Gen Zs construct the next era of culture, blurring the lines between consumption and creation.

By: Dawn Ostroff  Chief Content & Advertising Business Officer, Spotify

How has a generation moved from “emerging” to the center stage of culture faster than the world could understand them? By raising their voices, listening to one another, and blurring the lines between consumption and creation. The youngest Zs are well into their high school years, while the oldest are starting to enter the workforce. As creators, their approach to music and podcasts are forging entirely new aesthetics, genres, and fandoms. As listeners, their tastes and habits are fluid and say a lot about who they are. Above all else, as a generation, they’re more engaged with digital audio than ever. In 2021, Gen Zs streamed music more often than they used other media (including videos, games, and TV). They also shared more Spotify playlists and engaged in more group listening sessions than any other generation, making them the most social generation of audio streamers.

In this year’s Culture Next, we dive ever deeper into Gen Z as tastemakers, fans, and, most of all, individuals navigating and defining their place in the world through audio. As Gen Zs’ global destination for audio streaming, here are the top trends and insights we uncovered during our research – and how we’re seeing it play out on our platform in ways that both validated our predictions and took us by surprise.

Despite everything, Zs are ready to make the world a better place. Sixty-nine percent of Zs characterize their generation as change-makers rather than status quo, and their collective soundtrack reveals the energy they’re harnessing as they look towards the future: Idealistic and passionate, were among the music moods that grew most among Zs in the last year. But make no mistake: Zs are highly aware of the world around them. Our research shows that Zs are more likely than millennials to described their generation as “stressed out” (67% vs 48%), and more likely to agree that “my generation is under too much pressure to fix the world’s issues” (76% vs 72%). With all that external pressure, audio helps Zs turn inward to understand and enhance their inner journeys. Eighty percent said audio allows them to explore different sides of their personality, while more than a third said the podcasts they choose to stream are the ones that help them feel a range of emotions, from joy to sadness. When things get too raw or real, Zs are more likely than other gens to say they use audio as a respite from their current reality.

We know the conversation around Gen Z is incredibly noisy. But we believe Spotify offers something different: A deeper, more intimate understanding of this generation through the music, podcasts, playlists, fandoms, and more that form the immersive soundtrack of their lives. Digital audio streaming habits are personal. They’re a strong predictor of Zs’ attitudes and moods, and what’s in store for culture at large. So, if you want to understand this consumer demographic, tune into what they’re doing on Spotify. And if you want to connect with this generation in meaningful ways — we can help with that, too. I’ve spent my career developing content for younger generations, from TV to digital media and more. At Spotify, I’ve seen firsthand what sets Gen Z apart. They’re expressive, resilient, and ready to disrupt culture. Read on for insights and inspiration about meaningful ways to connect with them through audio.

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METHODOLOGY
For this issue of Culture Next, Spotify conducted a combination of qualitative, quantitative, and first-party data analysis that explored distinct segments of Gen Z (15-25) based on lifestage, as well as their millennial (26-40) counterparts.

We partnered with youth culture agency Archrival to conduct eight Zoom focus groups and 13 in-depth interviews, ultimately speaking with over four dozen respondents around the globe, in the United States, Canada, Mexico, Brazil, Spain, Italy, France, Germany, United Kingdom, India, Indonesia, Singapore, Philippines, Japan, Australia / New Zealand, and the United Arab Emirates. We conducted additional in-depth interviews with advertising and audio industry thought-leaders.

We also fielded a global quantitative survey via Lucid among 12,500 respondents in March and April of 2022 (with approximately 650-750 respondents per market — both in the above markets, as well as Thailand). Findings were additionally grounded in Spotify’s unique Streaming Intelligence and first-party data.
Chasing Creators

Gen Zs are revolutionizing the creator-fan relationship, turning it from a one-way broadcast into a two-way exchange. Now, creators are building entire digital worlds for their ride-or-dies to dig into — and carving their own path to stardom in the process.
Through Discord chats, TikTok updates, texting, and even IRL interactions, Zs are creating a new style of creator-fan relationship based not on one-way admiration, but on mutual kinship. Even for smaller emerging creators, Zs are forming online communities where they can gather and encourage each other to chase down every scrap of information they can find about their favorite artists. We’re not just talking fan culture here; we’re talking stan culture. Enabling these standoms is a new generation of creators who are fans of, well, their fans — and are skilled at constructing entire worlds to keep the mutual interest going. Lil Nas X, who ran a Nicki Minaj stan account before becoming famous himself, engaged his fandom early on by carving endless pathways through digital realms, an intimacy he’s kept up even as one of the world’s biggest stars. But it’s smaller emerging artists who are truly engaging one-on-one in the worlds they’ve built for their fans. Huron John, for example, hosts an active Discord to keep up with fans. Podcast hosts, too, are prompting their ride-or-dies to follow not just a single channel or project, but the creator as a whole. “Our advice to connect with Gen Z is to build a community around them, going beyond the audio format itself,” said the hosts of YO INTERNETO, who regularly engage in discussions with fans on Twitch.

10 “Lil Nas X finally admitted he’s a ‘Barb,’ confirming long-time rumors that he ran a Nicki Minaj stan account,” Insider, June 2020

11 Spotify Culture Next survey, U.S., among 750 respondents 15-40, MAR-APR’22

“I DON’T REALLY CALL [MY AUDIENCE] FANS BECAUSE THEY DON’T ACT LIKE THAT. I FEEL LIKE WE’RE ALL JUST KIND OF HOMIES... THERE’S NEVER BEEN A WEIRD FAN INTERACTION.”
— MUSIC ARTIST DREAMER

ZS IN THE U.S. ARE MORE LIKELY THAN MILLENNIALS TO FOLLOW A MUSIC CREATOR ON SOCIAL MEDIA AFTER LISTENING TO THEM (48% VS 38%).
Many Z creators are using the digital worlds built by them or their fans to foster tight-knit fan bases with deeper, more meaningful connections. “We’re all just kind of homies,” is how 21-year-old singer-songwriter Dreamer put it. Meanwhile, 17-year-old pop-punk up-and-comer Sophie Powers told Alt Press: “I want to build a friendship with anyone who supports my music... I don’t really care if I don’t have the same huge audience as Ariana Grande, but if I can have a small fraction of those dedicated supporters... that’s all I can ask for.”

For Gen Z audiences, that’s just the kind of sentiment that makes a creator worth stanning.

From that one track they can’t stop playing, to that one podcast episode that makes them laugh (or cry, tbh), musicians and podcaster help give a voice to what Gen Zs might be thinking and feeling. Conversations happening between artists and fans via social media and social audio are adding even more access and intimacy to the creator-fan relationship. Here are some ways your brand can bridge the gap between audio creators and their biggest fans.

**PASS THE (HOT) MIC TO CREATORS.**
Turn your podcast ad campaign into an audio series that features bonus content from the hosts, like unaired bloopers, candid conversations, or feedback from the audience via Q&As and Polls.

**CREATE A DIGITAL JOURNEY.**
Transport Gen Zs to the places where it all started. For Pride, Target created an auditory queer space on Spotify where both music and storytelling could blend together. LGBTQIA+-identifying artists Hayley Kiyoko and MNEK curated Sounds That Found Us playlists, composed of music that reminded them of moments when they felt affirmed. The playlists also included spoken-word annotations that allowed the curators to tell their personal stories between songs.

**GO LOCAL.**
You don’t have to be based in a big city (or have a big budget) to amplify up-and-coming artists and reach Gen Zs. Partner with artists, venues, and other players in your local music scene to reach Zs in your area with location targeting on Ad Studio, Spotify’s self-serve advertising platform.

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12 “At 17, pop-punk newcomer Sophie Powers is already establishing her identity,” Alt Press, February 2022
13 Spotify Culture Next survey, Global, among 12,500 respondents 15-40, MAR-APR‘22
While previous generations of teens and twentysomethings often aimed to fit in, Gen Zs aspire to stand out — and they’re constantly finding new ways to express their individuality. Audio helps them explore and discover the most niche sides of themselves, tap into identities they never knew they had, and even create new ones.
Zs were brought up in a time of social upheaval as long-standing social structures such as education, work, and religion were disrupted, and the once-standard paths to success became overcrowded — or simply disappeared. In this landscape, Zs grew up not only with the freedom and inspiration to be different, but the competitive need to stand out. Nothing enables Zs to explore — and show off — their unique tastes more than audio. 71% of Zs in the U.S. said audio allows them to explore the outer edges of culture that they wouldn’t otherwise experience. But more than that, audio takes them to the outer edges of themselves: 80% said audio allows them to explore different sides of their personalities.

According to Zs, audio even allows them to explore sides of themselves they didn’t know they had or couldn’t otherwise access. Gen Zs are driving the “main-character energy” trend, in which people use social media or digital audio to make themselves feel like the center of attention with all eyes (and ears) on them. Zs tune into Spotify’s own “my life is a movie” playlist, and curate playlists that immerse them in the “main character” vibe. Zs globally even created 79% of all Spotify playlists with “POV” in the title. “I think it plays into everyone’s desire to be perceived as unique,” said Siena, 20, in Sydney, “but also people placing proper emphasis on, ‘This is my life. I am in control of it.’”

Gen Z’s audio immersions even veer into fantasy: 65% of Zs in the U.S. have listened to music from a movie or show they like in order to feel like they’re a character in the story.

14 “America Is Having a Moral Convulsion,” The Atlantic, October 2020
15-17 Spotify Culture Next survey, U.S., among 750 respondents 15-40, MAR-APR’22
18 “We All Have ‘Main-Character Energy’ Now,” The New Yorker, June 2021
19 Spotify First Party Data, Q1 2022 vs. Q1 2021
This gen’s creators are also using audio to bring alter egos into the mainstream. While music artists have been constructing personas for years (from Ziggy Stardust to Megan Thee Stallion’s Tina Snow), Zs are getting creative. Yameii Online, for example, is a vocaloid artist created by rapper Deko and visual artist Osean, whose track “Baby My Phone” reached No. 2 on the Spotify Viral 50 chart in 2021.20 “Yameii is the perfect outlet of creation,” Deko told us. “I can make as cute, fun, and feminine sounding songs as I want.” 59% of American Zs said they like when audio creators take on different personas or characters.21

71% of American Zs said they listen to at least one music artist or podcast that others would find niche, obscure, or experimental.23

“THERE’S BEEN A TREND OF NOT JUST BEING AN INDIVIDUAL, BUT BEING DIFFERENT AND QUIRKY.”
— DYLLAN, 18, NEW YORK CITY

TAKEAWAYS & TACTICS

Welcome to young adulthood, Gen Z. As their personal tastes and niche interests start to take shape, audio content is their doorway to new corners of culture. Zs are looking for opportunities to embrace the unique, multifaceted aspects of who they are: 69% of Zs in the U.S. said they own products that allow them to explore different sides of their personality, and 80% like when brands are able to connect with their different sides.22 Here are a few ways your brand can help, too.

REVEAL A NEW SIDE TO THEM.
With fluid personalities that can change by the day (or the hour), try using a playlist generator that analyzes their listening habits to reveal something new about themselves. JÖRĐ oat drink showed Spotify listeners how naturally restless their streaming habits were and gave personalized playlists with new music to explore.

FORGET WHAT YOU KNOW ABOUT GENRE.
Gen Z is fluid when it comes to factors like gender, politics, and sexuality — and it’s no different for music. Sponsor playlists like POLLEN and Lorem, which put quality first and genres last. And consider targeting micro-genres like Emo Rap, Trap Latino, and Post-Teen Pop.

MAKE DISCOVERY PART OF THEIR DAILY ROUTINE.
Spotify’s real-time audience and contextual targeting can help brands reach the right Zs at the right time with fresh, unexpected messages. Like how MIDE, the Interactive Museum of Economics in Mexico, used Ad Studio to pair an educational message (starring Karl Marx) with reggaetón to promote a new virtual exhibit.

20 ‘The Year in Music on TikTok 2021’ Pitchfork, December 2021
21-23 Spotify Culture Next survey, U.S., among 750 respondents 15-40, MAR-APR’22
Gen Zs are turning to podcasts as a safe space to work through life’s most complex issues. Especially among 18- to 24-year-olds, who are on their way into adulthood, podcasts go beyond sheer entertainment and serve as spaces for knowledge, learning, and even catharsis.
Navigating everything from college to early career to new relationships, the teen and twentysomething life stage demands an intense need to process one’s experiences. But Zs may have it even harder than generations past. Social media has amplified insecurities by putting young people’s identity experiments and stumbles on full display. And on top of it all, the pandemic isolated Zs from their peers at the very moment they needed each other most. With all this as a backdrop, Zs globally are more concerned about mental health than millennials — in fact, it’s the issue most important to them.²⁴

As Zs seek to gain perspective as they come into their own, they have a heightened need to process their raw emotions — and audio is providing critical support, especially podcasts. Over the last year alone, average podcast listenership among Zs in the U.S. increased by 62% on Spotify between Q1 2022 and the year prior.²⁵ Now, more than a third of American 18- to 24-year-olds are listening to podcasts at least weekly (41% vs 22% of 15- to 17-year-olds).²⁶ Mental Health, the top podcast genre among Zs globally, witnessed impressive growth with a 54% increase in the number of streams among Gen Z listeners in the U.S. in Q1 2022, compared to the year before.²⁷

“PODCASTS ARE ASKING FOR HELP WITHOUT HAVING TO ASK FOR HELP.”
— HANNAH PANGILINAN, HOST OF PAUSECAST, A SPOTIFY ORIGINAL PODCAST

²⁴ Spotify Culture Next survey, Global, among 12,500 respondents 15-40, MAR-APR’22
²⁵ Spotify Culture Next survey, U.S., among 750 respondents 15-40, MAR-APR’22
²⁶ Spotify Culture Next survey, U.S., among 750 respondents 15-40, MAR-APR’22
²⁷ Spotify First Party Data, Q1 2022 vs. Q1 2021
Part of the draw of spoken-word content, according to Zs, is that podcasts serve as a safe space for processing their feels. Whether they’re feeling too vulnerable to speak up or still figuring out the right words to describe what they’re feeling, podcasts are a judgment-free zone. In fact, 55% of American 18- to 24-year-olds said they turn to podcasts to get answers to hard or personal questions before talking to their families about it, and 62% of the same group said they listen to podcasts to inform the conversations they have with their friends. This doesn’t mean that Zs aren’t still having deep conversations in-person, but podcasts have become a powerful supplement.

75% of Zs in the U.S. said they use audio to understand themselves better, compared with just 60% of millennials.28-29

TAKEAWAYS & TACTICS

Podcasts have become a space for Gen Z to work through life’s most complex issues. Whether they’re navigating change (like entering college or the workforce) or seeking to learn more about relationships, Spotify has podcasts that help Gen Z find those answers.

- **USE HOST READS TO BUILD TRUST...**
  With podcasts being such an intimate audio format, Gen Z feels especially close to their favorite hosts. Use Host Talent ads, which are created and voiced by the show’s host in the style of the show, within podcasts where personal anecdotes can complement clear brand messaging.

- **...AND VOICE TALENT ADS TO BUILD YOUR AUDIENCE.**
  Businesses of all sizes can run Voice Talent ads, which are pre-recorded by an actor or producer, across Spotify’s owned and exclusive shows via the Spotify Audience Network, podcasts from third-party publishers via Megaphone, and up-and-coming podcasts via Anchor. Get started setting up your next podcast campaign with Spotify Ad Studio.

- **BECOME A PODCAST PRO.**
  Curious about podcast advertising, but not sure where to start? Whether you’re new to podcasts or a seasoned pro, the Spotify Advertising Academy has (free!) resources to help you and your team understand the basics of podcast ads, industry best practices, and creative tips. You’ll be telling your pre-rolls from your mid-rolls in no time.

28-29 Spotify Culture Next survey, U.S., among 750 respondents 15-40, MAR-APR’22
TREND NO. 4

Nouveau Nostalgia

While all generations look back fondly to earlier eras, Gen Zs are reinventing nostalgia. Zs are filtering pop culture throwbacks through a current lens to access and inspire something new and all their own.
Faced with climate change, economic upheaval, and the threat of WWIII (all during their most formative years), Zs in the U.S. are more likely than millennials to describe their generation as “stressed out” (74% vs 47%). Nostalgia has been shown to provide a sense of comfort amid uncertainty, and the last few years have been tumultuous to say the least. However, while millennials are nostalgic for earlier eras they themselves lived through, Zs will latch on to almost any era that offers a reprieve from the heaviness of the now.

Rather than seeing the cultural past as something stagnant, Zs are using technology — and digital audio streaming, specifically — to mash it all together to create something totally new. Take the Gen Z playlist Limelight, an eclectic sonic hodgepodge of throwback artists (The Dresden Dolls, Fiona Apple, Regina Spektor) alongside emerging artists (Teddy Hyde, Will Wood). “You have to craft it in a way that speaks to them, and sometimes it’s really perplexing to see what is the connecting thread,” said Lizzy Szabo, Senior Editor at Spotify.
On social media, Zs are mixing old hits with new visual trends — lip-syncs, dances, makeup tutorials, fit checks, and the like — to push them viral once more. Celine Dion’s song "It’s All Coming Back To Me Now" set a one-day streaming record on Spotify 25 years after it first came out. Nirvana and Coldplay saw a surge in streams among 18- to 24-year-olds globally between March 2022 and the year prior. Among Zs, the past is all fuel for the future — and that’s true for more than music. 80% of American Zs like when brands bring back old aesthetic styles, and 74% love when brands produce retro products or content. Brands today need to understand how nuanced nostalgia has become to connect with this gen.

"WE CAN BE MOST INNOVATIVE IN CONTEXT TO THE PAST. IT’S EASY TO TAKE FROM THERE."
— LEVI, 24, BERLIN

TAKEAWAYS & TACTICS

All generations feel nostalgia, but Gen Z’s relationship to the past is unique. They like to revisit pre-smartphone, pre-social media eras when the world seemed more stable and the future felt more certain. Music can be a vehicle of comfort, but also hope. On Spotify, brands can create unique experiences that tap into this nostalgia in an aspirational way.

TAKE THEM BACK TO THE FUTURE...
Zs are nostalgic, but they’re also forward-looking. Use contextual targeting to reach them when they’re listening to nostalgic, sentimental, and other moody playlists. Invite an artist to discuss how they take musical cues from the past, or tap creators who are expressing their vision for a new world with audio.

...OR HELP THEM TURN BACK TIME.
Bring the sound of your brand to life with curated Branded Playlists, throwing it back to the decades and genres that align with your brand’s personality. Or take Gen Z back to specific moments in life, like Netflix: They transported listeners back to their 12-year-old selves for The Adam Project.

STEP INTO THE STUDIO...
Ad Studio, that is. If it’s your first time making audio ads for Spotify, Ad Studio gives you all the free creative tools, educational resources, and more to help you recreate nostalgic-sounding ads that will resonate with Gen Zs — no synthesizer or throwback celebrity spokesperson necessary.

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33 “Why the music industry is paying close attention to TikTok,” NPR, January 2022
34 Spotify First Party Data, Q1 2022 vs. Q1 2021
35 Spotify Culture Next survey, U.S., among 750 respondents 15-40, MAR-APR’22
36 Spotify Culture Next survey, Global, among 12,500 respondents 15-40, MAR-APR’22
Self-expression and creativity are core components of how Gen Zs navigate the world. Now, not only are they leaning into music artists, podcasts, and playlists to shape the stories they tell about themselves — they’re inviting brands to reflect and broadcast their personal narratives as well.
More than any other medium, audio provides the opportunity for Zs to curate the stories they want to tell about themselves. Zs have become especially adept at curating and sharing their personal narratives via playlists. “A lot of us actually curate our Spotify playlists… to suit the type of personality that we want to give off,” said Adele, 19, in Singapore. Branded custom playlists, which reflect and broadcast users’ specific tastes, are being embraced by Zs, too. Spotify x Adidas Nite Jogger, for example, created a custom digital experience that gleaned the “sonic traits” of listeners’ nighttime streaming activity to create a custom playlist unique to each individual. The campaign racked up 32.4 million impressions and over 9 million unique visitors.

As Zs embrace the idea that their listening habits are a better reflection of who they are than most casual conversations, they’re seeking new opportunities to share themselves through audio — and looking to brands to help make it happen. Tinder’s Spotify integration, for example, allows users to place a 30-second audio loop on their profiles, putting front and center the music taste of a potential romantic partner. Meanwhile, Spotify Wrapped, the end-of-year walk down audio memory lane, has become a cultural staple among Zs, especially among 18- to 24-year-olds, who see the annual reflection as an opportunity to share their very selfhood via social.77 Podcast hosts are also now letting Zs chime in with their opinions via Spotify’s Polls and Q&As, enabling them to engage directly with podcasts such as Incredible Feats with Dan Cummins and Crime Countdown — both from Parcast, A Spotify Studio.

81% of American Zs believe that their listening habits tell a story about who they are.38
Meanwhile, Zs said they’re interested in interacting with brands through customizable ads, too: 48% of Zs in the U.S. said they like being able to select the ad they listen to on a digital audio streaming service, and more than a third said they like it when they can interact with ads.  
So, while brands of the past may have prioritized keeping an iron grip over their messaging, there’s a huge opportunity to connect with the next generation by handing the reins over to them and allowing them to customize their experience — especially in the space of audio.

AUTHENTICITY IS EVERYTHING.
This generation isn’t afraid to call out brands that misuse memes or appropriate other people’s work. Consider partnering with individual creators and following their creative lead. You can sponsor relatable, unapologetically funny and edgy shows like We Said What We Said to establish an authentic voice, and then scale your ads across the Spotify Audience Network.

INCLUDE A CALL TO ACTION.
So you’ve got Gen Z’s attention. Next, give them a clear path to your brand with a strong call to action, which can help drive online sales, increase website visits, or connect with new customers. Make it interactive with CTA cards, a new interactive podcast ad format available only on Spotify (and coming soon to Ad Studio advertisers).

TAP INTO CULTURE IN REAL TIME.
One major perk of digital audio? Compared to other formats, it’s pretty easy (and quick) to produce, so businesses of all sizes can join cultural conversations in real time. Like how Pizza Hut used ear-catching audio ads and interest targeting to reach hungry sports fans on game days in the U.K.

**“FROM THE HOLLISTER-BRANDED MUSIC PLAYLISTS SUCH AS GOOD VIBRAS (WHICH CELEBRATES HISPANIC HERITAGE MONTH) TO ORIGINAL MUSIC FOR OUR CAMPAIGNS, AUDIO HELPS OUR BRAND AUTHENTICALLY ADD VALUE TO THE LIVES OF OUR GEN Z CONSUMERS.”**
— JACEE SCOULAR, SR. DIRECTOR, BRAND MARKETING STRATEGY AT HOLLISTER

40 Spotify Culture Next survey, U.S., among 750 respondents 15-40, MAR-APR’22

**TAKEAWAYS & TACTICS**

Gen Zs are at the forefront of culture, constantly finding new ways to express themselves and build communities. Brands have the opportunity to not only support their journeys, but learn about the lives they live and how they view the world — especially through Spotify’s diverse slate of music artists and podcasts.

For Gen Zs across the world, culture happens in real time on Spotify. Ready to reach them? Connect with your Spotify rep or get started immediately with Spotify Ad Studio.

Want to become an audio pro? Enroll (for free!) in the Spotify Advertising Academy for interactive, self-paced courses and become a certified expert on all things digital audio advertising.