NETFLIX ADS PRESENTS

# STILL WATCHING

2026

THE GLOBAL REPORT ON STREAMING AUDIENCES

# ATTENTION ISN'T DEAD




If there's a buzzword in media and entertainment today, it's attention.

For years, a conventional wisdom has formed that people have too many options to really focus on anything anymore. That thinking has driven media plans, creative choices, and how billions of advertising dollars are spent.

But while it's true that there is an attention recession — that's not the whole truth. If it were, why do we still listen to three-hour podcasts? Or binge a season of a TV show in a weekend?

When you look at the data, a more complete picture comes into focus: **People haven't lost the ability to pay attention. We've raised the bar for what deserves it.**




We're bombarded with so much content, so much distraction, that filtering out the noise has become a survival tactic. But that doesn't mean we don't still crave the warmth, the thrill, the magic of a good story. When we encounter one, we give ourselves over to it.

Today, that experience happens more often than not on streaming. Why?

01 The stories are crafted for more than a scroll.

02 In a hyper-atomized world, they provide moments of shared culture.

03 And they stick with us — burrowing into our conversations and consciousness, and staying there long after we've stopped watching.

That promise of a more substantial, worthwhile entertainment experience is why audiences choose to pay attention when they sit down to watch something on streaming. Crucially, this also helps us understand what attention actually is.

For *Still Watching 2026*, Netflix Ads set out to answer the question — **what does attention even mean?** Our industry talks a lot about attention, but, respectfully, do we even know what we're talking about?

To find some answers, we went straight to the source — streaming viewers. We spoke with Gen Z's and Millennials across 12 countries and we learned that attention is a far more nuanced story. And it's definitely not what we thought it was.

It's not just eyes on screens. It isn't just an individual experience. And it doesn't end when the credits roll.

For all of us in advertising, this has real consequences for how we approach our work. For one, we've always talked about how to "grab", "capture", or "hijack" attention (words that would be alarming in any other context). But as our findings suggest, the questions we should be asking are — how can we *earn* our audience's attention? How can we *hold* it? *Be worthy of* it?

*Still Watching 2026* sets aside the accepted wisdom to arrive at deeper truths — about how attention actually works, and what it all means for brands.

● **Editor's Note:** Sign of the times, but no AI was used in the writing of this report.

EPISODE 1

# INTENTION SPANS

Attention isn’t dead. Audiences just save it for what really matters.

EPISODE 2

# TOGETHER BY CHOICE

Attention isn’t just an individual metric. It’s a collective experience.

EPISODE 3

# STORIES THAT STAY

Attention isn’t tied to runtime. The stories we love stick with us.

## “Attention is just the starting point; it’s not the finish line.”

When people actually choose to sit down with a title, when they’re intentional about it, that’s when you get something deeper. A real emotional connection. And that shows up everywhere — in the conversations people have, in the actions they take afterward. **The brands that understand this, and get the power of audience intention, will be the ones who win.”**

**MAGNO HERRAN**
VP, Global Brand & Marketing Partnerships, Netflix

# METHODOLOGY

***Still Watching 2026*** **is based on Netflix viewing data and original research covering Gen Z and Millennial streaming viewers across Asia-Pacific, Europe, North America, and South America.**




We performed qualitative, quantitative, and first-party data analyses exploring distinct segments of Gen Z (18-26) and Millennial (27-42) streaming viewers.

Partnering with youth culture agency Archrival, we conducted focus groups and writing assignments, gathering sentiment across 12 markets: Australia, Brazil, Canada, France, Germany, Italy, Japan, Mexico, South Korea, Spain, the United Kingdom, and the United States.

We also fielded a global survey of 13,500 frequent streaming viewers (at least one session per week), aged 18-42, in May 2026 (1,125 respondents per market).

In this report, “streaming” refers to video entertainment (e.g., TV series, films, live programming) delivered over the internet. It does not include linear TV, social media, or services with user-generated content.

# INTENTION SPANS

Attention isn’t dead.
Audiences just save it
for what really matters.



PEAKY BLINDERS: THE IMMORTAL MAN

# WORTH THE WATCH

There's a difference between brainlessly thumbing through content while you're vegging out after a long day — and settling in to watch a show your friends can't stop talking about. That difference is called intention.

For years, our industry has focused myopically on the decay of attention spans, thinking that's the full story. What we've missed is another phenomenon that's just as important: how audiences have become more discerning about what they give their attention to. Just in the past year, 82% of Gen Z and Millennial streaming viewers say they've become more selective about what they consume.[1]

Which makes sense. People are drowning in content on their feeds. We've all had the feeling of brainrot, of "why did I waste an hour doing that?", after wading through an endless scroll of empty-calorie videos. Intentional viewing has become an antidote to that — a way for people to reclaim their time and pick the moments they want to pay attention.

Nearly 9 in 10 viewers say that when they deliberately choose what to watch, they feel more emotionally fulfilled.[1] In other words, attention is alive and kicking; audiences just reserve it for the content they feel matters. To audiences, that means content that they feel isn't mindless (73%[1]), and that has the potential to provide a high emotional payoff (77%[1]) and to be memorable (89%[1]).

When a story does make the cut, the result isn't just bare metrics like views and impressions — but a different quality of attention. Hours spent watching and thinking about a story. Spirited conversations with others. Emotional investment. Fan love.

For our industry, this changes the brief. Rather than just "getting in front of" audiences, marketers must plan around moments that people have intentionally chosen. This also requires a mental shift on our part — a recognition that attention, without intention, isn't enough.

# NEARLY 9 IN 10 GEN Z AND MILLENNIAL STREAMING VIEWERS SAY THEY FEEL PROTECTIVE OF WHERE THEY SPEND THEIR ATTENTION.[1]

# LOCKING IN

Intentional viewing has a byproduct: people put down their second screens. It's not just that audiences give their attention to the stories they feel matter — they give those stories *undivided* attention.

80% of Gen Z's and Millennials say they've become more intentional about what they "lock into".[1] And 73% say they've given their full attention to what they're watching or listening to, without multitasking.[1]

Today, Gen Z and Millennial viewers overwhelmingly turn to streaming for that kind of experience. 83% say streaming is where they go when they want to fully engage with a piece of entertainment.[1] With premium stories that people can spend quality time with — and which can offer greater depth and complexity — streaming rewards attention. Audiences are more likely to get the emotional payout they're looking for.



2x

# GEN Z'S AND MILLENNIALS ARE MORE THAN TWICE AS LIKELY TO SAY THAT STREAMING A SHOW OR MOVIE DESERVES THEIR FULL ATTENTION VERSUS SOCIAL MEDIA.[1]

Take *The Witness*. The limited series dramatizing a 1992 murder case that gripped Britain became the most-watched Netflix show in the UK and globally in the weeks after its release.[2] A show like this is the furthest thing from easy viewing, but the challenging subject matter and heavy drama didn't deter viewers — it drew them in.

What's lost in our industry's fixation on "are audiences paying attention?" — is "what's the quality of that attention?" When a piece of entertainment offers more than a quick hit, audiences are willing to invest more deeply in it. Or put more simply, people will pay attention when they think there's something worth *paying attention to*.

> “I see so much short-form media, but when I actually sit down, take the time, and pay attention to something, it feels different. Choosing to watch something long-form feels more valuable to me.”

**JULIA**
23, Canada
Focus group participant

# 86%

**of Gen Z and Millennial viewers say that Netflix is where they go to watch something that deserves their full attention.[1]**

ONE PIECE

# TOGETHER BY CHOICE

**Attention isn’t just an individual metric. It’s a collective experience.**

# SHARED CULTURE

For most of the history of mass media, we lived in a monoculture — mostly watching the same shows, listening to the same music. With the internet and social media, the pendulum swung to the other extreme, giving us hyper-personalized feeds and content.

Audiences today want something in between. They enjoy the variety, abundance, and curation of the digital age, but they miss the connection that comes from shared culture.

That renewed desire for a communal experience of entertainment is one of the main reasons why people watch today. 72% of Gen Z and Millennial streaming viewers say that watching the same shows and movies as others gives them a sense of belonging.[1] It's also *how* we pay attention — and influences what we pay attention to.

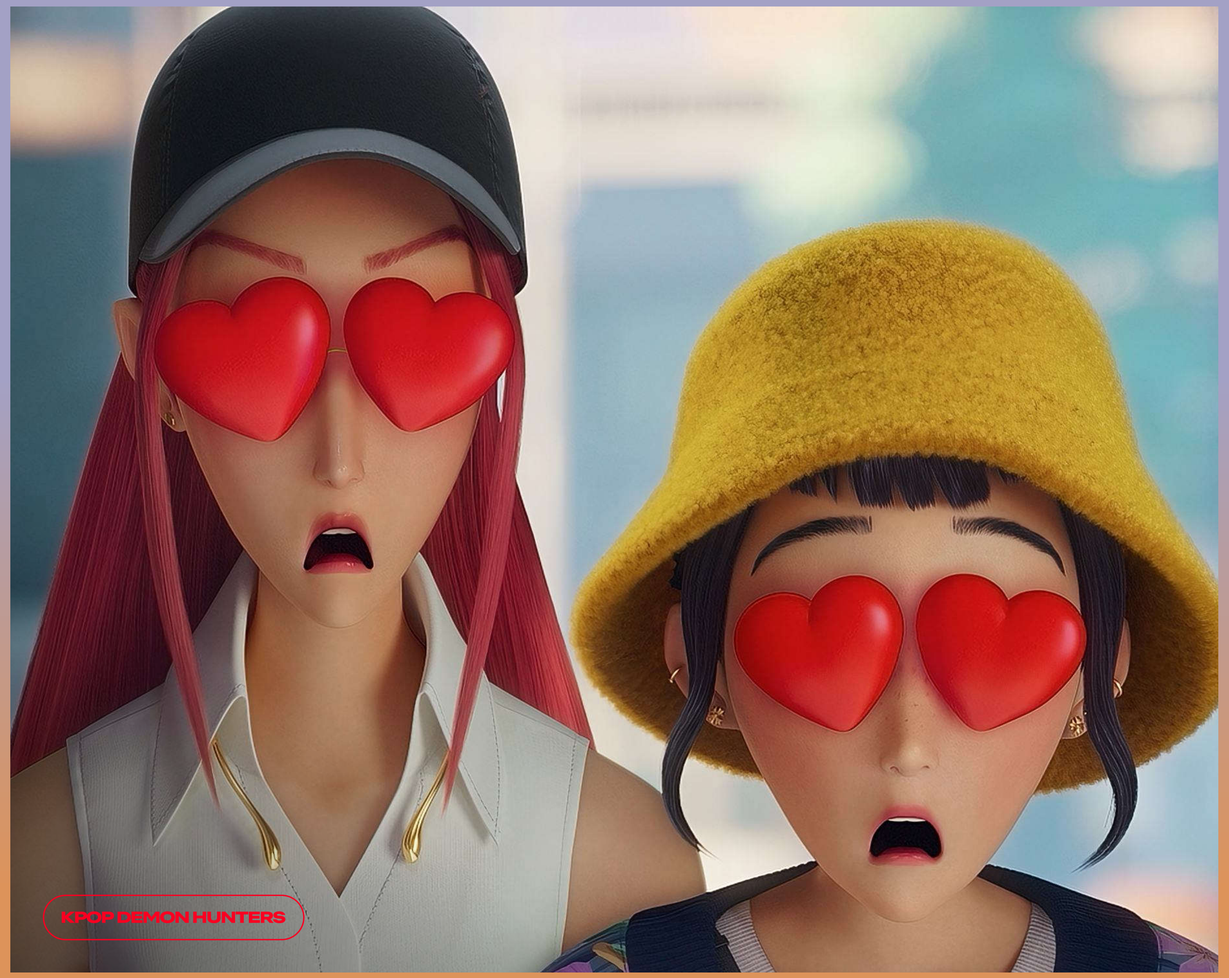
In "Intention Spans," we talked about how intentional viewing produces a greater quality of attention. One of the major ways that shows up is through conversation — when people talk to others about the titles they love. 81% say sharing what they watch is a way they connect with others.[1] The possibility of sharing or experiencing a story with others is also a driver of intentional viewing in the first place. What all that means is that attention isn't individual; paying attention is something we do together.

That togetherness takes different forms. It can mean *physically* watching together. In an era of individual screens, gathering around a story is a deliberate act, and audiences describe it as one of the most rewarding things they do. More than 8 in 10 viewers say streaming shows and movies with others feels more meaningful than streaming alone.[1]

But togetherness also means taking part in cultural moments — even when you're watching solo. Around two-thirds of viewers say when a title becomes a major cultural focal point, they feel the need to watch it at least within a few days.[1] Whether it's tuning into a live boxing match or binging a new hit series, joining a cultural current can give people a sense of connection to others, a feeling that they're part of something bigger.

**74%**

**say streaming shows and movies is a primary way they bond with family members.[1]**




# THE STORIES BETWEEN US

We don’t stop paying attention when a show or movie ends. People come together when we watch — but the deepest connections arise from what we do next.

Conversation — in real life, over group chats, on social media — is how collective attention forms, sparking fandom and turning great stories like *KPop Demon Hunters* into totems of shared culture.

All of this attention is active, participatory. 88% of Gen Z and Millennial streaming viewers participate in some kind of conversation around their favorite shows and movies.[1] But how they participate is more nuanced than the industry typically measures. Viewers are split nearly evenly between publicly driving the conversation (social posts, comment threads), privately stoking it (texts, DM’s), and quietly absorbing it (following along but rarely interacting).[1]

The last group is the one our industry most often overlooks. Participation doesn’t need to be visible to be powerful. The fan who reads every review, follows every thread, and re-watches the finale four times is just as invested as the one trending on socials. We have a stereotype of fans — the theatergoers camped out for a midnight release, the costumed attendees at a convention. But today’s fandom is a broader phenomenon, expressed in myriad ways.

## THE NETFLIX EFFECT

An adaptation of a Harlan Coben novel lands on Netflix, and book sales spike 200%, on average.[3] Of the tourists inspired by a show or film, 38% cite *Emily in Paris* as a motivation for visiting the City of Love.[4] *Culinary Class Wars* boosts the Korean restaurant industry, with reservations at contestants' restaurants climbing by 148%, on average.[5] Three different categories, one through-line:




# WHEN AUDIENCES FALL IN LOVE WITH A STORY, THE IMPACT DOESN'T STAY ON-SCREEN.

# WHICH OF THE FOLLOWING HAVE YOU DONE BECAUSE OF A SHOW OR MOVIE?

**46%** Bought something related to it[1]

**39%** Sought out extra content[1]

**23%** Traveled somewhere inspired by it[1]

**19%** Attended a live event, pop-up, or experience[1]

**19%** Participated in interactive elements while watching[1]




# ANNNNND ACTION!

# STORIES THAT STAY

Attention isn’t tied to runtime.
The stories we love stick with us.

# FEEL YOUR FEELINGS

81% of Gen Z and Millennial streaming viewers say they remember how something they watched made them feel, more than the plot or characters.[1] Stories have always been a catalyst for emotion — from escape to catharsis, curiosity to reflection.

The promise of an emotional payout is why we intentionally choose to watch, and the feelings a show or movie stir in us are what lodge the story in our memory.

More and more, streaming services are where audiences go for that emotional journey. 76% say streaming gives them a space to process feelings they can't always understand in real life[1], and 82% say it allows them a way to lean into their emotions — to feel their feelings.[1]

The technology and insights of streaming services play a big role here. No one (not even your ex) is emotionally one-dimensional. On Netflix specifically, the sheer variety of titles, paired with recommendations based on insights like viewing moods, serve people's multifaceted emotional appetites. For instance, more than half of the Netflix members who watched the breezy romcom *Office Romance* also watched the intense military sci-fi movie *War Machine*.[6]

Beyond craft, narrative, and production values, emotional resonance is a core reason why today's audiences choose to intentionally engage with streaming stories.



> “When I watch something just to pass the time, it fades quickly. When something engages me emotionally, it stays.”

**CHRISTIAN**
34, Mexico
Focus group participant

# 8 IN 10 STREAMING VIEWERS AGREE, “WHEN I WANT SOMETHING THAT WILL REALLY MAKE ME FEEL SOMETHING, I TURN TO NETFLIX.”[1]




# THE AFTERGLOW

How our industry has framed attention for years is wrong. We've focused on runtimes, and asked whether audiences are tuned in for that limited duration. But that's not how stories work.

After we finish watching a show or movie we love, we think about it. We talk about it with others. We re-watch it and re-watch it again. We read takes on it, and offer our own. We buy the T-shirt a character wore, or the burger another one ate. Stories *work* on us, leave an imprint on us. This is the period where fan love and loyalty emerge and gather, and where cultural phenomena are born.

By dipping out when the end credits roll, our industry has missed the moments where audiences are the most attentive.

One of the central reasons stories linger with us is because they help us understand the world — and ourselves. 77% of Gen Z and Millennials say certain shows and movies have shaped how they see themselves.[1] 75% say stories they love influence how they think about their lives or decisions.[1] And a significant percentage (40%) say great stories even help them imagine a different future for themselves.[1]

This is the promise of a good piece of entertainment — not just that it can amuse us, but that it can literally change us, contributing to our self-identity. That deep emotional connection doesn't evaporate when the show ends; in fact, it hasn't really even begun yet. It's something that develops in the days, weeks, and months after watching something we love.

This is the reward of intentional viewing. And in a world overrun with noise and junk content, it's what audiences today crave the most.

# NEW RULES FOR MARKETERS

01

## BUILD FOR THE LAST THREE SECONDS, NOT THE FIRST THREE

Marketing doesn't have to be slapping on a logo before the viewer skips the ad. Insist on great creative that earns every second.

02

## BE CONTEXTUALLY IRRELEVANT

Don't just go for titles that match your brand. Look for engaged audiences, no matter where they are.

03

## DON'T PLAY IT TOO SAFE

Brands write off whole genres that draw devoted audiences. Instead of reflexively saying no, be opportunistic.

04

## IT'S NOT THE SIZE OF THE FANDOM THAT COUNTS

Think outside the tentpole. Micro-communities are where brands can find some of the most passionate fans.

05

## BE IN-BETWEEN THE MOMENTS

Audiences share, re-watch, and obsess over the titles they love long after the credits roll. Don't leave the conversation.

06

## YOU WON'T SEE IT COMING

No one (not even Netflix) can predict a cultural phenomenon. Be ready when lightning strikes.

07

## FOLLOW THE CONVERSATION

When fans fall in love, they take their passion off-service and into the world. Go with them.

Attention isn't what we thought it was. So — as marketers — our old ways of operating, built on faulty assumptions, must change. We're not talking incremental fixes, but a new way of approaching how we reach and galvanize audiences.

If the old playbook chased the people who were never really watching, the strategies here are conceived for the world that actually exists — one of intentional viewing, collective attention, and emotional relationships to stories that last, long after the screen goes dark.

# 01

# BUILD FOR THE LAST THREE SECONDS, NOT THE FIRST THREE

For years, our industry has optimized for partial attention. “How short can you make it?!” “Get the logo in quick, before they skip!” This mindset trained a generation of marketers to essentially give up after three seconds, and resulted in exactly the sort of interruptive ads that we say we want to avoid.

How do we remedy this? By getting back to basics, and insisting on great creative. If the intentional viewing patterns of audiences today tell us anything, it’s that we need to shift the mental model to one of creativity that earns every second.

Use the tools of great visual storytelling — cinematic craft, narrative arcs, surprise, humor. Focus on introducing a new element or a change-up every few seconds in the creative. And before you say you don’t have budget, note the example of low-budget indie filmmakers and remember the power of a great idea, however simple the execution.

Instead of trying to pilfer attention, aim to produce creative that earns and holds it.

02

**76%**

**say when a show or movie makes them feel something, they're more likely to remember the brands they see alongside it.[1]**

# BE CONTEXTUALLY IRRELEVANT

When it comes to media placements or partnerships, it's easy to go for the obvious: the beer ad during football, the travel brand tacking onto a globe-trotting dramedy. Aligning based on subject matter or audience interests is commonsensical, and it works — which is why everybody else is doing it.

But this is a one-dimensional way to think about media. By looking deeper than surface-level similarities, and considering audience intention, marketers can find moments where viewers are emotionally invested and where the quality of attention is high — even when it's not an obvious match.

In other words, don't be afraid to be contextually irrelevant sometimes. Beyond reaching an audience that's glued, an advertiser that shows up somewhere unexpected (say, a beauty brand during a gory horror flick) can even attract notice by itself, exactly because it's so surprising.

# 03

# DON'T PLAY IT TOO SAFE

With its premium content and sophisticated targeting, streaming is already one of the safest channels for advertisers. Even so, marketers still rule out whole genres and categories of titles in the name of brand safety and suitability. This includes stories that command some of the most devoted audiences and intentional viewing, like true crime and horror.

For brands willing to rethink hard-and-fast rules and plan opportunistically, there are passionate, deeply engaged audiences hiding in plain sight. Add in advanced safety controls like sensitive content blocks, and it's possible to find a better balance between suitability and effectiveness, without dismissing entire genres.

After all, there's nothing less brand safe than showing up where no one's really watching.

04

# IT'S NOT THE SIZE OF THE FANDOM THAT COUNTS

**Nearly 4 in 5 Gen Z and Millennial viewers say they feel more positively towards a brand when it's associated with a show they love.[1]**

Brands have always looked to draft off of fandom. But most tend to go after the biggest, culture-swallowing titles — i.e., the same ones every other advertiser is chasing.

While that can be effective, the under-the-radar opportunity today is getting involved with micro-communities — those that sprout up around series, films, and genres that may not hit #1 on the charts, but still draw enthusiastic followings. Oftentimes, these micro-communities are just as passionate about their titles and feel a strong sense of ownership over them, precisely because they're more intimate.

These micro-communities are less saturated with brands, so you aren't just part of the herd. By contributing to them — crucially, in ways that are authentic and respectful — you may be likelier to spark the emotional relationships and spur the actions that are the whole reason why brands engage fandoms in the first place.

And to be sure, "micro" doesn't mean micro-results. Engaging an underserved, yet energetic audience and leaning into the cross-pollination of fandoms can deliver scale and impact.

# 05

# BE IN-BETWEEN THE MOMENTS

In “Stories That Stay,” we described how fan love and loyalty takes root after audiences watch. That’s the period when people talk about a title, re-watch it, discover it for the first time, shop for merch, play the needledrops, etc. — all the while forming a deeper emotional bond with it. But most advertisers dip out before any of this ever happens.

It can seem logical to show up for season 1 and then again for season 2, while skipping that interim period, if you assume audiences have moved on to the next thing. But if you think in terms of intentional audiences, you realize that there are many for whom the season never ended. They’re still involved in the world of the story; they’re still paying attention.

Instead of focusing your efforts on a single peak moment, then going dark until the next one, be present in that in-between period, where — for many intentional audiences — attention is most alive.

06

# YOU WON'T SEE IT COMING

Here's a secret: some of the biggest titles in culture — *Stranger Things*, *Squid Game*, *KPop Demon Hunters* — caught everyone by surprise. Even at Netflix, we can't guarantee a global phenomenon. We have an idea that certain stories will resonate with audiences — but, ultimately, it's viewers and viewer conversation that take a good story and turn it into a zeitgeist-defining cultural touchstone.

Netflix has a marketing team that's able to act quickly when we see a title surge. Advertisers can do something similar. When a brand shows up to a big title early, you earn an unfair share of voice, while other advertisers are playing catch-up. The clearest way to do this is to run always-on media targeted against top-ranked titles at any given moment, so you're poised to take advantage of lightning in a bottle.



# 07

# FOLLOW THE CONVERSATION

Good stories travel. People take conversation off-service into companion channels, social communities, group chats — and off-screen altogether. This forms a rich ecosystem where fan love actually lives and breathes, and where titles become part of shared culture.

The best media plans take into account where audiences gather and share, and incorporate the multiple nodes of this ecosystem of conversation. Community management isn't a marketing function of the past; but a renewed imperative. That's especially so in an AI-driven internet, where the same communities and fora are the sources AI search draws from.

Show up everywhere the story goes — not just where it begins.

# WHAT NEXT?

Our industry has misread audiences. We looked at people skimming and scrolling past content, and we jumped to the conclusion that attention is a thing of the past. In reality, attention is alive and well — if you know where to look.

It's in the hours of focus that come from intentional viewing. It's in the conversations and communities that spring up around titles that capture our imaginations. And it's in the days, months, and years a story remains with us, becoming an indelible part of our lives.

For marketers, the biggest opportunity is a blind spot. If attention isn't what we all thought it was — if audiences are indeed *still watching* — then what will you do differently?



# SOURCES




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