Generation STREAM STREAMS OF CONSCIOUSNESS **Gen Z's Self-Identification Through Streaming Content** hulu







Streams of Consciousness

For Gen Z, streaming is a self-exploration process a way to develop a deeper understanding of who they are and what they stand for.

Demographic Spectrums

They desire content that reflects the fluidity of traditional demographic boundaries.

T Emotional Range

Zs are embracing and opening up about mental health - and this is reflected in the streaming content they gravitate to.

Global Reach

Gen Z is looking for entertainment that spans all corners of culture.

Niche Interests

This is a generation that owns their obscurities.

15 Call To Action

Zs gravitate toward content that grapples big issues facing society, as purpose and politics are core to this generation's identity.

STREAMS OF CONSCIOUSNESS

Remember when self-identifying through TV characters was as simple as whether you were a Joey or a Chandler, a Brenda or a Kelly, a Blair or a Jo?

Cut to today and Gen Z has infinite options to consider on the identity spectrum. There are 70+ gender options on Facebook, hybrid races and cultures such as "blaxicans" or "blasians" have stirred the demographic mix, and niche passions are the norm. Simply put, there's a lot more to reflect upon today. For Zs, that means streaming is a self-exploration process as well as a way to develop a deeper understanding of who they are.

Sex Education helps Zs contemplate their gender and sexual identity; Shrill and Mrs. America tackle body positivity and women's rights; and Japanese anime introduces young people to different cultural aesthetics. In other words, streaming is a new form of identity development as Zs use the long tail of content to meticulously define who they are. Here are the categories of content helping Zs do just that.



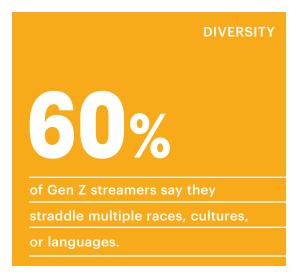
DEMOGRAPHIC SPECTRUMS



From limitless gender identities and sexualities to niche religions and races, "spectrum" is more than a buzz word for Gen Z; it's the lens through which they view all demographics. 60% of Gen Z streamers say they straddle multiple races, cultures, or languages and 77% of Gen Zs say that at least one major demographic marker-like race, gender, or sexuality-doesn't fit neatly into a box. Furthermore, Gen Z streamers are three times less likely than non-Gen Z streamers to describe themselves as "traditional." In fact, some Zs believe that breaking the gender binary is what they will be uniquely remembered for, generationally speaking, and they're likely right. Just consider these wins in the fight for full gender identity: last year, New York City's Department of Education made it possible for students to easily change their gender identity on school records without any legal documentation, as well as play for the sports teams of their preference; Pennsylvania made it legal for residents to change their gender marker to "X"; and over 150 colleges and universities have opted for gender-neutral bathrooms, with more gearing up to hop on board.

Content that reflects this fluidity—and pushes it further—resonates with Zs. It's not that everyone in the generation is pansexual, gender non-binary, blasian, or the like; it's just that they see themselves in the complexities of characters' identities, or use those characters to expand upon

their own. "I love that the host of *Nailed It* is a plus-sized African American woman," Fiona, 19, of Washington, DC told us. "While I will not watch something sheerly because it is representative, I still find it really heartwarming to see diversity on my screen." This demand for difference is well-documented across culture. Chulita Vinyl Club, for instance, is a nonbinary and gender-nonconforming women's Latinx DJ collective with chapters across the country working to claim space for themselves in historically straight and white spaces one record at a time. Then, there's the new generation of models of color—in the past fall season alone, nearly half (40% or



more) of models who walked in London, Milan, Paris and New York were women of color, up from 17% in 2014. Even disability has been mainstreamed into pop culture—Kodi Lee, a blind 23-year-old with autism, won *America*'s *Got Talent* (and the million-dollar prize) in the fall of 2019.

These cultural changes are creating an atmosphere where Zs are bored by the same old TV content. "I feel stuck sometimes when it comes to watching TV because I only see the same kind of things," Jorge, a 17-year old from Albuquerque told us. "I would like to explore sometimes and get to know myself better rather than watching the exact same thing all the time. I like to be exposed to a lot of things. Even if I don't like them, I'm happy I found that out rather than just staying in the same lane of shows all the time." In fact, a survey conducted by VICE Media and Ontario Creates shows that Zs are invested in diverse content—50% reported that the current level of diversity on screen does not reflect

modern audiences and 50% also believe that media has a "bigger impact on their sense of gender and/or sexual orientation than the culture they grew up with."

Creators are taking this to heart. Batwoman premiered in the fall of 2019 as the first superhero series in TV history to feature a LGBTQ character as the lead role. The recasting of Batwoman, with Javicia Leslie starring as Batwoman, continues to break new ground: "I am extremely proud to be the first Black actress to play the iconic



"My generation is not a fan of being told how to live life. We have realized that no one can stop change and things happen for a reason. We've realized that we as humans are generally congenial because of diversity and we LOVE to 'mix it up.'"

-Deb, 25, Dallas, TX



role of Batwoman on television, and as a bisexual woman, I am honored to join this groundbreaking show which has been such a trailblazer for the LGBTQ+ community," Leslie said. For the eighth season of the reality dating show Are You the One?, MTV assembled a cast of singles who all identified as sexually fluid—and young viewers couldn't have been happier. "This season was a Gen Z fever dream," The Guardian reports. "There was a trans masculine heartbreaker, a non-binary scene-stealer who uses they/them pronouns and performs under the drag persona Dionne Slay, and contestants who relished the chance to explore their bisexuality for the first time." Other shows tackling the permeations of identity include Ramy, which follows a first-generation

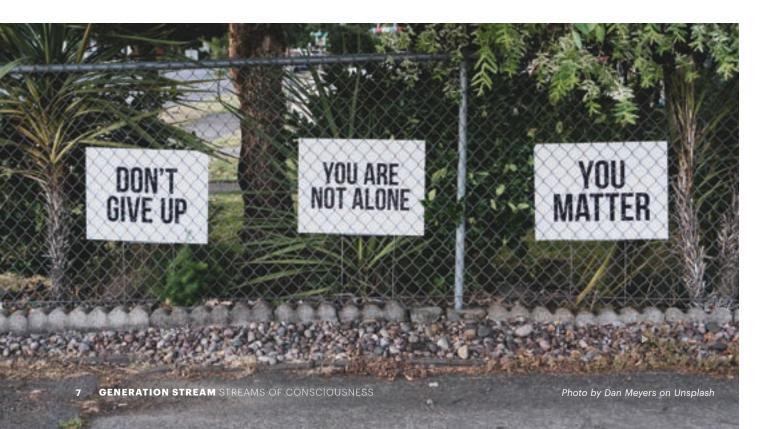
American Muslim on a spiritual journey in his politically divided New Jersey neighborhood; Love, Victor, which depicts a high school student grappling with his sexual orientation; Tiny Shoulders, a documentary about the marketing team that pushed Barbie to be reflective of real women; and Sex Education, which tackled everything from consent and gender fluidity to asexuality and interracial relationships. "I really loved season two of Sex Education specifically because of how it dealt with bisexuality/pansexuality," says Aiden, 23, in Brooklyn, NY. "I would've been so much more able to explore my sexuality as a teenager if I had been able to watch other teens explore their desires beyond provided binaries." ▶



EMOTIONAL RANGE



Gen Z was already coming of age in complex times, standing up for gun reform, promoting equality, dodging the crossfires of partisan politics, and feeling the weight of the world on their shoulders (literally-Zs feel it's become their unique duty to save the planet from climate change). And then, of course, there is the pandemic. As Corrine, 23, told us, "We are so traumatized. There are so many cycles we are waking up to and starting to unlearn. It feels like we are earlier on in that process, but when we figure it out and go through the healing process, I think we will be in a good position to dismantle and rebuild the systems of the world." Or, put more simply by Drew, 23, "My generation is very anxious." However, rather than recoiling from their emotions, as was standard in previous generations who were encouraged to keep their sh** together at all times, Gen Zs are embracing and opening up about their mental health. "I'm busier than ever and it's stressing me out," Fiona, 19, who's attending college in Washington, DC, told us. "I feel more strained. I always reach out and tell friends how brave they are when they speak up about mental health on social media." Larissa May, Founder of #HalftheStory, a non-profit which focuses on mental health in the digital age, agrees. "For Gen Z, the digital world is a playground for self-exploration and identification," she explains. "They're more comfortable expressing their emotions online and sharing struggles with mental health and emotional well-being than any other generation. They're paving the way toward a stigma-free society one story at a time". Underscoring this new focus on mental health, Gen Zs have even named it as the most important issue they are facing out of 15 issues, beating out major issues like climate change, gun reform, and LGBTQ+ rights, according to our study.



Perhaps this desire to emotionally vent is responsible for the rise of a new genre of what's been deemed "failure TV," or shows that accurately depict the challenges and foibles of being human, whether it's addiction (Euphoria), racism (Black-ish), mental health (13 Reasons Why), or the general challenge of being a teen (Lady Bird). "Seeing mental health and emotional challenges accurately portrayed on TV is more important than ever," psychologist Brad Ridout, Ph.D, deputy chair of the Cyberpsychology Research Group at the University of Sydney, told Teen Vogue. "When done well, fictional characters can help young people better understand their

own struggles, feel less alone, break down mental illness stereotypes and stigmas, and promote help-seeking behaviors." The CW's All American, now streaming on Netflix, rose to Netflix's top ten charts with its reflection on deep-rooted societal issues. All American is more than just a sport-centered television show—it taps into class struggles and race. It's a show with a predominantly black cast that talks about issues faced by the black community. Through the power of streaming and its ability to reach the right audience, All American unfolds the wins, losses, and struggles of people from vastly different worlds and invokes conversations to promote change.

EXPOSURE THERAPY

On the one hand, Zs are finding solace and connection with characters that reflect emotional depth and vulnerability. On the other, they are seeking out therapeutic content that helps them decompress, chill, and recenter.

EMOTIONALLY COMPLEX

The Handmaid's Tale

The Handmaid's Tale is an adaptation of Margaret Atwood's novel where fertile women are forced into sexual servitude by an elite class of commanders and their wives. It stretches viewers' emotional range: at once you can find yourself utterly repulsed by the rape and abuse the handmaids endure all the while feeling oddly sympathetic to those who torture them (cue: Aunt Lydia).

Fleabag

Fleabag follows the life of a complicated woman known only as Fleabag as she navigates grief, family conflict, sex, and selfhood—in hilarious and honest ways. "I feel utterly drawn to Fleabag, as if I am a tiny confidant on Phoebe Waller-Bridge's shoulder as she bumbles around life in all its absurdity and drama and awkwardness," says Emma, 23, in Burlington, VT. "I identify a lot with her and appreciate her overt sexuality, her boldness brimming on audacity, and her vulnerability toiling with grief."

EMOTIONALLY SMOOTHING

Dollface

Called a "Cinderella story for the age of Peak TV" by *Time*, *Dollface* is a surrealist and comedic post-breakup story featuring a woman that has to literally and metaphorically re-enter the world of women and rekindle lost female friendships. As one viewer put it, "If you are a woman between the ages of 25-30 you should definitely be able to relate in some way, shape or form. It was real, authentic and hilarious. Also so relevant to current female culture."

The Great British Bake Off

The Great British Bake Off (or GBBO to uber fans) is a competition where amateur bakers compete for the title of Great Britain's Best Baker. Unlike other competitions where contestants are out for blood, folks on GBBO are supportive, kind, and encouraging of one another—leading to an uplifting, easy viewing experience for viewers.





On the opposite side of failure TV, which has us face emotionally complex issues to work through them, is the rise of soothing content experiences, which are there explicitly to help us cope. Take Animal Crossing, for example, the video game that shot to popularity in the first days of the COVID-19 lockdown. While the premise of the game is simple—you inhabit a town filled with animals that slowly grows, make friends with

neighbors, collect fruit, fish, and donate to the local museum—the game has become an "anti-anxiety oasis" for people looking to escape the complications of real life for something decidedly more chill. Other kinds of content fill this role too. The rise of ASMR, soap-cutting, and slime-making videos has Zs tuning into YouTube for a dose of calm at the end of each day. Meanwhile, Jess, 25, of lowa City, tells us she watches *Blue Planet* late at night to get her ready for sleep. "Watching *Blue Planet* is an introverted nourishing thing for me.

"Young people are just kind of in love with the [emotionally complex] characters. In a way, Gen Zs can see themselves in these stories and can connect with their friends about these topics and these ideas."

—Larissa May, Founder of #HalftheStory

There's nothing controversial about it. Its politics are fine. Mostly it's just beautiful and brings me to real places in the world I wouldn't be able to visit otherwise." It's not surprising then that, under such mental strain, Therapeutic Viewing such as this is the number one type of viewing experience sought out by Gen Zs (72%). The point is that Zs are flexing their emotional range and looking for series and films that help them reflect upon, or allow them to talk about, their intricate feelings.

GLOBAL REACH



Though previous generations may have considered themselves worldly or internationally aware, Gen Z is by far the first generation of "global natives." In 2019, the number of international migrants reached a record 272 million, according to the UN. And according to our survey, 68% of Gen Z streamers consider themselves to be a "citizen of the world." It's not surprising, then, that Zs are looking for content that represents all corners of culture. Just take music: 18-to-25-year-olds listen to more international music than any other demographic, according to data from Spotify, and 78% of millennials and Gen Zs believe that music allows people to connect with each other and other cultures. The same seems to be true for film-the popularity of entertainment from around the world has grown steadily since Netflix first started commissioning international shows in 2014, according to IndieWire. The impact of this can be felt across culture. Consider the fact that South Korea's Parasite smashed the "subtitle barrier" by sweeping the Oscars-including Best Picture-and setting an all-time streaming record on Hulu within a week of its release; it's now the most streamed independent or foreign language film on Hulu. Furthermore, K-Drama is catching on just as quickly as its K-Pop cousin—some 18 million viewers in the US stream these over-the-top dramas centered around chaste storylines.

But the demand for video content extends beyond just our obsession with all-things-Korean. The Latinx streaming platform Pantaya exceeded its growth forecast when it hit 500,000

subscriptions last year, prompting the brand to ramp up its original programming. The oldschool Indian video company Eros Now, has attracted over 18.8 million paid subscribers and 155 million users worldwide on its on-demand video platform, which features more than 12,000 Bollywood films, music videos and original content.

This broader range of shows and movies from around the world gives Zs a chance to experience characters and situations unlike what surrounds them-but that they can relate to anyway. Take Netflix's series Money Heist, a popular Spanish-speaking Netflix series but

CITIZEN OF THE WORLD

of Gen Z streamers consider

themselves to be a "citizen of

the world."



GLOBAL REACH

appealing to non-Spanish speakers, thanks to a less subtitle-averse generation. Crunchyroll's anime series Yuri!! On Ice, for example, is about figure skating, but tackles bigger issues of identity. "It's the first anime to have canonically represented LGBTQ+ relationships and characters," says Maya, 15, in Atlanta, Georgia. "It's so relieving to see so many nationalities in one show, not to mention the LGBTQ+ representation in a foreign show. That representation, however, isn't the entire focus of the show-rather a healthy inclusion of minorities. The characters are relatable, and the mental and emotional issues of the main character aren't overly glorified, nor are they belittled." New Zealand filmmaker Taika Waititi's movie Hunt for the Wilderpeople features the tropes of coming-ofage stories but strips them of cliché by setting the film in the New Zealand bush and making the protagonist an urban Maori kid. Then, of course, there's Parasite, which chronicles a poor South Korean family who works for a wealthy family. More than just depicting lives not typically seen on the silver screen, these films also give Zs a glimpse into worlds they didn't know existed. "I thought Parasite was interesting just because it's a new genre of movie

that takes a step away from what is traditionally done," says Nesma, 22, of Brooklyn, NY. "It speaks about income disparity, specifically in South Korea where they have a strong disparity between two groups—which I didn't know about before." >>



"I work in Hollywood and the misrepresentation of Latinxs in the media is a big problem. I always try to watch any film directed by women and Latinxs."

-Gala, 26, Los Angeles, CA

NICHE **INTERESTS**



For Gen Zs, niche content reigns supreme. Bizarre passion points, one-off genres and anything left-of-center are prerequisites for a generation of self-proclaimed weirdos. Not only does niche content allow Zs to dive deeper into their long tail of interests, but it also pushes their creative limits and explores rabbit holes of potential interests, something they're tomed to doing digitally. After all, as of 2019, there were already 31 million channels on YouTube, which marks a 25%

uptick in choice from just the year prior. Just take it from Jorge, 17, in Albuquerque, NM: "Let's say I had all the time to watch TV. I would go down a rabbit hole of exploration because I hate living on the surface level of any topic. I would spend all my time looking and critiquing all the shows I've chosen, possibly accumulating a more refined taste in quality and type of media that would fit me best."

The ways in which this attraction to the niche, weird and one-off is manifesting in Gen Z's interests-and how social media is fueling these interests-has already been well-documented. Young bird watchers, for example, are taking up the classic pastime more often associated with gray-haired retirees and giving it a Gen Z spin by forming feel-good online

"On YouTube, I watch K-pop videos on channels like Jamjamj and Kpoptrash. I spend a lot of time gushing over performances on the MNET channel, and learning dances from Lisa Rhee. I also watch horror gameplays by CoryxKenshin and jacksepticeye."

-Maya, 15, Atlanta, GA

communities to share their sightings and experiences. "Amusingly, most of it happens on Twitter," according to The New York Times, "where birders pledge allegiance to certain species in their bios and discuss rare species with some of the world's foremost experts." Then there are the mushrooms hunters, who have taken up the old-world practice of fungi foraging, or the puzzle enthusiasts, who have transformed a boring family activity into a social trend—on Instagram, hashtags like #jigsawpuzzles and #puzzlesofinstagram have tens of thousands of posts and TikTokers and YouTubers post time-lapses of themselves assembling intricate jigsaws. Even something as niche as #spooncarving has almost 35K posts on Instagram. The list goes on. ▶



MEET YOUR MATCH

With culture fragmenting, Zs are looking for content that matches their specific—and increasingly particular interests. Here are some shows that fit that narrow mold.

Altered Carbon

A futuristic cyberpunk saga, Altered Carbon tells the story of a man trying to solve a murder mystery in a world where consciousness can be transferred to different bodies. "This show was the perfect pick for me because it fit all of my expectations," Jorge, 17, in Albuquerque, NM told us. "It's a Clue-like, cyberpunk, action, adventure show."

Normal People

Based on Sally Rooney's New York Times best-selling novel, Normal People tracks the tender but complicated relationship of Marianne and Connell from the end of their school days in a small-town in West Ireland to their undergraduate years and beyond in this deeply real and emotional story.



With Zs owning their obscurities, it's only natural that this ethos would extend to their TV preferences, too. When asked why they like to have an abundance of streaming choices, Gen Z's top answer was, "I tend to be very picky, or have very niche interests, so I need to cast a wide net to find something I like." What's more, Zs were 19% more likely to say this than millennial or Gen X streamers. Even sports are finding their way into this new need for the nichewhile big networks would never air arm-wrestling competitions or karate tournaments, digital platforms are more than happy to give them a shot, giving long-ignored athletics a new level of exposure and fandom. Comedians, too, are crafting their tight tens for specific crowds. In his Netflix special, Standup for Drummers, Fred Armisen made esoteric jokes about drumming to an audience made up exclusively of drummers. And Hulu's documentary, We are Freestyle Love Supreme explores Lin Manuel Miranda's hip-hop improv group. If you need more proof that niche reigns supreme, look no further than the widespread popularity of Netflix's docuseries Tiger King (a murder mystery about a gay exotic cat conservationist in Middle America? Pass the niche sauce, please);

HBO's McMillions, a docuseries about the security officer who stole millions of dollars by rigging the McDonald's Monopoly game promotion: and Cheer, which offers a window into the weird world of competitive cheerleading. "The docuseries Cheer on Netflix is my favorite thing I have watched recently. I kept saving out loud while watching "you can't write this," says Corinne, 23, of Brooklyn, NY. "It is a snapshot of such a specific culture in conservative Texas. There is so much to talk about and discuss." ▶

CHOICES

55%

of Gen Z streamers watch at least one show that they say others would find niche, or obscure.



CALL TO ACTION



Shows and movies for the teens of yesteryear rarely touched on politics or large, global injustices, save it for cafeteria table feuds, burn-books, and the occasional "ABC Afterschool Special" addressing peer pressure. Now, Gen Zs are gravitating toward content that directly grapples with big issues facing society, such as discrimination, police brutality, and sexual consent (to name a few). This is because purpose and politics are core to this generation's identity. Most recently, Gen Z has been at the forefront of anti-racism and anti-police-brutality movements sparked by George Floyd's death. Business Insider teamed up with the social networking app Yubo and the online learning platform

StuDocu to conduct a poll of US-based Gen Zs and found that 88% of respondents believe Black Americans are treated differently than others. Nearly 90% of those who responded also report that they support the Black Lives Matter organization. They express a need for anti-racism education and support equality for Black Americans. Gen Z, a generation defined by conflict, is reacting, internalizing, and leading the latest historic events surrounding race and equality. According to *Teen Vogue*, Gen Z is the most progressive and least partisan generation to date—and that's not just a matter of opinion. Their deep care for what they believe in pops not only in pop culture (think:

politically infused rap, should all be feminists" t-shirts, cause-inspired nail art, and more) but also in conversation ("I am passionate about economic injustice in America, primarily due to the misconceptions and misrepresented facts that arise around upward progression, where in many cases the success stories are largely helped by wealthy upbringings or financial support," says Sam, 16, of Denver, CO). And statistically speaking, Zs are twice as likely to say they care about certain issues. like sexual consent (22% vs. 12% of non-Zs) and LGBTQ+ rights (18% vs. 9% non-Zs), and over-indexed their non-Z peers on a full half of issues we surveyed on. "My generation is outspoken, engaged, open-minded and determined," Deb, 25, told us. "If something bothers us (me included), we



speak out and up for the people around us. We are also very engaged. We are the observers, which could come off as excessive or extreme, but we genuinely are concerned and care."

As such, there's a growing demand for content that hits on heavy topics and allows Zs to

get informed and refine their take on where they stand. And who better to lead the way than Gen Z's most ardent activist, Greta Thunberg? The Hulu Original documentary, I Am Greta, follows the teen climate advocate's path, from the school strike she began in August 2018 to protests across the globe as she speaks out in the name of the Earth. Or take Hillary, which, more than just documenting the former First Lady and Secretary of State's political path, considers a key issue: Can a woman actually become president? Then there's Crime + Punishment, which tackles New York City's illegal policing quotas and the struggle of the young minorities they targeted. And Untouchable goes deep into the story of the

"If something bothers us (me included), we speak out and up for the people around us."—Deb, 25, Dallas, TX

Harvey Weinstein scandal, giving a voice to Weinstein's former colleagues and victims. A different class of teen celebrity is also creating their own activist content—TikTok stars. With brutal memes that reflect Z's dark humor, the teens of TikTok have turned their micro-video expertise toward school shootings, showing the frustration and anxiety of a generation shaped by gun violence. Even dating has gotten #woke: according to Tinder's 2019 Year in Swipe report, users between the ages of 18 and 24—which makes up the majority of the app's users—were 66% more likely than millennials to mention issues like climate change, gun control, or social justice in their bios.



The Hulu Original documentary, I Am Greta, follows teenage climate activist Greta Thunberg in her moving fight to end climate change.



"Our generation is constantly laughing at our own struggle. We're self-deprecating, confident, creative, socially aware, and politically engaged."—Kelly, 23, Brooklyn, NY

Zs are ready to fight for the cause and actively seek content that not only tackles issues facing their generation, but also pushes their range. The Hate U Give follows Starr Carter, a young black girl who swings between the poor, mostly black neighborhood where she lives and the wealthy, mostly white prep school that she attends-a balance that is shattered when she witnesses the fatal shooting of her best friend at the hands of a police officer. "I watched The Hate U Give about a month ago, and I could barely make it through the whole movie because I cried so much," Maya, 15, in Atlanta, GA, told us. "As a person of color, with a black father, I couldn't restrain tears with how much I empathize with Starr. I felt everything Starr felt-from anger to misery to relief to indignance." Woke, a Hulu Original, follows the storyline inspired by Keith Knight's personal experiences with racial profiling and showcases how black culture influenced his work.

Mrs. America, on the other hand, creates a fictionalized version of the movement to ratify the Equal Rights Amendment and second-wave feminism in the 1970s. Little Fires Everywhere tackles issues of race and class. That may sound like some dark and serious fodder for young people, who are often thought to be more concerned with popularity than over-population. But with Zs increasingly cognizant of where they fit in the world, pulling back the curtain on the struggles of society is not only deeply important, but deeply entertaining too. "Our generation is constantly laughing at our own struggle," says Kelly, 23, of Brooklyn, NY. "We're self-deprecating, confident, creative, socially aware, and politically engaged." Gen Z is the most global, diverse, and arguably purposeful generation to date. They are pushing entertainment boundaries and see content as an outlet to reshape culture, rethink tradition, and truly expand upon themselves. ■



METHODOLOGY



To explore Generation Stream, Hulu partnered with Culture Co-op and utilized the following combination of qualitative and quantitative research approaches.

CULTURE CO-OP hulu

Trend Exploration

Leveraged Culture Co-op's trend research and Hulu's existing data to understand Generation Stream at a high level.

Culturesetter Projects

In-depth projects on TV and movie streaming preferences and behaviors among 20 diverse "Culturesetters," a handpicked group of individuals at the forefront of culture, ages 16 to 44, who only or mostly stream their video content. Culturesetters reflected 12 U.S. markets including New York/Brooklyn, NY; Washington, DC; Burlington, VT; Denver, CO; Iowa City, IA; Atlanta, GA; New Orleans, LA; Dallas, TX; Albuquerque, NM; Los Angeles, CA; San Francisco/Oakland, CA; and Seattle, WA.

Expert Interviews

Interviews with entertainment, tech and generational insiders on the future of streaming and entertainment.

Nationally Representative Study

A 25-minute online study among 2,500 Gen Zs, millennials and Gen Xers, representative of Americans ages 13-to-54, fielded in April 2020.



