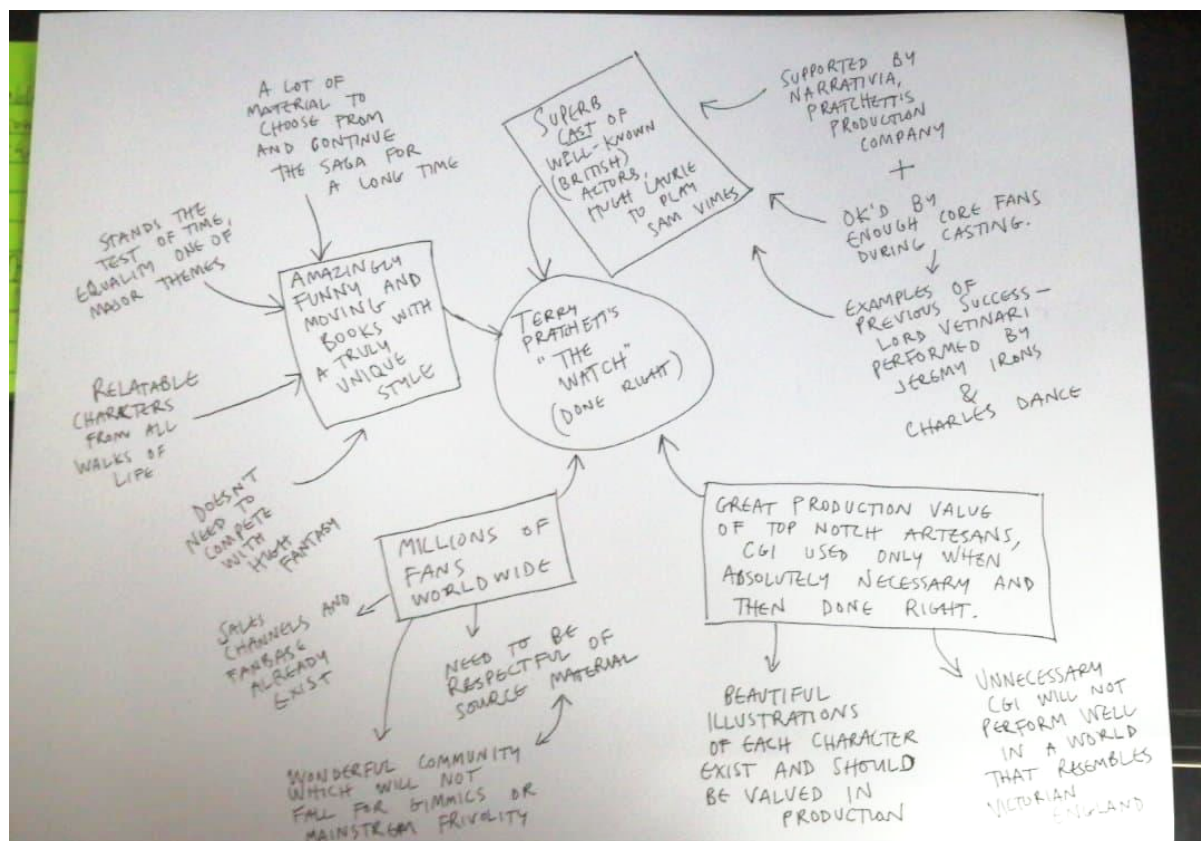


## Television trends for Millennials and Generation Z in the Nordic region

Annette Hill



Imagining the ultimate Terry Pratchett TV show (done right) by a Nordic fan

## Summary

*The Ultimate TV Show* project used mixed methods to analyze the television show preferences of Millennial and Generation Z viewers in the Nordic regions of Sweden, Denmark, Norway, and Finland. The project used contextual information, including ratings data for the top television series from 2019 to 2020; news and magazine articles featuring critics' top picks for TV shows to watch; and fan discussions about their favourite series on public websites. The primary data that formed the basis of this report included qualitative interviews with Nordic viewers. The project conducted interviews with 44 viewers, during November and December 2020, that addressed their tastes and values and the social context surrounding television. The sample included a mix of male and female viewers between the ages of 18 and 38.

The research highlighted a golden age for television, where both linear television and streaming services provided a social place where viewers could sit around the campfire and experience amazing storytelling. From drama and comedy to adult animation and reality romance, audiences valued television as both a "friend that never lets you down" and a master storyteller that invited empathetic viewers to relate to characters and reflect on their own lives.

Key themes from the empirical data included the shift from solo to social viewing, the DNA of television storytelling and the value of authenticity. In the past year, Nordic viewers have turned toward television to while away the hours at home during the COVID-19 pandemic. Television has become not only a 24-hour service, which offers a streaming playlist of favourite genres and series, but also a constant companion. A longing for social viewing led to audiences in our study creating an ambient television experience to match their mood. As one person said, "Television resets the day." Related to this finding is the rise of rewatch culture, where viewers discover a series and rewatch it again and again with family and friends.

The tradition of television storytelling is built into the DNA of audiences. Memories of watching television with parents, friends and siblings bring up positive feelings and reinforce the power of storytelling, from watching long running comedy series like *Friends* (NBC) as a backdrop to your own life to stand-out moments such as the "Red Wedding" episode in *Game of Thrones* (HBO Nordic). We can see the popularity of "based on a book" adaptations as part of this fascination with storyworlds. Viewers in our study were natural narrators of television stories, raconteurs with a rich knowledge of characterization, narration and genres. Some of them were even candidates for the storytelling podcast *The Moth*.

Viewers valued television storytelling for its authenticity, referring to original stories that stand out and keep it real in terms of characters, emotions and actions. Viewers looked for authenticity in all genres, not only factual ones. They sought real emotions in animated series; believable world building in fantasy genres; relatable characters in comedies; and accurate settings in crime dramas. Attention to detail is vital in television storytelling. From casting the right actor as the lead character to accurately portraying locations and time periods, every detail counted and kept viewers invested.

For specific regional trends, viewers positively engaged with the Nordic warmth of dramedies and relationship series, where they could relate to its characters and feel reassured that "everything is still fine." And there was an appreciation for Nordic gothic in supernatural and crime series set in rural and unusual locations in the far north of Sweden, Norway and Finland. Above all, Nordic series must offer TV from the heart. It must commit to an authentic story and make it believable for invested and intelligent viewers.

### **“The same storyline as the people around me.”**

In a recent national survey in Sweden by Kantar Sifos and Samsung Nordics, half their sample of 1,000 respondents spent more time watching television in 2020 and up to 85 percent found company in television. This was particularly the case for Generation Z and Millennials who turn to streaming services, such as Netflix, for drama and comedy and broadcast television for news and reality entertainment. Around a third of the sample, aged 18 to 38, were watching streaming content for over three hours each day.

The word “television” conjures up linear channels in people’s minds, an image of legacy television sets of the past. However, viewers in our study had different ways of engaging with streaming and broadcast content. They viewed such content live, caught up with it later, subscribed to it and accessed it using VPN services. For example, a Swedish viewer said she doesn’t “usually watch television” but watched “YouTube, Netflix, Viki, Viaplay, Amazon Prime” (22-year-old Swedish female translator). We found a mixed mode of television viewing as typical for the Nordic region, with younger generations turning to streaming series, such as YouTube and Twitch, for entertainment. As a Norwegian viewer said, “You can turn on a show and you got it. You got your fix” (25-year-old Norwegian male student).

Nordic audiences have not only watched more television during 2020 but they have chosen to do so socially, enhancing their personal experience of different series by sharing reactions and emotional engagement with others. The viewers in our study actively sought out social viewing, rather than solo viewing, experiences. As this Swedish viewer explained, a series becomes more meaningful when he watches it with others: “I always want to talk about it with other people and relate with others. It makes it more real” (36-year-old male Swedish academic advisor).

The shift was particularly strong for younger generations, who actively chose television as their 24-hour companion. For example, this Swedish viewer kept the television running right by her side: “While doing my makeup, while cooking, while getting ready in the morning, when brushing my teeth. I also watch series when I go to bed with my boyfriend” (22-year-old Swedish female translator). We also found that viewers engaged in “rewatch” culture. Rewatching a series several times over deepened their engagement with its story, as this Finnish viewer said of his repeated viewings of *Breaking Bad* (AMC): “My next time will be my fifth or sixth time — it’s just such a beautiful arc. A family that becomes *Scarface*. You find something new every time you rewatch it” (22-year-old Finnish male student). Rewatching a series with other people also gave viewers a feeling of togetherness, such as this Finnish viewer: “I’ve watched the same series with my best friend, my second best friend and with my girlfriend in one month. To me, watching together is more important than the series itself” (25-year-old Finnish male student).

### **“The greatest adventure ever told.”**

The tradition of television storytelling starts at a young age. When we asked viewers to recall early memories of television, they did not hesitate to share positive experiences, such as watching Norwegian soap operas with their grandmother, following the Danish family ritual of watching crime dramas every Sunday night or, for one Swedish sci-fi-fan, watching *Doctor Who* (BBC) with their dad. Audiences reflected on these early memories and, in doing so, understood how television became a part of the cultural DNA and why they valued particular television series today. For example, this Swedish viewer recalled how sci-fi television was a means of escape when he experienced tough times as a teenager: “This escapism of going into a galaxy far, far away or to join the crew of the *Starship Enterprise* on their voyages into deep space, you can escape reality for a couple of hours, and that was a very good feeling... In 2020, so far, it has been a really shit year and you think that’s the time when you really need culture” (36-year-old Swedish academic advisor).

The rewatch favourite *Friends* (NBC) is woven into the memories of Generation Z and Millennial viewers in our study. It's a comedy classic that is iconic of '90s culture and still feels relevant today. For example, a Swedish viewer recalled how she "watched this series with my parents since I was eight years old" and how she re-watched episodes now: "They're just so different but they fit so well together. There's always someone in the series you can relate to" (22-year-old Swedish female translator). For many viewers in our study, *Friends* is a sitcom that lifted their mood: "*Friends*. It's my all-time favourite, it never fails" (20-year-old Norwegian female student). This iconic '90s series is so revered in the memory and hearts of viewers in our study that it's possible to imagine the first rule of television nostalgia and comedic storytelling to be "don't f--k with *Friends*."

The continuing popularity of series based on books and films underscored the significance of storytelling. Viewers appreciated the craft of storytelling in original novels or films and adapting it for television. For example, *Björnstad*, (HBO Nordic) based on the novel by Fredrik Backman, offers a gripping drama in a small town; *Dash & Lily* (Netflix), based the teen series by David Levithan and Rachel Cohn, offers a comedic romance where two lovers leave clues and challenges for one another leading up to Christmas; and *The Undoing* (Netflix), based on the novel by Jean Hanff Korelitz, offers a psychological thriller that hooks viewers with its classic cliffhangers.

When we asked viewers in our study to pitch a new series, they revealed a rich knowledge of television storytelling. For example, this Swedish viewer pitched "the greatest adventure ever told": "Picture a man going on a journey, and you have this amazing adventurer that's been reclusive for some time now. And, suddenly, the world needs him in ways he didn't think was possible and he has to come out of retirement to help us save the world" (36-year-old Swedish male academic advisor). The series would have starred Brad Pitt, a popular choice amongst Millennials in our sample. For another Finnish viewer, he made a mashup of his favourite drama series: "I think there would be the element of the woman proving every man wrong, like in *The Queen's Gambit* (Netflix), and the suspense from *Money Heist* (Netflix), the character depth from *Breaking Bad* and *Better Call Saul* (AMC) and the overall writing of Vince Gilligan. I would bring them all into one great heist series" (22-year-old Finnish male student).

A Finnish viewer imagined a dramedy "as an embarrassing life. How millennials are fighting everyday problems while eating avocado toast" (30-year-old Finnish female student). Another Norwegian viewer mixed a sitcom with a location-based series that everyone could relate to: "*How I Met Your Mother* and *Sex and the City* together with club and love and family" (27-year-old Norwegian female administrator). And this Danish viewer went all out for their "crazy universe" series: "A lot of big actors and a different reality. Different universes, wormholes, teleportation, time travel" (26-year-old Danish male DJ).

### **"Seeing the character grow is important."**

We also found a return to the classics of characterization and empathetic storytelling. Characters, as well as the actors who play those roles, can make or break a show. It was vital for audiences to emotionally engage with those characters, whether it be through their growth or backstories. For example, this Norwegian viewer said he "really, really [appreciates] good character development. I think that's paramount for a good TV show" (25-year-old Norwegian male student). It's important to viewers that characters have complex story arcs, for example antiheroes with backstories: this Finnish viewer appreciated in the Netflix fantasy series *The Witcher* "how the witch learns magic, seeing the development from the character being able to make a stone levitate to doing really big things" (25-year-old Finnish male student).

The viewers in our study were able to relate to a series through its complex characters. For example, this Finnish viewer reflected on the adult animated series *BoJack Horseman* (Netflix): “The way they talk about human experience through animal characters, it’s bizarre writing but it’s very, very good and it made me cry during many points of the show because it’s so real. They got in so deep with the animal character about humanity. That was really cool about the show. I have never seen anything like that before” (22-year-old Finnish male student).

There was a spectrum of emotions in the way audiences related to empathetic storytelling. For example, this Norwegian viewer reflected on the value of emotional engagement: “I feel a lot of joy when I watch TV series that are very good. I kind of get overwhelmed by how good it is. I’m a person that gets very emotionally invested when I watch things. I get so overwhelmed that I want to show the whole world” (28-year-old Norwegian female video editor). Such a strong investment in television series was connected to complex characterization, as this Swedish viewer explained: “That’s really, really good writing, when you can relate to a character that you’re watching and it has an impact on you and that you can feel it” (36-year-old Swedish academic advisor).

Another aspect of character engagement was that of extreme personalities, both in television drama and reality entertainment. Viewers spoke of the downward spiral of Walter White in *Breaking Bad* (AMC), a popular rewatch series in 2020; or the increasingly outrageous behavior of reality contestants in *Paradise Hotel* (TV3): “They’re always trying to be the most crazy person. I think a lot of the appeal from reality TV is the fact that the people who are on TV have no inhibitions” (27-year-old Norwegian female administrator).

Another part of this theme was the relationship stress test. Viewers could relate lockdown pressures during the COVID-19 pandemic to the pressures placed on relationships in television shows. For example, viewers were able to identify with the stress of new relationships in the reality television series *90 Day Fiancé* (TLC); and the pressures of undertaking a mission to Mars with your family in the drama series *Away* (Netflix).

### **“Life is about a little bit of pain and suffering and dirt and shit, not marble and glitz.”**

A stand-out theme was that of authenticity in television content. Viewers in our study adopted a double meaning of authenticity as original and bold ideas, and also as real portrayals of feelings, locations and details in television content. While it was to be expected that audiences would critically engage with authenticity in factual genres, such as news or documentary series, it was surprising to find viewers valuing authenticity in a range of fiction and entertainment genres as well.

For example, this Finnish viewer addressed what she found authentic in the comedy sitcom *Friends*: “I really like how there’s a mixture of comedy but still real-life situations, like heartbreak, family members dying, stuff that happens in real life so there’s a perfect mixture” (30 year-old Finnish female event coordinator). In crime drama: “The world of *Breaking Bad* and *Better Call Saul* are very authentic. It’s so coherent, the atmosphere, which makes it so believable and authentic” (25-year-old Norwegian male student). In stand up comedy: “Because if someone is not authentic, you don’t believe that person. You’re, like, ‘oh but you’re just pretending’” (33-year-old Swedish female stand up comedian). And, in adult animation: “*Bojack Horseman*, that’s authentic since I’ve never seen any show like that. It’s so brutal because it lures you into this funny animal-people world with a sitcom aesthetics and lots of humour, but then it gets to the core of what it’s like to exist as a human and what it’s like to feel pain and what it’s like to grow as a person. I should rewatch it” (22-year-old Finnish male student).

This hyper attention to authenticity and believable storytelling was essential to how viewers appreciated quality television. Authenticity was related to bold ideas and a commitment to a distinctive creative vision: “I don’t want to watch any series that is making shortcuts. There is authenticity in that you take the risks and bother to create the kind of atmosphere that is somehow loyal to the idea that you want to do and authenticity is also important to me in the actor’s work as well, that they believe in what they do. That is very important. The better the show is acted, the more believable it is” (31-year-old Finnish male research assistant).

We saw how viewers in our study critically engaged with authenticity in many aspects of television storytelling, asking if something was original, if it was really committed to its creative vision and if it generated real feelings. This also extended beyond television to other kinds of entertainment content. For example: “I like to watch real things with real people, where you know that the content is actually real and not everything is staged. When you watch streamers on YouTube or Twitch or other platforms, you get real responses from them and you get the real shock when something happens in the game. You get those real feelings” (22-year-old Swedish, female translator).

Here, then, we saw the importance of authentic details and believable characters in television as connected to a broader ‘crisis of authenticity’ in factuality, such as fake news and misinformation, or scandals about the authenticity of internet celebrities. The audiences in our study could be said to have an authenticity radar that was on high alert to what was original or not and what was real or not.

### **“Oh my god, it’s here.”**

In 2020, the highest-rated shows among Nordic viewers, between the ages of 18 and 38, included reality television, talent shows and drama series on both broadcast television and catch-up services. The reality entertainment genre, which includes romance program *Temptation Island Suomi* (Nelonen), was popular in Finland. The drama genre, such as *Førstegangstjenesten* (NRK) and *Exit* (NRK), and reality entertainment genre were both well-liked in Norway. The reality entertainment and drama genres were also popular in Sweden and Denmark, as shown in the high ratings for reality romance series *Gift vid första ögonkastet* (SVT), singing competition *Talang Sverige* (TV4) and *The X Factor* (TV2) and Nordic noir *Björnstad* (HBO Nordic).

However, these official ratings are not necessarily the best indicators of what television series attracts young viewers. For example, Generation Z viewers in our study had a strong engagement with adult animation, from American series like *Rick and Morty* (Adult Swim) to Korean and Japanese anime like *One Piece* (Fuji TV) and *The Seven Deadly Sins* (Netflix). Indeed, there was a feeling among younger viewers, aged around 20, that they were already out of touch with the latest anime series and had to rely on their younger siblings for recommendations. This indicated that transnational television genres are as — if not more — popular than broadcast television among younger viewers.

Certainly, television series made in the Nordic region are important to viewers in our study in that it offered recognizable locations and accents and relatable characters and stories for regional viewers. Authentic characterisation comes from the heart: ‘You can see how they really make these people and it’s not just an actor’ (22-year-old Finnish female student). The specifics of a series, its authenticity in a Nordic setting, are key to viewer engagement. For example: “The last couple of years, they’ve been making drama series based on real happenings. For example, when they first found oil in Norway, they made a TV series about that, and these shows are actually fact checked by NRK. That’s pretty cool’ (27-year-old Norwegian female administrator).

Generation Z viewers in our study were already nostalgic for Norwegian teenage drama *Skam* (NRK). This Finnish viewer recalled the first time they saw the series: “My sister was watching it in the car. We were driving home from a holiday. I just kind of looked over, I was instantly interested, and it was kind of crazy how quickly you could know that this series was going to be really good” (22-year-old Finnish female student). Again, the theme of authenticity was significant. *Skam* was original in its conception and felt relatable: “I feel like a lot of younger people could relate to it in many ways, like my school building looked a lot similar to theirs” (22-year-old Finnish female student).

There was a trend related to Nordic warmth, in particular dramedies that offered recognizable characters dealing with real life issues. For example: “I got so comforted when I watched this show *Älska Mig*, and I noticed that I wrote to all my friends ‘Hey, watch this. You will be reminded that everything is still fine’” (30-year-old Finnish female student). The opposite of this trend was that of Nordic gothic, uncanny dramas that tapped into true crime stories set in remote or rural locations and evoked a feeling of unease. For example: “You take certain supernatural elements from a certain local milieu. There is such an unused potential in Finland, things that are hidden under the surface” (31-year-old Finnish male research assistant). Another Swedish viewer brought up crime series like *Jakten på en Mördare* (SVT), which was based on a true crime and expertly captured the ‘90s and its southern Swedish location. Much like other viewers, she strongly related to the details in these crime series: “Maybe that feels like home. When you hear voices and they film houses, like ‘that’s our neighbour’s house’” (24-year-old Swedish female medical secretary).

## Research Note

The project team includes Professor Annette Hill and research assistants Jian Chung Lee, Yunyi Liao, Josefin Waldenström, Anna Jaakonaho.

The research team aggregated available television ratings and viewership data related to the most-watched programs from 2019 to 2020 among Millennial (aged 25 to 39) and Generation Z (aged 24 and below) viewers in Sweden, Norway, Finland and Denmark. Their sources included companies such as MMS, Kantar Norway and Denmark and Finnpanel. The research team also used Statista to find further data on viewership data across all four countries. A qualitative textual analysis was conducted on television show-related discussions on online forums and social networking sites; and “Best Of” and “Recommended” lists in regional and national publications from 2019 to 2020 in Sweden, Norway, Finland and Denmark. See the reports of the ratings, forums and publications, for full details.

For the audience research, in total, the research team conducted 33 interviews with both Millennial (aged 25 to 39) and Generation Z (aged 24 and below) television viewers of Swedish, Norwegian, Finnish and Danish nationality. 11 of these interviews included 2 participants at the same time, mostly couples. These interviews were between 40 to 90 minutes long, and the research team conducted them between 26 November and 9 December 2020. The sample includes 44 participants, which includes 12 Swedes, 11 Norwegians, 9 Finns and 12 Danes. The sample included 32 Millennial and 12 Generation Z participants; and was divided evenly between women and men. See report on thematic couplets in the coding of the full transcriptions of the interviews.