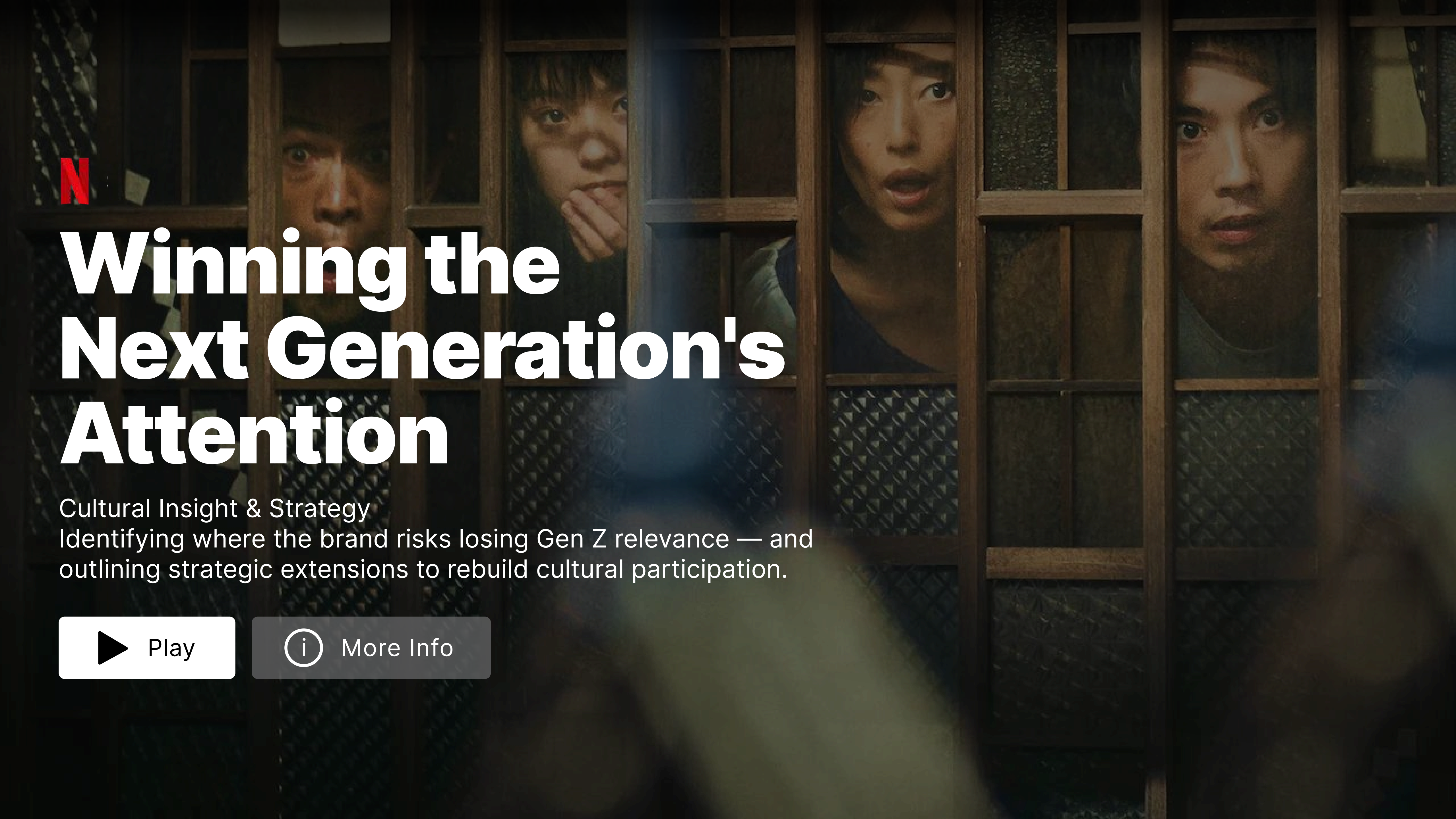




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Winning the Next Generation's Attention

Cultural Insight & Strategy

Identifying where the brand risks losing Gen Z relevance — and outlining strategic extensions to rebuild cultural participation.



Play



More Info

N

NETFLIX

NEVER HEARD OF IT?





Netflix: The little DVD rental that grew up to rule the streaming world and turned “just one more episode” into a lifestyle.

- 282.7 million paid subscribers worldwide.
- Market Capitalization: \$377.8 billion as of November 2024, ranking among the top 25 most valuable companies globally.

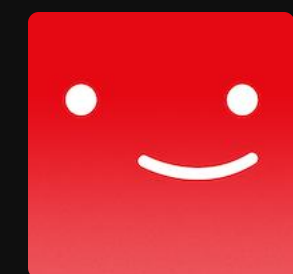
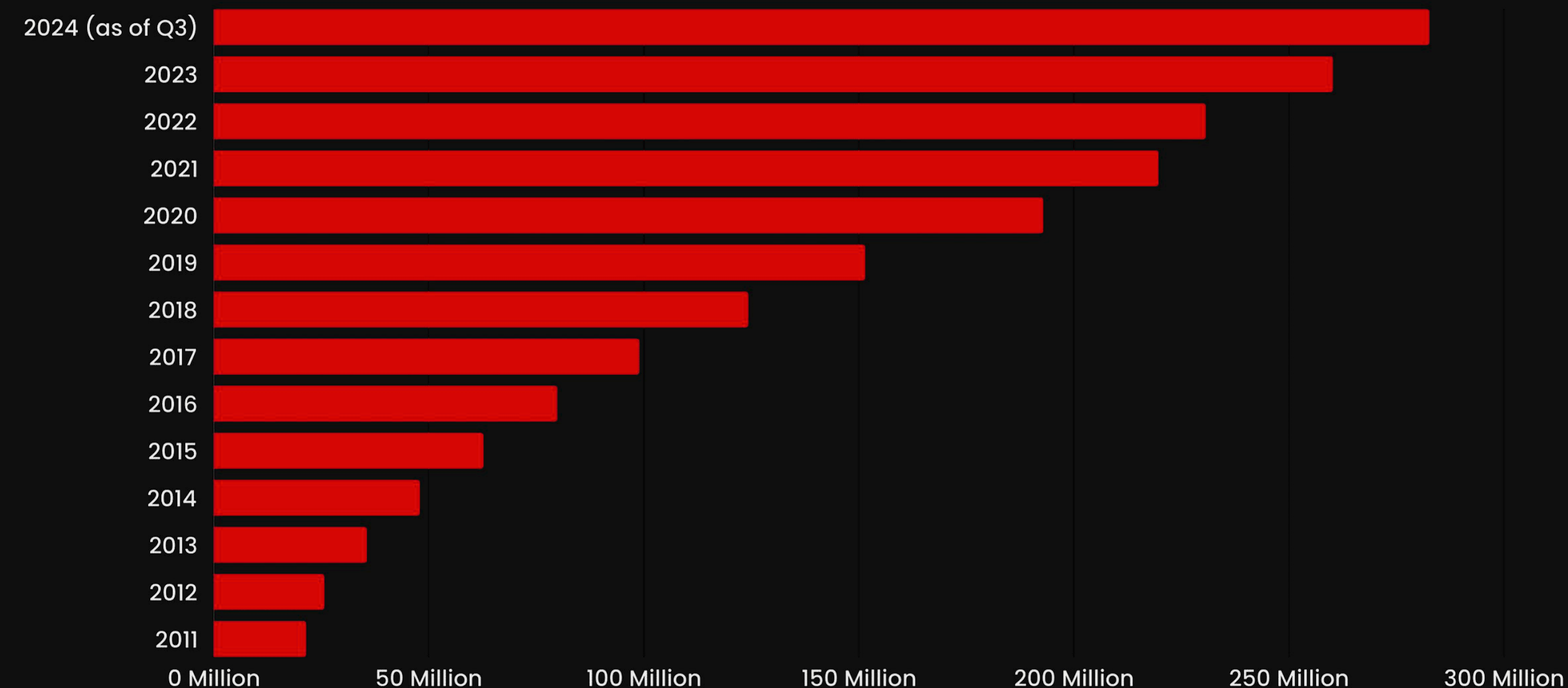
- <https://www.demandsage.com/netflix-subscribers/>
- <https://www.businessofapps.com/data/netflix-statistics/>
- <https://stockanalysis.com/stocks/nflx/>



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THINGS ARE GOING GREAT... FOR NOW.

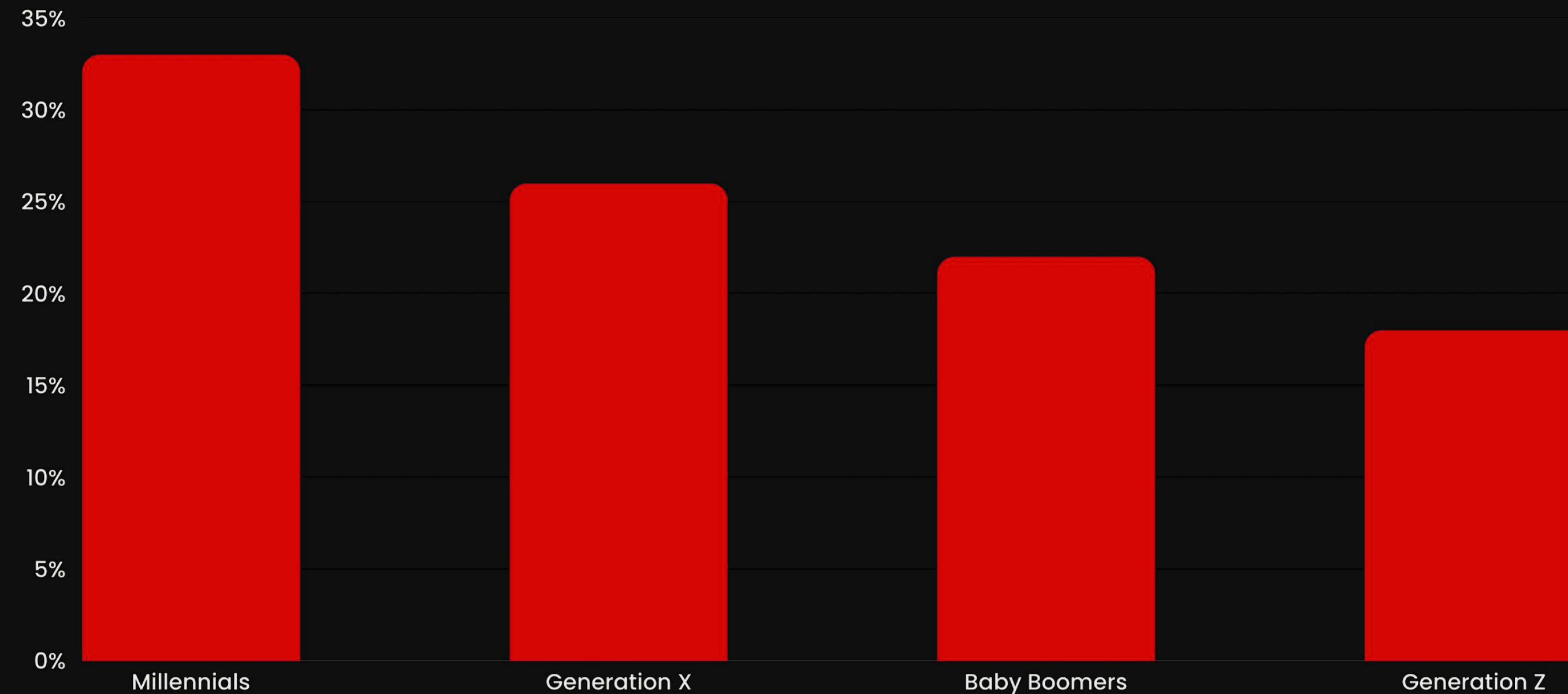
Platform continues to draw a solid user base and leads the SVOD market with 282.7 million paid subscribers worldwide as of Q3 2024, up 22.42 million from 260.28 million in 2023.



- <https://www.demandsage.com/netflix-subscribers/>
- <https://www.statista.com/chart/21465/global-paid-net-subscriber-additions-by-netflix/>

BUT... WHO'S WATCHING?

The struggle to keep younger audiences proves the future isn't guaranteed. Outrunning big competitors doesn't mean avoiding threats from unexpected places.



- <https://www.demandsage.com/netflix-subscribers/>
- <https://www.filmtake.com/streaming/netflixs-subscriber-surge-how-netflix-is-reinventing-itself-to-stay-on-top-2/>

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IS NETFLIX READY FOR GEN Z?



N

Gen Z is the largest, wealthiest and first generation raised entirely in the Digital Age, redefining entertainment in a world shaped by smartphones and social media.

For Netflix, Gen Z is critical. They're not just massive in numbers—they set trends and influence the viewing habits of other generations.

NETFLIX

- https://www.aecf.org/blog/what-are-the-core-characteristics-of-generation-z?utm_
- <https://nielseniq.com/global/en/landing-page/spend-z/>
- <https://www2.deloitte.com/us/en/insights/industry/technology/digital-media-trends-consumption-habits-survey/2024/online-creators-and-the-impact-of-social-media-on-entertainment.html>

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MEDIA CONSUMPTION

THE LANDSCAPE IS SHIFTING

N

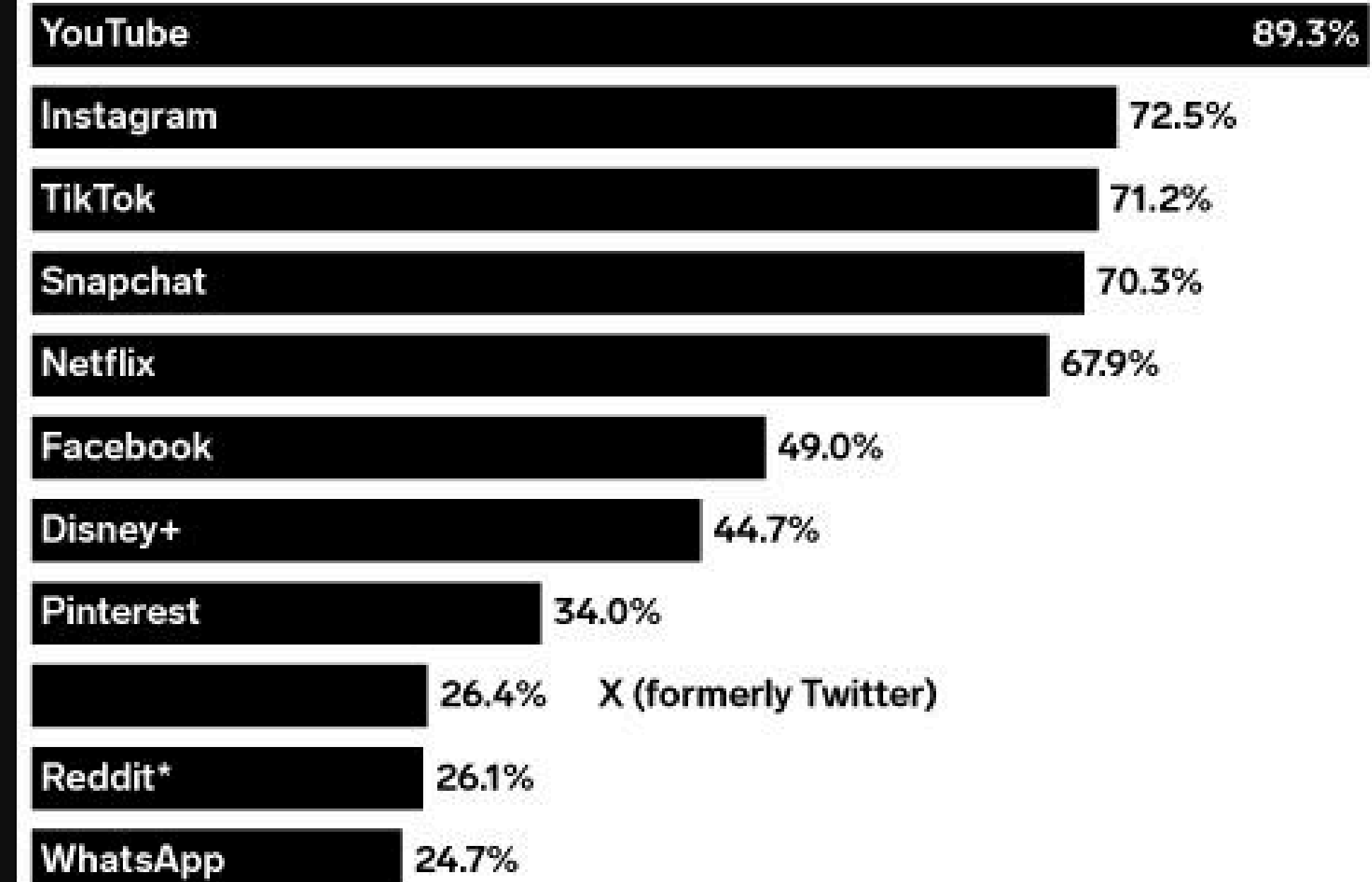
MORE THAN WATCHING...

- 47% of Gen Z respondents and a third of millennials prefer social media videos and live streams over traditional TV shows and movies.
- 60% of Gen Z and Millennials prefer User Generated Content (UGC).

Algorithms use rich data + blends content and connection, turning likes, chats and updates into real-time communities.

Penetration of Select Digital Platforms Among US Gen Zers, 2024

% of population



*Note: Internet users born between 1997 and 2012 who accessed any of the platforms listed at least once per month; *logged-in users*

Source: EMARKETER Forecast, May 2024

285867

EM | EMARKETER

- <https://www2.deloitte.com/us/en/pages/chief-marketing-officer/articles/consumers-and-social-media-preferences.html>
- <https://www2.deloitte.com/us/en/insights/industry/technology/digital-media-trends-consumption-habits-survey/2024/online-creators-and-the-impact-of-social-media-on-entertainment.html>
- <https://www.thewrap.com/gen-z-viewing-habits-streaming-social-media/>

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NETFLIX & CHILL OR DOOMED SCROLLING

THE BUSINESS PROBLEM

N

THE PROBLEM

Gen Z and late Millennials are increasingly disengaging from traditional media and streaming platforms like Netflix, driven by a preference for on-demand, interactive and personalized digital content. They prefer digital platforms where they can connect with creators and communities in more authentic ways.

NETFLIX

Something went wrong

Sorry, we're having trouble with your request. Please try again later.

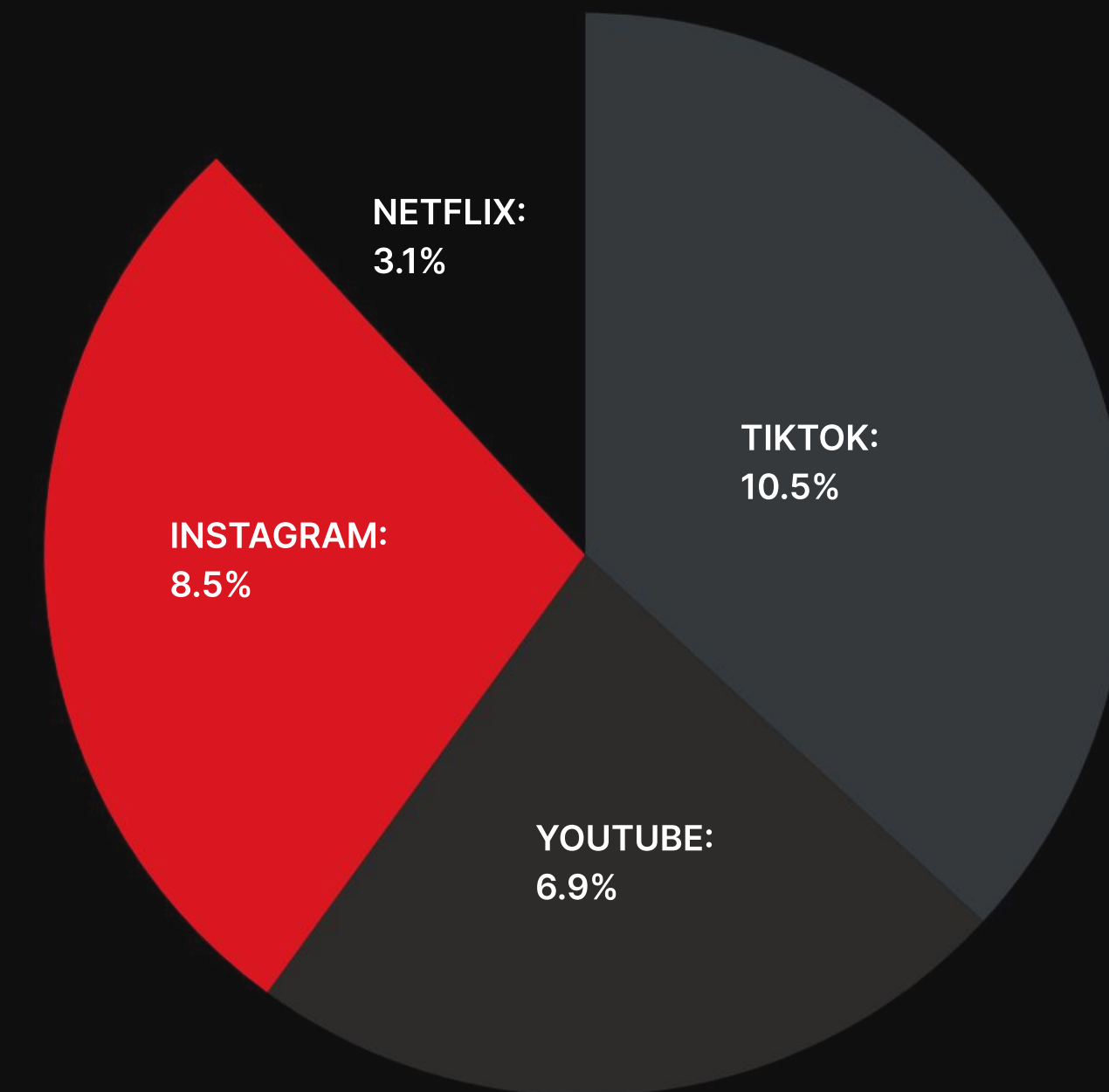
OK

THE BATTLE FOR ATTENTION

KEY STATS:

TikTok saw 20% year-over-year growth from May 2023 to January 2024, with short-form video driving its popularity.

Instagram is also maintain its stronghold among various age groups, but TikTok dominates Gen Z's and late Millenials attention.



Gen Z's weekly percentage of time spent on social media

- <https://www.mediaculture.com/insights/gen-z-media-habits#:~:text=Gen%20Z's%20media%20consumption%20habits,another%2010%25%20watch%20Outer%20Banks.>
- <https://profiletree.com/the-shocking-time-spent-on-social-media-statistics/#:~:text=Instagram%20and%20TikTok%20have%20emerged,contribute%20to%20its%20high%20engagement.>

SUBSCRIBER CHURN – A GROWING CONCERN



James

In 2023, churn rates for streaming services in the U.S. hit 35%. More consumers are jumping between services rather than staying with one platform.



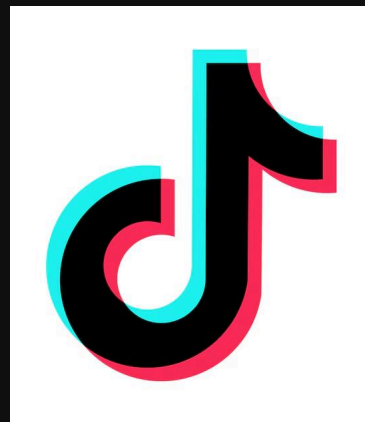
Retaining an existing subscriber is 5 times cheaper than acquiring a new one. When services don't keep users engaged, it costs them significantly to attract new ones to replace those lost.

Who's watching?

As Gen Z matures, they will become a significant portion of the subscription market by 2030. If Netflix doesn't successfully engage this group, it risks losing its future audience to competitors.

- <https://www.filmtake.com/streaming/the-churn-challenge-streamers-vie-for-viewer-loyalty-in-a-saturated-2024-market/>
- <https://www.forbes.com/sites/blakemorgan/2019/04/29/does-it-still-cost-5x-more-to-create-a-new-customer-than-retain-an-old-one/>
- <https://www.statista.com/topics/842/netflix/#topicOverview>

THE COMPETITION – IT'S CROWDED



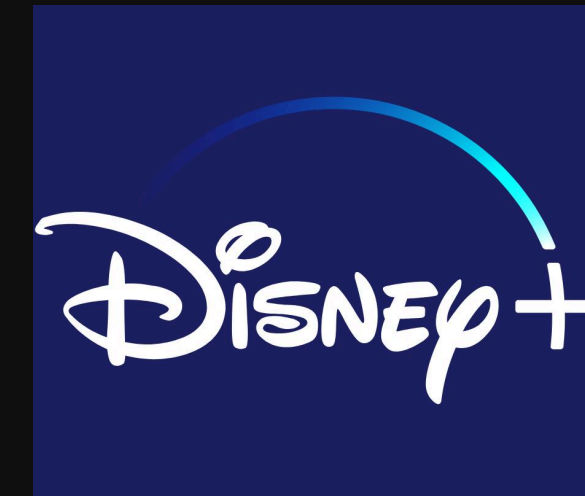
TIKTOK

Has capitalized on its algorithm-driven discovery model, which is a key part of its success with Gen Z.



YOUTUBE

Has integrated short-form video content (YouTube Shorts) to compete directly with TikTok, ensuring that it remains relevant to Gen Z.



DISNEY+

Has adapted to Gen Z's preferences by offering an extensive library of content that blends nostalgia with new original programming.

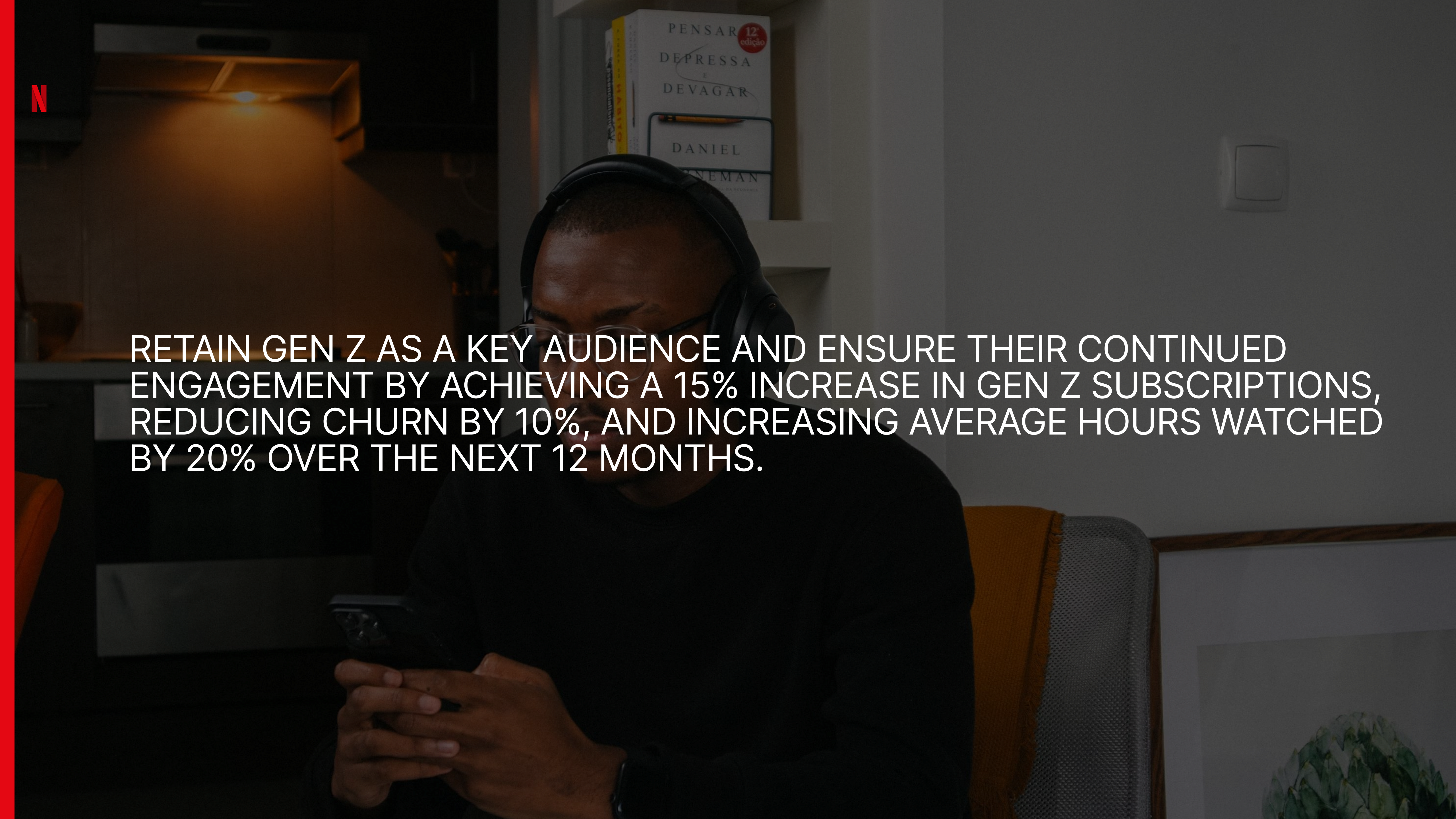
- <https://www.latterly.org/disney-plus-marketing-strategy/>
- <https://www.backstage.com/magazine/article/gen-z-tiktok-marketing-tips-75395/>
- <https://www.hopperhq.com/blog/marketing-to-genz-video-content/>
- <https://prosociable.com/tiktok-marketing-gen-z/>
- <https://transmediablueprint.com/2021/06/07/tiktok-youtube-shorts-instagram-reels-the-battle-for-gen-z/>

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THE GOAL

BUSINESS OBJECTIVE





RETAIN GEN Z AS A KEY AUDIENCE AND ENSURE THEIR CONTINUED ENGAGEMENT BY ACHIEVING A 15% INCREASE IN GEN Z SUBSCRIPTIONS, REDUCING CHURN BY 10%, AND INCREASING AVERAGE HOURS WATCHED BY 20% OVER THE NEXT 12 MONTHS.

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THE GAME PLAN

RESEARCH METHODS



QUANTITATIVE

- Survey
- 50 people
- Ages 18-33
- 2-week span

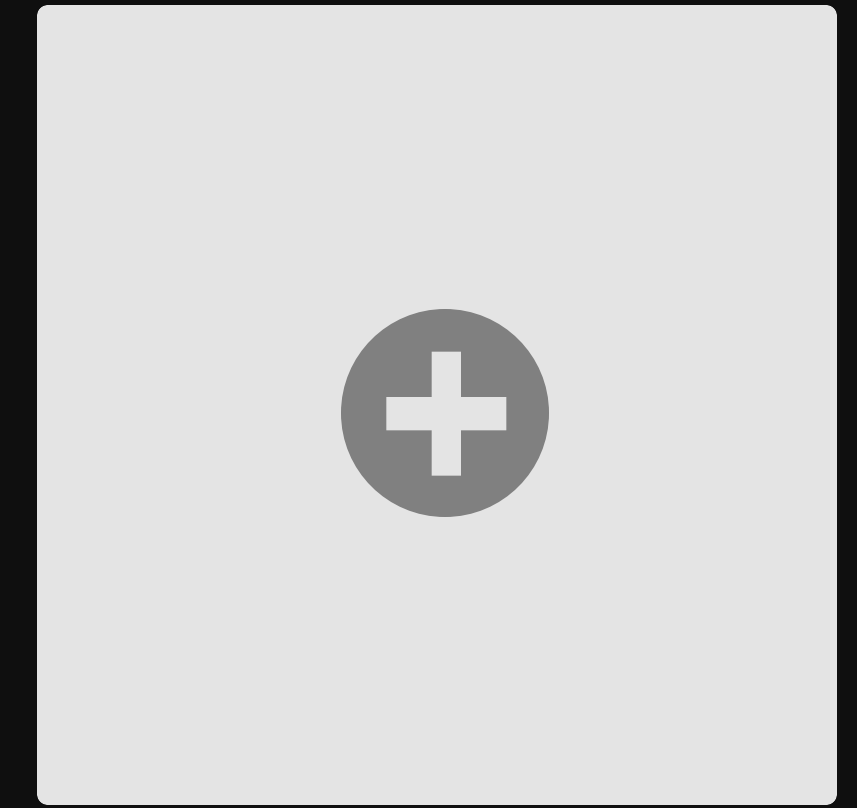


QUALITATIVE

- 3 Focus groups
- 10 people
- Ages 18-33
- 1-week span



SOCIAL LISTENING



ADD MORE

N

THE SOCIAL DILEMMA

NETFLIX VS SOCIAL MEDIA

Social Listening Findings

Pricing



Losing interest due to short attention spans



More work on the algorithm



Canceling fan favorite shows



Glitching during it's live streams



Ready to watch? Enter your email to create or restart your membership.

Get Started >

<https://www.instagram.com/>
<https://www.tiktok.com/en/>
<https://twitter.com/>

N



Ameen13

The biggest competition for Netflix is the shrinking attention spans. People just can't be bothered to sit for an hour and a half to watch a movie

2022-7-27

Reply



16



— View 3 replies



Prof Amanda Salis

Yes!!! I stopped watching Netflix after starting using TikTok, and I bet others are, too.

2022-7-27

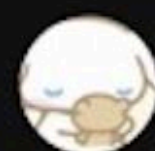
Reply



15



— View 6 replies



Ninjar4wr

to be fair tiktok will cancell nflx if they don't stop cutting stories mid series 🤔

2022-7-27

Reply



7



flooringthebrakes

Yes and no: Streaming is cable 2.0 now and you need multiple platforms for good media. Also companies like Netflix cancel shows after a season so nobody gets invested so they don't get let down.

3-22

Reply

10



Zaddy D. Choco

Not really. New shows are often trash and get canceled after a season...

3-22

Reply

55



— View 1 reply



deeznuts

Netflix shouldn't integrate with tiktok. I'm not seeing the value tiktok will add to the service unless it's seeking to create a YouTube experience.

2022-7-27

Reply



2



— View 1 reply



Here4me

How can it be a competitor? TikTok is free. Netflix just can't accept they have less stuff worth watching.

2022-7-28

Reply



2



— View 1 reply



/Users/gremlinzinmycereal ✌️

They are competing for screen time. You can watch a movie or TV series on Netflix, or you can scroll on TikTok. That's why

2022-7-27

Reply



2



— View 1 reply



Joseph Abehsera @KingzTheC... · 5d

The biggest competitor to **Netflix** is Reels/TikTok/Shorts.

Most young folks would rather doom scroll at night than start a new show.



5

316



Steph - Learn English online

I use them both at the same time 🤔🤔🤔🤔🤔🤔

2022-7-27

Reply



4



— View 1 reply

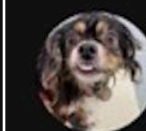


Kayla

EVERYTHING. COSTS. MONEY. I am not paying 18 dollars a month EACH for 9 different streaming services 🤔

3-22

Reply



Efrain Zepeda

I'm Gen Z and I hate social media give me a movie and tv show any day (I'm aware of the irony)

3-28

Reply



Jr

I mistly watch YouTube. I haven't seen a TV show in months. I do watch one or two movies in the theater a month though

3-22

Reply



Theafrokid19

Nobody wants to watch cringe commercials or deal with the overly sanitized nature of television

3-22

Reply

12



Gear Stuff & Things

As a millennial I prefer YouTube as well

3-22

Reply

10

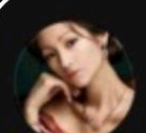


Tony Macaroni

I no longer have the time or attention span to sit though a 3hr movie

3-24

Reply



Marie

Not true, I think you have the wrong generation.

6-25

Reply

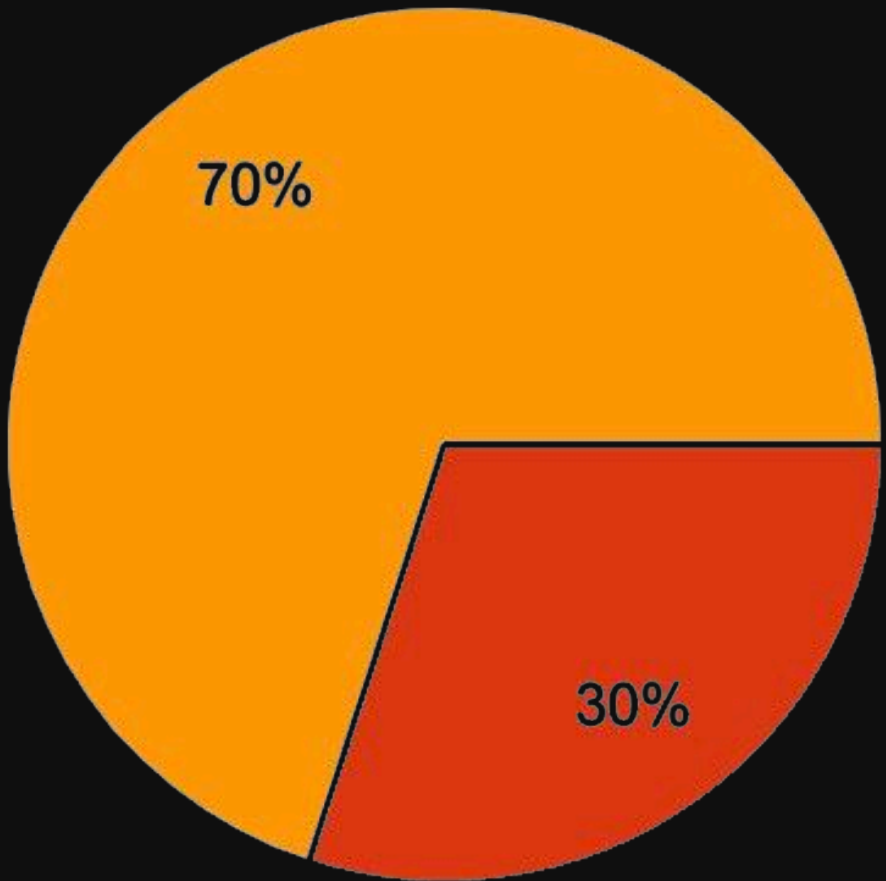


KEY RESEARCH INSIGHTS

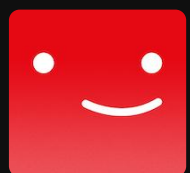
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Demographics

AGE



Under 18

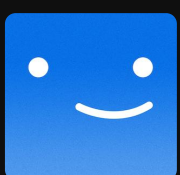
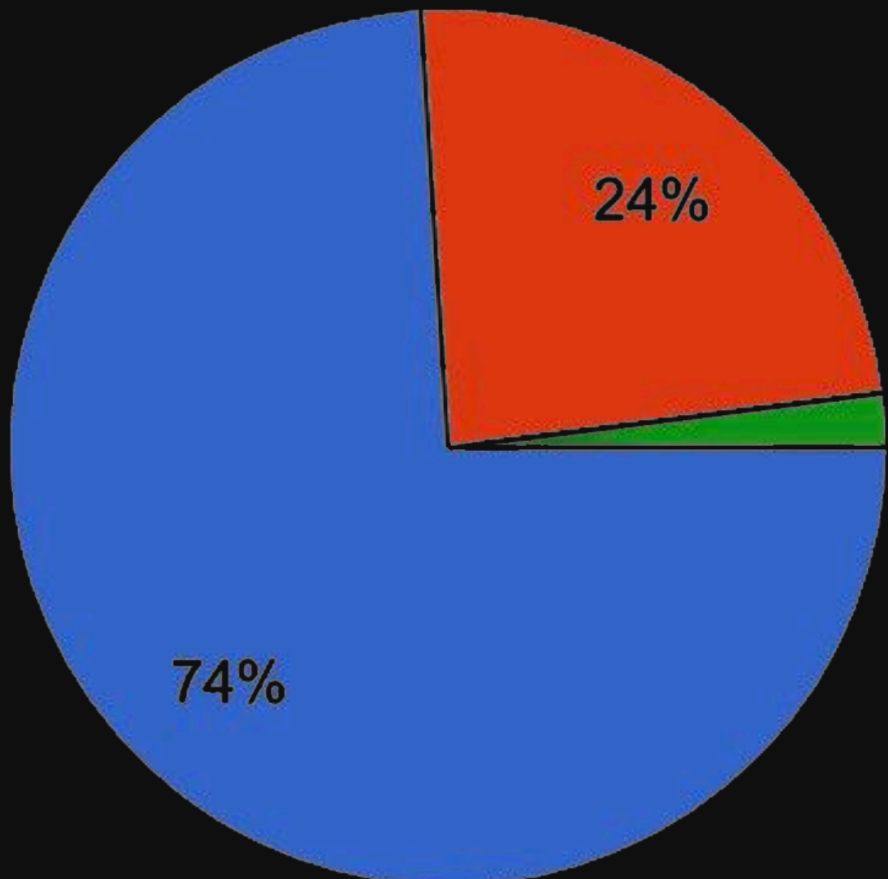


18-24



25-33

GENDER



Female



Male

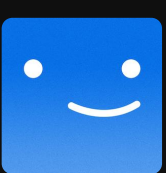
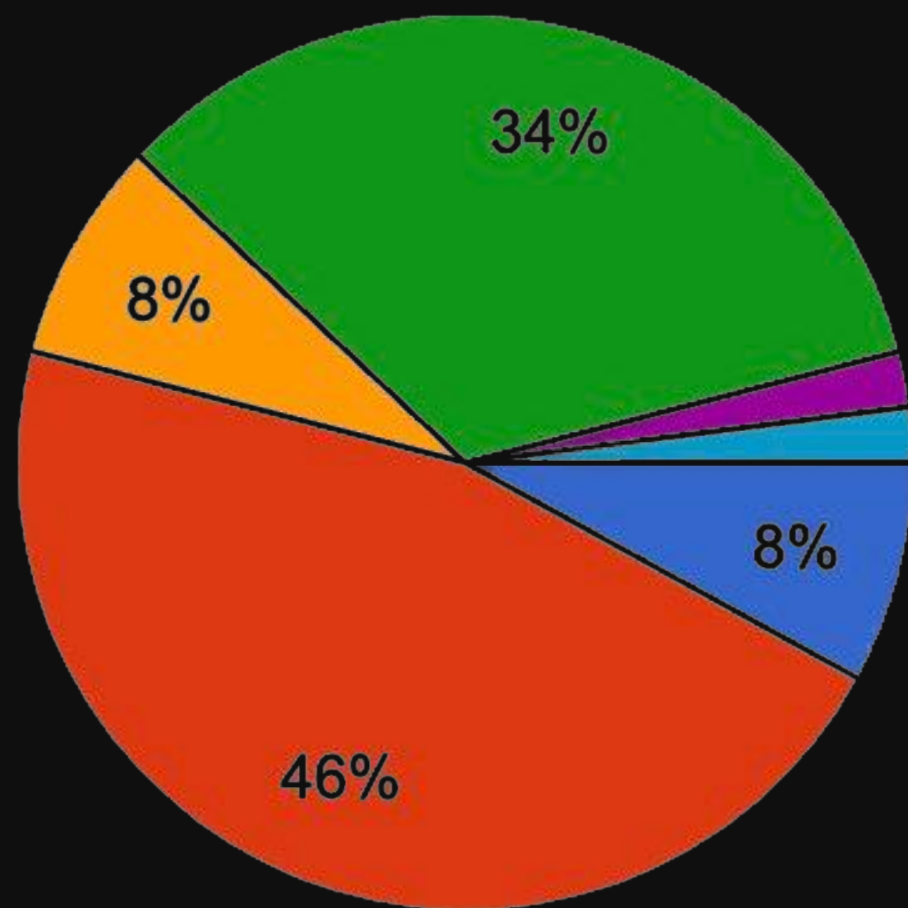


Non-binary



Prefer not to say

LIFESTYLE



Student



Employed Full-time



Employed Part-time



Both student and employed



Unemployed

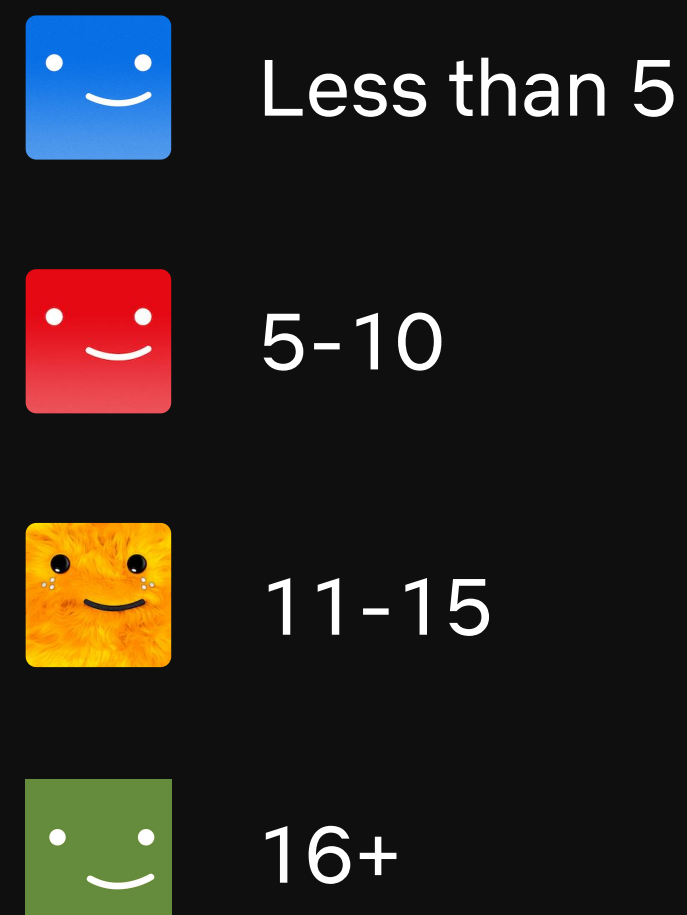
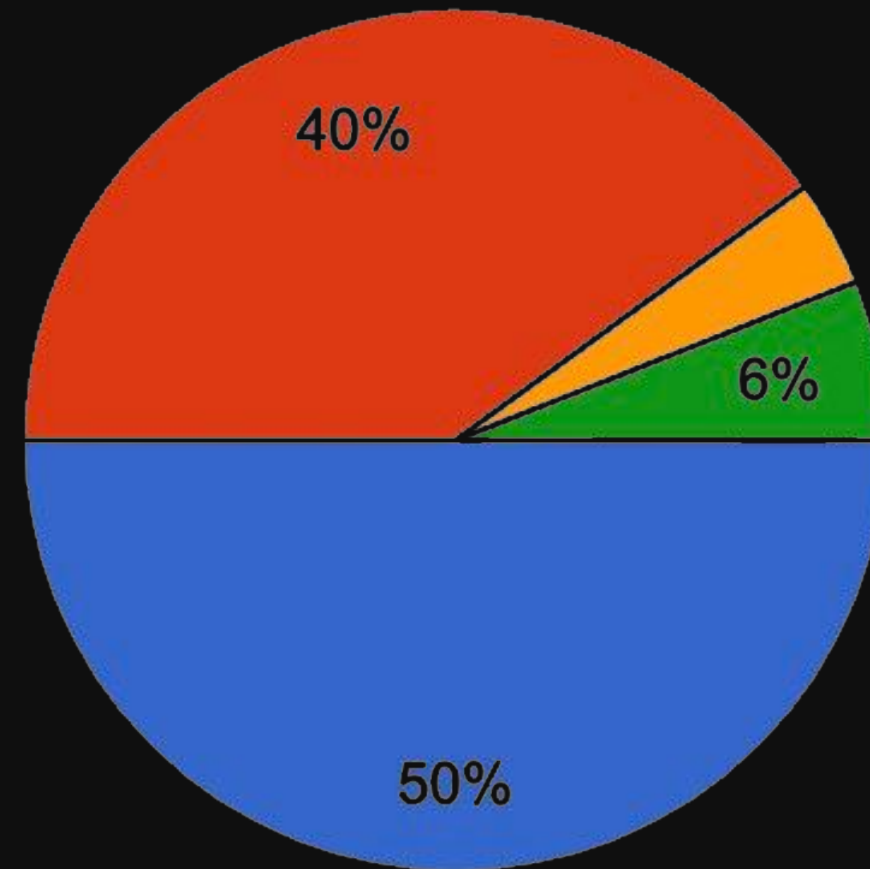


Freelance

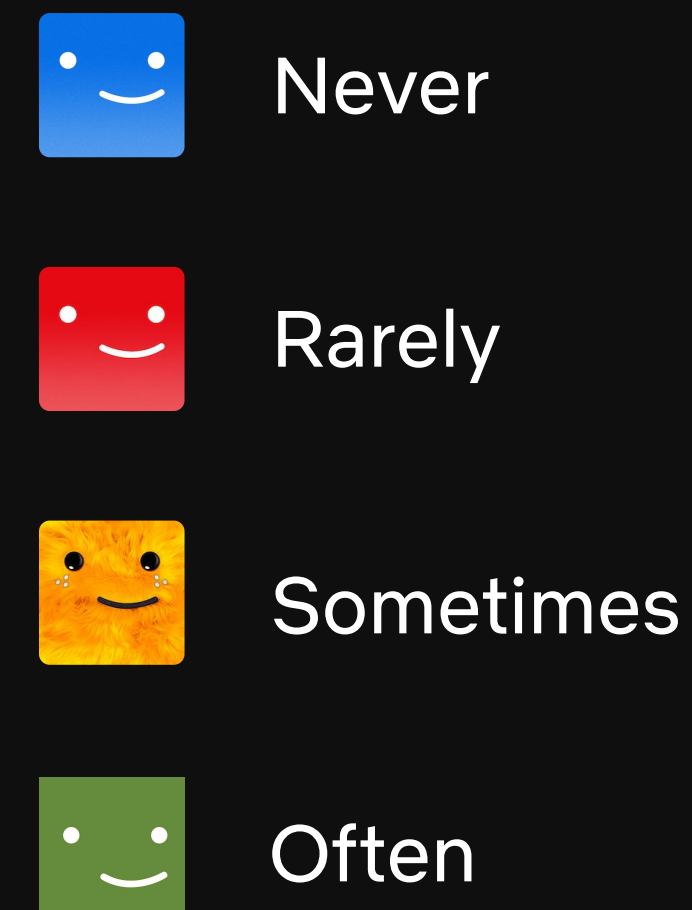
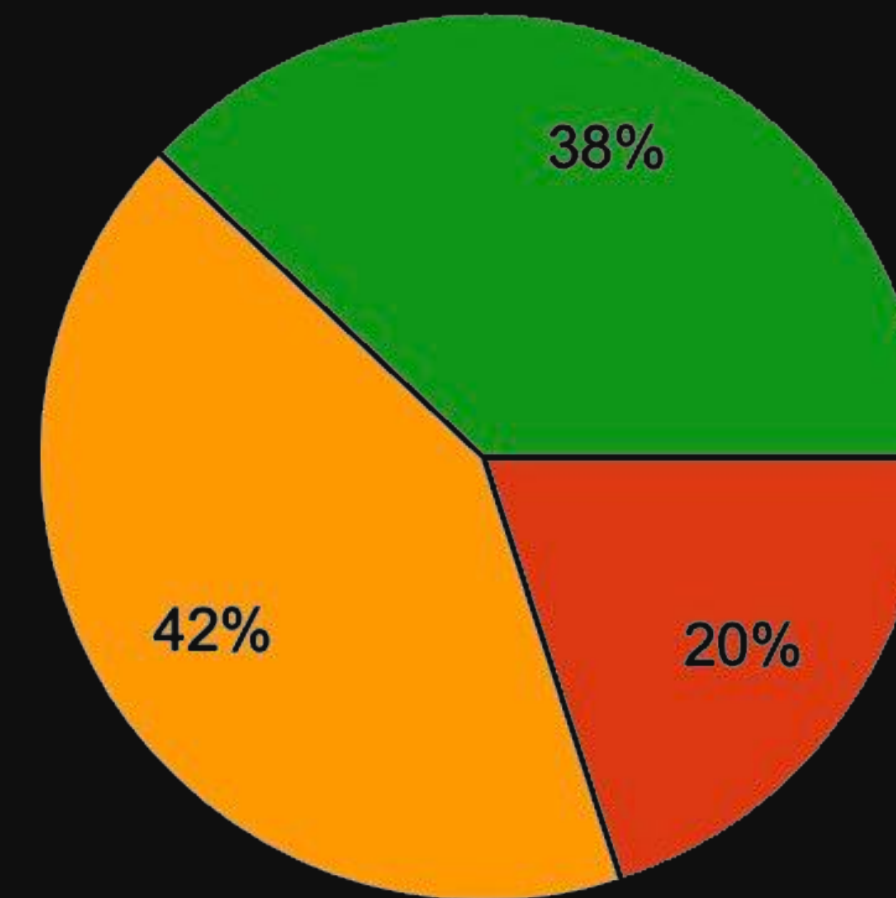
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Time Usage

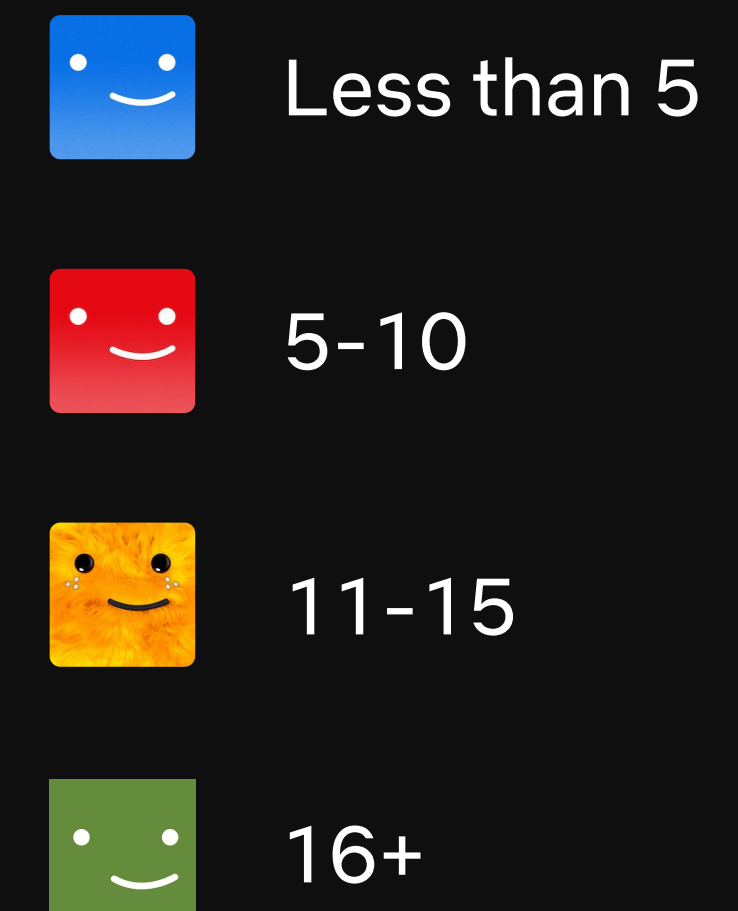
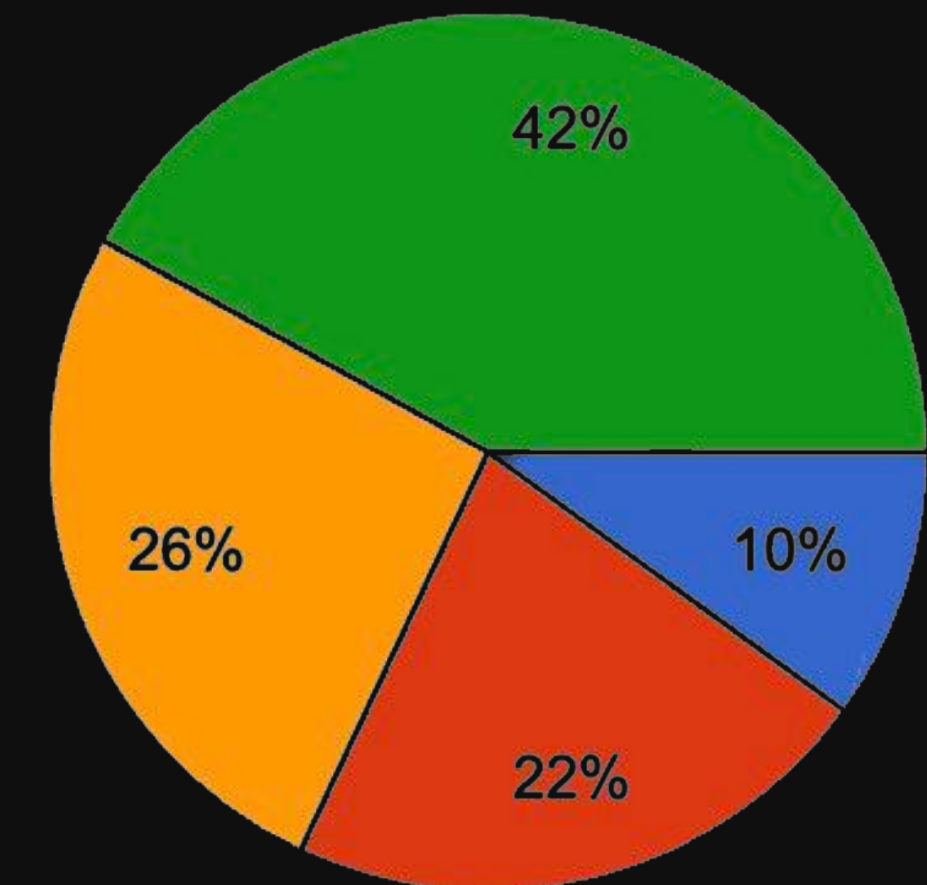
HOURS ON NETFLIX



MULTITASKING

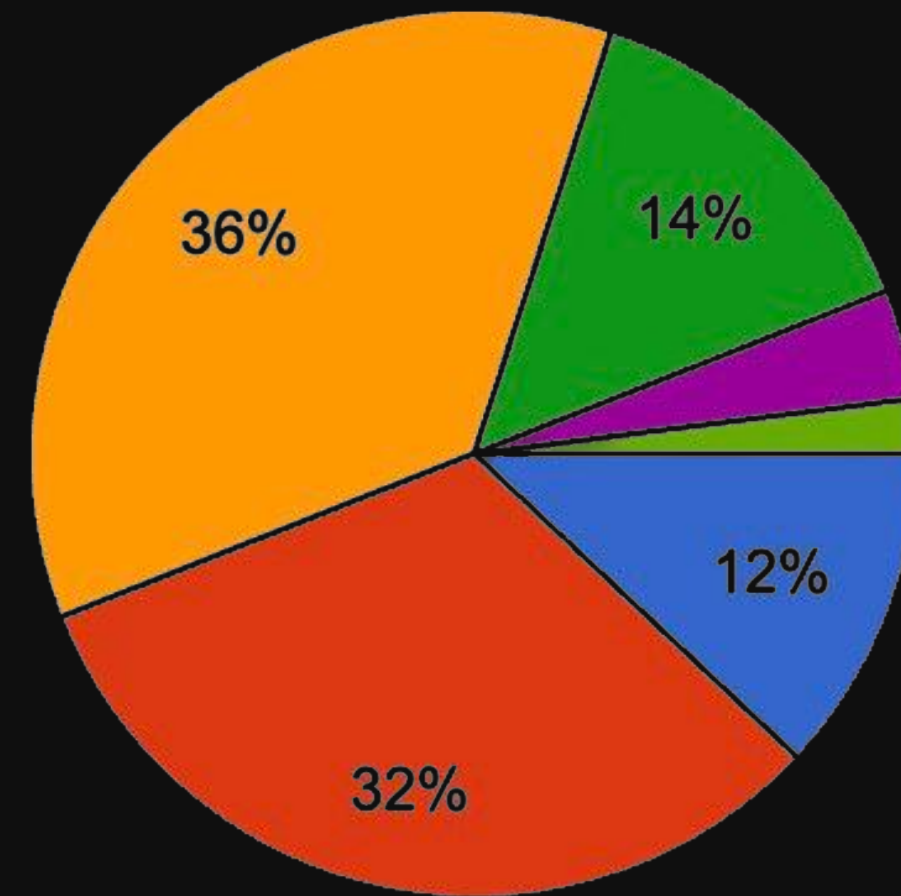


HOURS ON SOCIAL MEDIA



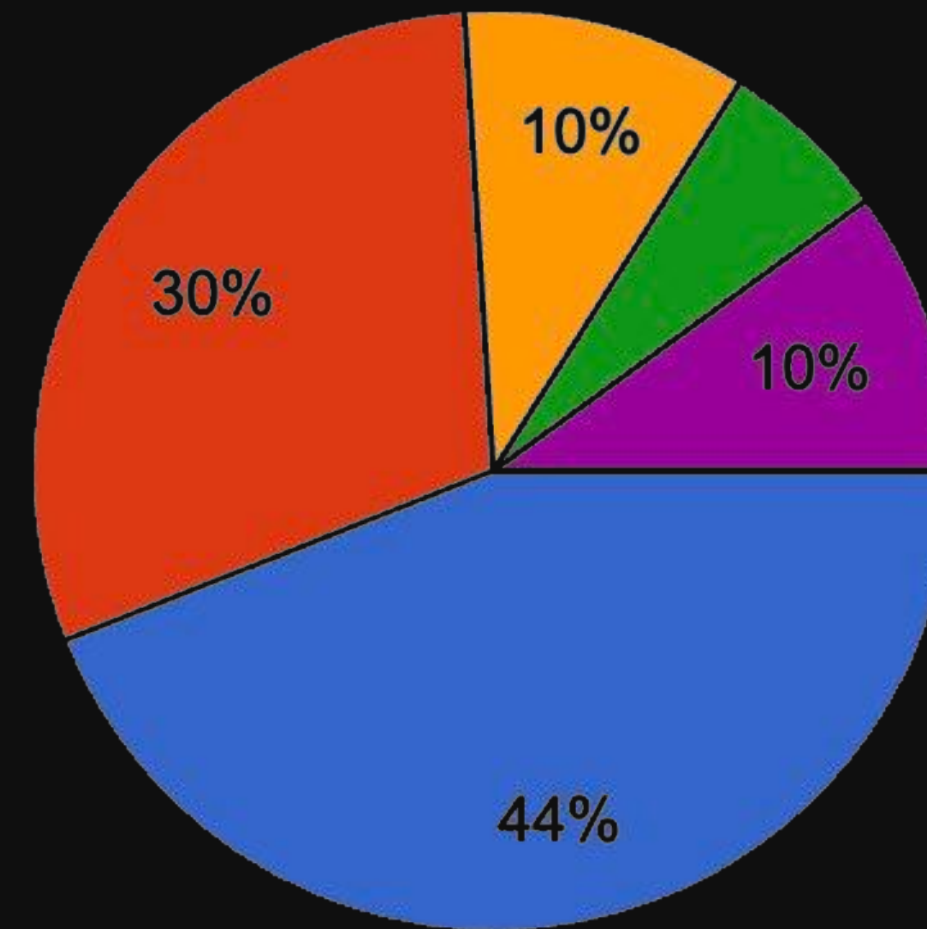
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ENTERTAINMENT



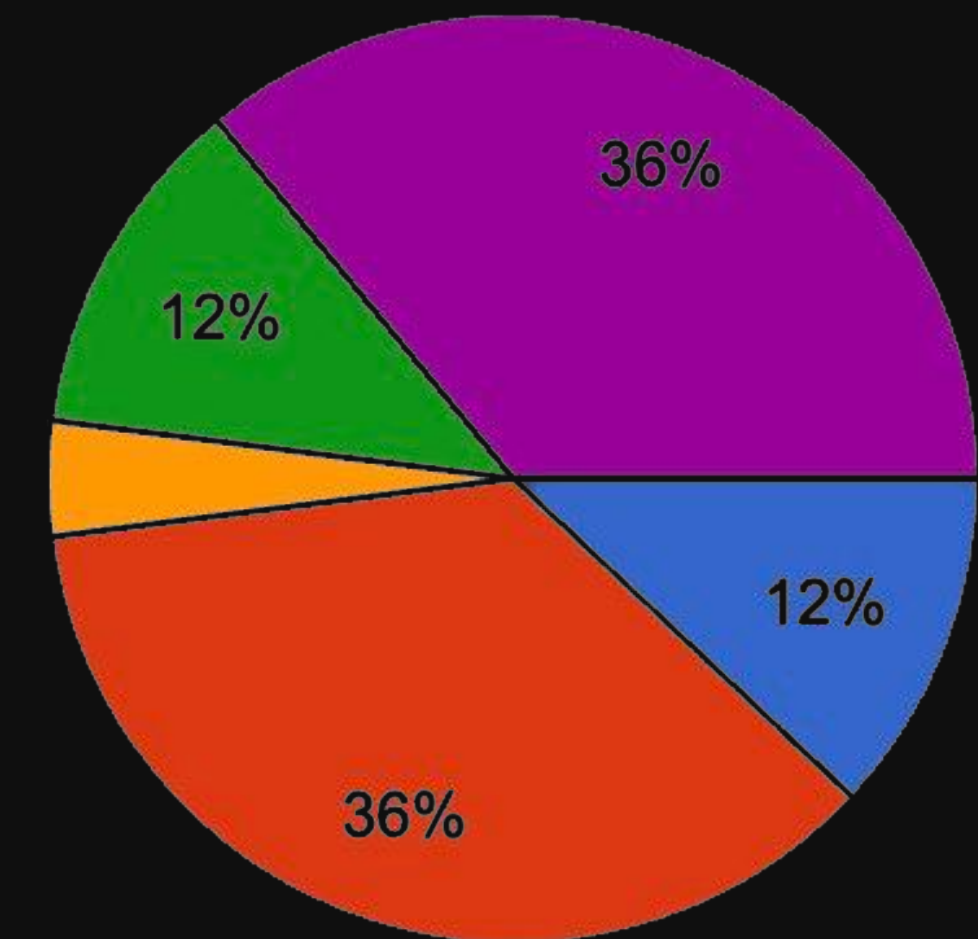
- Netflix
- Instagram
- TikTok
- YouTube
- Hulu
- Twitter

Engagement FEATURES



- Variety of content
- Original content
- Ease of use
- Accessibility
- Personalization

SHORT-FORM CONTENT



- 15-30 sec
- 31-60 sec
- Livestreams
- Stories
- Reels

Why have you ever considered canceling Netflix?

Yes, too much money	+
Lack of appealing new content	+
Increase in price	+
Lacks original content and is expensive	+
Budgeting	+
Monthly rates changed and payment for no ads	+
Variety of content/price	+
Low quality production	+

What influenced your decision to subscribe to Netflix?

I think is normal in the society right now	+
Content	+
Accessibility + I don't like cable shows	+
Original content/shows only on that platform	+
Family and friends	+
My T-Mobile account includes it	+
Exclusive content, accessibility from sharing accounts	+
Exclusive content and affordability	+

N

If you have limited time, do you prefer watching Netflix or using social media? Why?

What's the biggest difference between your experience on Netflix and social media?

Social media, because you can always trail down the rabbit hole of what's one more episode	+	Netflix is entertaining but you don't interact with others and it doesn't leave you feeling drained after using it for hours	+
Social Media because it has more content	+	Social media is faster to use at short periods of time while Netflix is needed for longer periods of time	+
Social media, it's free and it has unlimited content	+	Netflix is needed for longer periods of time	+
Watching Netflix because it's my getaway and much unlike social media	+	Scrolling through both is a drag into a dark hole but Netflix is a bit more meaningful	+
Social media because Netflix has nothing good left to watch	+	Netflix gives an experience and platform of movies and shows that social media does not	+
Social media because it's shorter and faster	+	Netflix is an escape from the real world, whereas social media gives you a look into	+
Netflix gives me a break from my phone	+	I use social media all the time, and Netflix only when I'm relaxed	+
Social media is more personalized and has more entertainment	+		

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FROM DATA TO CLARITY

KEY TAKEAWAYS

WHAT CAN WE LEARN FROM THIS?

Episode 1

NEED FOR PERSONALIZATION AND CUSTOMIZATION

Focus group discussions highlighted that customers are increasingly expecting personalized experiences, from tailored recommendations to individualized services. Yet, survey data showed that many felt the company's offerings were too generic.

Episode 2

PRICE SENSITIVITY AND PERCEIVED VALUE

A consistent finding across both surveys and focus groups is that customers are becoming more price-sensitive, especially in the current economic climate. However, there is a clear desire for value beyond just price—customers seek quality, reliability, and added benefits.

Episode 3

EMERGING COMPETITION AND MARKET DIFFERENTIATION

Survey results reveal an increasing awareness of new competitors offering similar products or services at competitive prices. Focus groups indicated that while customers are loyal, they are willing to switch brands if they feel another option better meets their needs.

RECOMMENDATIONS

OPPORTUNITIES & GROWTH STRATEGIES



THE WATCH PARTY

Optional comment section under videos, users could share reactions, discuss plot twists, and connect with other fans directly on the platform. For group viewing, a co-watch feature would let friends sync up their screens, chat, and share moments in real time, even when miles apart.

This feature creates a richer, more interactive experience, making Netflix feel less like a passive platform and more like a community hub. It taps into the social habits of Gen Z and Millennials, who thrive on connection and sharing their thoughts. Plus, it allows Netflix to gather real-time user insights, from emotional reactions to favorite moments, unlocking new opportunities for personalized content and marketing.

La regina degli scacchi

S1:E2 7 comments

Hi, YummyAlpaca601

Omg that look!

Post

BetterBison762

Might actually start playing chess now

42:21

2 ♥

12m

LemonMoose97

I can see something happening between these two

41:37

1 ♥

4m

BaldRhinoceros604

Trending haircut of 2021

20:54

1 ♥

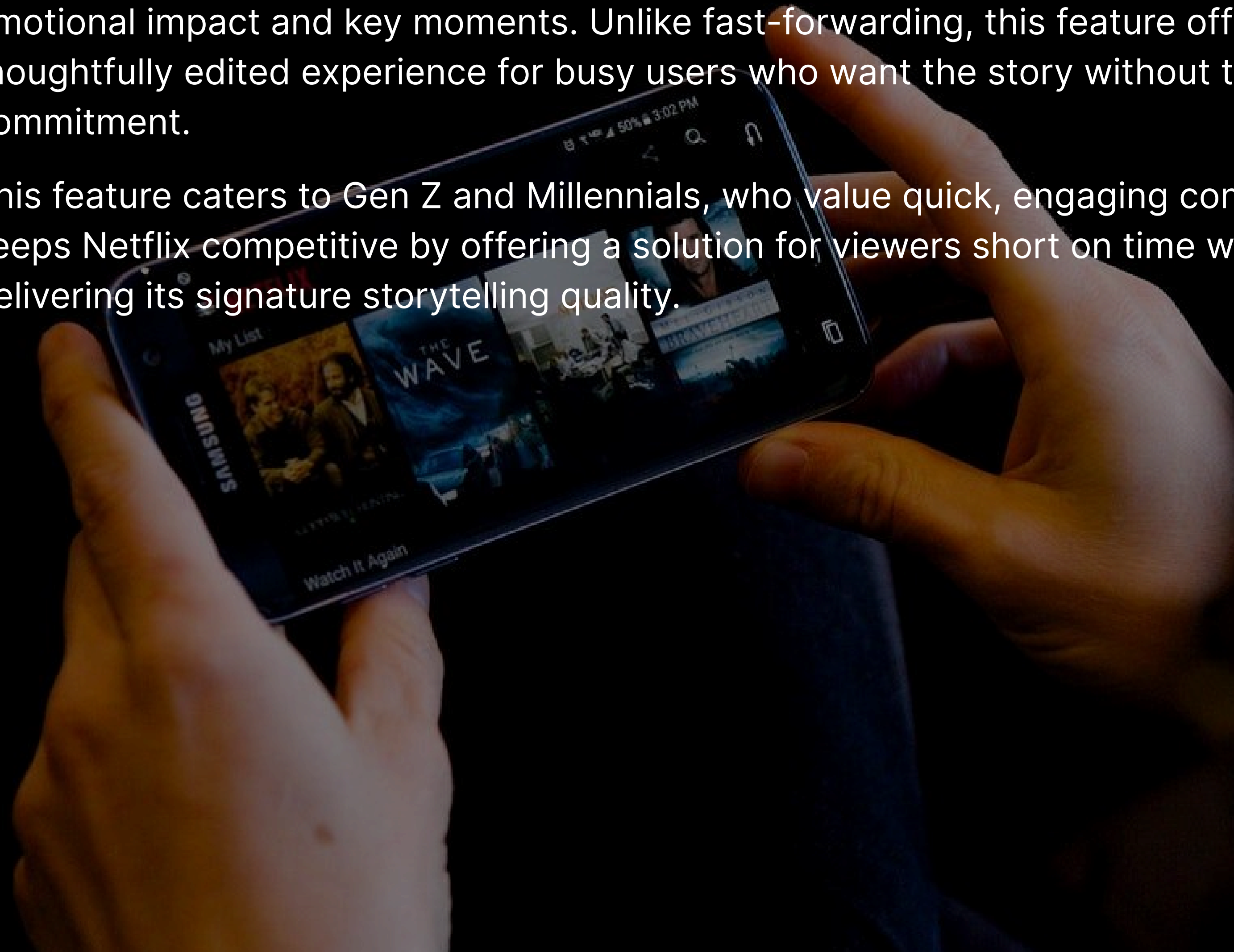
17m

SHOW MORE

SHORTCUTS

Create a dedicated section for viewers seeking fast content. Full-length movies or episodes are condensed into 5–10 minute videos, carefully curated to maintain emotional impact and key moments. Unlike fast-forwarding, this feature offers a thoughtfully edited experience for busy users who want the story without the time commitment.

This feature caters to Gen Z and Millennials, who value quick, engaging content. It keeps Netflix competitive by offering a solution for viewers short on time while still delivering its signature storytelling quality.

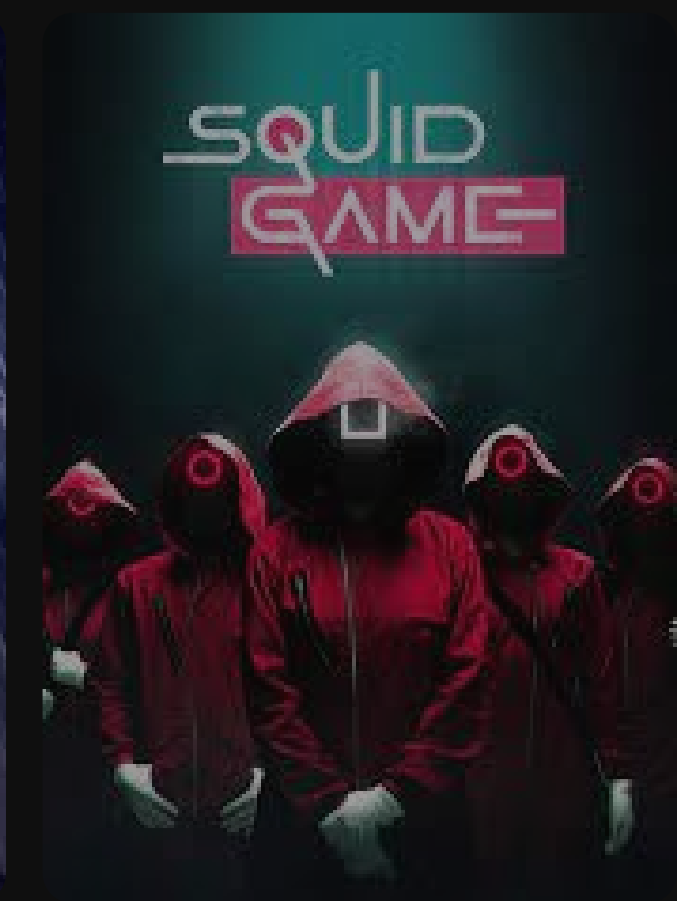
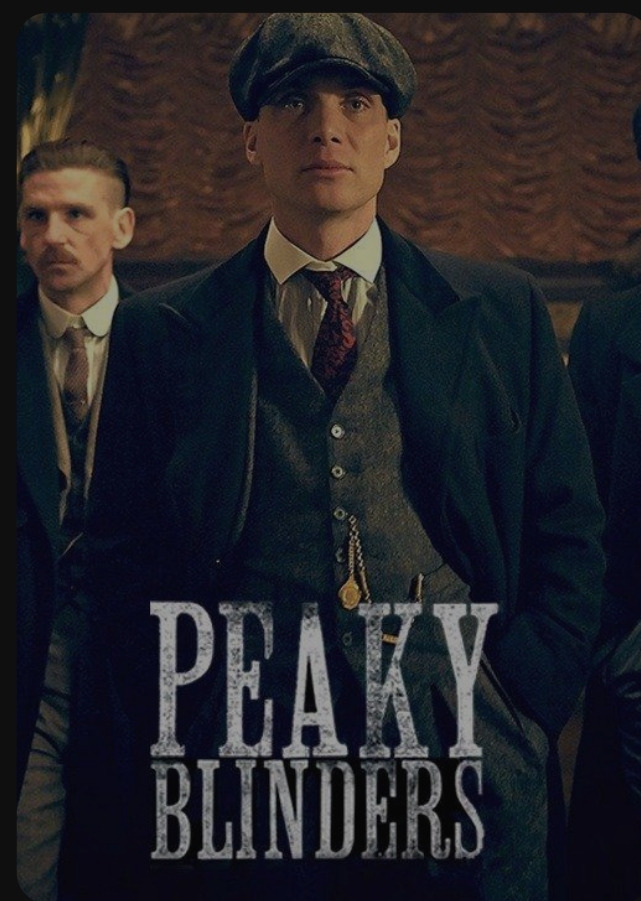




NEXTFLICKS

Transform content discovery into an engaging experience. Introduce a TikTok-style feed with swipeable teasers for movies and shows, making browsing fun and intuitive. Pair this with an advanced recommendation system that learns user preferences to provide smarter, more personalized suggestions. To add depth, invite experts and influencers to create entertaining recommendations, turning content discovery into a dynamic, enjoyable part of the Netflix experience.

This approach combines entertainment with utility, appealing to Gen Z and Millennials who love interactive, effortless browsing. It boosts user engagement while making content discovery feel fresh and exciting.



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Watch Credits

▶ Next Episode

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THANK YOU!