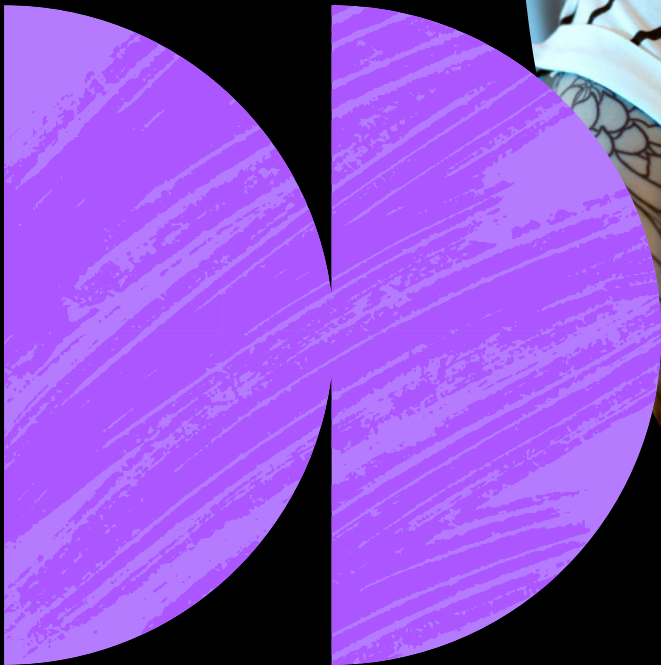


# Why We Watch

**Co-creating culture:**  
how viewers inform  
and influence the  
content they love



# Introduction



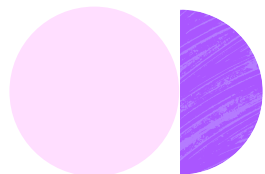
Compared to traditional art forms, audio-visual culture is still in its infancy. The first television broadcast was less than 100 years ago; the first cinema exhibits only a little older than that.

But in around a century, film and television — video in all its forms<sup>1</sup> — has become the dominant cultural product of our times.

We wanted to understand how video became so culturally prominent, so we began by exploring the underlying reasons why people watch. But it quickly became apparent that the basic psychological motivations haven't changed much. While the content we enjoy might have evolved beyond recognition, the reasons we watch have largely stayed the same over the decades.

And yet the contemporary video landscape feels undeniably different. Our hypothesis, which we'll explore across the rest of this report, is that new technology, new opportunities for creators, and new methods of engagement and curation have combined to bring about the emergence of a crucial new factor in decision-making: **viewer agency**.

In this context, agency isn't just about being able to choose what you want to watch — after all, even with just a handful of channels, we could always switch over or switch off. Instead it signals a power shift, from a media environment in which the value of content is defined by traditional gatekeepers, such as commissioning editors and production houses, to one where viewers have an equal seat at the table.



For the first time in the history of video media, the audience is not just a passive recipient, but an engaged curator, using cultural fluency and tech to build their own personal media universes.

And on some platforms, the degree of feedback and collaboration between viewers and creators has even elevated the audience to a position where the viewer can legitimately be thought of as a **co-creator**.



Audiences now use their agency not just to choose but also to influence; becoming critical decision-makers alongside media owners and content producers.

In fact, creators of all types are experimenting and iterating as never before, because they know that the audience's attention cannot be taken for granted.

As a result, people report feeling a new depth of engagement with the media they love. And from this sense of ownership and empowerment, viewers are deriving more value than ever, which is ultimately what keeps them coming back for more.





## Methodology

We approached these concepts from a range of different perspectives, from the underlying neuroscience to ideas about culture and identity to the impact of new technology.

On this journey we've partnered with experts from research companies The Behavioural Architects and MTM. They've helped us map the terrain of this rapidly evolving landscape in a way that is as representative of viewer diversity as possible.

Together, we've conducted literature reviews and interviews with experts across many fields (from neuroscience and behavioural science to academics, creators, and more).



We've also conducted viewer surveys in nine countries across Europe and the Middle East, with a total of ~12,000 interviews completed and diary entries of over 27,000 viewing occasions analysed.





CHAPTER

# 01

**Why do we watch?**

## Chapter 01

# Why do we watch?



Our starting point was a simple trend: year by year, people are spending more time watching online video.<sup>2</sup> We wanted to understand why. Reviewing previous research on the subject revealed a straightforward answer.

At the most basic level, we watch video because our brains are drawn towards dynamic scenes.<sup>3</sup> The more visually dynamic something is, the more attention we pay to it and the better we're able to recall what we've seen.

This was the case during the linear TV era and it remains the case now, with new devices, platforms, and formats simply offering us more freedom in meeting our needs.



“Video plays a huge part in my life and I would definitely struggle without it. It's part of my routine, the structure of my day. It provides a way of **switching off**, providing **familiarity** and **comfort**, or taking me on a thrilling rollercoaster.”<sup>4</sup>

FEMALE, 40-49



**Because of this ability to access anything, anywhere, video has become the default format for addressing many of our everyday emotional and intellectual needs.**

So, what exactly are these needs? Our literature review identified four main categories of need commonly answered by video:

**Self-identity and growth:** Video can be a powerful tool for exploring our sense of self and our place in the world. There is a strong connection between visual media and emotion, which makes video a potent way to make sense of our personal history and evoke nostalgia.

**Connection to others:** Watching content together in the same physical space is an obvious way that video allows us to connect with others. But video also helps us form emotional bonds and connections when we're alone. Choosing content that inspires us and that we relate to can help us feel understood, console us, and make us feel part of something bigger.

**Stimulation and entertainment:** Video can be engaging, enjoyable, and low-effort. When we're bored or need to reset, we might turn to a video to feel enlivened. On the other hand, if we're experiencing a strong emotion, we might seek out content that matches that feeling and responds to it.

**Learning and doing:** Video makes information easy to process, so it has become essential for people who want a simple way to learn something new, or to keep up with what's going on in the world. Being able to gain new knowledge and skills helps us feel competent and capable, which can in turn reduce anxiety.

#### FIGURE 01

Viewers are mainly motivated by stimulation and entertainment, but learning, self-identity, and connection all play a role.<sup>5</sup>

#### Motivations for viewing content

##### Stimulate and entertain

72%

##### Learn and do

34%

##### Self-identity and growth

28%

##### Connect to others

19%

Our research suggests that these needs have remained constant even as content, devices, and platforms have evolved. What has changed is that viewers now have significantly more opportunity to meet these needs. All of which begs a follow-on question: how do people choose between the content, devices, and platforms available to them?

We address our needs both consciously and unconsciously, with our viewing behaviour also governed by habits and preferences. While viewing was once limited to a TV in the living room or the bedroom, digital channels are now accessible on any internet-connected screen.

At certain times of day and in certain locations, such as a commute or when we wake up, we are more likely to resort to quick, instinctual content selection. In particular, watching on smartphones appears to be deeply habitual. For many of us, muscle memory causes us to pick up our devices during any moment of downtime, weaving social video unconsciously into the fabric of our day.

On the other hand, with more time available we may allow ourselves to be guided by the associations we make between content platforms and the specific emotional needs they answer.



If the reward we experience is strong enough, behavioural science tells us that these associations can become “anchors”,<sup>6</sup> drawing us back to a specific platform whenever we feel a particular need.

This powerful effect is one of the keys to understanding why viewers still seem to find the complex media landscape easy to navigate.







Viewers rank YouTube

**#1**

among all platforms for enabling them to find the exact content they like at any moment, significantly higher than TV.<sup>7</sup>

Most platforms only anchor to one or two specific need states, such as sport on linear TV anchoring to a desire for social connection and entertainment, or social video anchoring to momentary distraction. But with a broad range of creators, flexible formats, and accessibility across phones, computers, and connected TVs, YouTube stands out as anchoring to all four of the need states described above.

**In a survey by MTM, 46% of viewers in EMEA say that YouTube enables them to find the exact content they like at any moment, ranking first among all platforms and significantly higher than TV.<sup>7</sup>**

In many ways, this is also due to the platform offering content across multiple screens. Viewers value the ability to seamlessly switch between short-form and long-form video conveniently on the same platform, with these two content types being tailored to distinct needs.

**Sixty-one percent of short-form video viewers who were surveyed said they choose short-form videos to discover a new product or brand, type, while 57% choose long-form videos to go deep into a particular topic/type of content.<sup>8</sup>**



““ With YouTube, I can watch it on any device at any time because it has **both short-form and long-form videos** ... YouTube has almost got an infinite number of people making videos, so you can always find something that relates to you. ””<sup>9</sup>

MALE, 25-34

These findings suggest an important nuance: rather than being overwhelmed by abundance, viewers have embraced all this choice.

They have become savvy navigators, enjoying their freedom and agency, adept at finding the content that reflects their identities, speaks to their passions and interests, and, ultimately, brings value to them.



CHAPTER

# 02

**Curating your personal  
media universe**

## Chapter 02

# Curating your personal media universe



The dramatic expansion of the video landscape has created some additional complexity for advertisers and media planners.

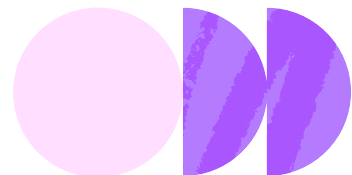
But this same complexity has empowered viewers, as they have rapidly acquired the tools and mental models they need to navigate it.

Between emotional anchors and an intuitive understanding of how to surf this wave of fragmentation, viewers are now experts at programming their own viewing. This kind of self-discovery is made possible because of a more diverse creator community that produces content for everyone.



“What makes YouTube very unique for me is the **diversity of videos**. One minute you’re going to watch a movie or learn how to fix your tyres and the next you can watch a three-hour documentary about North Korea.”<sup>10</sup>

MALE, 18-24







Instead of being reliant on broadcast schedules and the whims of a small number of producers and editors, viewers are now the masters of their own media universes.

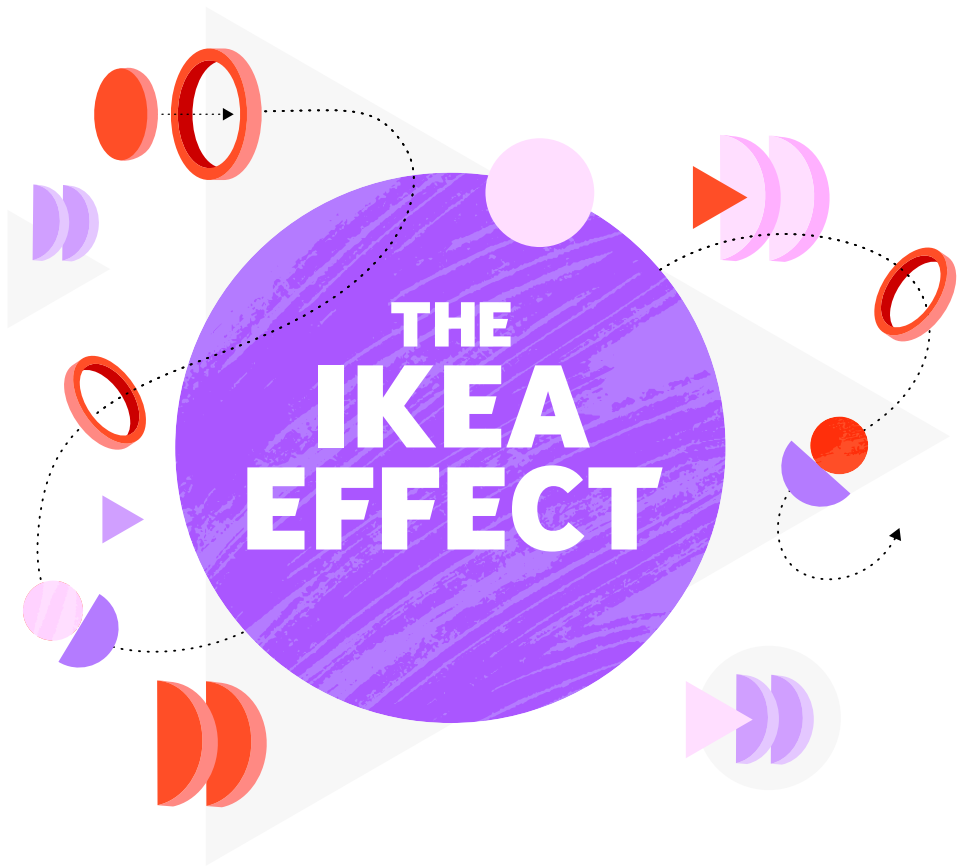
And no two people's universes are the same. This makes platforms that can cater to a wide array of needs — and a wide array of viewers — particularly valuable for marketers.

**In a survey by MTM, viewers ranked YouTube highly on this point, putting the platform first ahead of broadcast, streaming, and social video when it comes to having content that is “for everyone.”<sup>11</sup>** This gives viewers a sense of autonomy in their decision-making — and is driven not just by content breadth, but also its accessibility across devices and screens that were previously more restricted.

““ The smart TV gives me my own direction. So I don't have someone who says what I'm watching ... I can turn the controls myself and watch my own content. That is a **sense of freedom** that is very important to me. ””<sup>12</sup>

FEMALE, 45-54





At any given moment we're in control of what we want to watch and how we watch it. And the more empowered we feel, the more our desire to watch seems to increase. A possible explanation for this phenomenon can be found in behavioural science.



The so-called “IKEA effect”<sup>13</sup>

describes a tendency for people to value something more when they've had a hand in building it.

Just as there is meaning in putting together a flatpack bookcase yourself and filling it with your favourite novels, viewers also feel an elevated sense of ownership of the channels they subscribe to and the creators they follow.

**Our media universes reflect our sense of self, our individual identity. We exercise agency, choosing the content that means something to us, and the IKEA effect confers an emotional reward for our investment, making us want to invest even more.**

And by sharing the content we love or commenting on videos we find meaningful, we can also communicate something about ourselves back out into the world.

As curators, we're aided by powerful technology that learns from our preferences, making discovering new content easier and raising the level of personal relevance.

Platforms take implicit and explicit signals, such as our watch time and likes or dislikes, and use them to suggest new content. On YouTube, Google AI helps surface what's relevant to the individual. Every day, the system learns from billions of signals to find the videos users want to watch. And this personalisation has real value to users.

In fact, many of the people we interviewed said they felt protective of their online accounts, revealing that they refuse to share logins to ensure that their viewing history isn't lost or corrupted. The degree of investment is clear, with obvious parallels to email, social media, and other high-value digital accounts.

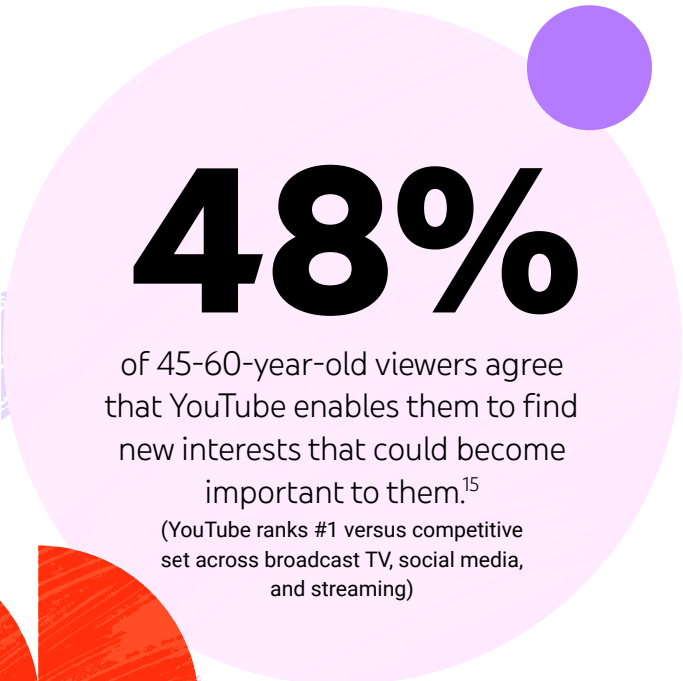


“ My YouTube homepage is incredibly personalised to me. **The algorithm has known me for 15 years. I would never make a new account** because it's so easy to find something that interests me on mine! ”<sup>14</sup>

FEMALE, 25-34

However, not all algorithms are created equal. Algorithms that primarily surface familiar content may prompt concern from some viewers that this is creating an echo-chamber effect. Viewers value platforms that allow for more expansive use cases, such as self-improvement or exploring new perspectives, as these systems can learn from their desire for new experiences and include novel content in their recommendations.


And it's worth noting that an interest in exploring new ideas isn't limited to younger viewers: **48% of 45-60-year-old viewers agree that YouTube enables them to find new interests that could become important to them (YouTube ranks #1 versus competitive set across broadcast TV, social media, and streaming).**<sup>15</sup>



# 48%

of 45-60-year-old viewers agree that YouTube enables them to find new interests that could become important to them.<sup>15</sup>

(YouTube ranks #1 versus competitive set across broadcast TV, social media, and streaming)

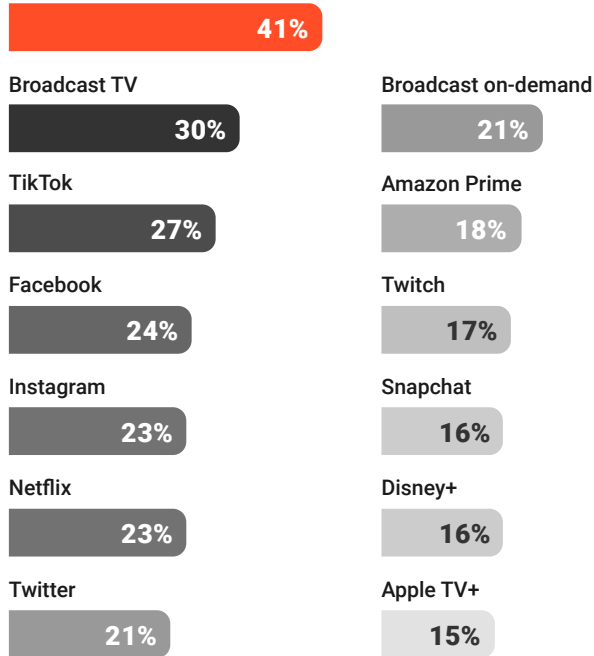




## FIGURE 02

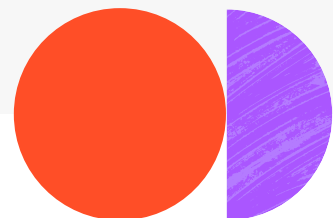
Viewers rank YouTube first for being a place that has helped them learn things about the world they wouldn't have without it, versus competitors across broadcast TV, social media, and streaming.<sup>16</sup>

### YouTube



**Another route to discovering novel content comes from the increasing number of people watching together on connected TVs, a figure much higher than even three years ago.<sup>17</sup>**

In other words, viewer agency is not just a story about individuals creating their own media universes; it's also about putting these preferences back out into the world — sharing them and playing a part in influencing the broader ecosystem.





CHAPTER

# 03

**Co-creators of culture:  
viewers call the shots**

## Chapter 03

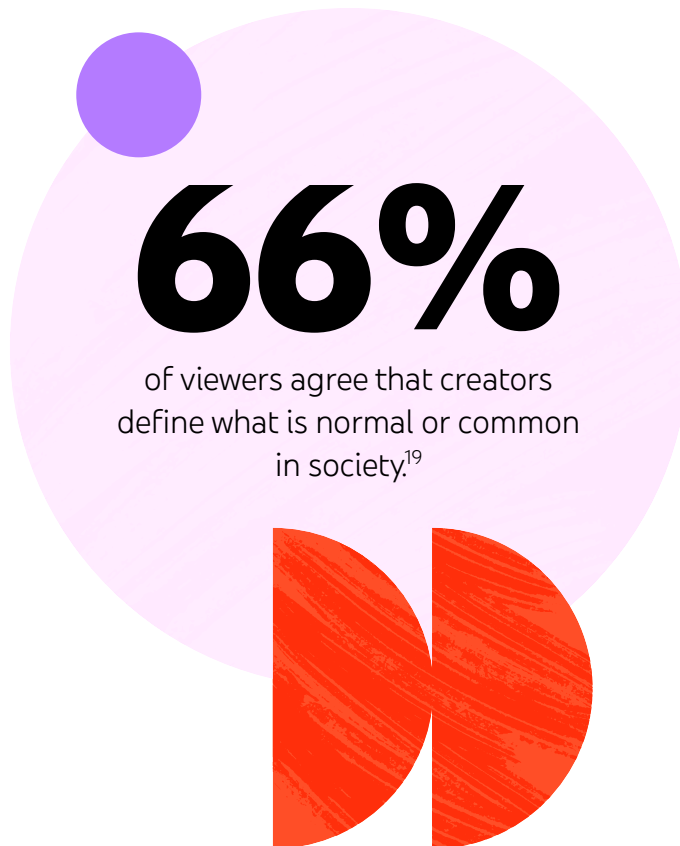
# Co-creators of culture: viewers call the shots



According to a survey by MTM, 18-34-year-old viewers chose professional creators as their #1 most watched category of content producers, even above traditional production companies.<sup>18</sup>

This new generation have seized the opportunity presented by open, UGC-driven platforms, defining culture as we know it and becoming brands themselves in the process: **66% of viewers agree that creators define what is normal or common in society.**<sup>19</sup>

The IKEA effect explains why curation gives viewers a powerful sense of ownership. But in many cases, the relationship between creators and viewers goes even further, becoming a genuine collaboration.



For many creators, it has become commonplace to ask their audience what they want to see next, with replies coming in the form of comments and reaction videos. This powerful feedback loop simultaneously heightens engagement while increasing the personal relevance of future content.



Together, these creators and their audiences are modern tastemakers, establishing cultural trends for others – including traditional media – to follow.

And while linear TV and streaming offer fewer opportunities for direct feedback and collaboration, this hasn't stopped passionate viewers from occasionally taking matters into their own hands.

In recent years, several popular shows have been saved from cancellation as a result of fans making their voices heard across social media. Not every campaign has been successful, but this kind of direct action by viewers would have been unimaginable only two decades ago.



““ My subscribers are vocal and tell me what they want. I have to be conscious of what I post. ””<sup>20</sup>

YOUTUBE CREATOR

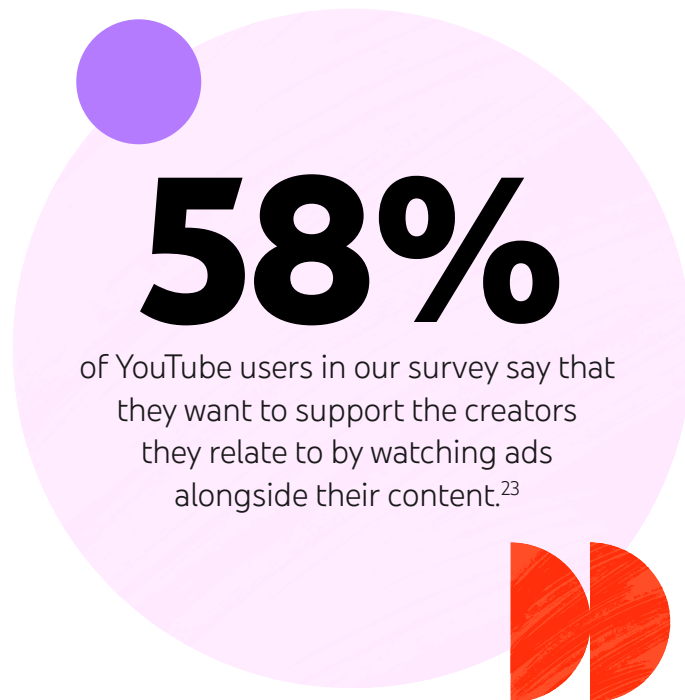


On YouTube, we've seen viewers establishing and nurturing particularly deep connections with creators — **almost a quarter of surveyed viewers said that they feel as though the creators in the content they watch are friends to them.**<sup>21</sup>

This is an unusual degree of intimacy, but it isn't without precedent. Studies from the 1980s show that during the heyday of talk radio, listeners felt extremely close to DJs<sup>22</sup> because of the intimacy of direct address: a mode of delivery echoed and arguably intensified by the direct address to camera favoured by many creators.

And the relationship between creator and audience isn't just deep, it is also reciprocal. The content viewers love provides reliable emotional, social, and intellectual rewards, becoming indispensable to their daily lives. They value it.

And they understand the economics of how it is produced, with **58% of YouTube users in our survey saying that they want to support the creators they relate to by watching ads alongside their content.**<sup>23</sup>





“ Most of the time ads on YouTube don’t really bother me at all. With some creators, if you have the option to skip, I’ll sit and watch it. I’ll watch the ads because I want them to get the revenue because I really appreciate the effort and time they put into their content. ”<sup>24</sup>

MALE, 25-34

The narrowing gap between creators and viewers, and the sense of connection it fosters also contribute to increased perception of **authenticity**.

Media is a potent means for exploring identity, community, and representation. And in this context, **authenticity matters — our survey research with MTM placed it as the most common consideration when deciding what to watch.**<sup>25</sup>

Viewers say they value feeling like the content they watch is created by “real people” they can connect and identify with.



“ I do feel close to people who talk about shared experiences. When you have things in common with the people creating and watching the content, it definitely builds a sense of attachment. ”<sup>26</sup>

NON-BINARY, 45-54

**FIGURE 03**

According to a survey by MTM, viewers rank YouTube first for having content made by people they identify with, versus competitors across broadcast TV, social media, and streaming.<sup>27</sup>

**Perceptions of YouTube versus other platforms – % select “Has content made by people that I identify with”**

**YouTube**

**34%**

**TikTok**

**30%**

**Instagram**

**29%**

**Facebook**

**28%**

**Twitch**

**21%**

**Twitter**

**20%**

**Netflix**

**20%**

**Snapchat**

**18%**

**Broadcast TV**

**17%**

**Amazon Prime**

**16%**

**Disney+**

**16%**

**Apple TV+**

**15%**

**Broadcast on-demand**

**14%**

Beyond the relationship between viewers and creators, a sense of ownership can also arise in relation to several of the drivers discussed earlier. The personal growth that forms through exploring identity, the community built as fans connect in person and online, and the new skills they acquire, all have a tangible value for viewers and contribute to a sense of growing investment.

**FIGURE 04**

Viewers rank YouTube first for being a place where they can always explore new creators and content to provide new ideas/perspectives, versus competitors.<sup>28</sup>

**Perceptions of YouTube versus other platforms**  
— % select “I am always able to explore new creators and content to provide new ideas/perspectives”

YouTube

42%

TikTok

34%

Instagram

30%

Facebook

25%

Netflix

24%

Twitch

20%

Twitter

19%

Amazon Prime

19%

Snapchat

17%

Disney+

17%

Broadcast TV

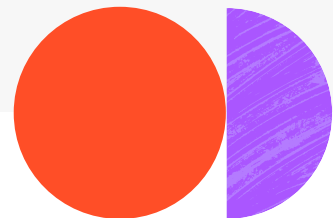
17%

Apple TV+

16%

Broadcast on-demand

16%







CHAPTER

# 04

Why all this matters

## Chapter 04

# Why all this matters



At the start of this report we outlined four key impulses that drive our consumption of video. And our research suggests that the basic psychological motivations behind video consumption remain unchanged.

People still want to be entertained, to explore their identities, to connect with others, and to learn new things. The explosion in new technologies, formats, and creators might lead us to think that the audience for these platforms is also somehow different. But the reality is that people are still responding to the same needs that have driven viewing throughout a century and counting of audio-visual media.

While marketers will still be dealing with an audience guided by the same set of behavioural drivers, the contexts in which those encounters occur are important.

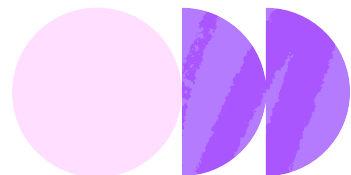


Taken together, the act of curating and even co-creating their own media universe endows viewers with a profound sense of ownership.

The content we watch isn't just entertaining, edifying, or resonant:  
**it's ours.**

Set against a powerful sentiment like this, traditional debates over content quality begin to pale; viewer decision-making is far more nuanced and layered, and ultimately the audience knows what they like and where to find it. This presents advertisers with a valuable opportunity to communicate with a highly engaged audience.

It also presents them with a challenge: when viewers are so invested in what they are watching, what can you do to earn some of that engagement?



To help brands make the most of this opportunity, we'll end by summarising a few implications and recommendations for brands:

- **Creators and viewers are essential to the video ecosystem, but none of this is possible without the support of advertisers.**

**YouTube paid more than \$50 billion to creators, artists, and media companies in the three years prior to June 2022.**<sup>29</sup> This monetisation enables a diverse range of creators to flourish, enriching our culture and producing content that provides a clear window on the world and a bright mirror in which our identities can be seen more clearly.

- **Viewers benefit from a diverse creator community that shapes culture; heavy topic exclusions can negatively impact this.**

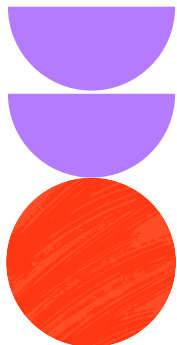
We all have a role to play in co-creating culture. We've seen many legitimate topics being excluded by advertisers as a proxy for avoiding potentially sensitive themes. Excluding these can mean missing out on diverse, relevant content and audiences, potentially biasing media selection, and penalising talented creators. Longer term, it could mean a retrenchment of media diversity, as creators from certain backgrounds are not rewarded for their work.

- **With the sheer expansiveness of content available, viewers are going deep on what they love and advertisers need to meet them in these moments.**


Viewers now have the agency to confidently seek out content that meets their emotional needs. To meet viewers at all of these points of high engagement, ensure your targeting strategy expands your reach rather than limiting it. Advertisers should avoid traditional targeting methods that make narrow assumptions about what their customers are viewing, and instead use our wide range of signals to find their customers. Expanding your reach can also make your media more efficient, as CPMs decrease due to a larger inventory pool with lower auction pressure.

- **While the media landscape might look complex from the outside, reaching viewers on YouTube doesn't have to be.**

The greater agency afforded by platforms like YouTube, and the availability of formats like YouTube Shorts, means that video plays a role across a range of needs, moments, and devices. To help advertisers navigate this, YouTube's ad ecosystem, powered by Google AI, offers end-to-end full-funnel solutions to meet viewers across all the ways they watch, as well as creative tools to assist in adapting horizontal video content to the Shorts feed.





 YouTube and other platforms have become indispensable to audiences, giving viewers the agency to access whatever they want, whenever they want.<sup>30</sup>

They're passionate about this content, invested in these creators, and deeply engaged in the processes of curation and co-creation. Brands that support this creativity — with all of the opportunities for emotion, connection, and identity it makes possible — can reap the rewards.

# Appendix

We investigated Why We Watch subject matters across a series of studies. Here is more detailed information on the methodology used to uncover these insights:

**Research agency:** The Behavioural Architects

**Study name:** *Why We Watch*

## 1: Multidisciplinary scoping phase

Wide-lens scoping of existing evidence alongside expert perspectives relating to why we watch video, and the physiological and emotional needs met by different types of video.

### Literature review

TBA conducted a systematic review of existing literature into video-watching drivers and motivations.

Over 80 articles and sources from a wide range of academic disciplines — including neuroscience, media and communications studies, social anthropology, and behavioural science — were analysed and themed around four key needs that video meets, alongside three drivers for decision-making.

### In-depth interviews with experts and YouTube creators

10x in-depth interviews with experts from a range of fields — including media industry experts and content creators, alongside academics — pushed the evidence further, providing a holistic and nuanced interpretation of why we watch video.

## 2: Deep consumer immersion

Forty-eight people in the UK and DE engaged in a longitudinal qualitative research programme over three weeks, revealing decision-making within the video ecosystem: how/where/when/with who/what — and why — we watch.

This began with a greeting and briefing call to engage and upskill participants, and to raise consciousness of the role of video in their daily lives.

All participants shared their video-watching behaviours, routines, and habits in a two-week digital diary capturing in-the-moment video-consumption triggers, motivations, and rewards:

- 2x days (weekday and weekend) capturing all video engagement across platforms
- 4x video highlights capture days
- 1x deprivation day where participants were tasked not to watch any video, or not to watch specific platforms or on specific devices

The programme wrapped with individual “join the dots” Google Meet conversations to co-explore and co-explain each person’s video-consumption patterns and behaviours, and surface deeper needs that video fulfils in people’s daily lives.

*Sample:* 48x participants in the UK and DE, age 18-65, gender balanced, ethnically representative, mix of heavy, medium and light video consumers across full breadth of platforms (live broadcast TV, broadcast on-demand, streaming services, YouTube, social media platforms, cinema, other).



**Research agency:** MTM

**Study name:** *Mirrors & Windows*

## **1: Multidisciplinary scoping phase**

### Literature review

Literature review of research into the topic of media and identity, reviewing over 50 sources from academic, industry, and consumer publications.

This generated hypotheses on how media shapes the formation, development, and expression of our identity, which we explored in the subsequent qualitative and quantitative research phases.

We also use this phase to build on the findings from the *Mirrors & Windows: How identity impacts media choices in modern Britain* study from 2021.

### In-depth expert interviews

5x in-depth interviews with subject matter experts from both academic (3x) and cultural backgrounds (2x) to hear their diverse perspectives on the topic of media and identity.

These interviews enable us to understand not only the foundational theories of identity that have influenced thinking on this subject for decades, but also the latest ideas and conversations on how identity intersects with media, especially online video.

### Cultural analysis

MTM partnered with local experts from each market (UK, DE, NL, FR, IT, ES, KSA) covered by the research to explore and understand the local landscape of identity and cultural and societal influences.

## **2: Deep consumer immersion**

EMEA qualitative exploration, with light-touch pre-task, exploring identity and videos that reflect self and deep-dive into identity and connection of video content, in online in-depth interviews for each lasting 1.5 hours across seven EMEA markets (56 interviews – 8x UK, DE, NL, FR, IT, ES, KSA).

Diverse sample of viewers aged 18-65+, representative of ethnicity, sexuality, gender (or non-binary), disability, location, social grade, beliefs, and cultural values.

## **3: Large-scale validation**

A 15-minute mobile-friendly survey in nine markets (UK, DE, FR, ES, IT, NL, EG, SA, UAE) collected data from n=11,877 people who use at least one online video service a month (across YouTube, social media platforms, broadcast TV, broadcast on-demand, and streaming services).

The sample was representative of the online population in each market, with quotas set on age, gender, region, Emirati/Saudi versus expat, education, and working status. We boosted the number of 18-24s in each market to ensure we had a robust sample for this audience, achieving a minimum of n=300, and weighted the final data to be representative.

The questionnaire covered four key areas. The first was a viewing diary where we asked people about up to three viewing occasions from the previous day.

We collected data on 27,136 viewing occasions across 13 platforms (YouTube, Instagram, Facebook, Snapchat, Twitter, TikTok, Twitch, Netflix, Amazon Prime Video, Disney+, Apple TV+, broadcast TV, and broadcast on-demand services).

We explored types of viewing and motivations to view content. The second section of the questionnaire covered perceptions of the platforms and the third section covered perceptions of advertising. Finally, we explored favourite YouTube videos and creators.

**Research agency:** MTM

**Study name:** *Why We Watch: CTV*

### **1: Deep consumer immersion**

CTV EMEA exploration with five-day video consumption diary pre-task and two-hour deeply immersive in-home interviews, exploring role of CTV in home, use of services and need states associated, and YouTube's role within it.

80x CTV media users across EMEA (20 x UK, 15x DE, NL, FR, IT), mix of age 18-65+, heavy and lighter YouTube users.

### **2: Large-scale validation**

Google/Cint quant survey across five markets (UK, DE, NL, FR, IT), main sample n=5,860 (N=1,000/market + additional booster for Gen Z (18-24 years)), regular (weekly) CTV viewers 18+.

*Method:* 12-minute mobile-friendly online survey in local language conducted by the Google Research Team in cooperation with Qualtrics and Cint.

**Research agency:** Differentology

**Study name:** *Why We Watch: Shorts*

### **1: Deep consumer immersion**

*Qualitative stage 1:* Five-day online community exploring their short-form video behaviours across the different platforms.

*Qualitative stage 2:* Two participants per market from stage 1 showed the short-form video behaviours visually.

*Target population:* Mix of very active and less active\* short-form video users, mix of ages from 18 to 65, sample: n=10 in seven EMEA markets: UK, DE, FR, IT, NL, UAE, ES.

N=8 in three EMEA markets: TR, SE, PL.

*\*Very active users=use SFV platform/s at least once a day; less active users=use SFV platform/s once a week*

### **2: Large-scale validation**

Google/Cint quant survey across 10 EMEA markets (UK, DE, FR, IT, NL, UAE, ES, TR, SE, PL), main sample n~10,000 (n=1,000/market), short-form videos monthly viewers between 18-64 years.

*Method:* 14-minute mobile-friendly online survey in local language conducted by the Google Research Team in cooperation with Qualtrics and Cint.

# Authors and acknowledgements

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