film ever on Netflix.⁷⁷ Meanwhile, *Ripley* fans, inspired by the programme’s dramatic filming locations, sparked a 90% increase in Airbnb bookings in lesser known parts of the Amalfi Coast.⁷⁸ IRL immersions are so meaningful to fans that they’re making them the settings for once-in-a-lifetime moments. The Queen’s Ball: A *Bridgerton* Experience – an immersive Regency era-style ball with live music and performances inspired by the beloved series – has been the chosen spot for over 70 real-life marriage proposals.⁷⁹

Fans Want to Step Inside the Story

Fans want to visit filming locations and attend themed events and conventions tied to their favourite stories.



Stories That Move People... Literally

61% say their favourite programme or film has encouraged them to travel to a new place.



WHAT IT MEANS FOR MARKETERS



Invite audiences deeper into the streaming stories they love. Brands that help audiences learn everything they can about their favourite narratives and characters can benefit from a halo effect. QR codes are one easy way to give viewers a VIP pass. 80% of Gen Zs and Millennials say they’d be interested in a brand offering behind-the-scenes content related to their favourite programmes.⁸⁰ With a quick scan on a service such as Netflix, a QR code can unlock exclusive content, sneak peeks, teasers, and more. Nearly two thirds (65%) of Gen Zs and Millennials say QR codes on ads help them easily find information they want, and enable them to learn more about brands and products they might be interested in – making it easier than ever to immediately follow up on ads that capture their attention while streaming.

Audiences today love to keep the story going, so create brand experiences that extend the narrative or experience of their favourite programme or film. More than half of Gen Zs and Millennials say they’d feel more positively about a brand that references programmes or films in ads (66%), hires actors as spokespeople (58%), or creates social content that gives behind-the-scenes access (66%).⁸² They also welcome spin-offs that transcend the screen and immerse them IRL, including travel packages to or tours of filming locations or sets (76%), limited-edition merch (75%), or in-person experiences such as themed parties and remakes of iconic locations (72%).⁸³ In fact, more than two-thirds (68%) of Gen Zs and Millennials say they’ve already attended or are interested in attending a brand-sponsored event or experience tied to a programme or film.⁸⁴

Fans Crave a Peek Behind the Curtain

80% of Gen Zs and Millennials are interested in brands offering behind-the-scenes content related to their favourite programmes.



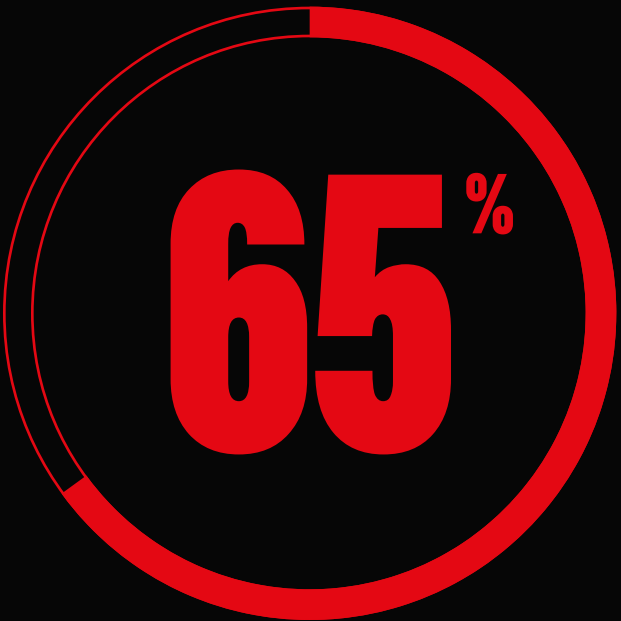
Events Make Brands Part of the Story

More than two-thirds have already attended or are interested in attending a brand-sponsored event or experience tied to a programme or film.



Scan to Go Deeper

65% say QR codes on ads help them easily find information they want, and the same share say they help them learn more about brands and products they might be interested in.



Turn Fictional Worlds Into Real Destinations

76% are interested in travel packages or tours of filming locations or sets tied to programmes and films.



THEME III

THE AGE OF ENGAGEMENT

Quality is defined by the depth of audience engagement.

The rise of streaming hasn't just changed what people watch – it's transformed *how* they watch. **Today's audiences are fully immersed in the series and films they love.** On Netflix specifically, sustained watching sessions are commonplace. On average, Netflix binge-watchers in the UK are so engrossed that viewing sessions on our ads plan average 3.6 hours per session.⁸⁵ And with deep immersion comes deep engagement. Nearly three quarters (72%) say that, in the past year, they've felt "obsessed" with a streaming programme or film and couldn't stop thinking about it long after it ended.⁸⁶

But engagement isn't just measured in hours – it's measured in emotional resonance. Viewers say that in the past month, they've had a strong emotional response while streaming a programme or film, including laughing out loud (89%) and even crying (55%).⁸⁷ **Especially in today's era of second-screening and scrolling, this level of emotional connection is what enables viewers to lock in meaningfully.** Here, Netflix members over-index: 73% of all Netflix members say that in the past year, they've been so emotionally invested in a programme or film that all their attention was focused on that, compared with just 67% of non-members.⁸⁸

For today's audiences, emotional connection and deep, focused attention are two elements that go hand in hand. With stories that captivate across genres and hyper-tailored recommendations, Netflix – more than any other service – sits at the intersection of both. The resulting viewing experience has reshaped how modern audiences define what's "good." Viewers say the biggest indicator that they'll enjoy a programme or film has nothing to do with how it scores with critics or how it performs at the box office. Instead, it's about what's recommended to them by a streaming service, based on their unique tastes and interests.⁸⁹ In fact, 86% of viewers today agree: "Quality is in the eye of the beholder."⁹⁰ That's why audiences are turning to streaming services that deliver consistent, emotionally resonant experiences – the kind that reel them in, move them, and keep them coming back for more.



A Story Worth Silencing the Group Chat

70% of viewers say they've been so engrossed in streaming a programme or film that they've ignored their phones — including social media.



Quality Is in the Eye of the Beholder

86% of viewers say they define quality based on personal connection to the programme or film.



Some Stories Stay With You

72% say they've felt "obsessed" with a streaming programme or film in the past year, thinking about it long after it ended.

WHAT IT MEANS FOR MARKETERS



Here they are now, entertain them. Streaming audiences tune in to be entertained, so ad breaks that match the vibe — and the high creative bar — of what they’re watching are more likely to capture and hold their attention. Netflix’s genre-targeting solution, for example, helps brands align to specific genres, while creative that matches the themes and tones of that genre can build on and feel of a piece with the film or series a member is enjoying. The vast majority of Gen Zs and Millennials say they pay attention to streaming ads that continue aspects of what they’re already watching, such as themes (72%), featured products (71%), and content or characters (75%).⁹⁰ This relevance heightens the emotional experience they crave: 83% of Gen Zs and Millennials say they’re more likely to pay attention to an ad that matches how they feel emotionally.⁹²

Keep the Story Going

72% of Gen Zs and Millennials pay attention to ads that carry forward themes from what they’re already watching.



Put Products in the World They Love

71% say they notice ads featuring products from the content they’re watching.



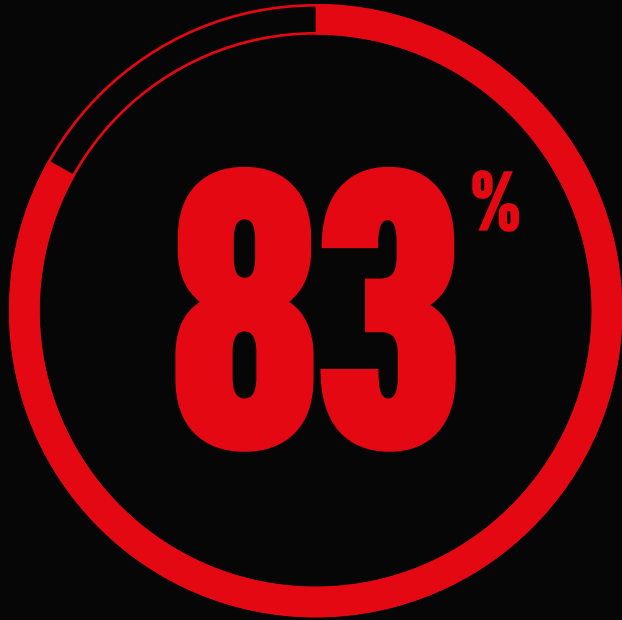
Let the Characters Do the Talking

75% say they pay attention to ads that include content or characters from the programmes or film they’re watching.



Match the Mood, Win Their Focus

83% are more likely to pay attention to an ad that aligns with how they feel emotionally in the moment.





PERSONAL

TREND

Curation helps viewers feel understood,
and understand themselves.

RES ONANCE

More Than Entertainment: Streaming That Sees You



“I like a lot of fantasy as well so if I’m in the mood for something like that I keep my eye out for the ‘Because You Watched’ section to see what else I might like.”



CHELSEA
31, UK
SURVEY RESPONDENT

When it comes to choosing something to watch, Gen Zs and Millennials rely on recommendations from streaming services, almost as much as they trust their own instincts: half say that when looking for something to watch, they turn to suggestions rather than arriving with something specific in mind.⁹³ And the vast majority of viewers (82%) say that streaming services recommend programmes and films that are exactly right for them.⁹⁴

But this isn’t just about good recs; it’s about reflecting and affirming their identities. When streaming services surface titles that feel perfectly tailored to them, Gen Z and Millennial viewers feel validated. This is especially true for Gen Zs: 83% agree that “My favourite programmes and films help me understand and accept myself on a deeper level” (vs 77% of Millennials).⁹⁵ In a world where identity can be fluid and culture fleeting, streaming services consistently help audiences see and accept themselves.

Furthermore, viewers have begun to see streaming not just as a source of entertainment, but as a space for personal growth and expansion. Gen Zs and Millennials say that programmes and films have inspired them to change things in their real life – whether it’s taking more risks (59%), pursuing new hobbies (62%), or even trying out a new fashion aesthetic (53%).⁹⁶ 75% say what they’ve streamed has even inspired them to get in touch with feelings they wouldn’t otherwise have, and develop a richer interior life (81%), making streaming feel like modern-day therapy (82%).⁹⁷ This deeply emotional experience keeps audiences coming back for more.

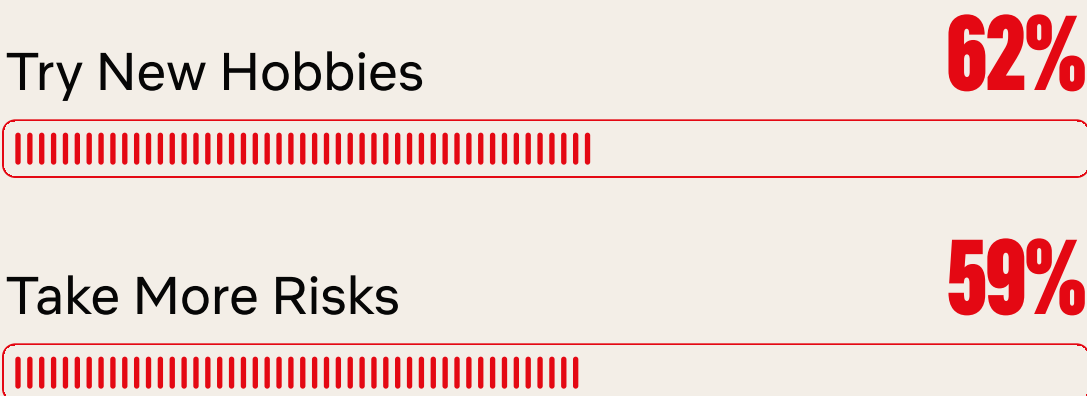
They Know Exactly What I Want

82% of viewers feel streaming services recommend programmes and films that perfectly match their tastes.



On-Screen Inspiration Becomes Real-Life Action

Streaming often motivates audiences to try new hobbies or take more risks.



Stories Help Me See Myself

83% of Gen Zs agree their favourite programmes and films help them understand and accept themselves on a deeper level.

WHAT IT MEANS FOR MARKETERS



Engage audiences with ads tailored to them. Audiences have come to expect more than just entertainment from streaming services; ads must engage them on a deeper level. 81% of Gen Zs and Millennials agree: “My favourite streaming programmes and films make me feel deeply seen.”⁹⁹ That sense of personal resonance extends to the brands they discover on the service, too. 80% of Gen Zs and Millennials say the more a streaming service “gets” their tastes, interests, and moods, the more it will be able to connect them with relevant brands and products.⁹⁹

As an example, Netflix’s interest targeting synthesises preferences based not just on content but past behaviour. A viewer who streamed *Drive to Survive*, or *F1 Academy*, for example, may be interested in Formula 1 and behind-the-scenes content but not watching live races specifically. Counter-intuitive insights like this have led 72% of Gen Z and Millennials to agree, “Netflix sees me and understands me on a deep level” – a testament to Netflix nuanced recommendations. In fact, because the product surfaces what members are looking for, two thirds (65%) of all viewing hours in the UK originate from Netflix’s home page. Members are especially drawn to the “Because You Watched” section, where viewing hours have increased by almost 50% globally in the last year. Now, over 80% of what all Netflix viewers watch is a result of personalised recommendations.¹⁰²

Beyond validating who they are and what they want to see today, audiences (especially younger ones) want to stream inspiration for their future selves: 65% of Gen Zs say that what they watch on Netflix has shaped their identity (compared with 62% of Millennials).¹⁰³ 72% of Gen Zs and Millennials say they like ads that inspire them to explore themselves or their life path.¹⁰⁴

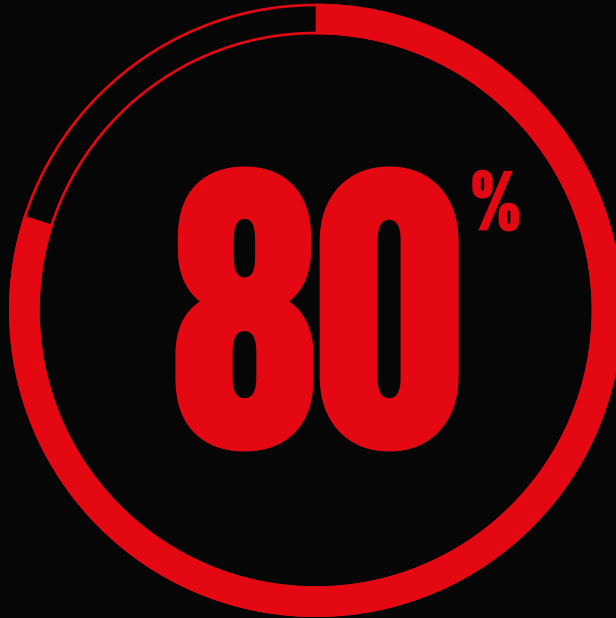
Audiences Want to Feel Seen

81% of Gen Zs and Millennials say their favourite streaming programmes and films make them feel deeply seen.



Relevance Builds Connection

80% say the more a streaming service understands their tastes, interests, and moods, the better it can connect them with relevant brands and products.



Streaming Shapes Identity — Especially for Gen Z

65% of Gen Zs say what they watch on Netflix has shaped their identity, compared with 62% of Millennials.



Netflix Knows Its Audience

72% of Gen Zs and Millennials agree that “Netflix sees me and understands me on a deep level.”

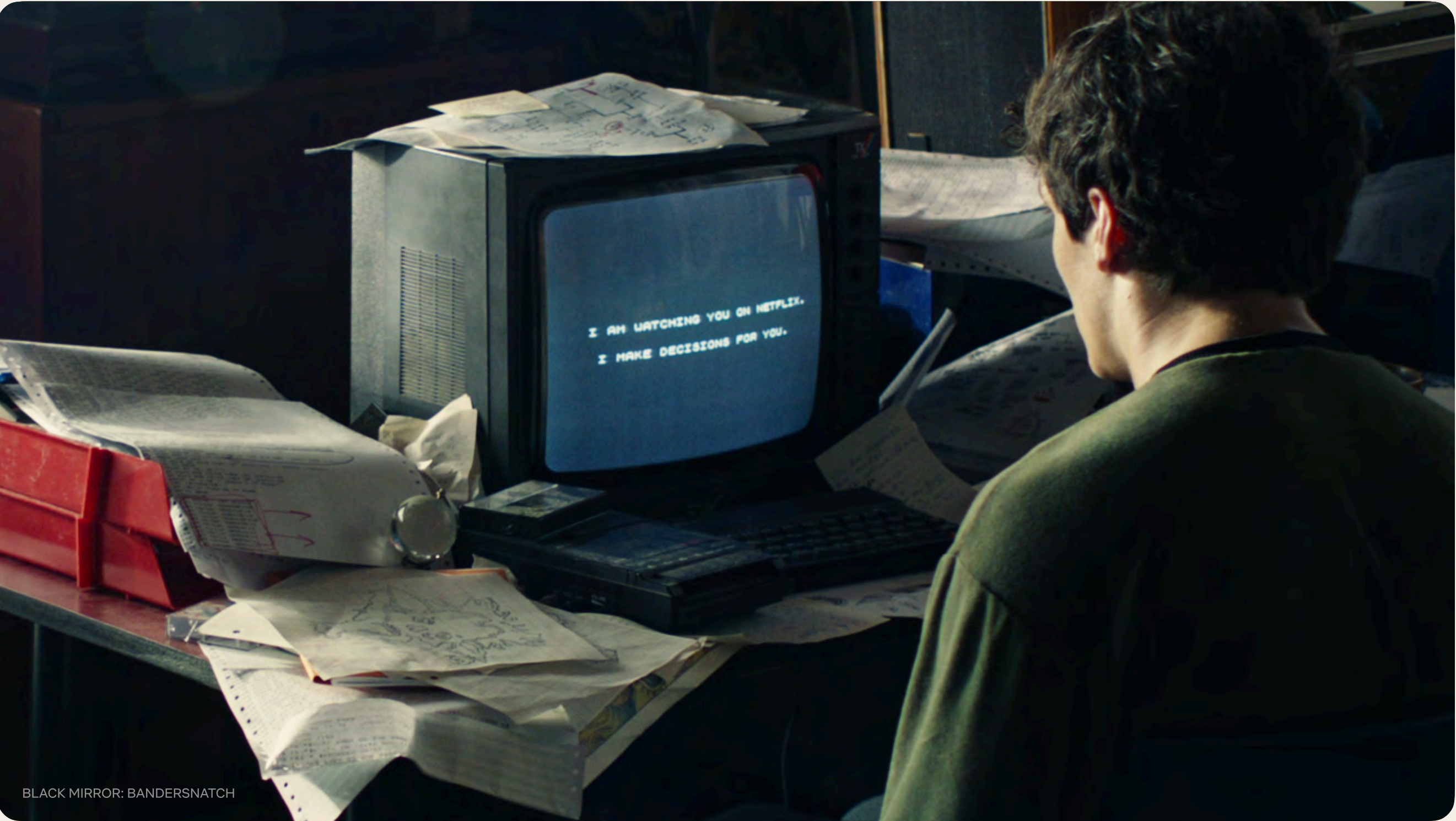


TREND

Audiences feel a powerful connection to the streaming environment itself.

FAVOURITE STREAMING SERVICE

The Experience Is the Platform



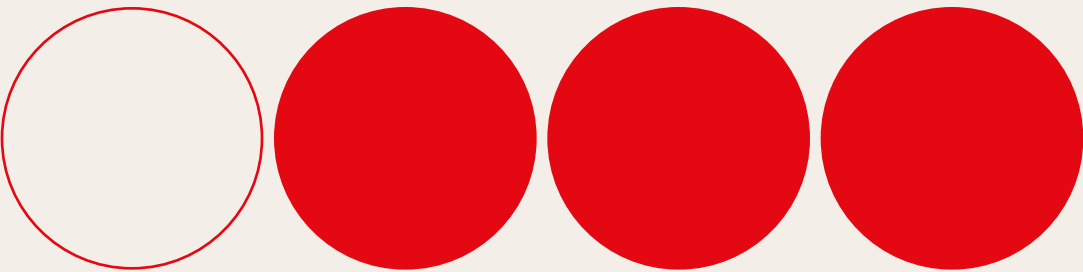
BLACK MIRROR: BANDERSNATCH

For today’s audiences, streaming services aren’t just gateways to films and series; they’re part of the experience itself. For instance, many viewers no longer say they watched a specific film or programme; they say they “watched Netflix.” Beyond brand recognition, that shorthand signals an emotional connection to the service. The majority of Gen Zs and Millennials say they get excited just thinking about streaming on their favourite services (69%), and that they feel emotionally connected to or invested in at least one streaming service (62%).¹⁰⁵ In a crowded digital world, the streaming service itself has become a space of comfort, identity, and ritual.

That emotional resonance begins before the first scene plays. Of the viewers who say they have a regular streaming routine, three quarters use streaming as a motivation or reward for completing daily tasks and chores (75%), and they often log into streaming services without a specific title in mind (79%), trusting the experience to guide them toward something they’ll love.¹⁰⁶ That sense of anticipation and trust has made streaming a go-to escape. **But more than that, it’s elevated services to premium, immersive environments that reflect and match the viewer’s state of mind.** With 78% of Gen Zs and Millennials saying that the more content they feel attuned to on a streaming service, the more emotionally connected they feel to it – it’s clear that streaming service loyalty is rooted in something deeper than habit.¹⁰⁷

Streaming as Ritual

Three-quarters of viewers with a regular streaming routine use it as a motivation or reward for completing daily tasks.



They Trust the Journey

79% log in without a specific title in mind, trusting the platform to guide them to something they’ll love.



Streaming Sparks Anticipation

69% of Gen Zs and Millennials say they get excited just thinking about streaming on their favourite platforms.



WHAT IT MEANS FOR MARKETERS

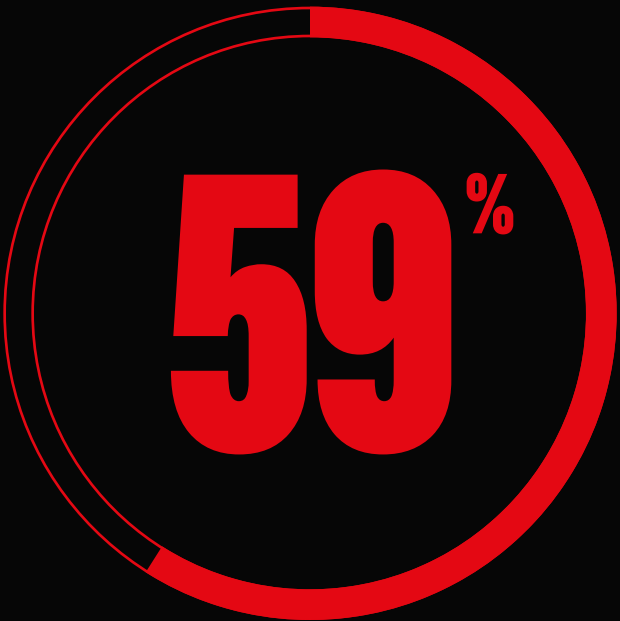


Make a great first impression with emotionally engaged streaming service loyalists. Viewers today tune into their favourite service to see where it will take them. 79% of Gen Zs and Millennials say they trust and expect their favourite streaming services to provide a “premium” experience that they can immerse themselves in, meaning they’re highly receptive to streaming service-recommended programmes, films – and brands.¹⁰⁸ 59% of Gen Zs and Millennials say they trust their favourite streaming service to serve up relevant ads, and that the ads served up on their favourite streaming service are more likely to be contextually relevant to them (53%).¹⁰⁹ In fact, 56% of Gen Zs and Millennials say they’re more likely to pay attention to the ads on their favourite streaming service compared with ads in other places.¹¹⁰

On Netflix, members are so emotionally invested in the streaming service, they’ve developed a sense of fondness for everything from the logo (63%) to the iconic “tudum” sound that plays when they log in (69%).¹¹¹ **Netflix’s First Impression targeting secures premium placement, meaning your brand will be the very first ad Netflix members see when they start watching.** This first-look advantage maximises brands’ impact.

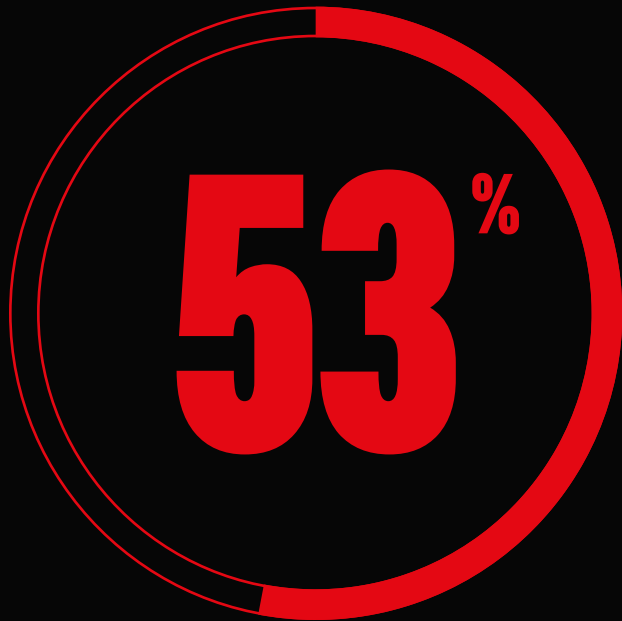
You Just Get Me

59% of Gen Zs and Millennials say they trust their favourite streaming service to serve up relevant ads.



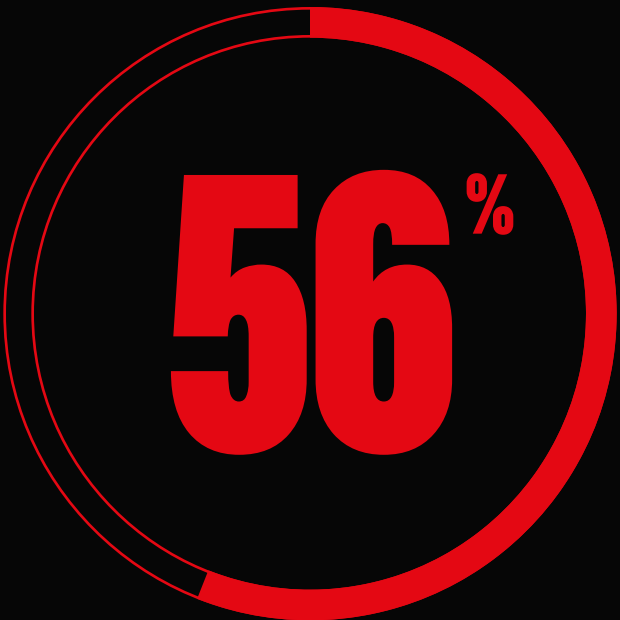
Right Place, Right Message

53% say ads on their favourite streaming service are more likely to be contextually relevant to them.



Attention Comes Easier Here

56% are more likely to pay attention to ads on their favourite streaming service compared to ads in other places.



An Icon That Resonates

69% of Netflix members feel fondness for the iconic “tudum” sound, and 63% feel the same about the logo.



CONCLUSION: THE CENTER OF ATTENTION



THE GENTLEMEN

As streaming entertainment evolves, so will audience expectations. Gen Z and Millennial audiences crave variety that reflects their diverse tastes, experiences that unlock conversation and community, and stories that resonate with who they are – and who they are becoming.

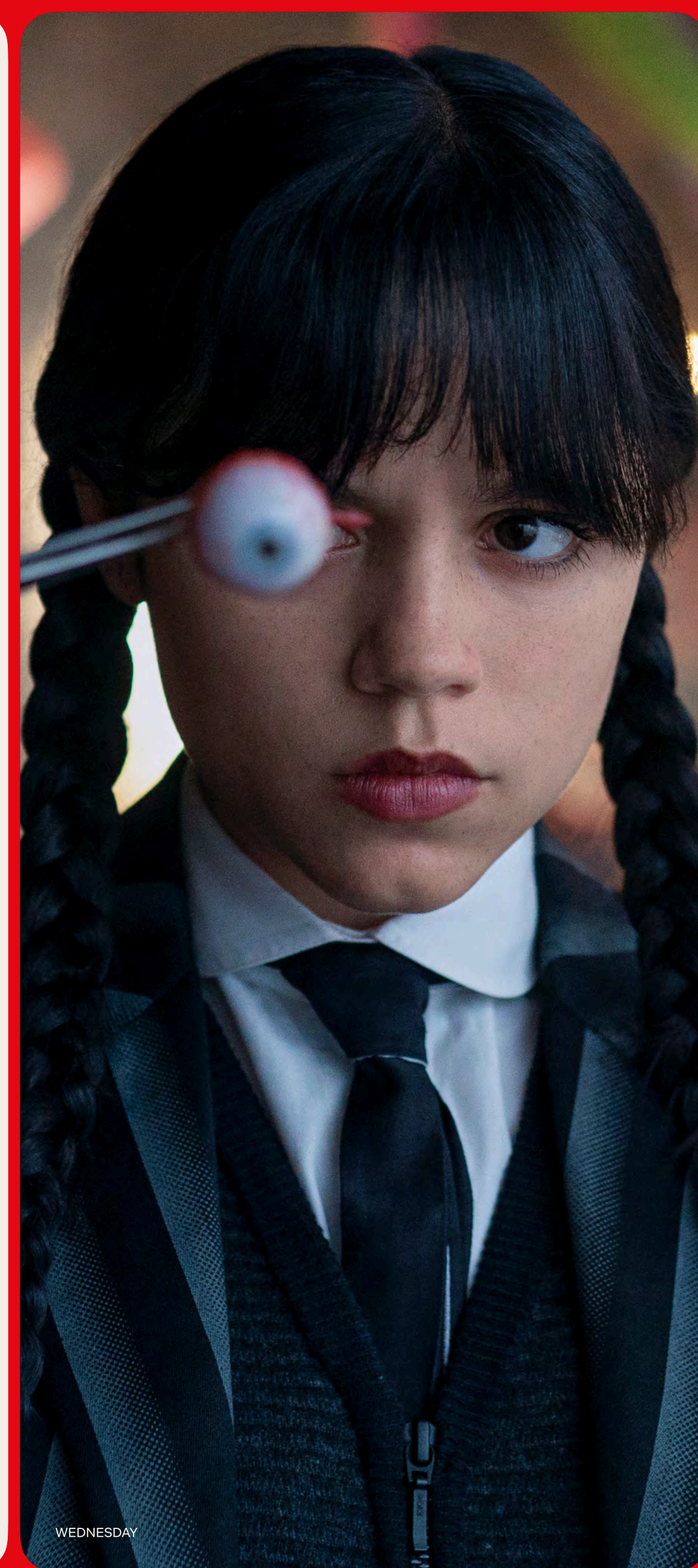
For advertisers, understanding the attitudes and behaviours of streaming audiences will enable them to craft more memorable moments for their brands and drive real results. **Netflix Ads represents a powerful way for advertisers to align to the world's most culture-defining programmes and films, while reaching the most attentive audience in entertainment.**

Gen Z and Millennial audiences are 6 times more likely to choose Netflix when looking for something new to watch and fall in love with, versus our closest competitor.¹¹² This is an outcome of the variety and quality of Netflix's programming. A personalised viewing experience, including recommendations that help members discover the right title for the moment. And a premium viewing environment where members stay engaged.

This recipe leads to an audience that is fully tuned in. For advertisers, that attention translates to real results across campaign objectives. In fact, Netflix Ads delivers +34pp higher awareness, +7pp improved brand favourability, as well as +7pp greater purchase intent versus Kantar's benchmarks in the UK.¹¹³

With Netflix, advertisers can engage these highly active viewers and tap into the power of fandom through custom brand partnerships and innovative ad formats. They can easily find their audiences on Netflix via programmatic buying through DSPs, such as Google Display and Video 360, The Trade Desk, Yahoo, and Amazon. They can target with nuance and precision, including via viewing moods and interests. And they can measure through a wide range of first- and third-party solutions, including access to more than 30 third-party partners.

In a world of abundant entertainment options, Netflix delivers something rare: a place where stories – and brands – keep viewers hooked and coming back for more. With Netflix Ads, your brand is where the world is watching.



WEDNESDAY

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NETFLIX ADS **STILL** PRESENTS
WATCHING

2025