

Generation STREAM



hulu

Generation STREAM

Vol. 01

Understanding the viewers
reshaping how we watch TV.

hulu



Generation Stream is Hulu's commitment to deeply understanding the power and impact of the streaming movement and the next generation of TV viewers. Through extensive trend research, informational interviews with "Culturesetters" and industry experts, as well as a nationally representative survey, Generation Stream provides an insightful and fresh look at the current and future state of Streaming TV.

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Classic Streaming
Curated Streaming
Indulgent Streaming

Shaping what the world will watch next, Generation Stream crosses all corners of culture, spans generations, and sets the bar high for the evolution of TV and film. But not all streaming experiences are alike, as different experiences appeal to different demographics, psychographics, and moods of the viewer.

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Bingeing is the #1 way 13-to-54-year-olds say their TV viewing experience has changed. Content is no longer confined to timetables or traditional genres—there is more to explore, watch, and indulge in than ever before.

UNPACKING THE STREAMING EXPERIENCE

Shaping what the world will watch next, Generation Stream crosses all corners of culture, spans generations, and sets the bar high for the evolution of TV and film. But not all streaming experiences are alike, as different experiences appeal to different demographics, psychographics, and moods of the viewer.



Meet the audience shaping what the world will watch next.



Made up of a mix of those who only stream and those who stream alongside watching traditional TV, Generation Stream crosses all corners of culture, spans generations, and sets the bar (high!) for the evolution of TV and film. However, this entertainment majority is anything but a singular block; their diverse streaming experiences tell a powerful story of how what we watch reflects cultural shifts, life stages, daily patterns, and even our deepest selves.

Remember TGIF, ABC's legendary Friday night line-up of 90s sitcoms like *Full House*, *Family Matters* and *Perfect Strangers*? Thirty years ago, when Gen Xers were teens and millennials weren't yet a thing, TGIF was a programming block that defined how we watched television: all together, at set times, and in tried-and-true formats. We tuned in weekly, watched one season at a time, loathed reruns, and regrouped around watercoolers. Dances (the Urkel, the Carlton, the Elaine, the Super

Bowl Shuffle), commercials (California Raisins, "Where's the Beef?", the Energizer Bunny) and catchphrases ("How rude!", "How YOU Doin'?", "That's what she said") seeped seamlessly into our cultural lexicon. While a certain nostalgia for this time exists—nearly half (49%) of us admit we miss those watercooler convos—few of us have stuck with the old TV program. Instead, digital killed the *TV Guide*, and the diversity and personalization of streaming now reign king. Backing this up, 90% of Americans 13-to-54 have made the shift to streaming (see *Generation Stream by the Numbers*), a statistic that won't surprise any of us who spent the weekend plowing through *Little Fires Everywhere*, *Unorthodox*, *The Sopranos*, 90s rom-coms or *Teen Titans Go!* (for younger streamers, of course). For most of us, the shift to streaming has been profound. Nick, 30, of San Francisco reflected, "The downtime of television has been removed. You can watch 10 hours

of your favorite show and never feel distracted. You can build your own bathroom breaks. You can make space in your brain to binge.” Just take the experience of watching *Friends* now versus then. “In 2001, bingeing *Friends* on TBS was painful,” Nick recalls. “If you could survive, you had a sickly superpower and you should’ve been teaching meditation at Esalen.” While Nick is squarely part of the millennial generation, a generation that remembers analog television, the youngest generation of viewers—aka Gen Z—don’t. For them, linear TV is a tale from the pre-digital days they never knew, similar to those stories of parents who walked uphill to school (both ways, in the snow). The point is Zs never knew a time when content wasn’t limitless and on demand, and the rest of us are happy to leave those awkward years behind.

We’ve dubbed this new generation of content streamers, aptly, “Generation Stream.” Taken together, Generation Stream is more than just a demographic, psychographic, or audience segment—it represents a multi-generational movement that is entirely reinventing how, what, where, and when we watch. While this movement has emerged seemingly overnight (we’d pin it more precisely to 2013, when seasons were dropped in one fell swoop and binge-watching was born), it will shape our entertainment experiences and expectations for decades to come. ►



“Having access to old and new shows makes me happy. I can go as fast or as slow as I want when watching a show. I love being able to limit or excessively watch one show or three shows in a few sittings.” —Deb, 25, Dallas, TX

91%

91% of Generation Stream would give up their music streaming service, their social media, their favorite food, favorite fashion item, and favorite brand before they gave up their video streaming service. In fact, the only thing other than video streaming they aren’t willing to give up is their hair.

GENERATION STREAM BY THE NUMBERS

Generation Stream is comprised of the 90% of 13-to-54-year-olds in the U.S. who stream video content using one or more streaming services. As the vast majority of Americans, Generation Stream is reflective of the country demographically—it is balanced by generation, age, gender, race, and geography. Generation Stream falls into three types of streamers, defined by how much of a role streaming plays in their TV and movie-viewing experience (see below).

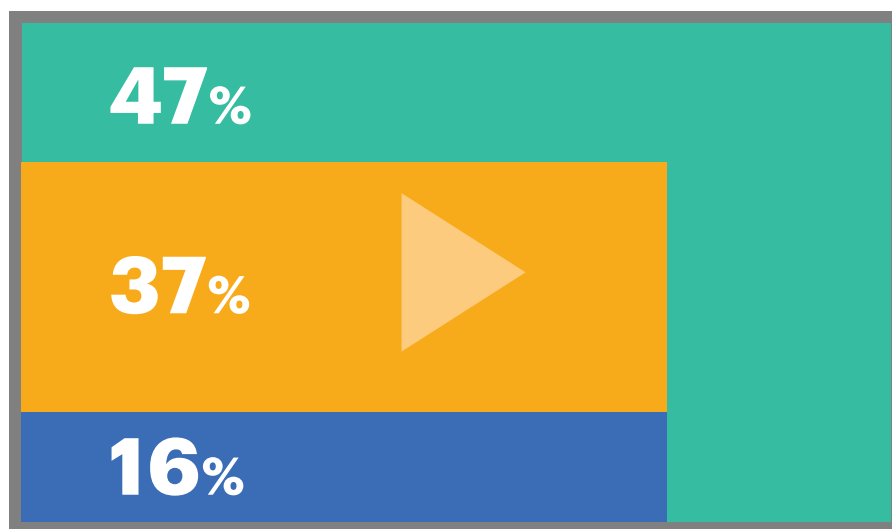
The ripple effect of streaming is as powerful as it is universal: virtually all (95%) of Generation Stream say streaming has changed their viewing experience in at least one way, from being

able to binge content to having more control over their viewing experience to watching niche content. Beyond just shaping Generation Stream's video experiences—but more on that later—streaming has shifted audiences' expectations. Untethered from the 24-hour day, primetime slots, Nielsen ratings, or set commercial breaks, content has newfound wiggle room. Audiences are answering to this creative leeway with expectations for more left-of-center shows, more multidimensional characters, more bingeable seasons and, well, just more: over one-third (35%) of Generation Stream says, because of streaming, they watch

STREAM MOST

STREAM ONLY

STREAM ALSO



▶ STREAM MOST

The most trend-savvy group, these streamers tend to be extroverted entertainment enthusiasts that skew male, multicultural, pop culture-savvy, and Gen Z.

▶ STREAM ONLY

Typically more introverted and open-minded, these streamers are more likely to be female solo-watchers and span multiple generations.

▶ STREAM ALSO

Older, less trend-forward streamers who are more likely to have children, established jobs, and consider themselves brand-loyal.



more content than they did before, making it a top 3 way in which streaming has shifted their viewing behavior (see The Network Effect). This increased demand for content—supported by the streaming platforms like Hulu that serve it up—has deepened the pipeline for diverse, creative talent, both behind the camera and on the screen. Just take *Pen15*. This cringe-worthy comedy follows two 30-somethings playing tween versions of themselves as they navigate middle school in the early 2000's and give an uncomfortable window into life as a 13-year-old girl—puberty, sexual discovery, AOL Chat Rooms, and all. Backing up this trend towards more creative content, Julie DeTraglia, Head of Research & Insights at Hulu, predicts, “I think there’s going to be a lot more experimentation with the types of content. We’re no longer locked into an hour or a half hour, a comedy or a drama.” Already, 70% of Generation Stream—and three-quarters (73%) of Hulu subscribers—watch at least one show that they say others would find niche or obscure. For the vast majority of us—and particularly Gen Zs, self-described as “commonly uncommon”—creative experimentation is a good thing. ►

THE NETWORK EFFECT

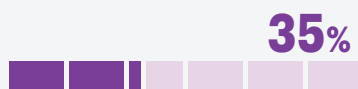
65% of Generation Stream agrees that the networks that television and movies come from matter less, and **95%** say the rise of streaming services has changed the way they watch content in at least one way. Here are the ways that the demise of traditional TV networks has given rise to new viewing behaviors, trends, audience types, and content expectations.



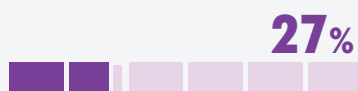
I **binge-watch** TV series, which is something I couldn't do before.



I have **more control** over my TV viewing experience.



I watch **more content** now than I used to.



I have an **ad-free** viewing experience now.



I watch on my **laptop or phone** rather than on traditional TV.



I watch **more niche content** now.

THE STREAMING EXPERIENCE



While streaming has become America's entertainment go-to, not all streaming experiences are alike: while the through line is watching what we want, when, where, and how we want it (commercials optional), there's more to streaming than just that. In our conversations with culture-forward streamers across the country, backed by a 2,500-person nationally representative survey, we pinpointed four unique streaming experiences:

Classic Streaming, Therapeutic Streaming, Indulgent Streaming, and Curated Streaming. Rather than static experiences, linked to certain "types" of viewers, these experiences are dynamic by design, meaning one viewer often dabbles in different experiences depending upon the moment, their mood, their surroundings, and more. Key to these four entertainment experiences are two significant viewing behaviors, or preferences, that operate on a continuum: **the intensity of the viewing experience and the viewing community.**

Viewing Intensity and Viewing Community

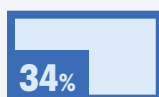


STREAMING EXPERIENCE METRICS

Streaming experiences were identified based on two key metrics: intensity and community. Each of these metrics operates on a continuum, but for the purposes of this study and simplicity's sake, we classified Generation Stream's experiences as either one, or the other.

QUESTION:

For each of the following statement pairs, select the one that best describes how you prefer to watch TV shows and movies.

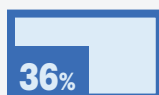


INTENSITY FACTOR

Lean Forward: When I'm watching, I am fully immersed and/or actively thinking about the show I am watching.



Lean Back: When I'm watching, I'm chilling out. TV helps me relax and unwind—it's not an intense experience for me.



COMMUNITY FACTOR

Social: For me, TV and movies are a social experience. I like watching shows with others, or talking with others about them afterwards.



Solo: For me, TV and movies are personal experiences. I prefer just watching what I like; watching with others or connecting with them about the shows isn't that important to me.

Viewing Intensity

First, we measured the intensity of the viewing experience on a "lean forward" versus "lean back" metric (see Streaming Experience Metrics). Simply put, how engaged or serious were viewers about what they watched? For example, in talking about her addiction to *NCIS*, Deb, 25, of Dallas, TX, explained, "I watch *NCIS* 5 days a week at least 3 hours a day. I get so involved in solving the cases and characters it's unbelievable. I purposely do not watch some shows when they air to binge-watch them." Like Deb, Drew, 23, of Brooklyn, also gravitates to high-intensity viewing experiences—albeit not of the same binge-variety as Deb. He explains, "Sitting down to watch something is a very important time for me and, if I've decided to watch something, 90% of the time I'm

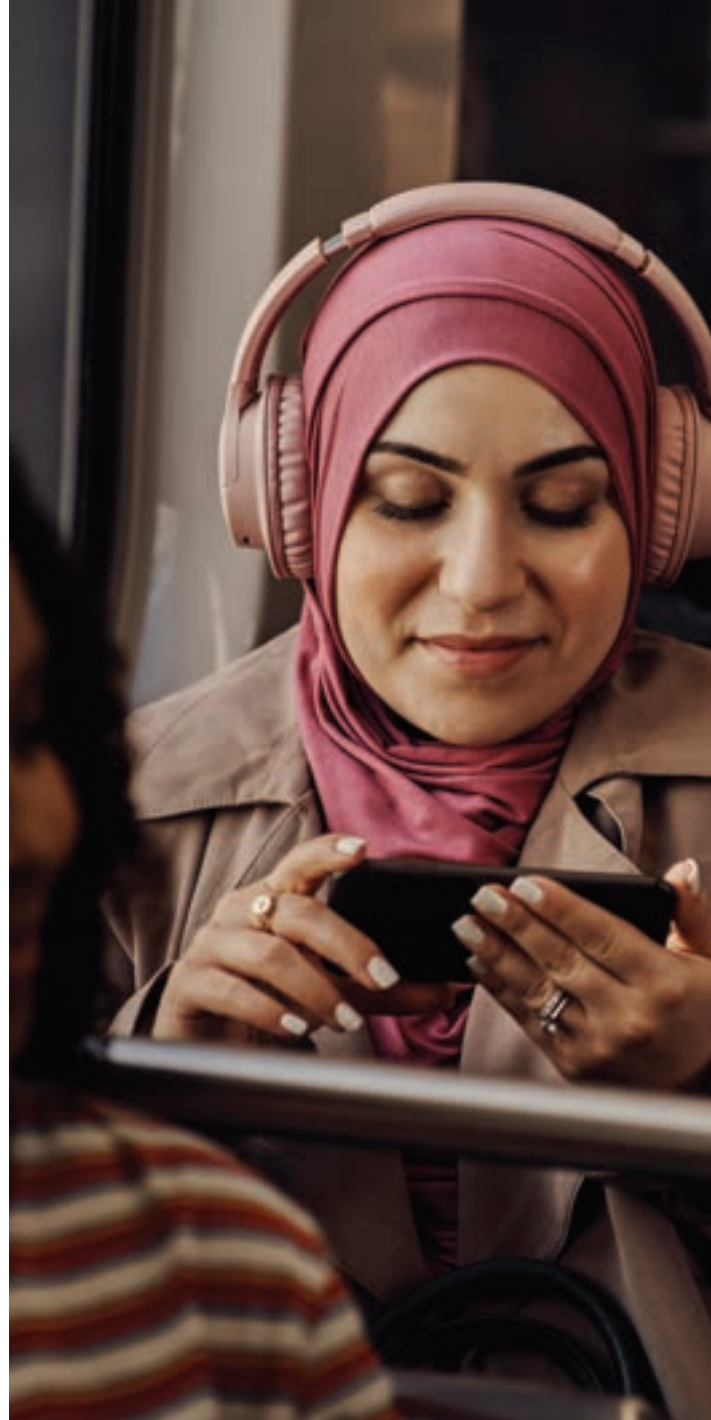
watching for a specific reason e.g. I want to learn about that director, actor, photographer, or writer. I'm rarely just watching something because so and so told me to." This type of 'lean forward' behavior, whether it was more indulgent (Deb) or more intellectual (Drew), fell to the right of our Streaming Experience continuum. On the opposite end of the intensity continuum was 'lean back' viewing, where viewers wanted to relax, chill out and unwind. For example, Tim, 33, a father of two from Seattle, often watches TV as part of his routine—closure to the end of the day and a chance to connect with his wife. "In recent times, watching an episode of a show each night has become very important to me and is a consistent part of mine and my wife's

routine,” he explains. “After putting the children to bed, we make tea, talk for a while and then we watch our show. This is our time to reset after the day. It is our most important time. It is when we are together.” Whereas Tim’s inclination to chill out is linked to his family-centric life stage, Nikol, 30, from Brooklyn, seeks out easy, familiar content as a way to escape from intense moments in her life. In her words, “I keep going back to old staples that are comforting like *Mad Men*, *30 Rock*, and *Schitt’s Creek*. I’ve been experiencing a high level of anxiety and just needed to watch familiar, funny shows.”

Viewing Community

In addition to intensity, we found that community—i.e. social viewing experiences—was a key differentiator in viewers’ Streaming Experiences. Whether socialization was IRL (i.e. watching the season finale of *The Bachelor* with roommates) or online (dissecting the characters in *The Handmaid’s Tale* on a social media forum post-show), viewers tended to either gravitate to social experiences, or preferred flying solo. The latter is true of Deb on her borderline addiction to *NCIS*. On why she watches the series alone, Deb puts it bluntly: “I watch it alone to save myself the embarrassment [of being so involved in the series].” Nikol, 30, of Brooklyn, on the other hand, watches alone as a form of relaxation. “I usually have *Schitt’s Creek* playing in the background... I’ve watched it so many times it’s extremely comforting and makes me feel happy. It’s like a warm hug!” On the social side of the spectrum, Fiona, 19, a rising junior at George Washington University, prioritizes shows she can watch with her roommates: “I have less time to stream now, so

“I stream with friends to build more social bonds while at school.” —Fiona, 19, Washington DC



when I do, I want it to be fully worth my time, so I stream with friends to build more social bonds while at school.” Of course, social media also plays a large role in our entertainment experiences and this is something Nick, 30, of San Francisco, seeks out. “Most of my streaming choices have a strong social element,” he told us about his digital entertainment community. “I want to discuss it with my friends and hear their thoughts as though we’re in a book club. A show club. I don’t want to feel left out from these conversations.”

Married together, these four metrics created a quadrant of unique Streaming Experiences. It’s important to note that these are *experiences*—not segments of viewers

(though, as pointed out below, certain demographics and psychographics do tend to skew to one experience or another). While Tim, for example, likes unwinding with his wife at night with shows like *Barry* (Classic Streaming) his favorite recent show was HBO’s *Chernobyl*, which falls into the Curated Streaming Experience. And back to Deb: In addition to obsessing over *NCIS* (Indulgent Streaming), she also appreciates less intense, Therapeutic Streaming Experiences. “I will not watch anything scary and I do not like to dive into historical times. I find it to be draining.” The point is, one viewing experience doesn’t fit all...and viewers don’t fit neatly into singular experiences. ►

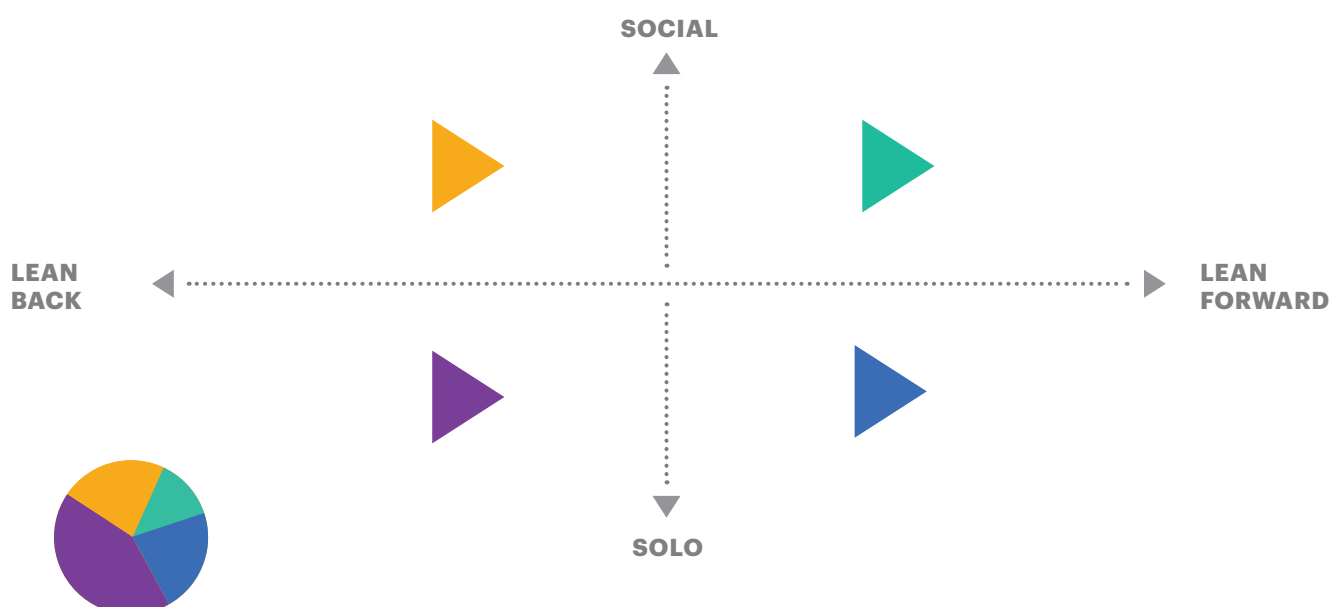
“I want to discuss it with my friends and hear their thoughts as though we’re in a book club. A show club. I don’t want to feel left out from these conversations.”

—Nick, 30, San Francisco, CA



THE FOUR STREAMING EXPERIENCES

Not all streaming experiences are alike, as different experiences appeal to different demographics, psychographics, and moods of the viewer.



43%

THERAPEUTIC

STREAMING METRICS:
LEAN BACK + SOLO

MOST MAINSTREAM

Streaming that is meditative and therapeutic, this is the type of streaming that reminds them of childhood or helps them (lightly) reflect.

23%

CLASSIC

STREAMING METRICS:
LEAN BACK + SOCIAL

MOST ROUTINE

Streaming in much the same way people watch traditional TV—at set times, with family or friends, and as part of a daily routine. The only difference is that they can do it on demand.

13%

CURATED

STREAMING METRICS:
LEAN FORWARD + SOCIAL

MOST TRENDSETTING

Streaming that centers on carefully selected content that is intelligent, niche, and/or global. More than just entertainment, it's about TV and movies that create cultural conversation with like-minded entertainment enthusiasts.

21%

INDULGENT

STREAMING METRICS:
LEAN FORWARD + SOLO

MOST SPONTANEOUS

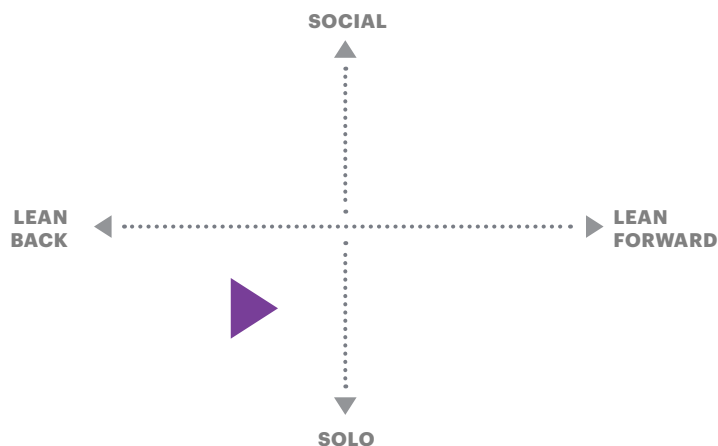
Streaming that is about being fully consumed with shows where viewers have no problem “holing up” for a weekend solo to make it through multiple seasons of their latest obsession. This is the biggest bingeing experience.

Therapeutic Streaming

43%

STREAMING METRICS:
LEAN BACK + SOLO

In these days of unprecedented change, we all need self-care. Enter Therapeutic Streaming, which is meditative, reflective, and just what the doctor ordered in these difficult times when mental health is top of mind, and the urge to slow down and reset is palpable. This is the type of streaming that helps viewers decompress, reminds them of childhood, or helps them (lightly) reflect.



DEMOGRAPHICS

Mainstream: The Streaming Experience most reflective of the national population

18%

more likely than all Streamers to consider themselves "Traditional"

PSYCHOGRAPHICS

Introverted

19%

more likely than Gen Pop to describe themselves as "Introverted"

Homebodies

30%

more likely than Gen Pop to describe themselves as "Homebodies"



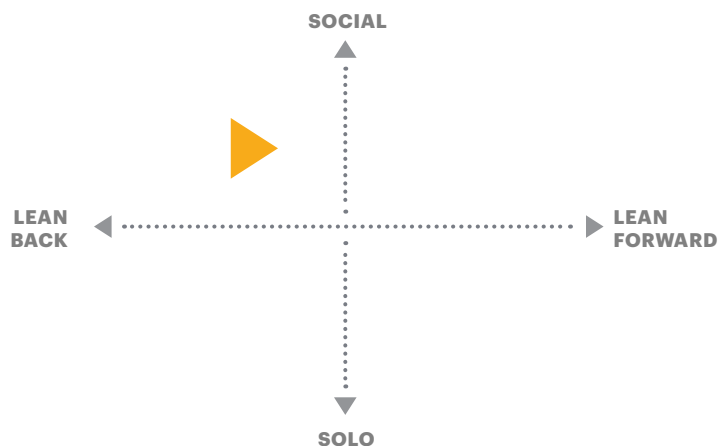
"The amount of streaming video available is sometimes too much to bear ... In these cases, I simply go to a comforting older series or movie I've watched previously." —Seth, 38, New Orleans, LA

Classic Streaming

23%

STREAMING METRICS:
LEAN BACK + SOCIAL

Some things never change, like chilling out on the couch at night with family or friends to watch the latest episode of [you-fill-in-the-blank], albeit digitally. Classic Streaming is the closest streaming experience to watching TV and movies the “old fashioned way”—at set times, with family, friends or a partner, and as part of a daily routine.



DEMOGRAPHICS

Married: +20% more likely than Gen Pop to be married

Affluent: Average income of \$68K/year vs. \$62K/year among Gen Pop

12%

more likely than all Streamers to watch TV and movies with family or friends (64% Classic Streamers vs. 57% Gen Pop)

PSYCHOGRAPHICS

Social

38%

more likely than Gen Pop to describe themselves as “Social”

Recommenders

7%

more likely than Gen Pop to say they recommend shows and brands to friends

“Weekly releases allow shows to stay in [my] consciousness over an extended time period, rather than exploding like a supernova and fading out quickly.” —Jason, 44, Renton, WA

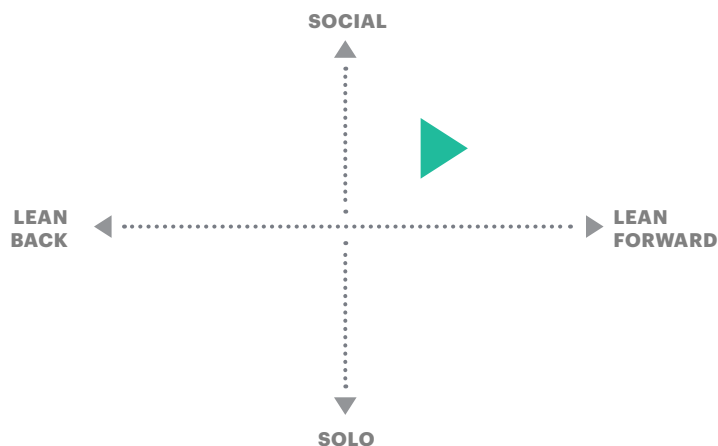
Curated Streaming

13%



STREAMING METRICS:
LEAN FORWARD + SOCIAL

Pop culture always has its trendsetters to cater to, and streaming is no different. Curated Streaming centers on intelligent, niche, and global content; more than just entertainment, it's about shows and movies that create cultural conversation with like-minded entertainment enthusiasts.



DEMOGRAPHICS

Divers: +11% more likely to be non-white than the Gen Pop

Young: +15% more likely to be part of Gen Z than the Gen Pop

Gender-Balanced: Equally male/female

71%

more likely to seek out a community of fellow fans to discuss shows or movies (53% Curated Streamers vs. 31% Gen Pop)

PSYCHOGRAPHICS

Pop Culture Influenced

27%

more likely to say they are influenced by pop culture than Gen Pop

Digitally Influenced

42%

more likely to follow influencers online than Gen Pop

“Now we can be even more connected with the rest of the world. When I was traveling in Argentina, I talked about a Spanish TV show with Argentineans who also watched it because of their access to [streaming].” —Gala, 26, Los Angeles, CA

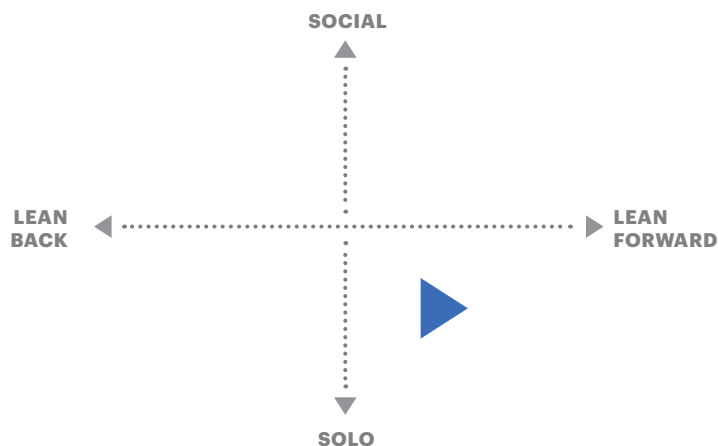
Indulgent Streaming

21%



STREAMING METRICS: LEAN FORWARD + SOLO

Calling all bingers (you know who you are)! Indulgent Streaming is about being fully consumed with shows. Viewers have no problem “holing up” for a weekend solo to make it through multiple seasons of their latest obsession.



DEMOGRAPHICS

Solo-Dweller: +18% more likely than Gen Pop to live alone

Older: +15% more likely than Gen Pop to be part of Generation X

36%

more likely than all Streamers to admit to being “bingeing addicts” (15% vs. 11%)

PSYCHOGRAPHICS

Intellectual

25%

more likely than Gen Pop to describe themselves as “Intellectual”

Tech-savvy

21%

more likely than Gen Pop to describe themselves as “Tech-savvy”



“The most bingeing I’ve done at once is probably 50 hours. At that point it felt like an addiction ... And now that it’s over, I’m very wary of anything I watch because that was quite the commitment.” —Ben, 32, Seattle, WA



THE TV MULTIVERSE

Generation Stream is creating new “networks” of television—constellations of fandom that reflect personalities and tap into a deep need for human bonding. It’s about more than just watching a show—it’s the community bonds, personal connections, and conversations that extend the TV viewing experience.



Streaming has forever changed our relationship with traditional network TV.

95% of Generation Stream say streaming has changed the way they watch: from watching more content to watching niche content to being able to binge multiple seasons at a time. But as we've shifted from revolving around one prime-time sun to each having our own content "north stars," we're feeling a little out of orbit.

We have infinite choice, but fewer people to share these choices with. "It used to be that we all tuned in to watch *Friends*, *Family Guy*, even *LOST*. Then, we would discuss our favorite moments or jokes from the episode," Adam,

30, of LA, told us. "Nowadays, I feel excited and connected when I find out that someone watches *Big Mouth* or *Succession*. It feels like we are somehow connected, that our niche tastes have aligned and now we share something obscure in common." Adam's not alone. Generation Stream is creating new "networks" of television—constellations of fandom built from the ground up. These new networks are as much about a deep need for human bonding as they are about what's on TV.

In the beginning, there were the Big Three—CBS, NBC, and ABC—and all of America

95%

of Generation Stream say streaming has changed the way they watch TV.



“The more that we can create real conversation and community, I think the better we'll be.”

—Larz, 25, Brooklyn, NY

49%



of Generation Stream say
they miss those collective water
cooler conversations.

tuned in to watch the nightly roster. Now, the average household gets almost 200 channels—and that's just counting linear television. With original content coming from every corner of the internet, it's never been more possible to go down the TV rabbit hole and come out with titles as niche as Netflix's *Peaky Blinders*, Hulu's *Big Time Adolescence*, or YouTube's *Wisecrack*. And while that means finding a show that fits your exact taste is as easy as opening your laptop, it also means that the water cooler conversations about last night's episode have all but disappeared. And while the water cooler may be an outdated concept, that connection isn't—nearly half (49%) of Generation Stream say they miss those collective conversations. “It can be very disconnecting to just be in your room watching a show,” says Larz, 25, of Brooklyn. “The more that we can create real conversation and community, I think the better we'll be.”

Sure, fandom has long taken forms beyond that proverbial water cooler, from Comic Cons to FanFiction to petitions to bring favorite shows back. But today's constellation communities are taking connection over content a step further by tapping into deeper human needs—and forming factions around them. Whether it's *Rick & Morty* chat rooms, *The Office* podcasts, or viral memes, people are finding bespoke forms of connection—and that's what really matters.

“When you discover that someone else likes one of ‘your shows,’ you feel intrinsically connected,” Adam says. “I think television is such a commitment in the wake of all this content that it's become akin to finding out someone else really loves model train building. It genuinely feels like a part of your life and your identity. These shows are appendages of our own personalities, our affinity for them reflects our personality on some level.” ►



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Meme Scene

Memes are a new social currency and provide an outlet for humor and levity to cope and connect with others.

ASPIRATION

CATHARTIC CONNECTIONS

56%

of streamers agree, “Keeping up with popular TV shows and movies is a form of social currency that allows me to be part of cultural conversation.”

Podcasts & Crews

Podcasts are the new spin-offs of TV, allowing conversations to continue long after the season (or show) ends, creating highly personalized communities.

ASPIRATION

NOSTALGIA AND COMMUNITY BUILDING

46%

of streamers are actively part of a community, either IRL or online, that discusses their favorite TV shows and films.

Otherhoods

Communities formed around niche content interests—a way for viewers to find and connect with like-minded fans over unique passions.

ASPIRATION

BONDING OVER NICHE CONTENT

49%

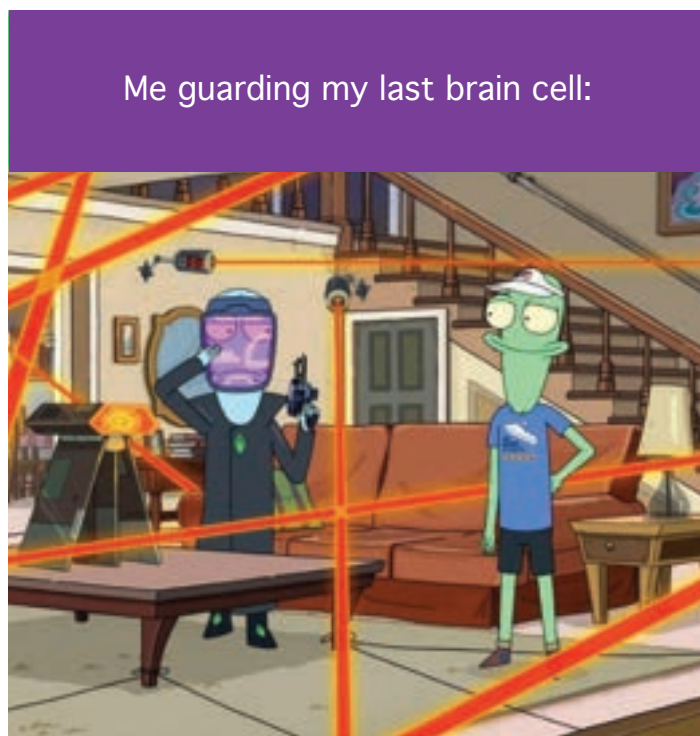
of streamers miss the “water cooler” conversations that used to happen when everyone watched the same shows.

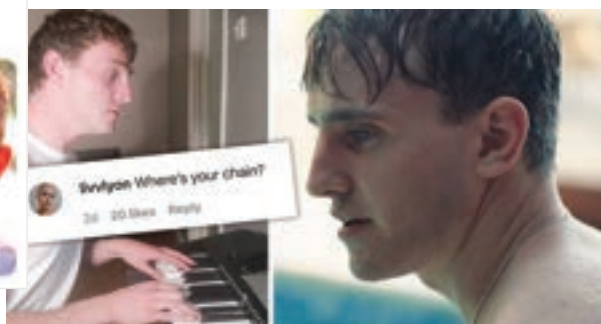
THE MEME SCENE

In the vast and rapid-fire world of the internet, memes have become the new social currency, especially among Gen Z. Appealing to Zers' notoriously dark humor, memes provide an outlet for levity in chaotic times. In other words, memes help us cope and connect with others. These days, general mental health is top-of-mind among streamers and non-streamers alike. When asked to rank the issues most important to streamers and non-streamers, mental health ranked first out of 15 key issues, ranging from climate change to LGBTQ+ rights. And while depression is an issue this generation takes seriously, making light of it is in Gen Z's dark nature—and has become their go-to coping mechanism. Memes tackling topics like depression, debt, and failed relationships abound on Instagram, Reddit, and Twitter meme groups. Research from *The Conversation* even found that people with depression actually prefer memes that relate to their mental health experience over the lighter variety. Memes are also changing the conversation around therapy, and even therapists are catching on, creating memes to help themselves cope with the emotionally taxing nature of their work. In true internet fashion, this has

gotten meta: one meme from TherapyMemeQueen reads, "Therapist: 'And how does that make you feel?' 'I am not very good at describing my emotions, maybe you could just hold up a bunch of meme pictures until I see one that I would normally comment the word 'mood' on?'"

It's safe to say that memes have taken over the internet. They've become one of the leading ways content gets dissected and shared—and that gives TV shows and movies a second (or third or fourth) life. *The Office*, for example, went off the air seven years ago. But in the world of the internet, "you won't need to scroll too far down your feed before you come across one of Dunder Mifflin's disgruntled employees," writes Daniela Cabrera for *Teen Vogue*. The same goes for *Game of Thrones*, *Friends*, *Sex and the City*, and oh so many more. ▶





“If I meet people who also watch *The Real Housewives of New York City*, we automatically have a ‘gif keyboard’ of language in common. We can talk about it in a very familiar way, even if we don’t know each other.”

—Corinne, 23, Brooklyn, NY

TV memes tend to take two forms: memes directly related to the show or those that connect a specific TV show with something broader going on in culture (i.e. comparing the mess of climate change to a still of Peter Weber’s season of *The Bachelor*, a joke you’d only understand if you were in the know on just how much of a mess his season was). This creates levels of fandom that everyone can participate in, from superfans to those who just occasionally tune in.

More than just a laugh, memes have become the conversational nexus: when everyone on Twitter is memeing the latest episode of *Killing Eve*, those not in the know want to join the conversation. In fact, 40% of streamers say they find out about and decide to watch new content based on social media—on which memes are rampant—compared to 28% of non-streamers.

“Memes are what’s influencing me the most to watch TV,” says Ben, 32, of Seattle. “It’s like the internet has all just melted into one consciousness and everyone is pretty much plugged in at this point.”

There’s a next level to all of this. While content shapes memes, the internet has become such a feedback loop that memes are also now shaping the content. Memes are so indicative of a TV show’s success that some creators are framing shots and writing lines with the meme world in mind. Consider *Love Island*, which writer Ellen E. Jones says “has audience engagement written into its DNA. Every episode is crammed with the meme-makers’ raw materials of character confrontation and closeups on expressive faces... and fast-turnaround edits allow producers to double down on whatever’s trending.” ▶

PODCASTS & CREWS

While spin-off shows were historically a way to continue a character's journey and social media created a new layer of spinoff content (see FanFiction and Tumblr), podcasts have opened yet another format for fans to relive a favorite show and continue the spinoff fan dialogue. Podcasting has exploded in popularity in recent years, with the industry expected to reach \$1 billion in revenue by 2021. According to Edison Research and Triton Digital, globally there are now an estimated 800,000 active podcasts with some 54 million individual episodes and 62 million American listeners each week. And while many of these podcasts have nothing to do with TV shows, the two formats

have been intertwined since pods started being cast—a number of successful audio shows have been adapted to TV, including *Dirty John*, *2 Dope Queens*, *Homecoming*, and *Lore*. As Richard Frankel, Global Creative Director of Spotify, put it, "Anything at all that drives conversation in pop culture, and TV does a lot of that, is worthy of consideration in a podcast environment." What's more, streamers are also more likely to be listeners: on an average day, streamers spend 27% more time listening to podcasts than non-streamers, according to our survey, and Hulu subscribers report spending 14% more time listening to podcasts than non-Hulu subscribers. ►

LISTENING TIME

+27%

More time streamers spend listening to podcasts, compared to non-streamers.

+14%

More time Hulu subscribers spend listening to podcasts, compared to non-subscribers.



Making the leap: *2 Dope Queens* went from hit podcast to TV series.

THE TV MULTIVERSE



Podcasts are becoming the new water cooler; they're becoming the meeting grounds where fandom communities can dive deep into the ins-and-outs of their favorite TV shows, whether they've got the primetime slot or not. *The Office*-centric podcast *Office Ladies*, for example, launched five years after the show went off the air—and shot to the number one slot on the Apple podcast charts the day it launched. Made for *The Office* superfans, the hosts go down the rabbit hole of one facet of the show in each episode, gleefully taking the fandom community down with them. *Buffering the Vampire Slayer* follows a similar premise, revisiting an even more off-the-airwaves cult series. While these podcasts hold a nostalgic appeal and allow fans to stay connected to characters that feel like old friends, other podcasts offer a

more immediate fix for fans wanting to process an on-screen breakup, make up, or twist in real-time. *The Good Place: The Podcast* offers fans behind-the-scenes stories and up-to-date insights about the show (Ted Danson's dance moves and all); and *Here To Make Friends - A Bachelor Recap Show* is exactly what it sounds like. For streamers, having a place to connect once the episode, or season, ends not only gives them a favorite-show fix after the credits roll, it also offers them a more intimate connection to the community than that of memes, where virtually anyone can join in. Listeners need to know the ins and outs of the shows to appreciate the podcast. Furthermore, they often report feeling a personal connection to the host, strengthening and deepening the community bond. ►

OTHERHOODS

Log on to Adult Swim's *Rick and Morty* Marathon Channel day or night and you'll find two things: a nonstop stream of live *Rick and Morty* episodes and a chat room full of *Rick and Morty* superfans talking about anything under the sun. (On a casual Monday evening, we found a group of fans discussing their hometowns and the importance of hydrating.) The Marathon Channel is a perfect example of fandom connection in the digital age—communities formed on platforms may have initially been built around specific or niche interests (*Rick and Morty*, say) but the bond formed between members grows beyond that initial connection point. The Marathon Channel is no longer about one TV show; it's about fans finding their odd-ball posse in a disconnected world.

While there are many ways to connect in the digital realm, interactive viewing—that is, watching alone, together—is not only most like old-school viewing parties, it's also one of the most popular ways for fandoms to congregate. In fact, 32% of streamers say watching shows or movies with others and having a community of fellow fans is very important to them, while 59% of streamers say they are part of an online community that is specific to a passion of theirs—20% more than non-streamers. Online communities are even more central for Hulu viewers: 62% say they are part of an online community that is specific to a passion. Hulu recently answered this call for community with the launch of its Watch Party feature, which allows viewers to virtually watch and chat about Hulu shows while in separate locations, making Hulu one of the first major streaming services to offer co-watching directly on its site. "People don't want to watch things by themselves," says Jonathan Miranda, Emerging Strategy Principal at Salesforce and content futurist. "It's not how human beings are wired. There's a broader need to connect with individuals." ►



ABOVE:
Rick And Morty

59%

of streamers say they are
part of an online community
that is specific to a passion
of theirs—20% more than
non-streamers.

This connection is particularly prevalent on the game-streaming platform Twitch. While gamers log on to watch like-minded people play their favorite video games, most people now stick around to just chat. The platform's "Just Chatting" feature is now its most popular. In fact, in December 2019, Twitch viewers watched 81 million hours of "Just Chatting," according to stream management site StreamElements—7 million hours more than the first game listed, *League of Legends*, and 23 million more than the second, *Fortnite*. Miranda says Twitch is known for pulling in parallel interests beyond just gaming. "Music is a big community on Twitch and it is common for people to jump into 'chill' music areas and just talk about whatever is going on," he explains. "It's why Twitch is moving to a multiplayer platform, and not just a gaming-focused one, because the community can take the platform where they want it to go." Like TV and film, gaming provides a jumping off point for people to connect—the community evolves well beyond discussing kill ratios, Easter Eggs, and XP levels (though that talk happens, too).

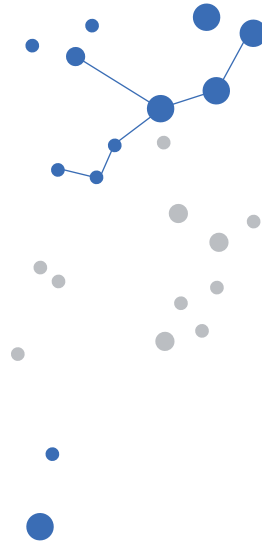
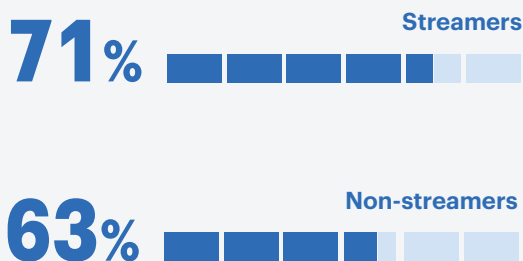
Anime viewing platforms have similarly expanded beyond simply streaming. While they provide a place for fans to chat about anything

inside the anime universe or out, they also provide a creative outlet—most of these platforms have a place for people to share their own manga and anime. Crunchyroll, for example, recently announced its first slate of original shows (becoming the first anime streaming service with its own animation studio), but it also hosts one of the most vibrant and international forums, covering topics well beyond anime like religion, healthcare, and breakfast. Hulu's own lineup of anime has been credited by Thrillist as "a treasure trove of titles" that outperforms its competitors by offering a strong selection of both classic shows (voted 2020's best classic anime streaming service by *PCMag*) and off-the-beaten-path options. According to Android Authority, "It's one of the few streaming services with dubbed *Gundam* shows." Then there are the anime forums specifically for fans of color, for whom making connections in forums is not just about expressing their identity but validating it. "Even though I have a huge love for anime, Black people and people with darker skin tones are very underrepresented in these shows," anime cosplayer Shellanin told Vice. "I figured that when I cosplay, I should make my childhood dreams come true."

It goes without saying that these communities are on the more niche side of the constellation community spectrum, reserved only for those in-the-know (i.e. not just anyone can join into a black anime cosplay community). They are also largely populated by Gen Z. This isn't just because of Z's well-documented digital native heritage; it's also because of their status as citizens of the world. 71% of streamers say they are as in tune with what's happening globally as they are with what's happening in their immediate surroundings compared to 63% of non-streamers. With a worldwide community at their fingertips, how could they not be? ►

TUNED IN GLOBALLY

Percentages of streamers who say they are as in tune with what's happening globally as they are with what's happening in their immediate surroundings.



CRITICS CIRCLE

Outside of the casual, constellation communities forming around television and film are more elite creative circles, comprised of writers, film buffs, aspiring directors, and other professionals squarely anchored in the entertainment community. These Critics Circles, as we're calling them, are leveraging digital to expand conversations, critiques, and creativity well beyond La La Land.

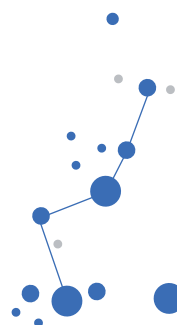
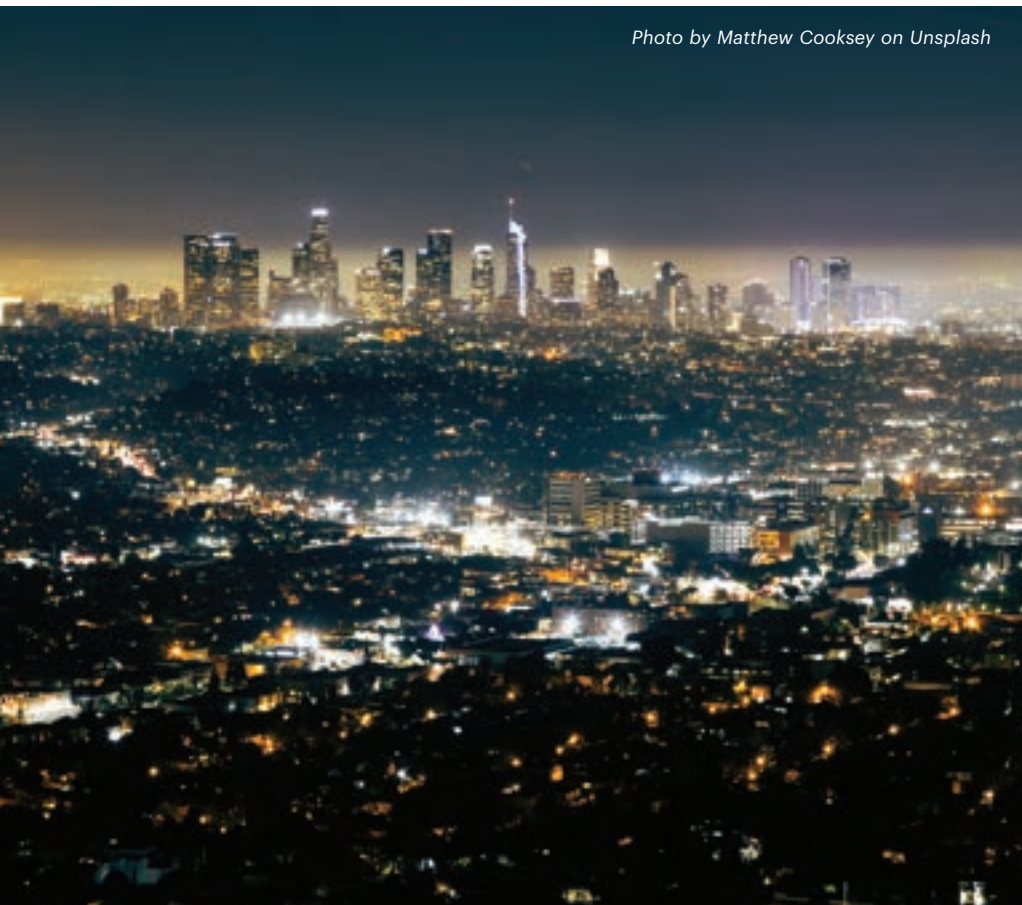
Think of the creative circles of yesteryear and you'll find them centered around one thing: geography. Studio54, Hemingway's Paris, grunge-y Seattle, and, of course, Hollywood. And while young TV- and film-industry hopefuls still flock to Los Angeles looking for their big break, new and perhaps more innovative communities are forming across platforms as a way for folks in film and TV to connect, share ideas,

and—perhaps most importantly—start new entertainment trends. Like virtual clubhouses, the digital pages of Twitter, Vimeo, and less-well-known forums have become filters through which creatives find their like-minded peers.

One of the most popular and prevalent of these circles is the culture-changing world of Joke Twitter, a subset of blue-checked Twitter users that use the platform as their virtual open-mic night—and have risen to notoriety with viral one-liners. Originally a subculture dedicated to text-based joke formats on Reddit, 4chan, and Tumblr, Joke Twitter took off in 2012 through Favstar, an app that tracked tweet popularity and rewarded creators for popular content before the social currency of Twitter's "like" and "retweet" functions were born. This early reward system gave an incentive to amateur comedy

writers to collaborate and create new joke formats. In the process, the subculture grew, cult comedy icons were born, and Joke Twitter essentially took over the internet. Remember those TV show-based memes we talked about? We can thank Joke Twitter for that. But while meme culture participation doesn't require insider status (anyone can share that *Love Island* still), membership to the inner circle of Joke Twitter requires a comedic commitment. ►

Photo by Matthew Cooksey on Unsplash



“I find the general public’s opinion on movies or shows regularly contradicts my own, and so I tend to not listen to ‘amateur critics’ ever.” —Tim, 33, Seattle, WA





Film buffs have also found places to congregate around their shared love of cinema—and their hopes of breaking into the industry. No Film School, for example, is a worldwide community of filmmakers, video producers, and independent creatives who want to learn from each other as they build their careers—no film school re-

quired. Similarly, the forum Indie Talk acts as a gathering place for film lovers to nerd out on everything from gear to new obscure releases. Drew, 23, in New York City, also sees participation in these cinema circles as a way to pay it forward. “I consider myself a part of the *Film Comment* magazine community and the Criterion Channel and Mubi channel communities,” he says. “These communities are extremely important to me because I know that my paying for subscriptions to these publications/channels is keeping the love of cinema alive for me and generations to come.”

But sharing a love of the craft is just one element of the Critics Circle. For many, sharing their creations—and seeing the creations of their peers—is the most important part of

“With Vimeo, users are able to connect with people who share the same passion, acting almost like the LinkedIn of the filmmaking world.” —Lily, 17, Connecticut


these communities. For novice filmmakers, Movie Movies is a place to do just that. At no cost, budding directors can upload and share their films, gaining an audience as well as comments and critiques. This film sharing is also happening on the channels of Vimeo, the filmmaker’s YouTube. “With Vimeo, users are able to connect with people who share the same passion, acting almost like the LinkedIn of the filmmaking world,” says Lily, 17, in Connecticut, who considers Vimeo a significant form of media in her life. “Users can support other filmmakers by browsing their work, following them, and leaving comments below their videos. Sometimes during my free time, I just log on to Vimeo and watch the week’s featured videos.” ■



STREAMS OF CONSCIOUSNESS

Streaming is a self-exploration process for Gen Zs who use content to help define who they are and what they stand for.

Zs see themselves in the complexities of characters' identities, push for cultural connectedness, and seek content that deepens their niche interests.



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. ►



A hulu ORIGINAL
shrill



FX ON hulu
Mrs. America

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

DIVERSITY

60%

of Gen Z streamers say they
straddle multiple races, cultures,
or languages.

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. ►



Photo by Dan Meyers on Unsplash

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 Iowa 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 old-school 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

68%

of Gen Z streamers consider themselves to be a “citizen of the world.”

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-of-age 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 accustomed 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. ►

“I like to explore
sometimes and get
to know myself better
rather than watching
the exact same
thing all the time.”

—Jorge, 17, Albuquerque, NM



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 niche—while 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 saying 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

65%

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

hulu

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, “we 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

Photo by Charles Fair on Unsplash



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 Harvey Weinstein

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

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.

Zs are ready to fight for the cause and

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



hulu DOCUMENTARY
I Am Greta



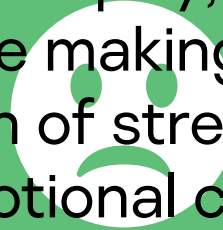
“Our generation is constantly laughing at our own struggle. We’re self-deprecating, confident, creative, socially aware, and politically engaged.” —Kelly, 23, Brooklyn, NY

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. ■



MOODTUBE



Moods, serendipity, and good old-fashioned browsing are making a comeback among a generation of streamers relying more on their emotional compass to carve their entertainment path.





▶ Big data, AI, and targeting tech promise to unlock our taste in entertainment through what we tap, tweet, watch, and rate.

But on the other side of the customization coin is a less algorithmic path to what we're likely to watch next. Moods, serendipity and good old-fashioned browsing are making a comeback among a generation of streamers who rely

more on their emotional compass to carve their entertainment path. More than just a whim, this new emotional "north star" is an entertainment survival mechanism for audiences navigating an unprecedented amount of choice. ▶



THE BITSTREAM



To understand why Generation Stream has gotten “moody” in their entertainment choices, let’s first get down to the brass tacks of just how many more options we have in entertainment today. Since the rise of digital, choice has grown exponentially—in entertainment and in everything. This concept was established nearly 20 years ago by Chris Andersen, then head of *Wired*, in an article-turned-book titled *The Long Tail*, which predicted the fragmentation of entertainment that we’re seeing now. “Forget squeezing millions from a few megahits at the top of the charts,” he wrote. “The future of entertainment is in the millions of niche markets at the shallow

end of the bitstream.” Andersen couldn’t have been more on the money. When asked how streaming has changed their viewing experience, the No. 2 answer for Generation Stream is “There’s more choice, so I watch more content now.” Julie DeTraglia, Head of Research & Insights for Hulu, broke down for us just how much more choice there is today. “In 2019 there were over 500 scripted originals. Going back a few years, it was three or four hundred,” she explained. “Streaming accounts for the lion’s share of this increase. I did the math on it once. If you assume 40 minutes an episode and you started right now, it would take you over five years to finish all of Hulu.” ▶

CHOICE

86%

of streamers do not feel
overwhelmed by the amount of
choice they have on TV.

CHOICE

75%

of streamers say they prefer “lots of
choice” to “less choice.”

Interestingly, audiences *aren't* pumping the brakes—they only want more. 86% of streamers do not feel overwhelmed by the amount of choice they have on TV, and 75% of streamers say they prefer “lots of choice” to “less choice” because they “prefer to be their own content curator.” Similarly, the majority of Generation Stream (57%) agree that “more is more” when it comes to entertainment.

In addition to choice, the rise of digital also brought the need for (and ability to give) more direction. As it tends to do, the internet answered with an evolving range of ways to get to the good stuff quickly: Yelp and Rotten Tomatoes give everyone access to opinions on new eateries and new releases; sophisticated algorithms develop personalized (if not hand-picked) recommendations based on what you've previously watched; and digital influencers pass their preferences on to followers. Now, word-of-mouth has given way to “What to Watch Next,” and niche content has never been more available.

What's more, artificial intelligence promises to predict our preferences with even more precision. Researchers at the University of Texas, for example, have developed an algorithmic DJ that can create on-the-spot playlists based on listeners' moods. Then there's Misü, an opt-in computer app that can tell you which websites are stressing you out by taking photos to discern the moods you are experiencing with each site, and up-and-coming voice-recognition software that can detect depression through vocal cues. Even Amazon is working on an emotion-detecting wearable that could become the 21st century's answer to *How to Win Friends and Influence People*. It will offer suggestions on how to have more successful social interactions. ►



“My wife and I joke about putting a time limit on choosing a movie - if you don't choose in [a certain amount of] time, you can't watch anything.” —Tim, 33, Seattle, WA

But digital recommendations—AI or the OG variety—can only go so far. While admittedly helpful in sifting through an ever-expanding sea of content (Deb, 25, told us, “Suggestions on what to watch limit my frustration with watching television. And in most cases, they do get it right.”), the stream of suggestions has its drawbacks. Jess, 25, in Iowa City, told us that this makes her relationship to suggested content complicated: “Oftentimes, suggested content is relevant to me, and I’m glad to have engaged with it. But, it seems like I usually head towards whatever is trending and most popular with people in my social circles. Which makes me think that we’re all being shepherded towards the same content.” They also can take a good chunk of time to sift through. In *The New York Times* article, “Do Not Trust That Stranger’s 5-Star Review,” author

Joanne Chen points out that “Without [star-rating systems], you’re vulnerable to decision paralysis. But with them, you still can’t shake the feeling that there’s a lot of homework to do — hours of life lost, scrolling through reviews, many of which were written by people who have little to nothing in common with you.” Finally, it’s just difficult to get it right, especially since platforms have a limited view of viewers’ personalities and preferences. Take Seth, 38, in New Orleans, for example. A self-described “two-fer,” Seth is a cis straight male crossdresser who enjoys exploring his feminine side. But this aspect of his identity runs counter to many of his viewing preferences, which include content about the function and mechanics of esoteric firearms as well as documentaries about military history. “My interests are diverse and sometimes at odds with the al-

gorithm a particular platform uses to tailor content towards me,” he says. “I don’t believe that one single thing can define me in any capacity. My existence is nuanced and constantly filled with change and introspection on a daily basis. While my general routine is physically the same, my mental existence within this world is fluid and plastic in nature.” ►

“Suggestions on what to watch limit my frustration with watching television. And in most cases, they do get it right.” —Deb, 25, Dallas, TX



GUT, CHECK!



On the bright side, digitizing our entertainment choices opens up the potential for viewers to discover things they might have skipped before. But there's a downside to this, too: algorithms remove the human element—mood, emotion, and surprise—from the recommendation equation. And these are elements that we are seeking out now more than ever. Take it from Gadi Amit, Founder & CEO of New Deal Design: “If you go to a good restaurant, you don’t always want to see what you’re looking for. You’re looking for surprises. It’s not the expected, it’s the unexpected. You trust in the restaurant’s atmosphere. You don’t know exactly what you’re getting, but you trust their creativity and that you’ll enjoy whatever they serve you.”

As testament to this, when asked how they decide what they are going to watch next, the top answer choice among Generation Stream

(outside of recommendations from friends and family) was that they trust their gut: “It’s random: I just tune into whatever catches my attention.” In fact, half as many streamers turn to recommendation engines (23%) than their gut (45%) for the content they are going to watch next.

“I have a few trusted friends that have opinions I trust [with recommending content], but for the most part I like to be on my own,” Drew, 23, in New York City tells us. “I’ve always had this thought that it’s okay to waste my own time but if someone else wastes it, it is not okay in the slightest. This goes for everything but especially movies and TV.” Furthermore, 61% of Generation Stream—and 65% of Hulu’s audience—think they are pretty good at making their own choices, saying, “I am an entertainment connoisseur—I consider myself to have a very high standard when it comes to entertainment choices.” In fact, the top reasons why they want more entertainment choices are “I am picky, so I like to cast a wide net” and “I appreciate being able to curate my own viewing

“If you go to a good restaurant, you don’t always want to see what you’re looking for. You’re looking for surprises. It’s not the expected, it’s the unexpected. You trust in the restaurant’s atmosphere. You don’t know exactly what you’re getting, but you trust their creativity and that you’ll enjoy whatever they serve you.”

— Gadi Amit, Founder & CEO of New Deal Design



Gadi Amit

experiences”—and part of that has to do with the unreplicable experience of discovery. Hulu’s recent campaign, “Hulu Has Whatever You’re Feeling” is an acknowledgement of just this: it gives a nod to audiences’ feelings as the ultimate recommendation “engine.” The campaign seems to be striking the right emotional chord: since April, it’s been viewed nearly 10 million times on YouTube.

But the desire to lean more into our human nature goes deeper than choosing between *AKA Jane Roe* or *The Bachelor*. As a culture, we’re increasingly turning inward and putting our trust in our emotional compass as we explore and express our emotional range. In fact, 55% of global millennials and Gen Zs say their generation finds camaraderie in sharing deep feelings, according to 2019 data from Spotify’s “Culture Next” report. Culture Co-op’s previous research also found that 87% of young people are nostalgic for at least one aspect of the pre-digital world—real connection instead of swiping right on dating apps, the video store instead of Netflix, and stepping outside to check the weather instead of looking at a screen. That doesn’t mean digital is in danger of a downfall, however, it does mean that Zs and millennials are increasingly seeking out the *real*. According to a study from Live Nation, 73% of 13-to-49-year-olds globally agree with the statement “Now, more than ever, I want to experience real, rather than digital life,” and 66% say they are starving for experiences that put them back in touch with real people and raw emotions.

Underscoring this shift of turning inward is the mental health movement, which has become the number one issue among young people today—as of April 2020, 39% of Generation Stream named it as the top issue facing their generation out of 15 issues, beating out climate change (28%), sexual consent (22%) and LGBTQ+ rights (18%). Culturally, we are more in tune with just how powerful our mental state is in determining, well, everything. Now, Generation Stream—and Zs in particular—value their mental wellness as a key part of who they are: “My mental illness, actually, is one of the things I’m proudest of. I don’t think it’s something to be ashamed of; it’s a part of me,” says Maya, 15, in Atlanta. “It’s awful when my depression or anxiety makes me rethink my worth as a human, but each time I come out alive is another laurel wreath, another victory.” ▶



Photo by
Nathan McDine
on Unsplash

MOODY CUES



When using this new inner emotional compass to navigate entertainment choices, mood is the 'north star.' It is the enigmatic navigational pull that takes us to what we want to do, buy and—yes—watch. As Deb, 25, in Dallas, told us: "My content choice depends on my mood and the amount of time available." And mood can certainly enhance a watching experience. "I do think that there are fun ways to engage on a more emotional level," says Liz Levy, Vice President and Head of Branded Entertainment at Hulu. "In the future, it's going to be like pushing a button on my phone that says, 'Give me the Barry Manilow vibe.' And my whole house and TV and the candles and everything [will turn into that vibe]."

But mood is a two-way street. On the one hand, it directs us to what we want to watch and listen to. But on the other, what we watch and listen to directs our mood—which then directs us to what we want next. And so it goes. As Nick, 30, in San Francisco, told us about Spotify: "They give me access to all of the music I could ever want. They are with me every day. They offer me new music I genuinely enjoy. As if they know me. They set my mood. They make me excited if I'm feeling low and calm me if I'm feeling too high. It's more like music is my favorite brand and Spotify has done the best to prescribe it." This, of course, is no accident. "[At Spotify,] we have 286 million users and each one of them is in a relationship with us," says Richard Frankel, Global Creative Director of Spotify. "We're making suggestions to

THE HULU QUIZ

WHAT SHOULD I WATCH?

As more people have been hunkering down at home during COVID-19, it's no surprise that binge-watching is seeing a serious uptick. Since March, Hulu has seen a 41% increase in binge-watching and, on average, viewers are watching 9 different titles in a given week, a 26% increase compared to last year. To help its subscribers—and non-subscribers—get to the good stuff quicker, Hulu launched a four-question quiz that unleashes a personalized recommendation from 600 movie and TV show titles. Questions rely on Moody Cues, asking viewers whether they are in the mood for something raunchy, an oldie-but-goodie, positive vibes and other questions to suss out their emotions. Even better? If they don't like the first pick, or have already seen it, they can drill down to other options along the same vibe.

them and their data and behaviors are feeding information back to us. This virtuous loop lets us give them highly personalized recommendations based not only on what they've told us they've liked, but also based on how they've behaved around that content." ►

Emotional Range: The Macro Moods of Streaming

Social

What everyone's watching and talking about.

Cultured

Shows that deliver on deeper cultural conversations.

Intelligent

Challenging, trend-forward content that generates discussion.

Productive

Content that's helpful, educational, or informative.

Gratuitous

Binge-worthy shows that lean into personal preferences.

Emotional

Pulls at the personal heartstrings.

Soothing

Predictable, calming, nostalgic.

Relaxing

Easy-to-watch content that connects various groups in culture.

THE 'S' FACTOR— SERENDIPITY



Of course, we don't always know what we're in the mood for. Enter serendipity. While browsing and stumbling upon a hidden gem may have felt like a waste of time circa 2010

when digital shortcuts and efficiencies reigned supreme—along with the statement, “there’s an app for that”—today there’s a deep need for freedom of choice and the pleasure of surprise. This is especially true at a time when no stone feels unturned—even taco trucks have Yelp reviews and locals-only destinations are finding themselves mapped on TripAdvisor. But people don’t always want to know exactly what’s coming around the bend—and that’s as true of travel as it is for TV. “I like

“I like to find hidden gems [of content] when I least expect them.” — Drew, 23, New York, NY

to find hidden gems [of content] when I least expect them,” Drew, 23, of New York City told us. Jorge, 17, of Albuquerque, seconds that: “I like to treat watching shows like thrifting for clothes. You have to spend a good amount of time on both to really find a good piece to spend your time and money on. Also, there’s never really a static familiarity to either of them since every time you go back there’s something new.” ▶

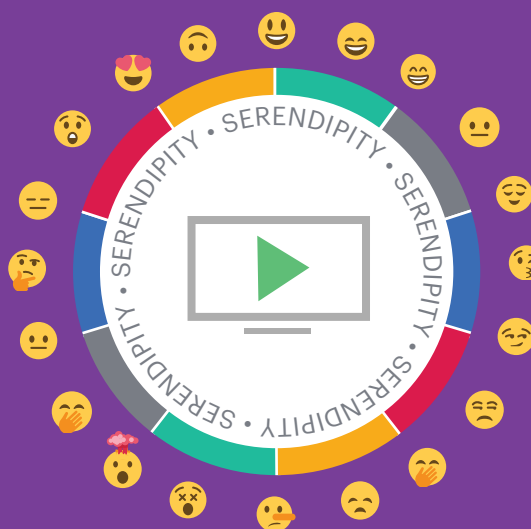


OUT-OF-THE-BOX

Brands are harnessing out-of-the-box thinking to serve up serendipity with a capital 'S.' In 2017, HypeBeast launched its Mystery Boxes, which are exactly what they sound like. Customers pay one flat rate and HypeBeast fills a box with a surprising mix of clothing and sneakers. The brand has sold over 5,500 Mystery Boxes. Etsy has also tapped into serendipity, asking artisans to build personalized mystery boxes. With everything from second-hand jewelry and used CDs to new age-y trinkets, there are nearly 6,000 results for mystery boxes on the site. What's more, between January 2019 and July 2019, the site had

over 495,000 search queries for "mystery boxes," showing that the demand for bespoke experiences is high. FabFitFun, Scentbird Fragrance,

BirchBeautyBox, and Raddish Kids, are among some of the other brands boxing up serendipity and bringing it to consumers' doorsteps.



We can see this need for serendipity in the popularity of recent left-of-center hits like *Cheer*. It's unlikely many viewers were "in the mood" for a rural Texas cheerleading docuseries. However, the appeal came in the surprise factor, something that algorithms will try to replicate—we're already anticipating a run on niche-interest, rural-world documentaries but as soon as they do, they'll fit a formula and no longer be serendipitous.

So, what's the solution? Matching mood requires a wide range of content that allows streamers to 'stumble upon' something that is unexpected. It's not about predicting what

people will want to watch next; it's about showing audiences the value of choice. As Jonathan Miranda, Emerging Strategy Principal at Salesforce and content futurist put it, "It's not about being the first to predict what people want to watch. It's different. It's about getting viewers to browse. You want to show them the value of all of the money Hulu has spent and the great range of TV and film for them to choose from. And that's what e-commerce marketplaces do very differently. They don't try to predict what you're trying to buy; they prescribe you to a path showing you the value of shopping with them." ■

BEAUTY IN THE BINGE

Bingeing is the #1 way 13-to-54-year-olds say their TV viewing experience has changed. Content is no longer confined to timetables or traditional genres – there is more to explore, watch, and indulge in than ever before.



If television has a dark side, it's how easily a weekend can fly by while working through Season 1 and 2 of *Pen15*.

Pick your poison, but now that content isn't confined to timetables, traditional genres, or—in some cases—commercials, it's a free-for-all. Most of us can't (and won't!) resist. Naturally there's a little guilt that comes with this new TV

terrain, but there's also an unexpected bright side to binge-watching: creation of content has never been more prolific, diverse, and original. TV is pushing entertainment boundaries and expanding the way we see the world and ourselves. ▶

BINGE ON

78%



of Generation Stream has binge-watched at least one show in the past 6 months.

84%



of Hulu's audience has binge-watched at least one show within the past 6 months.

BIRTH OF THE BINGE

While binge-watching is more the norm than not, it is still a relatively new cultural phenomenon. The term was first seen in mainstream use in 2013 when full seasons were released in one fell swoop and bingeing described the act of watching three or more episodes in a row. (But let's be honest—three episodes is nothing). In 2015, the Collins English Dictionary even named "binge-watch" the word of the year. Not even a decade later, bingeing has become the definitive way we watch TV. In fact, the number one way people report watching shows today is to binge-watch several episodes at once (38%). On top of that, 78% of Generation Stream and 84% of Hulu's audience say they have binge-watched *at least* one show in the past 6 months. And when asked to name the biggest way streaming has changed

their viewing behavior, the number one answer was "I binge watch series, which is something I couldn't do before" (42%). Just take it from Jason, 44, in Renton, WA: "Bingeing has allowed people to consume an entire series over the weekend, which was a titanic shift from the weekly release of typical TV shows. From the perspective of a consumer who is eager to consume as much of the content as they want as quickly as they can, it seems like a positive development. Because if something is good, isn't more of something good even better?" The result? Audiences have adopted a binge filter—instead of watching whatever's on, Generation Stream says the most important criterion for a show is its "binge-worthiness," or a show so engaging they just can't stop watching. ►

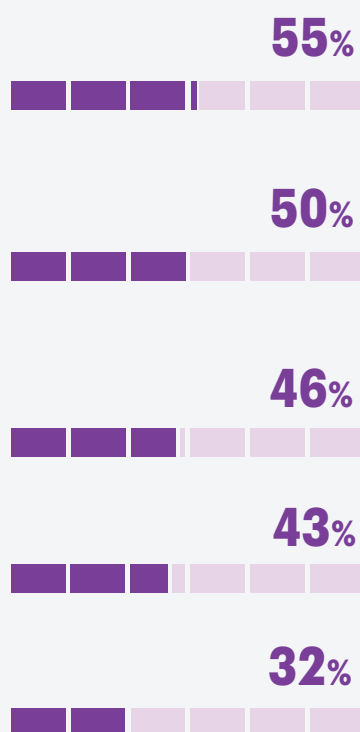
BENEFITS OF THE BINGE

QUESTION

How important are each of the following when you are watching TV shows or movies?

ANSWERS

Top 5 answer choices among streamers



Binge-worthiness

Content that's available all at once that is just so engaging that I can't stop watching.

Comfort

Content that's soothing, helps me decompress, is nostalgic, familiar or predictable in a good way.

Intellectual Stimulation

Content that makes me think, has complex stories or characters, or generally pushes me intellectually.

Relatability

Content with characters that represent me.

Community

Watching content with others and/or being able to discuss it afterward.

BINGECORE

Binge mania shows no signs of cooling down either: 32% of Gen Zs, millennials, and Gen Xers consider themselves to be either “Heavy Bingers: I watch a whole season at a time” (21%) or “Bingeing Addicts: I watch multiple seasons at a time” (11%). Of course, this may not always feel completely voluntary. “The most bingeing I’ve done at once is probably 50 hours. And at that point, it felt like an addiction,” Ben, 32, of Seattle, confessed. “I felt like there was nothing else I could think about besides getting to the end of *Power*. And now that it’s over I’m very wary of anything I watch because that was quite the commitment.” Jenn, 41, in San Francisco, expressed a similar out-of-control sentiment: “Typically at the end of an episode, it’s designed to give watchers a ‘cliff-hanger’ response, something that makes you want to return and watch the next episode. Having the ability to actually shorten the duration of that feeling is like a drug.” In reality, this analogy is not far off. According to clinical psychologist Dr. Renee Carr, bingeing gives your brain a hit

of dopamine—and then it just wants more. “This chemical gives the body a natural, internal reward of pleasure that reinforces continued engagement in that activity,” she told NBCUniversal. “It is the brain’s signal that communicates to the body, ‘This feels good. You should keep doing this!’”

Binge-watching has also sent a ripple effect through the broader entertainment culture. In 2017, “old school” binge-watching evolved into “binge-racing,” or watching a new show the second it drops and not stopping until the final credits roll. Even ads have adapted to the world of bingeing. In late 2019, Hulu launched the binge ad. By harnessing Hulu’s deep, first-party consumer insights, the binge ad experience is tailored to viewing behaviors, and serves viewers a series of relevant messaging throughout a three-episode binge session. But perhaps one of the biggest shifts to come out of this new style of watching content is the content itself. While the TV writers of old had to learn the art of telling a story in chunks, which were satisfying



BINGERS

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hulu

POWER

and titillating, those who write with bingeing in mind can deliver the whole all at once. “The viewer expects to be in for the long haul,” writer Marc Bernardin explains in *The Hollywood Reporter*, “so the writer doesn’t necessarily have to systematically woo him or her.” But let’s face it—innovation always comes at a cost. And with the golden age of content shining on, we’d venture to guess that Generation Stream and creators alike would say it’s worth it.

Binge-watching has altered more than the course of the lives taking place in the virtual world. Life patterns in the real world have also taken a detour. In fact, one-in-five streamers have actually called in sick to work for the sole

purpose of binge-watching a TV show, according to a survey from *Radio Times*, giving a new meaning to playing hooky. But it’s not all bad. Binge-watching has actually been shown to strengthen relationships by giving couples a shared comfort zone, characters to bond over, and an easy date. On top of that, a good binge can serve as a much-needed mental health break. While we often consider a bad-TV-watching spree to be a “guilty pleasure,” psychology experts agree that indulging in some mind-numbing content could actually be good for us—as long as you can introduce some moderation. So go ahead and lose yourself in *The Last Dance*. Just try to make it to work tomorrow. ►



“I watch *NCIS* 5 days a week, at least 3 hours a day. I get so involved in solving the cases and characters it’s unbelievable. I purposely do not watch some shows when they air to binge-watch them.” —Deb, 25, Dallas, TX



BALANCE IN THE BINGE

“The old, ‘*are you still watching?*’ appears, and we all think the worst of ourselves.” —Nick, 30, San Francisco, CA

As normalized as binge-watching has become (and as much as our mental health may depend on moments of indulgence), watching multiple episodes or—eek—seasons in a row still comes with a palpable sense of guilt. Just take it from Adam, 30, in Los Angeles: “I feel guilty watching TV anytime before 9 p.m. I think that’s just from having workaholic parents.” Indeed, the pressure to maximize our free time with productivity instead of reruns of *Seinfeld* is still strong in our work-above-all-else culture.

But that impulse just doesn’t match up with the world we live in today. “The old, ‘*are you still watching?*’ appears, and we all think the worst of ourselves. Or we laugh at how foolish the service must be to

think we are done watching,” says Nick, 30, of San Francisco, CA.

If this is the new world order, though, then why do we still feel so bad? The truth is, it runs deeper than fearing we’ve become the proverbial couch potato. Though that’s certainly part of it, we are living in a world with exponentially more choices than ever before—and that puts pressure on us to make the “right” ones, TV-related or otherwise. Consider the fact that 2019 was viewed as the year of ‘peak TV,’ with 532 scripted series in the US alone. That’s the first time we’ve crossed the 500-show threshold, and it represents a 7% increase over 2018. More shocking perhaps is the 153% increase in scripted shows between 2009 and 2019. Channels and timetables are no longer integral parts of the TV equation, giving us more to explore, more to watch, and more to indulge in—and this puts the pressure to set limits squarely on our shoulders and our shoulders alone. With infinite viewing hours and options, there are no built-in boundaries. And that’s created a new-found pressure to feel like we’re using our time well. “Now, when I watch anything, I feel guilty, or unable to enjoy the show because I know my time could be better spent doing something else, so the whole experience is stressful,” says Jess, 25, in Iowa City. “There’s too much to read for me to be watching.”



Seinfeld

Jess may be right, but that's not going to stop our binge culture from bingeing. "Saying 'Don't binge-watch' is like saying 'The only safe sex is abstinence,'" writes Jeff Wilser for *Vulture*. "The question should be: If we can't abstain from binge-watching, what's the equivalent of protection?" The answer may look different for different people, but across the board, many people are coming up with new approaches to balance the binge—and binge guilt is giving rise to mindful TV remedies. Adam, for example, opts out of *The Big Bang Theory* re-watch in favor of something more intellectually stimulating: "I try to be somewhat economical and efficient with the time I spend watching. I want to make sure it will enrich me, entertain me, or empower me to take part in larger conversations. If it doesn't successfully do one of those things, I just feel like I'm kind of wasting my time." In a similar enriching vein, some people have taken to keeping a journal of what resonates with them from a show or have created some other way to actively engage with the content. Others use bingeing as a way to connect with family, friends, partners, or roommates. Fiona, 19, a college sophomore told us,

"I have less time to stream now, so when I do, I want it to be fully worth my time; whatever I watch has to be interesting to me and new, then I feel less guilty about not doing homework or the like. I stream with friends to build more social bonds while at school." Others offset bingeing by building exercise into their viewing (i.e. doing a plank during a commercial break or 10 lunges every time a character on *The Bachelor* says, "Can I steal you for a sec?"). And, going back to separating the "guilt" from the "pleasure," others are recognizing that maybe bingeing is just an opportunity to slow down, accepting that they won't be productive for X amount of time—and that's ok, too. ▶

"I have less time to stream now, so when I do, I want it to be fully worth my time; whatever I watch has to be interesting to me and new, then I feel less guilty about not doing homework or the like. I stream with friends to build more social bonds while at school." —Fiona, 19, Washington, DC



“When it comes to lazy Sunday binge-watching, I once watched the entire first season of *Blown Away*—a show about glassblowers in a competition to see who is able to make the most creative work.”

—Gala, 26, Los Angeles, CA

THE GOOD BINGE

Our level of choice (in TV and life, but let's rein things into TV here) is only set to grow. The laws of supply and demand mean that the more hours we spend watching, err bingeing (demand), the more resources will be allocated to creating (supply). Already, innovation is happening. New streaming services such as Peacock, HBO Max and Disney+ are pushing their way into the space, and original content is cropping up across platforms. The result—and true silver lining of the binge? Original content is surging. The number one type of content that audiences say they stream, outside of binge-worthy content (i.e. full seasons released all at once), is original content, or shows that are created by the video streaming service (43%). Initially, this deluge of OG shows may have some not-so-great-side effects, including audience skepticism. “‘Original’ is very much a buzzword to me, and I roll my eyes every time I hear it,” says Jess. “If I’m really interrogating this, I think ‘Netflix Original’ is synonymous for me with ‘could be bad.’” But in general, it’s a good thing. More creators—and outlets for creation—means a more diversified entertainment pipeline. We’ll see more shows representing niche interests, diverse demographics, global cultures, and all the other “others” in need of the spotlight. “I think that it’s really awesome that these platforms are able to create and greenlight shows that are creative, smart, beautiful, and interesting. They seem to be out of the box and more avant-garde,” says Nikol, 30, in Brooklyn. “I feel like network shows just keep

“I think that it’s really awesome that these platforms are able to create and greenlight shows that are creative, smart, beautiful, and interesting. They seem to be out of the box and more avant-garde.” — Nikol, 30, Brooklyn, NY

being formulaic and ‘safe.’ While it’s true that most shows are a basic formula, these platforms have found writers and showrunners who are given complete creative freedom to create interesting, out-of-the-box show concepts and the money to properly execute them.” ▶

ORIGINAL CONTENT

43%

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A hulu ORIGINAL

LITTLE FIRES EVERYWHERE

This diversification is already well underway. Take, for example, Hulu's wildly popular shows *Shrill*, which tackled body positivity and inclusivity, and *Little Fires Everywhere*, which represented a diverse range of experiences, from class and race to sexuality and a woman's right to choose. Then there's Netflix's *Cheer*, which showcased life in small-town Texas, and HBO's *Euphoria*, which starred a transgender character and dealt with addiction among other demographic and cultural boundaries that never would have shown up on traditional networks. It's not surprising that TV would swing so far away from binary experiences. After all, TV has long been a representation of current culture—as much as we may cringe at the tone-deafness of *Sex and the City* now, at the time it was a revolutionary looking glass for women's sexual, financial, and fashion freedom. We reflect upon ourselves and our lives through the characters and settings we see on TV. And we develop empathy for difference (*Atypical*), place ourselves in "their shoes" (*Couples Therapy*), and learn about other cultures and times (*Chernobyl*) through what we watch. Adam, for example, enjoyed watching the Apple TV+ show *Little America*,

each episode of which follows a different American immigrant, because "it did a really great job of showing the breadth of where immigrants come from and all the different kinds of challenges they might face – financial, social, linguistic, cultural, etc." Ben liked the Starz show *Power* because it "showcases social issues in the world that people deal with," and

Tim, 33, in Seattle, says HBO's *Chernobyl* "grabbed [me] from the opening moments right through to the end of the series. The makers of the show used darkened tones, a fabulous script and honest, raw storytelling to create an extremely realistic depiction of the Chernobyl disaster." This new level of representation and risk-taking is particularly important to Gen Z—aka the next generation of streamers—as they see TV as a chance to reflect and expand upon themselves. This diversification is only set to grow—and we personally think that's a good thing. So no need for Hail Marys or repenting. There's salvation—personally and culturally—in a good binge. ■

#1

The #1 aspect of Hulu that
streamers love: Great Originals.

SEVEN DEADLY BINGES

Here are the seven deadly binges of TV.
Which is yours?

SLOTH

Basic Binge

A few random hours on a weekend that could have been spent elsewhere, but no real harm done.

LUST

Bingeing Around

You and your partner are committed to a season and are halfway through. Then, in a moment of weakness, you binge the rest alone.

GREED

Day Bingeing

It's just one more show, you tell yourself...but it's also noon on a weekday. It's okay. As the saying goes, it's primetime somewhere.

GLUTTONY

Binge & Cleanse

You've over-indulged and now you need to make things right and repent through a TV cleanse of restricted watching.

PRIDE

Binge-worthy

Bingeing the most popular show is a bragging right. You take a certain pride in getting through it all. If anyone is going to spoil the spoilers, it'll be you.

ENVY

Secret Bingers

You hide your unhealthy obsession for reality TV. You're not proud, but no one has to know.

WRATH

Premeditated Binger

You plan that perfect weekend of complete, uninhibited TV bingeing. There's an art in restraint and a thrill in holding out.

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 

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.



Generation
STREAM

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