

ANALYST REPORT

The State of Media & Entertainment

A look at the sector's biggest trends as
macroeconomic pressures continue to challenge
growth strategies

 H2 2023



WHAT YOU NEED TO KNOW

The threat of recession looms, but not all media categories are equally vulnerable

Media giants continue to face pressure to boost profits while slashing costs to account for soft ad spending and an uncertain market. At the same time, the Hollywood writers strike has made matters worse by delaying content that would otherwise hook customers.

Fortunately, consumers [deem some media expenses like streaming to be essential](#), and it's possible other entertainment expenses could be viewed as essential too — companies just need to incorporate international content and try to offer more for less.

Morning Consult's semiannual State of Media & Entertainment report tracks evolving consumer behaviors in the sector and analyzes what they mean for the future of the industry. Based on survey interviews conducted monthly since June 2022, this report provides actionable insights into how consumers are spending time with and money on entertainment.



Franchise fatigue concerns are overrated

2 in 5 adults said they would be willing to pay more for a video streaming service that released content based on big franchises.



Declining social media trust is real — for some

Since 2021, TikTok and Twitter have seen trust levels decline more than other competitors.



Generative AI could ding quality perception

Roughly a quarter of adults say using AI in the production of shows and movies makes dialogue and plots worse.



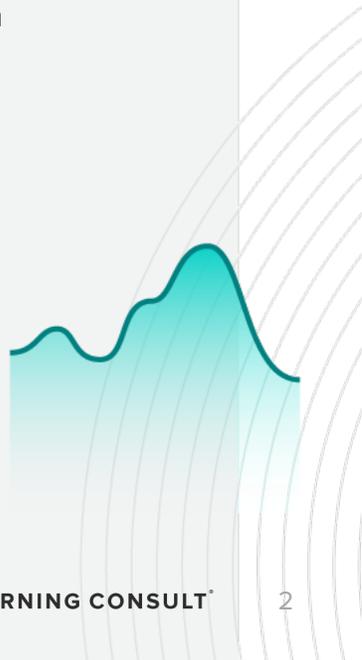
U.S. metaverse hype has cooled, but that's OK

Interest in the metaverse still exists and ties in well with companies' desire for global franchise building.



The line between audio and video is blurring

Video podcasts are rising, and Gen Zers are receptive to more visual-forward music streaming experiences.



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SECTION #1

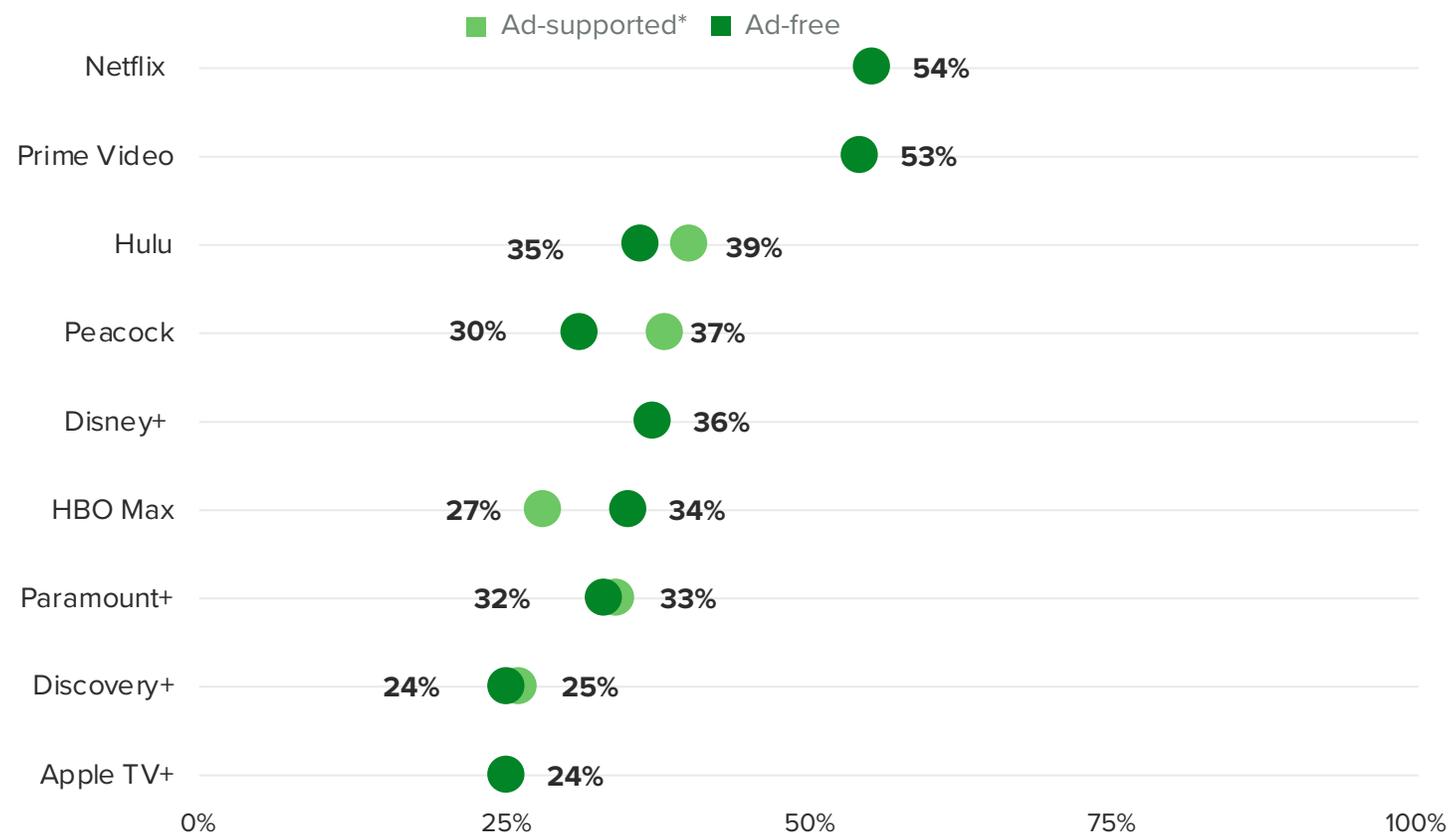
Video Streaming

The days of easy subscriber growth are gone, but consumers can still be convinced to increase their streaming budgets



In the race for ad dollars, streamers still have many consumers to win over

Share of U.S. adults who said in April 2023 that they used each at least once in the past month:



While 77% of U.S. adults said they pay for at least one video streaming subscription, the split between ad-supported and ad-free streaming usage doesn't lean as heavily toward the cheaper option as one might think. For example, only Hulu and Peacock saw the reported usage of ad-supported tiers eclipse that of ad-free tiers by more than 1 percentage point.

Streamers could increase uptake of ad tiers by making them even more accessible to consumers, perhaps by way of providing college student discounts (which aren't a ubiquitous offering).

Streamers can also look to preferences abroad to fuel expansion: 62% of consumers from South Korea said they prefer cheaper ad-supported streamers over costlier ad-free streamers, while those figures were 56% for India and 46% for Japan.

Source: Morning Consult Research Intelligence. *Services without an "ad-supported" value either don't have ad tiers or have had ad tiers available for less than a year.

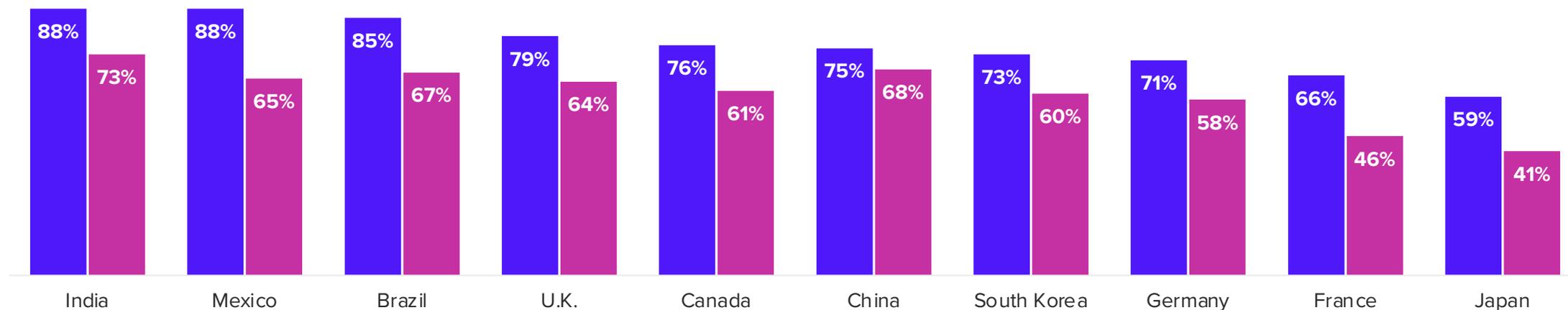
How Asia and Europe can help streamers accelerate subscriber growth

As streamers get close to the U.S. subscriber ceiling, their international efforts should increasingly focus on Japan, South Korea, France and Germany. Not only do these four countries have relatively higher shares of respondents who don't subscribe to any streaming service, but they also have the lowest shares of respondents who said they are close to maxing out on spending money for subscription services.

Netflix is really the only major streamer that consistently releases foreign-language content at scale, but competitors that want to shore up should know non-English content can still court interest in the United States. For example, 38% of Gen Z adults said they were interested in watching series or films that were primarily in Japanese, while 32% said the same for Korean, 28% for French and 24% for German.

Shares of adults in each country who ...

■ Have at least one video streaming subscription ■ Are close to their spending limit on video streaming subscriptions



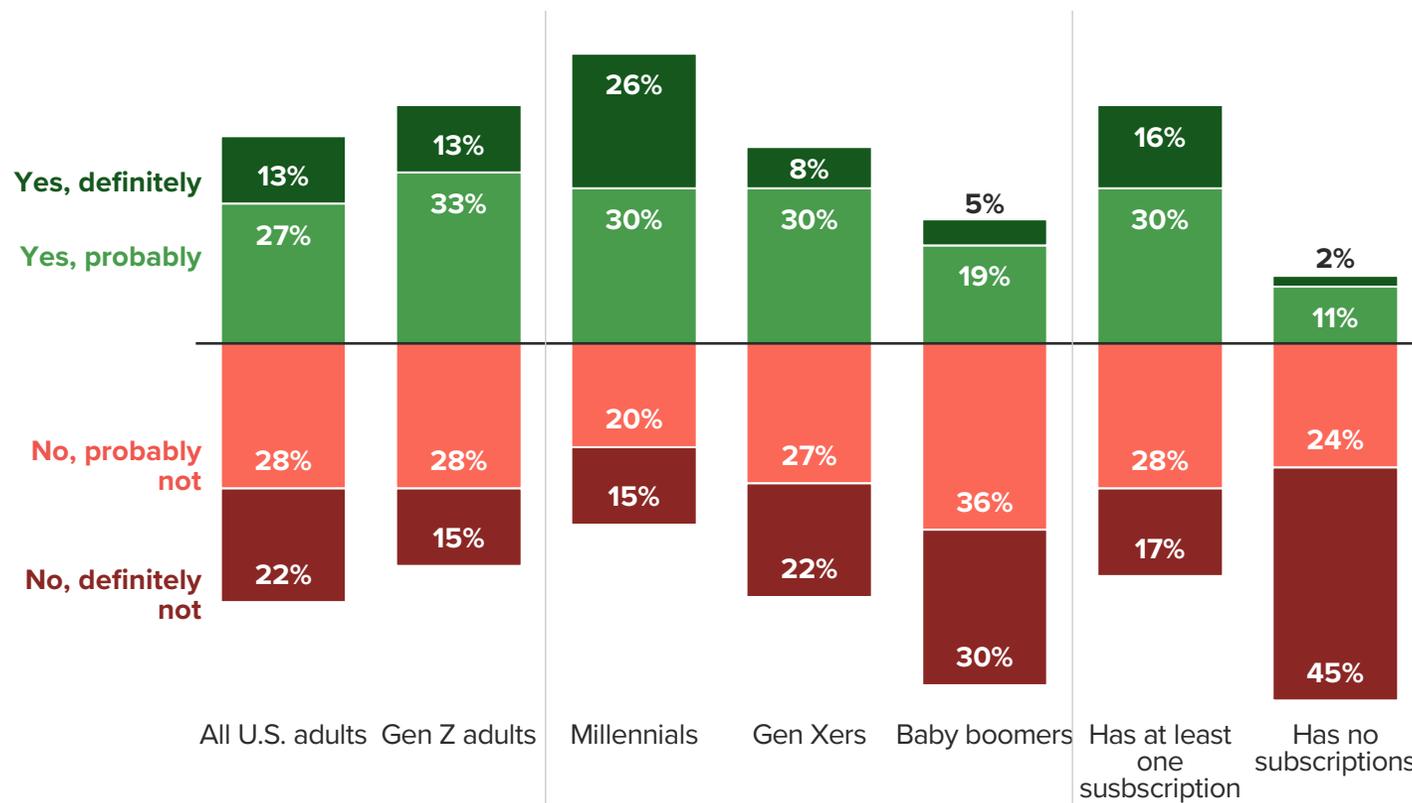
Building universes is paramount, despite franchise fatigue concerns

Fresh concerns surrounding franchise fatigue are understandable given renewed efforts by Hollywood to lean more into existing brands, but they're not exactly warranted. Morning Consult data shows that 40% of U.S. adults said they would be willing to pay more for a service that consistently released content based on well-known franchises, and [most consumers](#) have positive opinions on TV and film franchise content.

Those with streaming subscriptions are more likely than those without to value franchise-based streaming content, but companies can still distribute older franchise-based originals on free ad-supported streaming TV to better reach consumers who don't pay for streaming.

Franchising must also take the shape of non-English spinoffs: 27% of adults said they'd be more interested in watching an English-language series if it had one or more foreign-language TV spinoffs set in the same universe (and that's higher for Gen Z adults, at 37%). This is a strategy being executed by Amazon's "Citadel."

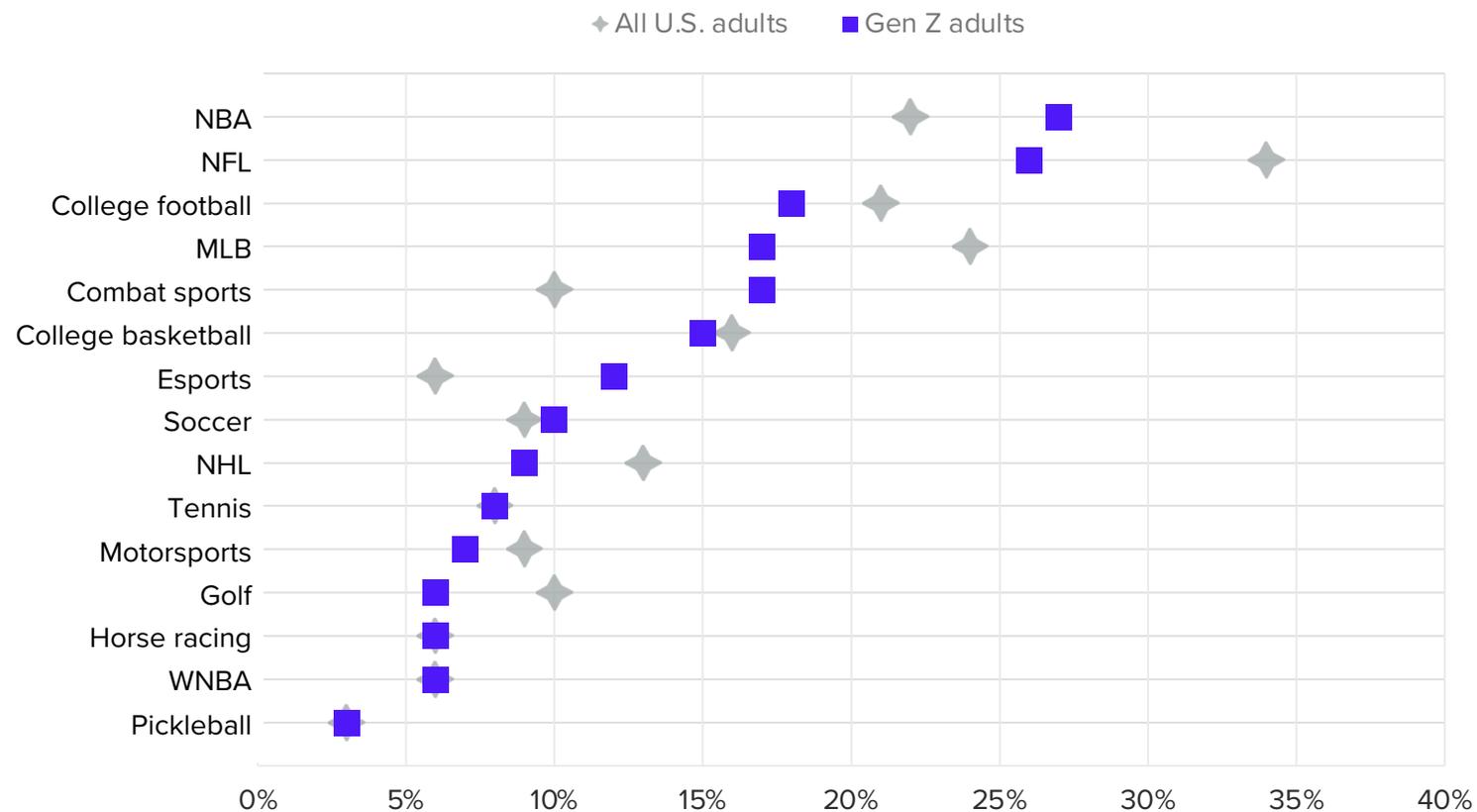
Shares who said whether they'd be willing to pay more for a video streaming service that regularly released content based on well-known franchises



Source: Morning Consult Research Intelligence. "Don't know/No opinion" responses not shown.

Sports will help drive subscriptions, but Gen Z isn't completely sold on these live broadcasts

Shares who said they'd like to have access to live broadcasts of each sport on the video streaming subscriptions they already pay for:



Source: Morning Consult Research Intelligence

Live content is the next [major battlefield](#) in the streaming wars. But the costs of sports rights are soaring — and they aren't even guaranteed to be a needle-mover.

Apple TV+ started streaming MLB games in April 2022 and MLS games (for an additional fee) in February 2023, though the share of adults using the streaming service monthly in May (26%) wasn't much higher than it was six months prior (21%).

NFL games were by far the live sports broadcasts that the highest share of U.S. adults said they wanted to access for streaming services, while Gen Zers, who are [less likely](#) to be sports fans in general, preferred NBA games.

Streamers can still target rights of lesser-known sports, but they'll get the biggest return on their investment if they simultaneously develop docuseries surrounding them, such as Netflix's "Drive to Survive" series, which helped spur interest in F1 racing.

WHAT IT MEANS

Leveling up in the financial austerity era is achievable

What this means for media & entertainment leaders:



Develop Gen Z-targeted strategies. Getting this group to pay for streaming via programs like college student discounts could help streamers with fledgling ad tiers capitalize on a relatively undermonetized cohort.



Emphasize content that can be localized in various regions. With boosting profitability and growing internationally as key goals, streamers need to invest in content that has the potential to spawn foreign-language editions.



Sports won't be the cure-all that some streamers hope for. While live sports broadcasts help platforms easily differentiate, streamers should know that Gen Zers are less likely than adults overall to be sports fans.



SECTION #2

Social Media

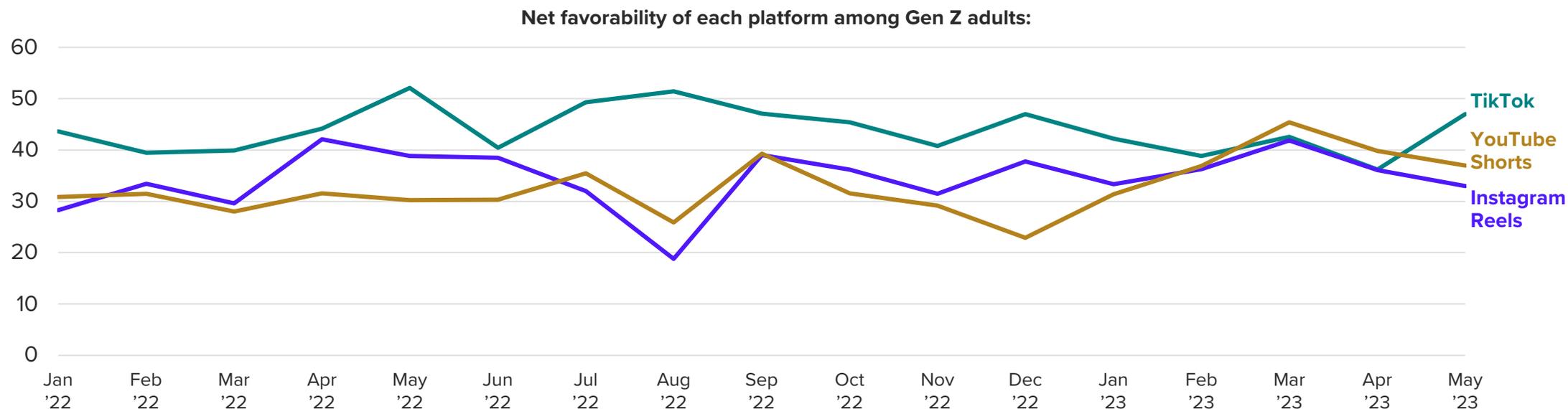
Despite the space's steady flood of apparent disruptors, it's largely going to be more of the same



YouTube Shorts is a credible TikTok challenger, but monetization remains a broad issue

Users have largely stuck with TikTok even as regulatory scrutiny seriously escalates, but cracks in the ByteDance-owned app are starting to show. TikTok's ad revenue-sharing program Pulse, rolled out last year, has yielded modest results for creators thus far, as has YouTube Shorts' program, which was rolled out in February. But YouTube's new program isn't limited to the top 4% of content on the platform, making it seem more generally lucrative to creators than Pulse.

This is why more creators in 2023 became vocal about favoring YouTube as a distribution platform — and it helps explain why Morning Consult Brand Intelligence data shows that Gen Z adult net favorability of YouTube Shorts overtook TikTok's late in the first quarter of this year. TikTok could better measure up to the competition by broadening who is eligible for Pulse.

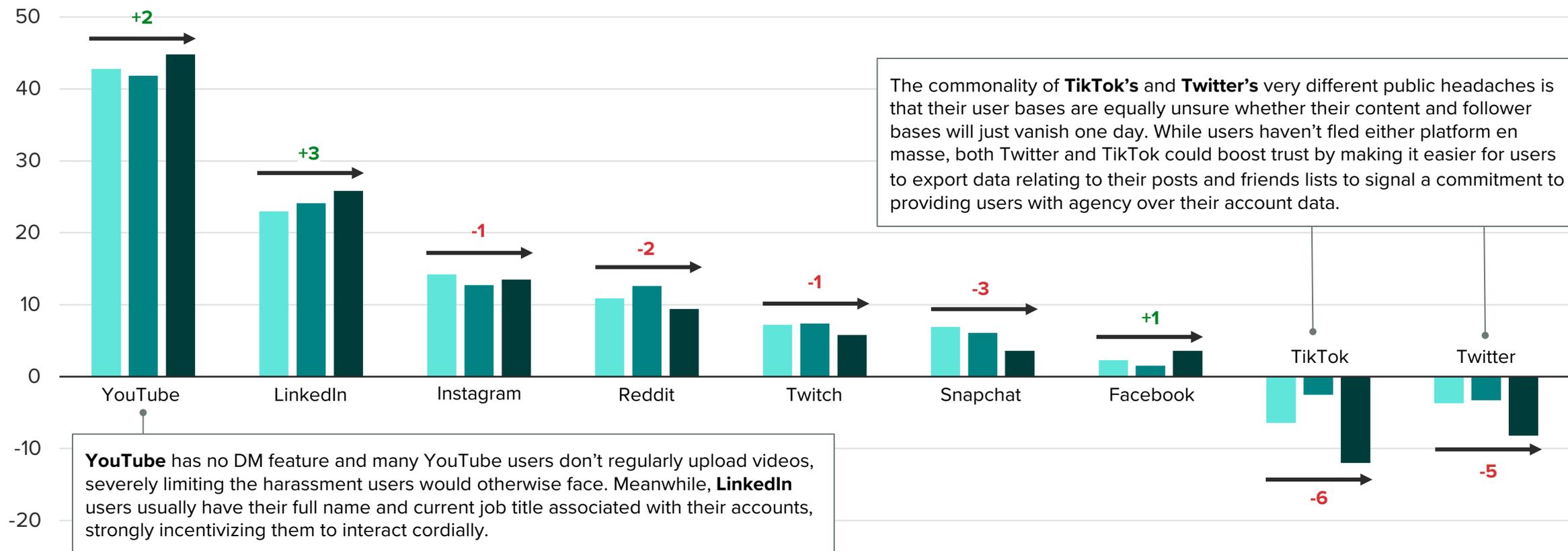


Source: Morning Consult Brand Intelligence. Net favorability refers to the share of respondents who said that they had a favorable impression of each brand minus the share who said they had an unfavorable impression.

Trust is dipping most among the two platforms with the least certain futures

Net trust* in social media platforms:

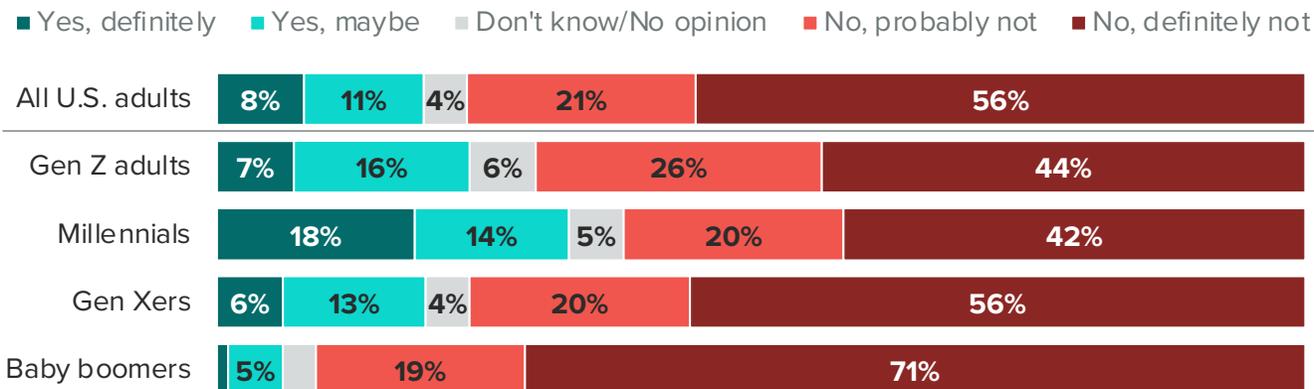
■ Q1 2021 ■ Q1 2022 ■ Q1 2023



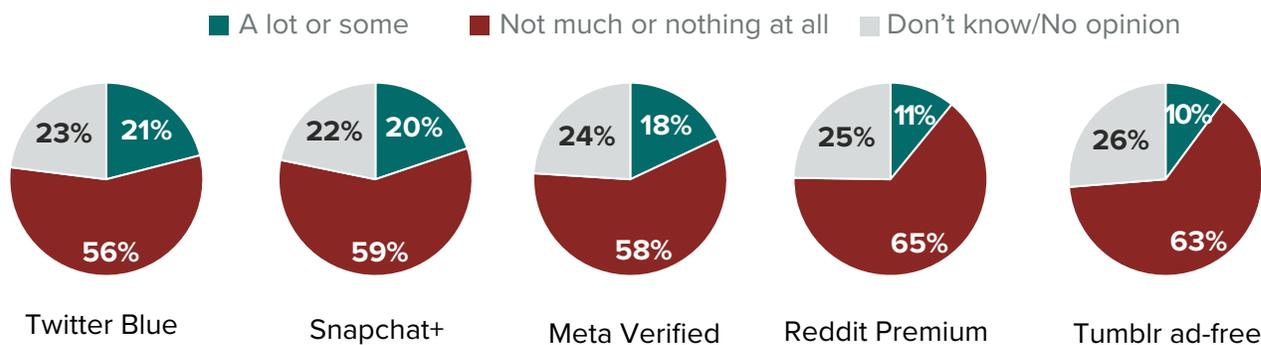
Source: Morning Consult Brand Intelligence. *Net trust is the share of consumers who said they trust a platform minus the share who said they didn't.

Paid social media is a mini trend, and will stay that way

Shares of U.S. adults who said whether they would pay to use a social media platform:



Share of U.S. adults who, when asked about the following, said they had heard ...



Reddit and Twitter have offered premium subscription tiers for years, but the paid social media trend picked up steam in 2022 when Snapchat and Tumblr launched their own premium offerings, followed by Meta in 2023.

But none of these paid offerings are truly need-to-have, since perks like ad-free browsing and additional post visibility are only enticing to power users or influencers. This explains why more than 3 in 4 U.S. adults said they wouldn't pay to use a social media platform, while most adults hadn't heard of the named social media subscription offerings.

It's unlikely that these attitudes will change soon, since platforms' most compelling features — talking to and sharing content with friends — won't ever be paywalled.

Source: Morning Consult Research Intelligence. For all graphics above, figures may not add up to 100% due to rounding.

Consumers like the idea of decentralized social media — but only as an idea

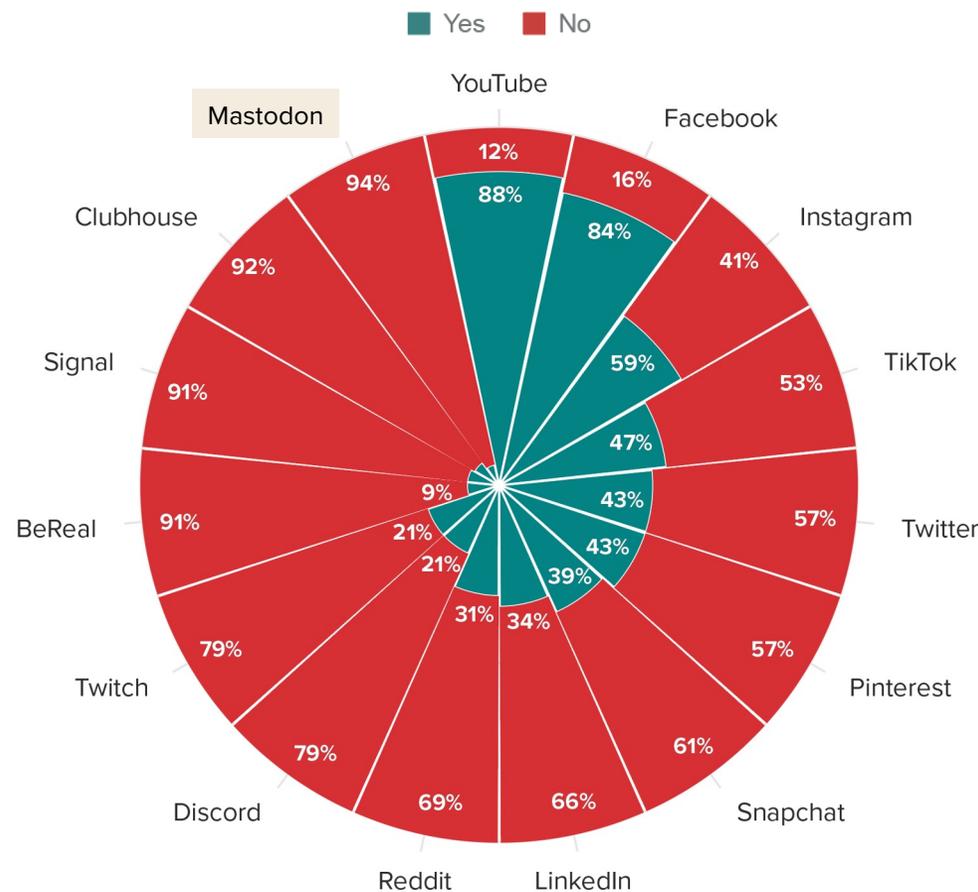
Aside from paid subscription offerings, the other big trend in social media has been the hype around decentralized social platforms — no doubt spurred by the Twitter [chaos](#).

Decentralized social media generally refers to a network of compatible applications that no one authority presides over. With decentralized social media, users can interact with their follower or friends lists on any other app built on a certain protocol. These benefits mirror those that current internet users experience with email providers — you can keep emailing the same people regardless if you're on Gmail, Outlook or something else.

That's why over 2 in 5 adults (42%) said they would be interested in using a decentralized social media platform after being given a brief explanation of the concept. But the reality is that few Americans beyond the extremely tech savvy care that much to make the jump to platforms like Mastodon, which less than 10% of U.S. adults said they use.

For decentralized social media to truly flourish, the tech will need to appeal to those beyond the ones that are already in the market for such platforms.

Share of U.S. adults who said in April 2023 that they used each at least once in the past month:

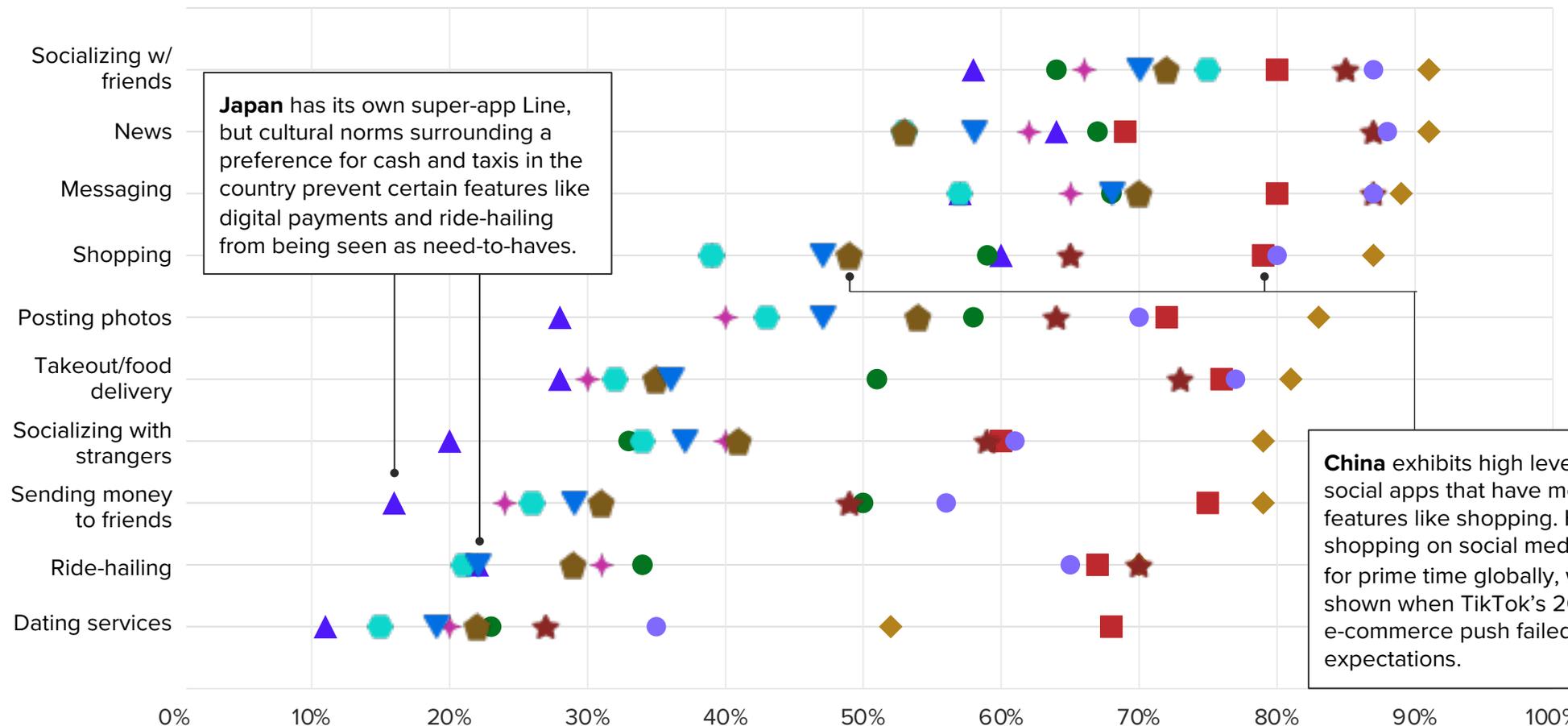


Source: Morning Consult Research Intelligence

Why not all countries' super-apps can be built equally

Share of adults in each country who said it was “very” or “somewhat” important that social media services offer the following features:

◆ India ■ China ▲ Japan ● South Korea ✦ France ● Germany ◆ U.K. ★ Mexico ● Brazil ▼ Canada



Japan has its own super-app Line, but cultural norms surrounding a preference for cash and taxis in the country prevent certain features like digital payments and ride-hailing from being seen as need-to-haves.

China exhibits high levels of interest in social apps that have most super-app features like shopping. However, shopping on social media isn't ready for prime time globally, which was shown when TikTok's 2021 **U.K.** e-commerce push failed to meet expectations.

As mobile ad-targeting becomes less lucrative due to Apple's App Tracking Transparency feature, companies are aiming to boost revenue by expanding beyond their core competencies. But platforms must consider how cultural differences dictate demand for certain features.

Source: Morning Consult Research Intelligence

WHAT IT MEANS

Recent social media trends and new challengers are still just noise

What this means for media & entertainment leaders:



Emphasis on short-form video distribution remains key. But companies can't afford to ignore TikTok copycats Instagram Reels and YouTube Shorts, given that Gen Zers increasingly favor those products.



The decentralized hype will stay among the most tech savvy. Places like Mastodon won't warrant media brand investment for a while, since many consumers still need to be educated on what decentralized social media is.



Social media subscriptions face an uphill battle. Willingness to pay for social media will remain limited for the same reasons that many [don't want](#) to pay for podcasts — the most compelling content in the space is available for free.



SECTION #3

Generative AI

It's still early days for generative AI, but consumers clearly value human touch when it comes to content production

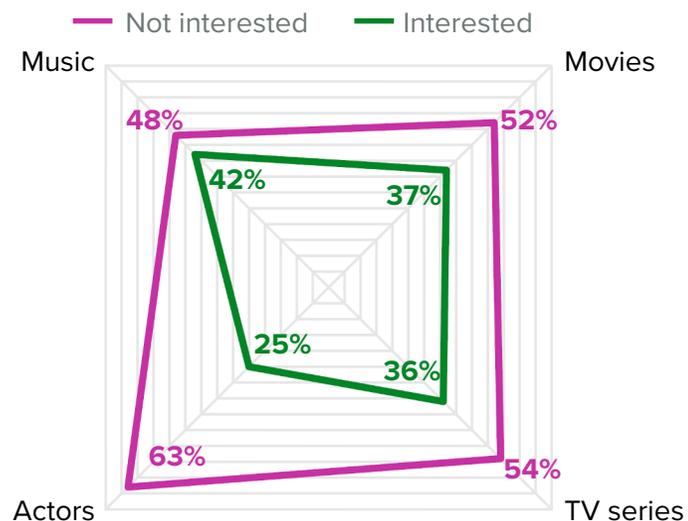


There's some interest in AI-generated media, but it's mostly just viewed as a novelty

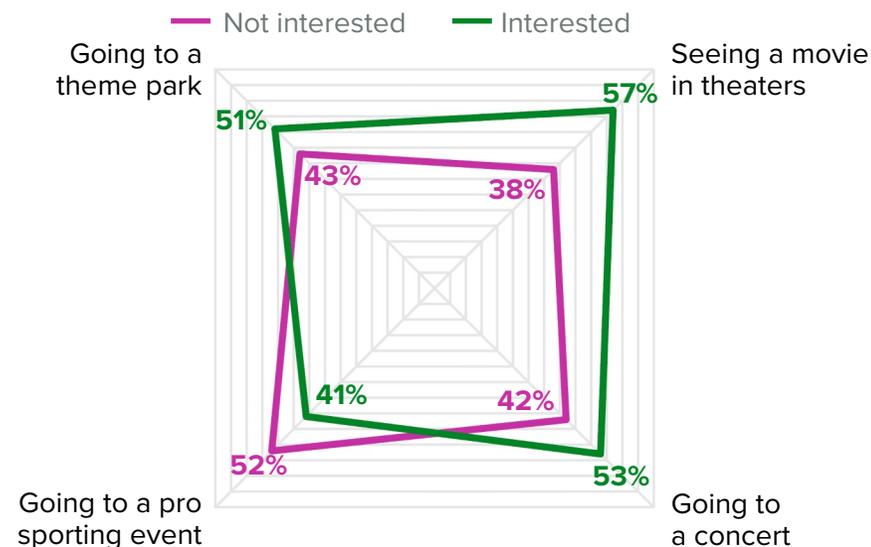
Fears about generative AI have understandably bubbled up this year, with disagreements over the tech contributing to the writers strike. But most people aren't even thinking about it: Over half of U.S. adults (55%) said they had heard "not much" or "nothing at all" about ChatGPT, the tool that brought generative AI to the public. For many, the technology is mostly known for capably generating outlandish content like the [AI "Seinfeld"](#) on Twitch, rather than something that should infiltrate Hollywood.

This explains why fewer than 50% of adults say they're interested in either in AI-generated movies, TV series, actors or music. Additionally, the interest in AI-generated content appears modest when considering the interest in entertainment experiences not typically associated with AI content. While 37% of adults said they were interested in AI-generated movies, a separate 57% of adults said they were interested in paying to see a movie in theaters.

Share of adults in April who said they are interested in the following things generated by AI:



Share of adults in April who said they are interested in paying for the following experiences:



Source: Morning Consult Research Intelligence. "AI-generated content" in this section refers to novel media (movies, TV shows and songs) wholly or partially created using AI that minimized otherwise required human input.

AI is more likely to damage certain aspects of content quality, consumers say

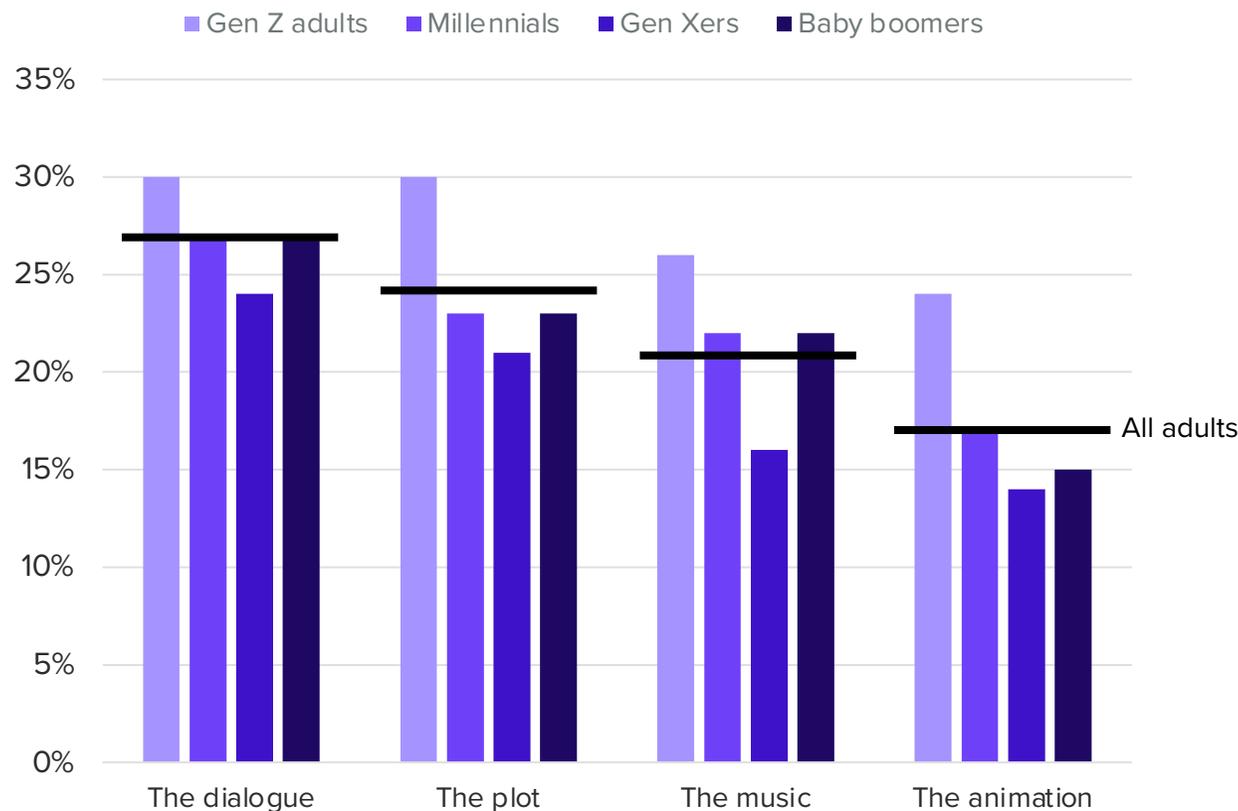
While most aren't using generative AI tools regularly, consumers are still opinionated on how artificial intelligence impacts the overall entertainment value of films and TV.

Consumers are less likely to hold faith in the technology's ability to write text than its capacity to generate compelling images — 27% of U.S. adults said a movie or show's dialogue would get worse with use of AI, compared with 17% who said the same about animation.

Studios need to be mindful of this when marketing new titles in the coming years; efforts to market a show as particularly quirky or different for its use of generative AI could backfire. Beyond concerns over the displacement of human writers, some consumers could be turned away watching the title simply because they lack faith in AI's creative abilities.

Showrunners Tara Hernandez and Damon Lindelof have been public about [ironically](#) using AI to create episode titles for their "Mrs. Davis" Peacock series, but series that lean even further into this type of shtick could ultimately limit their show's appeal.

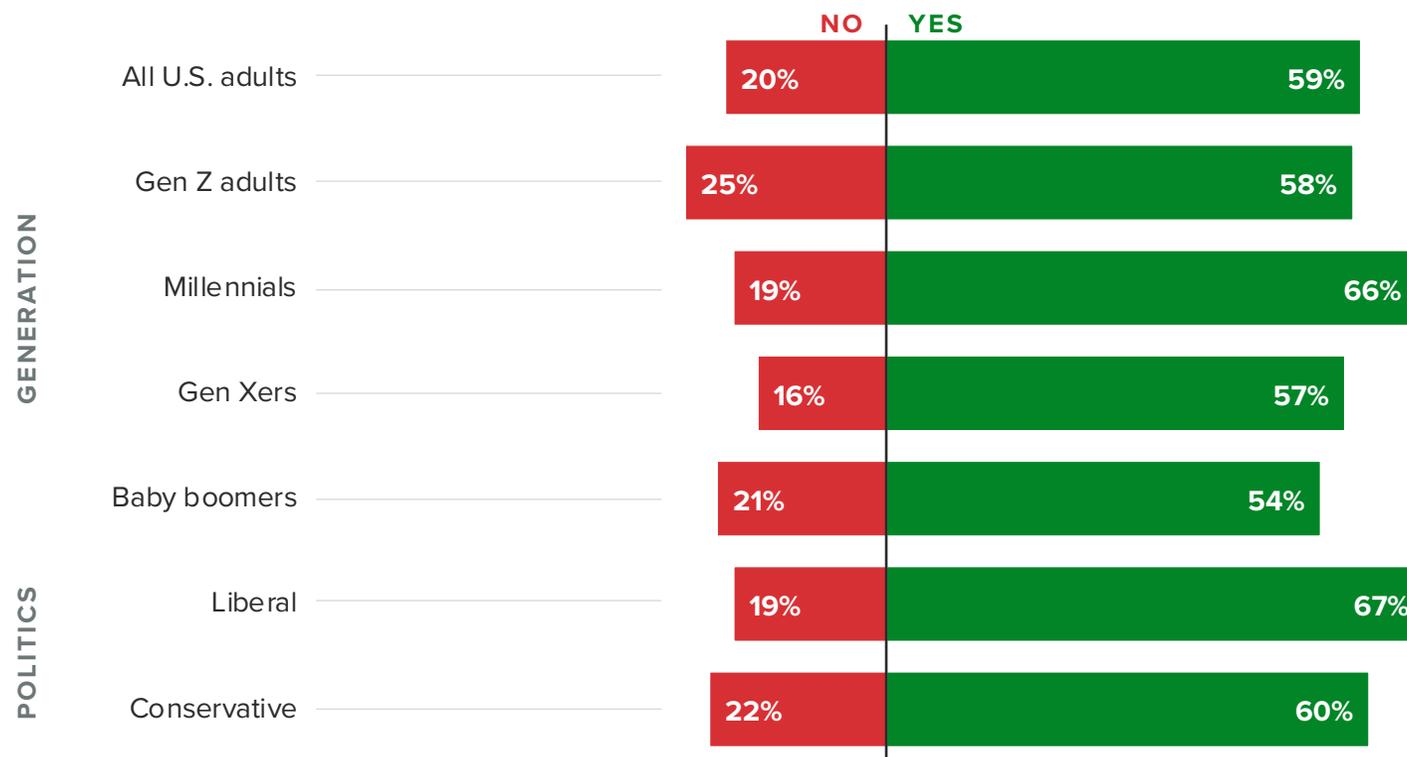
Shares of respondents who said use of AI in film and TV production would make the following worse:



Source: Morning Consult Research Intelligence

Why highlighting symbiotic relationships between AI and creatives will grow in importance

Shares of respondents who said whether there should be government restrictions on AI's ability to replace entertainment industry workers



More than half of consumers believe there should be governmental regulation for AI's impact on the entertainment industry. Millennials and liberals are the most likely to be concerned.

Because of this, it will be important for studios to eventually highlight opportunities that were created for entertainment workers due to generative AI — such as an indie filmmaker's hypothetical use of the AI-simulated voice of an established actor that helped make a scene from a movie go viral, for example.

Doing so would not necessarily entice more users to platforms like Netflix, but it could help them to be viewed more positively among regulators, similarly to what sustainability efforts can do for large entertainment conglomerates (in addition to benefiting the environment).

Source: Morning Consult Research Intelligence

WHAT IT MEANS

If media companies publicize use of generative AI, it could impact perceived content quality

What this means for media & entertainment leaders:



It's too early to think of wholly AI-generated content as a revenue stream.

Many aren't thinking about how AI can improve entertainment; most show little interest in movies, TV series and actors created with generative AI.



Studios should be mindful of how they promote their use of AI. About a quarter of consumers think generative AI harms dialogue and plot, so studios should be clear when their use of the technology didn't affect those areas.



Consumers largely think AI's role in entertainment should be regulated.

While the topic is still new, studios must become leaders in communicating to public policy officials any projects that wouldn't have been possible without AI.



SECTION #4

Video Games and the Metaverse

The growing appeal of games shows why it's not time to give up on the metaverse



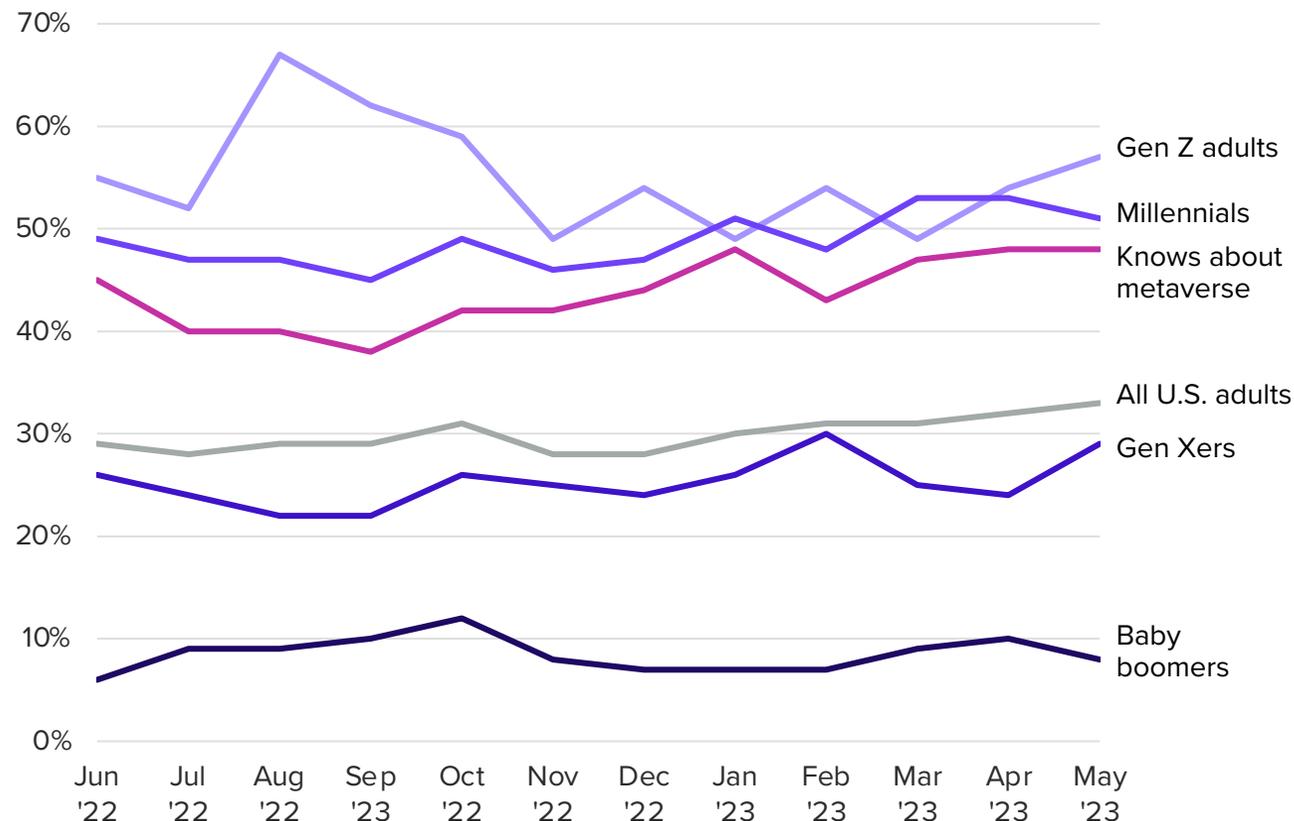
Console sales and Hollywood adaptations are expanding the gamer base

The video game consumer base is steadily expanding: The share of U.S. adults who considered themselves gamers in May was 4 points higher than it was in June of last year. And [not everyone](#) who plays video games considers themselves a gamer, suggesting even more consumers may have started regularly playing since last June, when Morning Consult began tracking this data.

The growing gamer base is partly attributable to the increased availability of PlayStation 5 and Xbox Series X consoles as manufacturers worked to overcome chip shortages. Meanwhile, Hollywood’s growing appetite for [video game adaptations](#) has also likely boosted interest in video games, as high-value productions like “The Last of Us” serve as de facto marketing tools for game franchises.

Growing interest in video games confirms the strategies of media companies that have invested in building out their franchises through interactive gameplay, even as the promise of the metaverse comes into question.

Shares of respondents who said they consider themselves gamers



Source: Morning Consult Research Intelligence. “Knows about metaverse” are those who said they’d heard “some” or “a lot” about the metaverse.

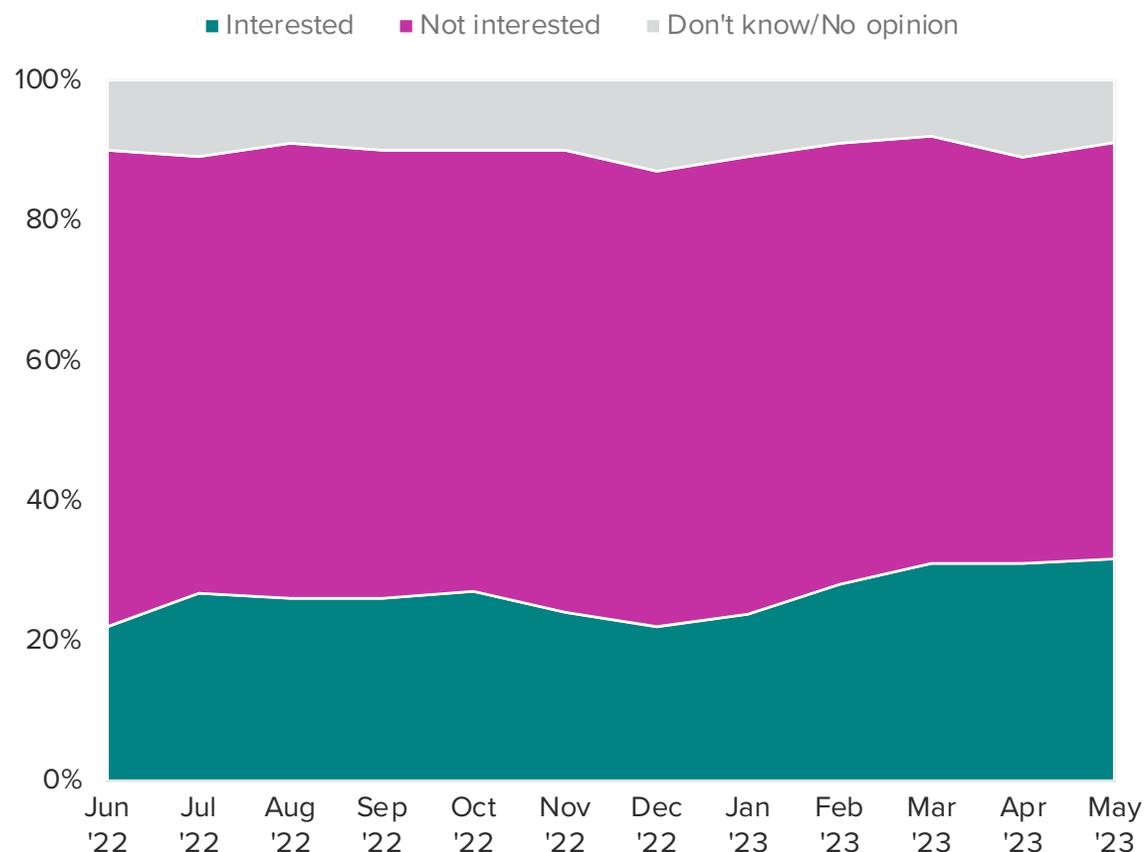
Brands, AI will continually drive interest in the metaverse

Reaching consumers via the metaverse has already become an afterthought to many, but companies shouldn't totally give up. After all, the share of consumers who are interested in learning about the metaverse has been trending upward since we began tracking in June 2022.

Credit can be given to major brands like Gucci and Walmart for continuing to experiment with establishing metaverse presences via Roblox, which in February said that its fastest-growing age group was in the 17-24 demographic. And more brands have an opportunity to reach consumers in the metaverse via concerts, as events like the NFL's Saweetie concert in Roblox gives fans easy access to big artists at a time when securing tickets to major tours has become notoriously difficult.

And while generative AI is a big reason many have lost interest in the metaverse, the rise of the former is actually why more should be bullish on the latter. A critical problem with metaverse platforms like Meta's Horizon Worlds is that there's just not enough compelling content, which in turn discourages users and further content development — aka the [metaverse paradox](#). But generative AI will let less experienced developers and users create compelling experiences in 3D digital worlds that will entice more casual gamers to experiment with games like Roblox and even virtual reality.

Share of U.S. adults who were given descriptions of the metaverse and said they were ...



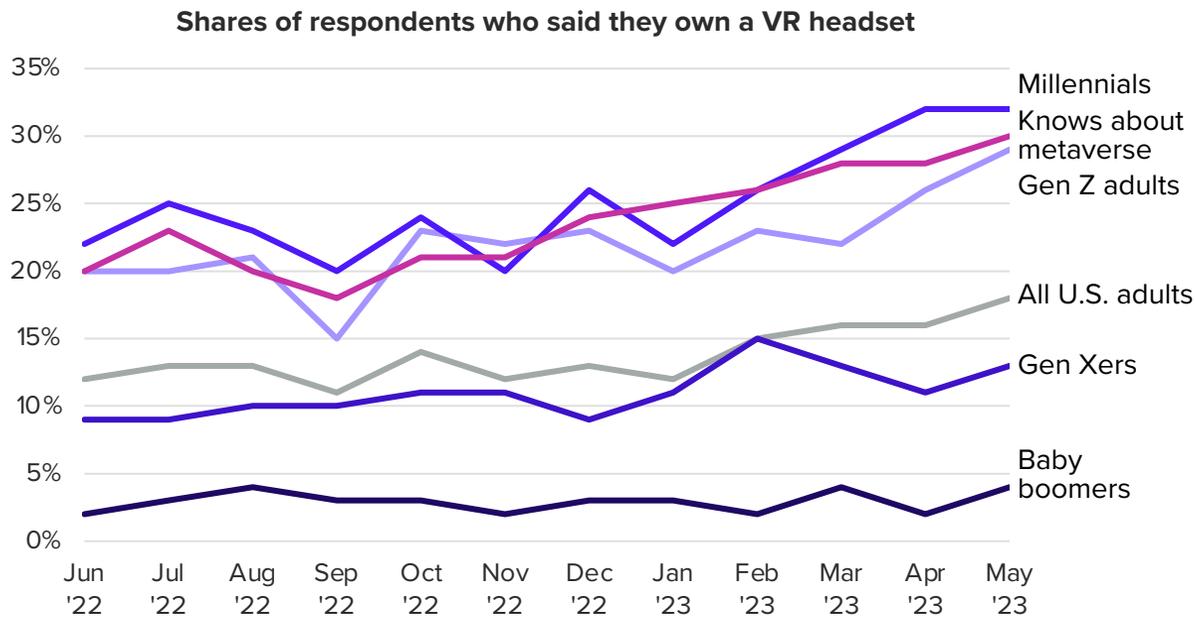
Source: Morning Consult Research Intelligence. Figures may not add up to 100% due to rounding.

VR headset ownership heats up among millennials, but overall penetration remains modest

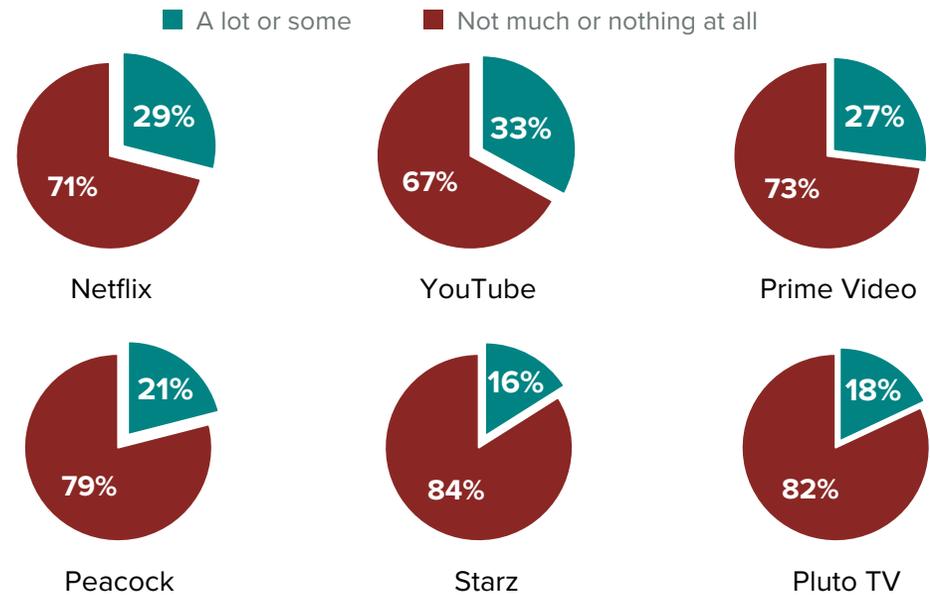
The share of millennials who said they owned a VR headset in May was 10 points higher than in June of last year, exceeding the change for other generations. Millennials are more financially capable of obtaining VR headsets than Gen Zers and likely see more VR content that's relevant to them than Gen Xers and baby boomers.

But VR headsets are still not mainstream, for the same reasons that drove their initial failure to launch — chiefly price and lack of content.

For media companies, the modest reach of VR shows that efforts to extend IP to platforms won't immediately yield big returns. The metaverse platforms that are truly worth developing a presence on remain those that are accessible across mobile and gaming consoles in addition to VR, like Roblox. This is why Horizon Worlds is developing the capability to be accessible across mobile and PCs after falling short of user goals in 2022.



Share who said they heard ... about being able to watch each on VR:



Source: Morning Consult Research Intelligence. Figures may not add up to 100% due to rounding.

WHAT IT MEANS

Not all is rosy with the metaverse, but 3D gaming platforms still provide compelling avenues for media companies to grow

What this means for media & entertainment leaders:



The gamer base continues to grow. With next-generation consoles like PS5s becoming more widely available, more consumers will identify as gamers and be receptive to Hollywood's game adaptations.



The case for metaverse activations is growing. More young adults will continue to use Roblox and Fortnite, which is now an Olympic esport, thanks to new content enabled by generative AI.



But VR-specific initiatives remain a lower priority. Streamers becoming available on VR helps them reach higher-income consumers, but most people aren't thinking about watching content through these headsets.



SECTION #5

Digital Audio

Video and AI-generated content are finding more ways to populate audio streaming platforms



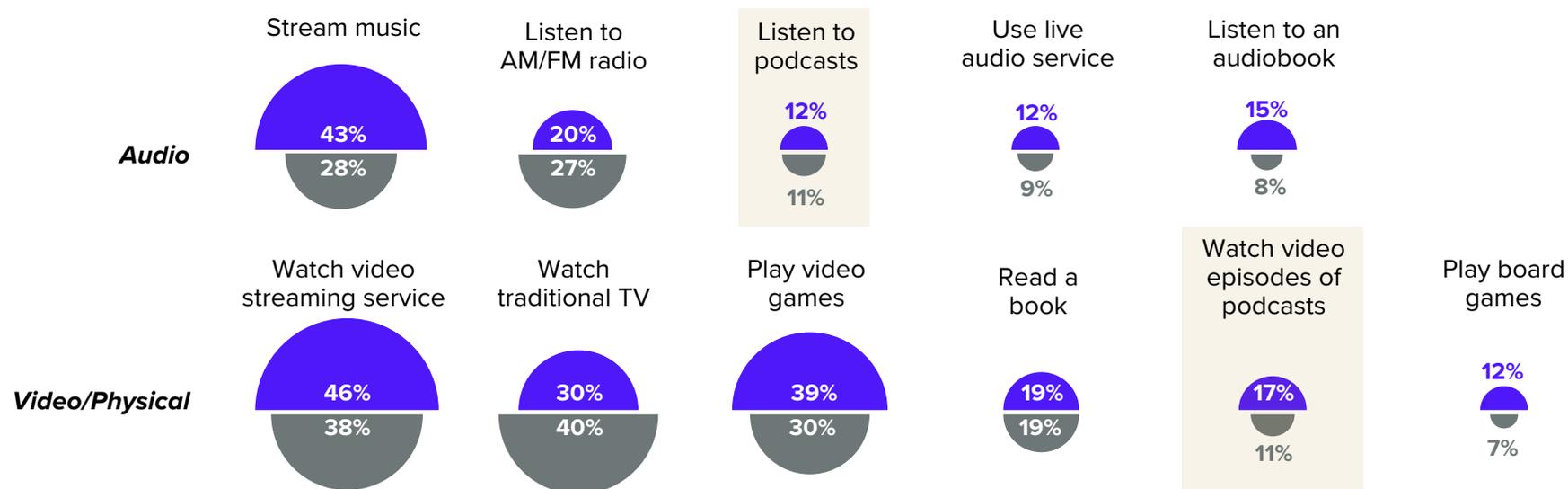
Gen Z's video podcast consumption suggests fewer shows will remain audio-only

There's no question that video podcasts have taken off over the past year. In 2022, Spotify began supporting video podcast uploads for all U.S. creators, while YouTube advised podcasters to incorporate more visual elements into their platform uploads. It makes sense that higher shares of Gen Z adults said they watched podcasts (17%) daily than said they listened to them (12%) that often. But given how many consumers likely stumble across podcast clips on social media without realizing it, the actual share is probably higher.

But YouTube distribution alone won't equal immediate success for a given podcast — podcast producers like The New York Times have seen modest consumption of some shows uploaded to the platform. However, podcast uploads on YouTube that feature video of the hosts get twice the views of uploads with simply a static image, according to the platform. But given the cost associated with producing video counterparts, we'll see more top-performing podcasts start to offer them, rather than less prominent shows.

Shares who said in May 2023 they did each of the following daily in the past month:

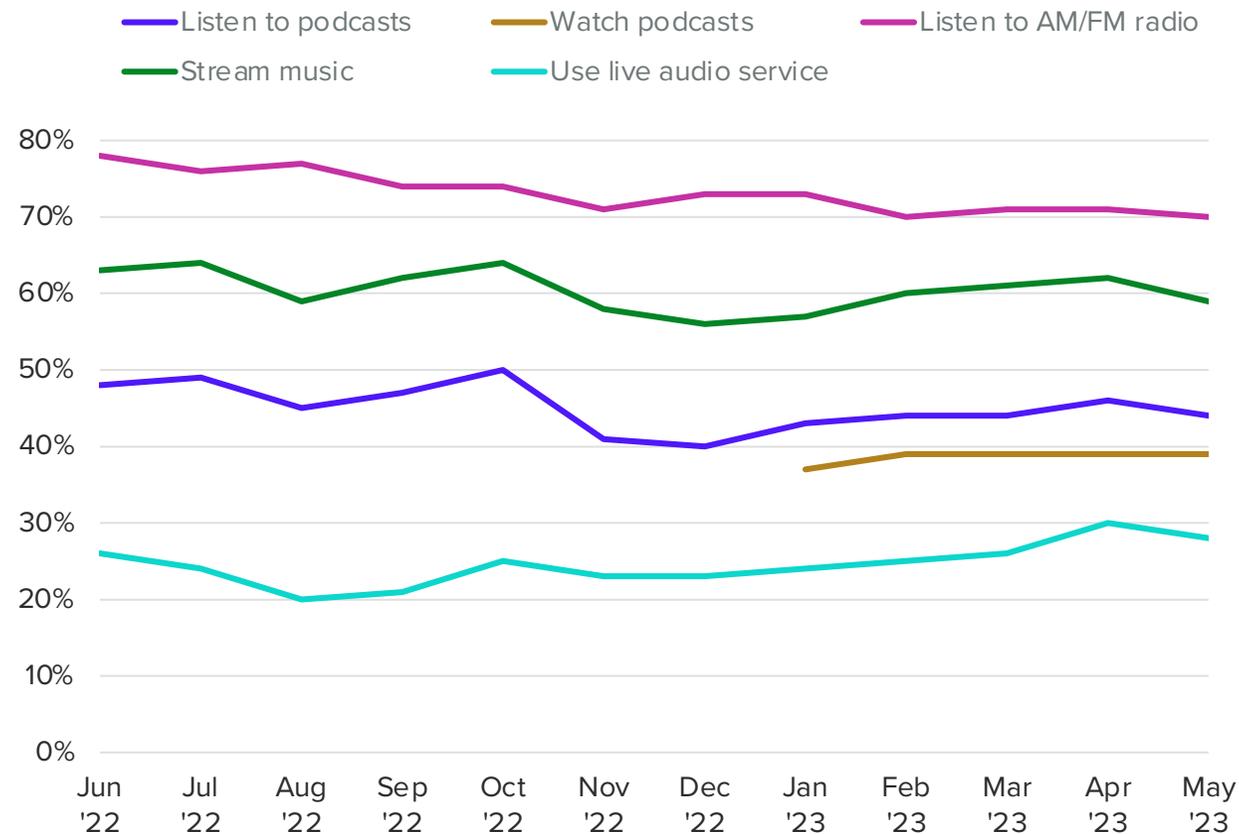
■ Gen Z adults ■ All U.S. adults



Source: Morning Consult Research Intelligence

Video podcasts will grow as social platforms further amplify that content

U.S. adults who said they did the following at least once in the past month:



Source: Morning Consult Research Intelligence

Nearly 40% of adults watch podcasts at least once a month, a high figure considering that many big podcasts still don't have video components that showcase hosts' conversations.

Video podcast consumption will grow as visual-forward social platforms turn to podcasts to differentiate. Twitter now allows Twitter Blue subscribers to upload videos (like video podcasts) of two hours to the platform, which is likely one of the reasons the platform became an attractive podcast distribution channel for conservative media giant The Daily Wire.

Meanwhile, TikTok in January tested a "podcasts" feature that lets users listen to videos with their screen locked. While this was just a test, it wouldn't be surprising to see TikTok experiment with a broader rollout of this capability, given that it could boost the number of video podcast clips distributed on the platform.

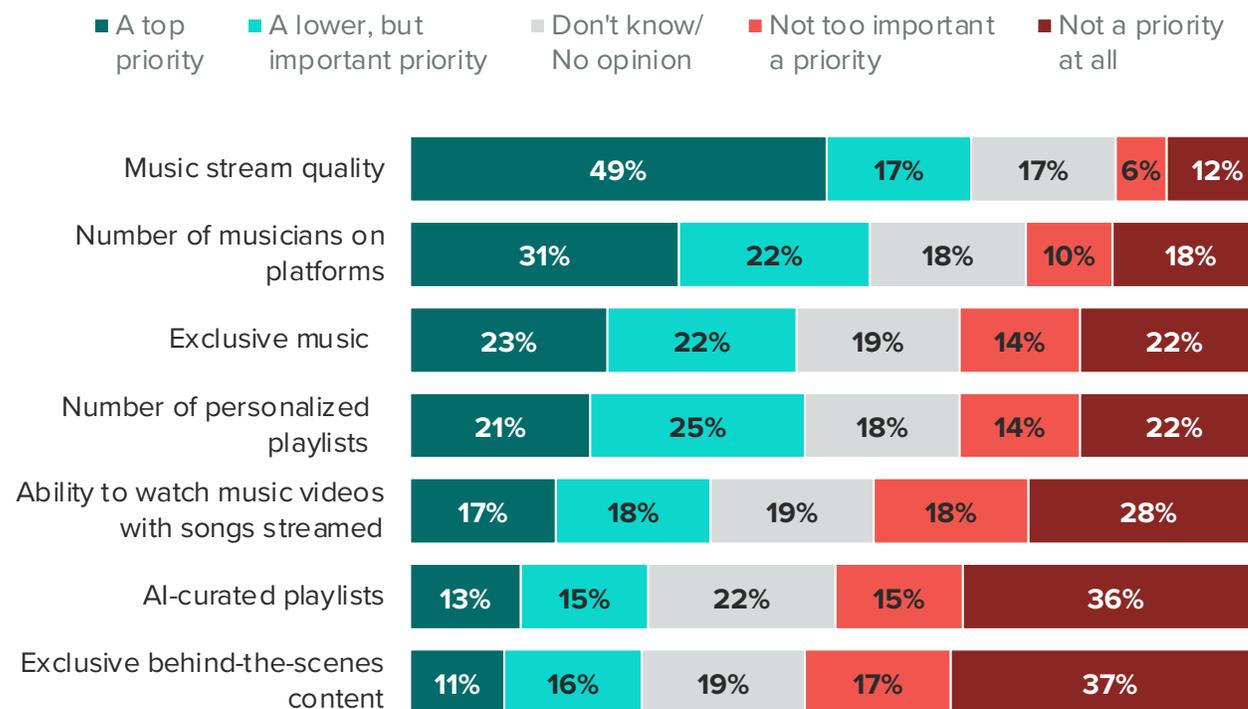
AI is not yet a difference-maker for music streaming platforms, but that could change

In the eyes of consumers, AI is not yet a key defining feature of major music streaming platforms — just 13% of adults said that AI-curated playlists were a “top priority” when deciding which music streaming platforms to use on mobile. Compare that with, for example, 66% of adults said music quality was a priority when picking a music streaming platform.

Still, the role that AI plays in the strength of music streaming platforms could grow over time. For example, the number of musicians a platform has was a “top” priority for 31% of adults when choosing a music streamer. And should AI-generated musicians become common, music streamers like Spotify will be judged on how much they allow these digital artists to populate their platforms. We’ve already gotten a glimpse at what virality AI-generated music can achieve (see: the now-infamous “Heart on My Sleeve”), and similar phenomena are surely on the horizon.

Since generative AI is still so new, there isn’t yet an industry-wide stance on whether to allow AI content on platforms, but Spotify’s Daniel Ek did say in April that his company wanted to balance “allowing innovation” and “protecting artists.”

Share who said whether each was a priority when choosing a music streaming service to use on their mobile device:



Source: Morning Consult Research Intelligence. Figures may not add up to 100% due to rounding

Where Gen Zers stream their music illustrates the enduring importance of audio ads

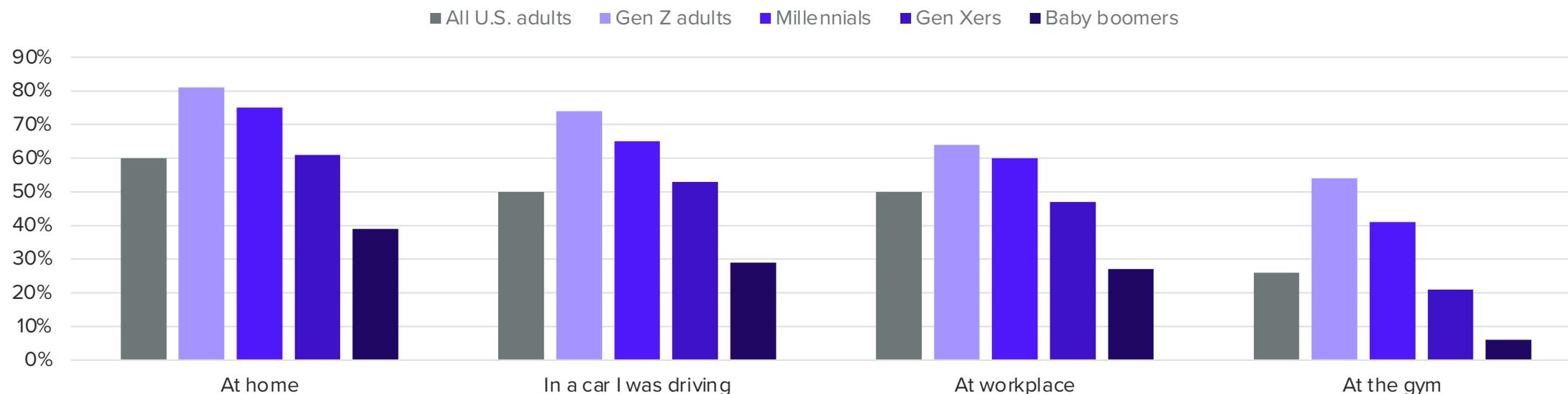
There's a limit to how much video can infiltrate music streaming platforms or overtake time spent streaming audio, given how many consumers continue to stream music in places outside the home, where audio-only consumption is ideal.

For example, Federal Highway Administration data does show that fewer twenty-somethings possess driver's licenses than in previous decades. But our data has shown Gen Zers tend to make road trips at rates higher than all U.S. adults, and a higher share of Gen Zers than other generations stream music in a car.

Meanwhile, sizable portions of Gen Z stream music at their workplace and the gym. This all reiterates that, despite the visual-forward reputation Gen Z has developed due to its [unique affinity](#) for TikTok, many young consumers are still regularly spending a lot of time with audio-only experiences.

This is unlikely to change and highlights the importance of investing in digital audio ads to boost awareness of upcoming shows and movies.

Respondents in April 2023 who said they had streamed music in the following places at least once a week in the past month:



Source: Morning Consult Research Intelligence

WHAT IT MEANS

Video and AI allow audio streamers to differentiate in ways previously not possible

What this means for media and entertainment leaders:



Invest more in video podcasts, but surefire hits aren't guaranteed. Video podcast consumption is substantial, but shows on YouTube that don't showcase the hosts speaking on camera will have a tougher time taking off.



Consider how video streamers could boost AI initiatives. Music streamers could license the voices of popular actors from recently debuting streaming series to voice AI-powered assistants like Spotify's AI DJ, for example.



At the end of the day, for music streamers, it's still all about the basics. More than anything, consumers cite music stream quality and selection of musicians as top priorities when choosing between music streamers to use.

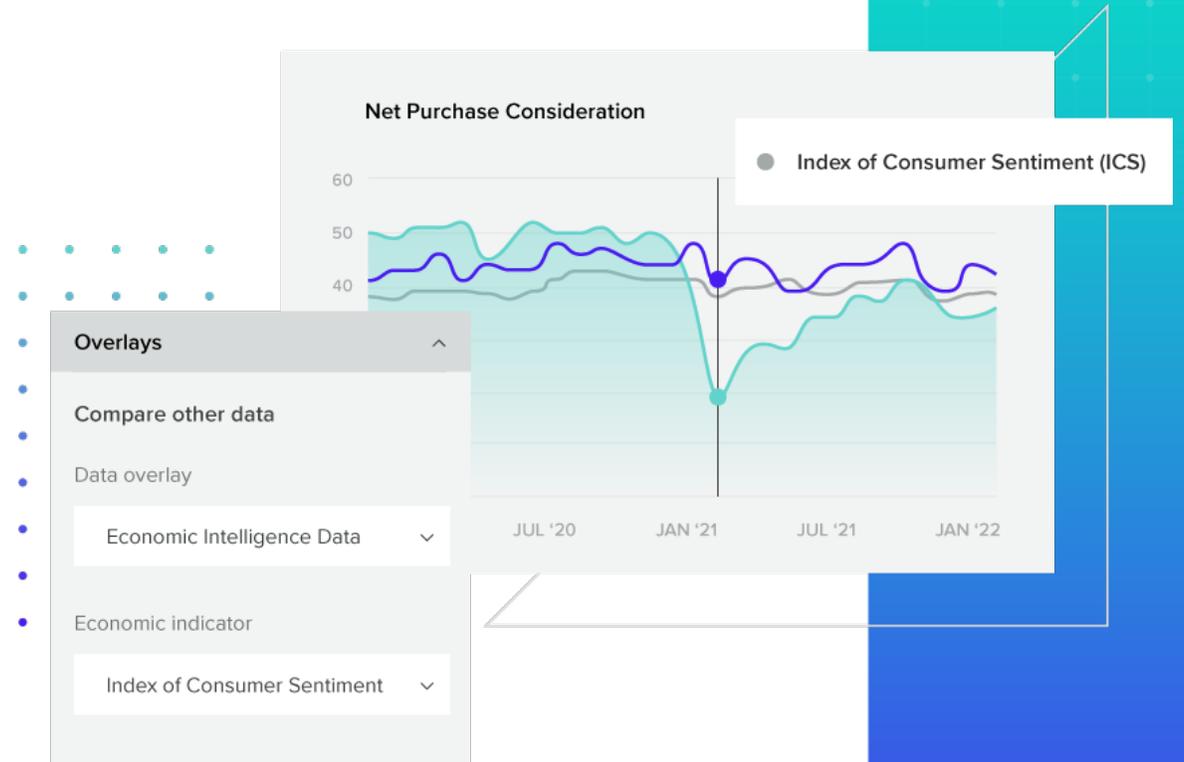


Methodology

Morning Consult Research Intelligence data featured in this report draws from monthly surveys conducted from July 2022 to May 2023 among roughly 2,200 U.S. adults per month. It also includes data from various surveys fielded throughout 2022 and 2023 among representative samples of about 2,200 U.S. adults each.

All U.S. surveys were conducted online, and the data was weighted to be representative of populations of adults based on age, gender, race, educational attainment, region, gender by age and race by educational attainment. Top-line results from the surveys have a margin of error of +/-2 percentage points.

Non-U.S. data was collected from May 2023 surveys among a representative sample of 1,000 adults each in Canada, France, Germany, Japan, South Korea and the UK, a representative sample of 1,000 internet-using adults each in China, India and Mexico, and a representative sample of 1,000 literate adults in Brazil. Results for each country had margins of error of +/-3 percentage points.





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Kevin Tran is the media & entertainment analyst at global intelligence company Morning Consult. He heads Morning Consult's efforts to deliver real-time insights for leaders in the media sector.

Prior to joining Morning Consult, Kevin was a media analyst for Variety Intelligence Platform, Variety's premium subscription service. Before Variety, Kevin was a digital media research associate at Business Insider Intelligence, which has since rebranded to Insider Intelligence. Kevin graduated from the University of California, Berkeley's Haas School of Business and currently resides in Los Angeles, Calif.

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