Welcome to the Age of Intentionalism
Turning off autopilot, turning up intentionality

What is essential? This question, an unexpected mantra that appeared during the pandemic, is shaping the behaviors of our audiences. As the world starts to pick up speed again, consumers are turning off their pre-pandemic autopilot tendencies and turning up intentionality. They are rethinking the essentials in their lives and making decisions of all sizes with increased intention — including how they use their time, where they spend their money, and even what, where, and why they stream. We call this reclamation of agency and direction by consumers: *intentionalism*.

A radical new shift for brands: people-positive marketing

In this new paradigm of intentionalism, consumers are purposefully selecting brands that elevate their lives and cutting out those that don’t add value. This shift is forcing brands to reframe the oldest and most grueling marketing dilemma: the fight for consumer attention.

Where intentionalism meets entertainment

In the golden age of streaming, consumers face a more complex paradox of choice — one that couples the exhaustion from excessive content with the desire to be intentional about what they watch. At HBO Max, we understand the relentless decision fatigue that consumers endure. Our unique heritage in both storytelling and technology enables us to understand the consumer and provide for their ever-changing needs. We meet their intention to stream content with our intention to captivate.

This is an opportunity for a 2020s cultural renaissance. But, it can only be sustained with collective intention. We have built a relationship of unbreakable trust with our viewers by bringing value to their lives — and we are inviting brands to be a part of it. Join us as we create a brighter and bolder future.

Our approach

For this perspective, we surveyed 1,000 AT3-54 across the U.S. to investigate the nuances of the rising trend of intentionalism. For specific themes, we also tapped WarnerMedia’s proprietary panel — TBH (To Be Honest) — to understand how 18-37-year-olds are being more thoughtful with their decision-making, particularly around what, where, and why they stream.
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**Proprietary and Confidential. Do Not Distribute.**
CHAPTER 1

The Rise of Intentionalism

As the world turns back on, what will you take with you?
The time when time broke

Is it today or yesterday? Variations of this cultural meme have spread across social feeds, perfectly encapsulating our disorientation with time since the pandemic began. Many of us feel that time is passing in slow motion and on fast-forward, simultaneously. With our usual reference points now gone, our collective equilibrium is off.

HOW DO YOU FEEL ABOUT TIME RIGHT NOW?
Respondents answered with over 40 distinct categorizations of time.

- FAST but SLOW
- RELIABLE but FLEETING
- EASY but DIFFICULT
- RELAXED but EXHAUSTING
- HOPEFUL but STRESSED

"[Time] goes by too quickly and too slow at the same time.
– Male, 25, Missouri"

Kim Koppel
@kimkoppel
Yes, I have said many times during the pandemic that time is broken now.
9:00 AM • May 28, 2021

Ara
@Arabwel
I think linear time broke somewhere in early 2020 and everything is meaningless
9:09 PM • Feb 4, 2021

hugo
@toastedbread
Fantasizing about.......... having a schedule
4:00 PM • Aug 27, 2020
The notion that time is our most precious resource has been hammered into our consciousness, but we never lived that way pre-pandemic. Instead, we sacrificed our well-being, overpacked our schedules, and glorified the “hustle culture” – so much so that, in 2019, the World Health Organization officially declared “burnout” an “occupational phenomenon” diagnosis.

But with the forced hiatus from our pre-pandemic norms and distractions, we've had time to reset. We formed new habits, renounced old ones, and got clarity on the things that matter to us. In fact, 60% of Gen Z and Millennials agree that “2020 was a year of necessary reckoning and reflection that will open us up for much more growth in 2021.” We even reverted to using “priority” as a singular noun, not a plural. We started to shed our multitasking addiction and found comfort in focusing on a single activity at a time – like baking, puzzling, or streaming.

We formed new habits, renounced old ones, and got clearer on the things that matter to us.

We are reimagining new ways of being. Some are making subtle updates to their lives, such as adding a self-care practice to their daily routine, while others are making drastic changes like moving across the country.

59% agree “I am more thoughtful about how I spend my time since the pandemic”

61% of Gen Z and Millennials formed new habits since the pandemic

OUR PRE-PANDEMIC LIVES
Exerted energy on many things

PANDEMIC LIVES
Focused energy on fewer things
The modern-day ritual of decluttering

The New Roaring Twenties will look dramatically different from the original. Since the pandemic began, our relationship to the word "essential" has transformed, pushing us to take a deeper look at what we consider important in our lives and in society. While the 1920s was a time of pushing cultural boundaries through overindulgence, the pandemic-born "essentialists" are clearing out the excess in all parts of their lives — from their closets to their beliefs — in pursuit of perfect alignment for their wellbeing.

1920s
- PANDEMIC: 1918 Spanish Flu + World War I
- MINDSET: Overindulgence
- DISPOSITION: Exuberance
- CULTURAL CHANGE: Push the boundaries

2020s
- PANDEMIC: COVID-19 + Polarization
- MINDSET: Intentional indulgence
- DISPOSITION: Cautiously optimistic
- CULTURAL CHANGE: Break boundaries

More space for what we love

This ritual of ruthlessly decluttering our lives is creating space for us to do what we love. We found that entertainment is the #1 way respondents want to spend their post-pandemic free-time, with over half saying they plan to spend more time with their favorite content.

The rise of intentionalism

72% are reevaluating what is "essential" to them

In a post-pandemic world, what’s the one way you would ideally spend your free-time?

#1 Entertainment
#2 Self-Help / Advancement
#3 Exercise
#4 Building Relationships
#5 Travel
Although nostalgia was an ever-present emotion during the pandemic, we are not turning back as we step into a new world. Instead, even as our lives continue to get busier, we will carry greater intentionality into the future.

Less than half of consumers reported living thoughtfully, pre-pandemic. However, as they look to the future, 64% predict they will be more intentional, a 36% increase from 2019.

![Graph showing the rise of intentionalism over time](image)

Even as life speeds up, consumers will be more intentional.

77% of Gen Z and Millennials agree that when they have free time, they are now more thoughtful about how they use it.

With so much time on my hands I realized how much [time] I was wasting on things that were really not that important.

– Female, 33, Pennsylvania
Intentional decision-making: micro + macro choices matter

As the world starts to gain momentum again, intentionalism makes us pause. It slows us down and turns off our autopilot tendencies, so we can act with purpose and make mindful decisions.

The pandemic taught us that we are all connected. We are more attuned to the fact that our personal choices can impact society as a whole, not just our own lives. This reflection informs the pre-pandemic habits consumers are leaving behind and the newly formed ones they will carry forward.

Intentionalism spans the subtle and significant choices that encompass every aspect of consumers’ lives — from the products they purchase, to the shows they watch, to how they envision their future selves. For consumers, intentionalism can be a decision as simple as carrying a reusable water bottle to cut down on waste or as life-changing as unlearning implicit biases.

71% are more thoughtful and purposeful in their decision-making since the start of the pandemic

69% agree that they feel better when they are more thoughtful about their decisions

Streaming habits are no exception to more deliberate decision-making

Behind being dedicated to saving money, the top decision that consumers are more intentional about is what they’re subscribing to and watching — ranking ahead of time spent with others, their mental health, and causes they support.

WHICH DECISIONS IN YOUR LIFE ARE YOU MORE THOUGHTFUL ABOUT SINCE THE START OF THE PANDEMIC?

- The money I save: 60%
- Entertainment I watch and platforms I subscribe to: 55%
- Who I spend my time with: 54%
- Work-life balance: 54%
- The food I eat: 50%
- The causes I support: 48%
- The brands/products I purchase: 43%
- The clothes I purchase: 40%
- The brands I follow: 39%
- My carbon footprint: 39%
- The apps I download: 35%

I have more time to think about my decisions and the possible outcomes and implications of each.

– Male, 37, Connecticut
People-positive marketing: a new approach for a new world

In the wake of intentionalism, brands must embrace a generous, regenerative approach to marketing – giving back more than they take from consumers. Brands have been entrenched in the attention economy where “grabbing” and “fighting” for audiences’ attention suggested they were inherently taking away time from consumers.

Brands must now recalibrate in a time when consumers are mindful of which brands they welcome into their lives. Instead of the mindset of “stealing attention” from viewers, brands need to have people-positive interactions and purpose-driven approaches to add to consumers’ lives – whether that’s by rewarding audiences with more of the content they love or making a tangible commitment to a social cause.
A framework for building additive experiences for intentional consumers

Brands that disrupt their consumers’ lives are viewed as annoying, even more so in a growing culture of intentionalism. To be people-positive, brands need to know how to deeply integrate into the lives of consumers. Although this might feel like an impossible mission, we have created a framework to break down the intentionalism mindset for brands to benefit the lives of consumers, depending on viewers’ various levels of attention versus intention. When applying our intentionalism framework to streaming, we’ve found that when audiences are immersed in entertainment, they favor brands that:

#1 Respect their time
#2 Create a cohesive experience
#3 Experiment with storytelling
#4 Challenge convention

The modalities of intentionalism mindset

Levels of consumer intention and attention inform a brand’s people-positive engagement strategy. For example, when consumer intention is low and consumer attention is low, brands should help consumers restore.

- **Reflect**
  - Know your space
- **Build**
  - Show up with intention
- **Restore**
  - Give back time
- **Inspire**
  - Get creative
When consumers’ intention capacity is low, recharge them – when their capacity is high, activate them

**REFLECT**

Know your space

Audiences want an integrative ad experience in which brands reflect the tone and context of the entertainment that is being consumed.

60%

agree "I prefer to have commercials that match the tone of the entertainment content around it."

60%

agree "I prefer to have commercials that match the category of the entertainment content around it."

**BUILD**

Show up with intention

Consumers don’t want brands only to be advertisers – they are challenging brands to be multidimensional. When asked which role they would like their favorite brand to assume in 2021, respondents chose advertisers the least (10%) compared to:

- 30% entertainers
- 23% informers
- 16% activists
- 14% listeners

**RESTORE**

Give back time

Less is more in the minds of consumers. They are looking for a less-cluttered ad experience. In fact, 65% agree "I think more favorably of a brand when they provide me with fewer commercial interruptions during my content."

**INSPIRE**

Get creative

Consumers expect brands to experiment with creative content formats that embody the storytelling they love – since the pandemic, audiences want more inspirational and personalized ad experiences.

**WHAT TYPE OF AD IS LIKELY TO GRAB YOUR ATTENTION?**

#1 A short/quick ad that brings you right back into your entertainment content
#2 An ad that feels relevant to the viewing experience
#3 An ad that rewards your viewing experience with fewer commercials

**WHAT TYPES OF ADS WOULD YOU BE INTERESTED IN BRANDS DEVELOPING?**

#1 Brand-created shows
#2 Brand-sponsored binge sessions
#3 Television or digital ads
CHAPTER 2

Streaming with main character energy

If your life were a movie, would you watch it?
Entertainment fills unexpected voids

From time machine to tutor, from mood booster to mobile home, our favorite shows and movies came to the rescue when our lives were flipped upside down. As consumers reevaluate what matters most, they are embracing content not only as a welcome distraction but also as a necessary self-care practice. Today, entertainment has earned the “essential” badge of honor in meeting our basic and evolving human needs.

Shows & films > scrolling

As audiences continue to get more intentional with their time, they see more value in watching entertainment versus scrolling through social content.

85% of Gen Z and Millennials agree that entertainment saved them during the pandemic.

70% shows & films

30% social media

Prince EL
@GoldenBlackRule

@hbomax @HBO has literally kept me sane with these good ass shows! 😂

8:50 AM • Sep 2, 2020
Living the streaming life

Consumers are rigorously decluttering multiple aspects of their lives, but entertainment has become a permanent staple with its own shelf space. Streaming is at the heart of their homes and fully integrated into consumers’ daily routines.

**Streaming every hour**

Consumers are streaming content for breakfast, lunch, and dinner. However, streaming spikes in the evening when consumers have the most free-time and want to be intentional with it. When the distractions of the day are gone, streaming is the #1 go-to source of entertainment, chosen twice as often as social media (39% vs. 17%).

**Home on-the-go**

The living room couch is not the only place people are streaming. They take their favorite shows with them into the bedroom, the kitchen, and even the garage. Not surprisingly, they are taking their streaming comforts outside the home — over 3 in 4 report doing so — proof that entertainment is ever-present.
A point of full immersion

Consumers plunge themselves into the narratives they love; they’ve filtered and prioritized stories that transport and transform them. They are finding comfort in Friends, turning to Love Life for dating advice, streaming Mare of Easttown for an adrenaline rush, and taking notes from Westworld for future survival skills. For some, the worlds on their screen provide a much-needed escape from the stress of their everyday life.

Consumers want more interaction

The deeper consumers go into streaming worlds, the greater their hunger for immersion becomes. Younger consumers especially have a growing appetite for blurring the lines between fiction and reality — 85% of Gen Z and Millennials would be interested in tech that allows them to immerse into their favorite shows or movies.

HOW INTERESTED ARE YOU IN WATCHING AN INTERACTIVE TV SHOW?
Percentage of Gen Z and Millennials who are very and somewhat interested.

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>48%</td>
</tr>
<tr>
<td>2021</td>
<td>68%</td>
</tr>
</tbody>
</table>

Interactive TV is defined as entertainment that allows a two-way flow of engagement and is responsive to audience input.

“ I like to feel and experience the same emotions that I see on the screen and pretend I live there.”

– Female, 25, Colorado
On-screen storytelling inspires off-screen intentionalism

The full immersion into streaming is sparking new off-screen ways of being. Eager to grasp control of their lives, consumers are taking cues from the main characters in their favorite shows and movies and invoking main-character energy. An ultimate manifestation of the intentionalism mindset, this emerging trend inspires consumers to live life with such purpose that they think of themselves as the stars of their lives. What began as a TikTok meme in late 2020, #maincharacter is a reminder that even the little things can be hugely cinematic — from doing laundry to dancing in the rain — and has inspired people to take control of their life narrative.

Today, #maincharacter has garnered over 5.5 billion views across social platforms and has even transcended social media. The principles of main character energy have emerged on T-shirts, in podcast discussions, and in dedicated weekend retreats — making it widely adopted as the New Roaring Twenties life motto.

Thank you for your question. Yes, I DO in fact adapt the main character’s energy from any movie I watch for 3-5 business days.
Streaming with main character energy

Audiences are taking full control over the remote control and streaming based on their personal preferences and needs instead of on external factors like recommendations from friends and family. Streaming is now the ultimate “me-time” activity.

WHICH OF THESE FACTORS INFLUENCE YOUR DECISION WHEN STREAMING?

<table>
<thead>
<tr>
<th>Factor</th>
<th>Personal (Net 84%)</th>
<th>External (Net 65%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mood</td>
<td>53%</td>
<td></td>
</tr>
<tr>
<td>Time available to watch</td>
<td>37%</td>
<td></td>
</tr>
<tr>
<td>Type of genre</td>
<td>34%</td>
<td></td>
</tr>
<tr>
<td>Time of day</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>Recommendations from friends &amp; family</td>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>The people I’m with at the moment of watching</td>
<td>24%</td>
<td></td>
</tr>
<tr>
<td>Recommendations from the streaming service</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Time I have to decide</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Wanting to keep up with the latest shows</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Recommendations from social media</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>Seeing memes</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>Not wanting spoilers</td>
<td>10%</td>
<td></td>
</tr>
</tbody>
</table>

When they are turning to external sources, recommendations from streaming platform ranks second to their social circle.
Consumers set new intentions with streaming

Instead of streaming to kill time, consumers are watching films and shows to make time count – 40% say they will be more intentional with content because they want to make sure they spend time in the best way possible. While streaming has always given consumers control over the what, when, and how to watch, the why is now a critical part of their consideration. Consumers have high expectations from entertainment. They want content to be entertaining (68%), but they also expect it to help them escape (50%) and inspire them (49%).

65%
agree that it’s important for the content they watch to have a specific purpose

Emily
@little_emu24

My dad: “I’m only gonna say this once. With our limited time for movie watching are we really gonna use that time for Drumline? If it’s what you want I’ll gladly watch, but I need to know if you think it’s worth it.”

I’ve truly never felt more pressure in my life

8:59 PM • Nov 26, 2020
The four streaming intentions

Whenever and wherever they are ready to stream, consumers are seeking content to serve different purposes. We identified four intentions consumers set when they stream.

**INTENTION #1**
**MOOD**
Streaming for emotional well-being

**INTENTION #2**
**TIME**
Streaming for memories + experiences

**INTENTION #3**
**IDENTITY**
Streaming for self-exploration

**INTENTION #4**
**GROWTH**
Streaming for knowledge gains

When exploring viewing intentions, we doubled down on Gen Z and Millennials — cohorts who have spent most of their young lives with streaming technology at their fingertips. Gen Z and Millennials are expert navigators of the expanding streaming landscape. These super streamers constantly propel social conversation, test new entertainment trends, and drive emerging viewing behaviors.
Streaming for emotional well-being

Because of their roller coaster of emotions, consumer content choices are now largely dictated by emotional bandwidth. Audiences are turning to streaming as a way to soothe their nerves. Some turn to feel-good shows to have their "screen friends" as company when they unwind. Others stream nostalgic shows and old favorites as a low-risk option to avoid surprise endings or unexpected twists. Many are eagerly anticipating remakes and prequels of beloved shows like *Gossip Girl*, *Sex and the City*, and *Game of Thrones*, which feel satisfyingly new, yet safe.

When asked how their relationship with entertainment has changed since the start of the pandemic, Gen Z and Millennials' top response was "it has become a greater source of comfort." Streaming is their go-to cozy blanket.

**#1 influence when choosing what to watch is “mood”**

**64%** of Gen Z and Millennials prefer shows or movies that stimulate their senses and help them unwind.

**What is your favorite HBO Max show and why?**

*I rewatched a lot of *The Fresh Prince of Bel-Air* during the pandemic. The nostalgia and comedy really kept me calm.*

– Male, 29, Missouri

*“Love Life* stimulates my senses and helps me relax.*

– Female, 30, New York

*[In] *Euphoria*, everything is so intricate and complicated and every character is flawed but you can’t help but hope everything turns out ok.*

– Female, 21, Arizona
Streaming for the memories

With our perception of time still “broken,” streaming helps consumers create time markers by establishing “can’t-wait-to-watch” moments. Not only are consumers opting for more weekly scheduled programming, but they are also modifying traditional streaming behaviors. Instead of bingeing in one sitting, 55% of Gen Z and Millennials watch in small doses to prolong their enjoyment. Many are also opting for longer shows spanning multiple seasons for the same reason.

Streaming for the experiences

Consumers are creating “experiential activations” to immerse themselves and to get lost in their favorite entertainment worlds. Some dress up in costumes, others cook entertainment-themed snacks. They are also upgrading their home entertainment by investing in projectors, popcorn machines, and more – fully committing themselves to these at-home immersive experiences for the future.

1 in 2
agree they have invested in their home streaming experience since the pandemic

55%
of Gen Z and Millennials have created new viewing rituals like family movie nights and date nights

58%
agree they actively set aside time to watch their favorite shows/content

59%
of Gen Z and Millennials say they have watched more weekly released shows and movies since the pandemic

“All programs, especially family [content] allowed my family to have happy moments together.”
– Female, 37, Washington
Streaming for self-exploration

You are what you watch. Like making a vision board or a playlist, consumers are carefully curating personalized content libraries that mirror who they are and who they want to become — 70% of Gen Z and Millennials agree “just like my music playlists, my streaming watchlists say a lot about me.”

Streaming is a place for self-exploration, and streamers want their content to be as multifaceted as they are. They seek entertainment with complex characters who authentically explore the human experience, like Genera+ion and I May Destroy You. Audiences want windows into new worlds and reflections of their own lives.

53% agree “I love to curate my own entertainment content experience”

77% of Gen Z and Millennials prefer to stream based on their personality and unique preferences vs. what is popular

Can’t judge a person by the content in their watchlists? Gen Z and Millennial consumers disagree. When asked whether they believe the shows and movies they pick to stream reflect who they are, 66% said yes.

WHAT IS YOUR FAVORITE HBO MAX SHOW AND WHY?

Veneno transmitted a positive message. It made me focus on other issues and made me research about Tena, it connected me with the story.

– Female, 25, Colorado
Streaming for knowledge gains

Audiences are turning their streaming content into personalized curriculums – 71% of Gen Z and Millennials use entertainment as a tool for education. They are learning new history lessons, exploring niche skills, escaping to remote corners of the planet, and more. Consumers are leaning into intriguing investigation chronicles like *Q: Into the Storm* or gripping docuseries like *Exterminate All the Brutes*. Whether a scripted series or a reality competition show, consumers apply lessons learned from these storylines to their everyday lives.

57% of Gen Z and Millennials prefer movies and shows that expand their knowledge on different topics

67% are making it a point to choose content that makes them feel fulfilled

Gen Z and Millennial consumers, particularly, are looking for entertainment that expands their knowledge. When asked how they would redesign their remote control, the #1 feature selected was the ability to search for content based on a skill or topic they want to learn about.

WHAT IS YOUR FAVORITE HBO MAX SHOW AND WHY?

Selena + Chef...I like cooking and I really love learning new things.
- Male, 32, Oklahoma

"The Great Pottery Throw Down was comforting, sweet and made me want to start getting into pottery!"
- Female, 33, Washington
The paradox of intentional viewing

The four intentions for streaming — mood, time, identity, and growth — are not completely independent from each other. Consumers seek content that is intersectional. Take, for example, *Selena + Chef*, which audiences call “funny” and “tender” but also “a great spin on cooking shows.”

As consumers get more intentional, they are becoming more selective and taking longer to decide what to stream. This presents a unique problem for essentialists — the paradox of intentional viewing. While they love streaming content that adds value to their lives, they hate wasting time searching for it.

I don’t want to feel like I have wasted my time; I want to feel like I have gained something [when watching entertainment].

– Male, 29, Kentucky

70% say they like having a lot of choices of what to watch

AND

56% will continue to explore new genres when streaming

BUT

1 in 2 agree finding a great show is as hard as finding a four-leaf clover
HBO Max is the home of intent-tainment

At HBO Max, we are constantly pushing the limits of audience expectations. We leverage human curation and machine learning to understand and adapt to viewer behaviors, needs, and desires so audiences can stop scrolling and start streaming.

We break consumers out of the intentional viewing paradox with “intent-tainment” – providing high-quality content that meets all our consumers’ unique streaming intentions. Besides cost, the #1 reason consumers subscribe to a streaming service is the variety of content, so they never run out of things to watch.

Our culture-shaping entertainment keeps audiences engaged, obsessed, and wanting to share with the world – 53% agree they are more likely to share their thoughts and opinions about premium entertainment content they’ve watched.

IDK who needs to see this but if you want to go on a mad delightful genre-bending horror journey then you better watch Lovecraft country

Oct 7, 2020

The Undoing was a masterpiece. The acting, the pilot, the writing, all of it. HBO been doing this though so I don’t know why I’m surprised.

Nov 30, 2020

Just finished I May Destroy You – it might have been the most tough to watch TV finale I have ever seen but it was a masterpiece (like the whole series). So raw and emotionally complex and a complete work of art.

Jul 13, 2020

The flight attendant on hbo is truly a work of art 10/10 recommend to anyone.

Dec 20, 2020
CHAPTER 3

Great brand expectations

In the Age of Intentionalism, how will you show up?
Breaking through with people-positive marketing

As the driving force of new customer expectations, the intentionalism mindset will shape and mold the New Roaring Twenties. To build long-term relationships with audiences, brands need to be as intentional as consumers and embrace the principles of people-positive marketing. While consumers handle their time with care, brands must make a greater impact in less time. They can reflect new realities, inspire creativity, and exceed expectations by leaning into the context of consumer’s life, environment, and entertainment. Reframing marketing strategies from being brand-centric to human-centric is the future of entertainment and advertising.

Here are three key learnings to remember:

#1
The future is more focused

#2
Home is where the stream is

#3
Inspiration is found on new pathways
#1: The future is more focused

The pandemic was a forced pause to our collective autopilot, but we aren’t returning to that old normal as we hit play on the world again. Instead, we have discovered that taking even momentary pauses in our lives can break us out of mindless cycles. We will bring this ingrained “practice of pause” into our post-pandemic lives and look to the future with intention.

From scattered attention to intentional action

In the future, we will continue to eliminate the clutter in our lives and focus on the few things that matter most. We will live every moment with intention, dedicating extra hours to what we deem self-care, and additional energy to take care of our world-at-large. Our time will be better optimized for personal growth and collective impact.
#2: Home is where the stream is

We learned that what’s on our screen matters. Entertainment can nourish, inspire, and captivate us — from our living room to the Central Perk couch, from our dinner table to Selena’s kitchen, from our LA apartment to the streets of Gotham. Entertainment not only transports us, but it also transforms us — 52% agree “I’ve daydreamed about living in the show/movie/series’ universe.”

When we stream alone, we feel comforted. When we stream with loved ones, we feel connected. No matter where we stream, we build a home in the safety of our entertainment. We feel a deep connection with the characters on our screen, fellow fans on our feeds, and the brands we love. Entertainment is an intangible shelter that gives us energy and fills our basic human needs for connection.

Streaming entertainment is:

**An Energy Source**

- 63% of Gen Z and Millennials say streaming entertainment makes them feel less alone.

**A Loneliness Remedy**

- 63% agree consuming great entertainment content is as exciting as trying new food.

**A Bonding Agent**

- 63% of Gen Z and Millennials wish they could join the circle of friends in some of the shows/movies they watch.
#3: Inspiration is found on new pathways

Increased hours of streaming romantic comedies, superhero films, and otherworldly fantasies are pushing audiences to unlock new levels of immersion. Their streaming entertainment is inspiring them to take real-life action, including shopping and exploring brands.

A positive streaming experience with a fully immersed consumer has a halo effect for brands – 72% of consumers agree they are receptive to ads when streaming. This receptivity translates to all parts of their day, whether relaxing in their free time (44%) or spending time with family (36%).

There are new pathways in the advertising funnel as consumers window-shop from their screens and streams.

83% say they were inspired to shop by a show/movie on a streaming service

WHICH OF THE FOLLOWING CATEGORIES HAVE YOU BEEN INSPIRED TO SHOP BY WATCHING A SHOW / MOVIE ON A STREAMING SERVICE?

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<thead>
<tr>
<th>Category</th>
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<td>Home Decor</td>
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<tr>
<td>Fashion</td>
<td>61%</td>
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<td>Tech</td>
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<tr>
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<tr>
<td>Toys</td>
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<tr>
<td>Auto</td>
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Final words

Brands need to be as entertaining as the content consumers love. Consumers are looking to brands to fuel their fandoms, empower their main character energy, and inspire their next big purchase. Entertainment has always been the driving force of the cultural zeitgeist, but now it’s the ultimate essential.
Methodology

We partnered with Leflein Associates to deploy a nationally representative survey of 1,000 A13–54 to investigate the nuances of the rising trend of intentionalism and its impact on entertainment and streaming. For specific themes, we also tapped WarnerMedia’s proprietary panel – TBH – to understand how 18-to-37-year-olds are being more thoughtful with their decision-making, particularly around how, what, when, and why they stream. Our panel methodology used a quantitative and qualitative approach. We surveyed 500 adult Gen Z and Millennials and heard directly from 100 super streamers about their relationship to HBO Max shows.

<table>
<thead>
<tr>
<th>Partner</th>
<th>Leflein Associates</th>
<th>WarnerMedia TBH</th>
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<tbody>
<tr>
<td>Research design</td>
<td>Quantitative Survey</td>
<td>5 Quantitative Surveys Qualitative Interviews</td>
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<tr>
<td>Sample size</td>
<td>N = 1,000 A13–54</td>
<td>Surveys: N = 500 A18–37 Interviews: N = 100 A18–37</td>
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<td>Fielding date</td>
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<td>November 2019; January–May 2021</td>
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What’s next...

Welcome to the Age of Intentionalism is the first in a series of cultural and behavioral research reports from HBO Max as we process the now and forecast the future.