



VOLUME 2

CULTURE

NEXT



GLOBAL
TRENDS
REPORT



Meet the generation rebuilding society

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

THIS WHIRLWIND YEAR has been strange and, yes, unprecedented — at times isolating and depressing, while also galvanizing and inspiring. It's clear that 2020 will help define generations to come, as a global pandemic has upended lives and a movement for racial justice has brought about a profound and overdue reckoning.

It's impossible to say exactly how this year's events will shape our future. Still, these months have clarified — and in some ways accelerated — cultural trends that Gen Zs and millennials have been shaping for years. At Spotify, we've been following those trends closely. We're excited to share our second annual Culture Next report — and this year's edition feels more urgent and necessary than ever.

Through our global reporting, we met entrepreneurs, activists, artists, and more. We discovered inspiring and surprising revelations from a generation ready to rebuild society from the ground up. Turns out, Zs are reconsidering college — 1 in 3 might not go at all.¹ They're rethinking the workforce — 65% plan to be (or already are) their own boss.² Millennials join them in shaking off old-school partisan labels, focusing on progress instead.³ And both generations overwhelmingly view 2020 as a “cultural wake-up call.”⁴

If there's one thing I've learned in my career, it's that young people define our future — how we engage with content and technology, our relationships with each other, and what's moving culture forward. At Spotify, we remain committed to understanding the next generation through their streaming behavior and using our platform to amplify the voices of creators from every corner of the world. Our influential young listeners stream the music and podcasts they love for hours a day, shifting their habits as their moods, passions, and moments change. They take us wherever they are. All this listening powers our rich first-party dataset (we call it our Streaming Intelligence), and the insights we glean from this data help us understand — and shape — where culture is headed.

As all of us strive to press forward in an uncertain time, we hope that Culture Next inspires you to consider new and meaningful ways to empower, inspire, and be there for your audience. After all, they're listening.



Left: Last year's Culture Next report
Clockwise from top: Mael and Kix, 18, Atlanta, with friend JLenz



INTRODUCTION



Larz, 25,
New York City

CONTENTS

4 GEN Z STARTS FROM SCRATCH

A highly motivated and resourceful generation is remaking societal institutions and rethinking social norms.

8 FAMILIES EMBRACE AUDIO AT HOME Parents and kids are tuning into audio — but it's not just about being connected, it's about strengthening connections.

12 SELF-DISCOVERY BUILDS COMMUNITY

Gen Zs and millennials are discovering new ways to find themselves across shifting passion points and niche obsessions.

16 PROGRESS OVERTAKES PARTISANSHIP Young people expect brands to take a stand, but what they really want is engagement and inspiration instead of posturing.

21 SOUND IS GETTING SMARTER

Audio isn't just ubiquitous in our everyday lives — it's also the most human of all technological mediums.

METHODOLOGY: For this project, Spotify partnered with research agency Culture Co-op to conduct a combination of qualitative and quantitative analyses, looking at Gen Zs (15-25) and millennials (26-40) during two distinct time periods: Fall/Winter 2019-2020 and Summer 2020. We used Spotify's unique Streaming Intelligence and first-party data to support both macro and micro trends in audio, as well as in broader culture.

Fall/Winter 2019-2020: We conducted focus groups in four U.S. cities (Atlanta, Denver, New York, and San Francisco) and assignments with 22 influencers in 12 markets (listed below, plus the Philippines), as well as a series of expert interviews. We also conducted a global survey via Lucid among 5,500 respondents in January 2020 (500 respondents per market — Australia, Brazil, Canada, Germany, India, Indonesia, Italy, Mexico, Spain, United Kingdom, and United States).

Summer 2020: Our follow-up research included a series of projects and interviews among 10 key influencers in Australia, Canada, Indonesia, Mexico, United Kingdom, and United States, as well as additional surveys via b3 Intelligence with fresh samples of 2,000 respondents (500 respondents per market — Brazil, Germany, United Kingdom, and United States).

ON THE COVER (FROM LEFT TO RIGHT):

Top row: Mael, 18, Atlanta; Mickala, 23, Brooklyn; Finn, 24, Surrey, U.K. **Middle row:** Deja, 22, New York City; Malcolm, 34, Brooklyn; Bhea, 21, Manila, Philippines; Brennan, 30, Topanga, California; Makayla, 23, Vancouver, Canada; Nina, 28, Berlin **Bottom row:** Christopher, 24, Berlin; Andrea, 25, Guadalajara, Mexico; Vidur, 17, New Delhi; Ella, 17, Brooklyn; Jesus, 25, Mexico City; Jonathan, 38, Brooklyn

Kix and Mael,
Atlanta



Gen Z starts from scratch

A highly motivated and resourceful generation is remaking societal institutions and rethinking social norms.

WITH LONGSTANDING norms around work and education upended in recent years, Gen Z has been practically hardwired with a DIY mentality. Nearly half of Zs we spoke to said older generations can't act as guides to adulthood because too much has changed in the world⁵ — and that was before the major shifts of 2020. In our July survey, that number was 67%,⁶ and as Kenneth, 23, in Jakarta, Indonesia, put it, “The vision of the world offered to us at school has no seeming correlation to what we see today.” Older generations acknowledge the challenge. As Tammy, 45, in Asheville, North Carolina, explained, “It’s scary as a parent because we know the way we came up, but we’re not sure about the way forward. We’re just preparing our son to create his own future.”

With 53% of Zs saying they’re increasingly wary of big institutions,⁷ that path-forging is already happening. For starters, many Zs feel traditional college isn’t relevant. “It’s not training you for the right things — stuff you can actually take on to adulthood,” said Jazmine, 18, in Atlanta. Faith in education has eroded in other ways, too. The 2019 U.S. admissions scandal highlighted class disparities after a group of rich parents used fraudulent means to get their kids into competitive schools. And the rise of virtual classes during the pandemic only furthered debates about the value of tuition and disparate costs between colleges. Underpinning it all, student debt in the U.S. reached a record \$1.56 trillion in 2019, with the average borrower owing about \$32,000.⁸

According to a 2019 TD Ameritrade study, 89% of Zs considered an

education plan other than a four-year degree immediately following high school,⁹ and that fits with our research. When we spoke to a group of five high school seniors in Los Angeles late last year, only one planned to follow that familiar route. The rest had taken a test to graduate early and were already in the workforce, with higher education on hold until it made practical and financial sense. In our own global survey, 1 in 3 Zs age 17 and under said they may not go to college at all.¹⁰

It should be no surprise that Zs are also rethinking how they enter the workforce. Many were in their formative years as their parents weathered the Great Recession, and now they face an already disrupted economy — characterized by gig work, telecommuting, and career shifts — further exacerbated by the

they were before the pandemic.¹² “Our generation has way more independent minds,” said Atlanta’s Kix, 18. “We’re more into entrepreneurship and not working for somebody else.”

Kix and his business partner Mael, 18, started a side hustle selling candy as early teens and went on to start ArtHouse the Collective, which strives to empower young creatives. Mael said this is what his generation is all about: “Making yourself known from nothing. Making yourself hot from scratch. Literally, I was sitting on my bed playing a video game around this time two years ago. Now we have a whole business.” Then there’s Finn, 24, in Surrey, U.K., who launched a T-shirt brand. “None of us trained in anything we do,” he said of his team. “No photography classes or design courses. Just the drive to create something new.”

“Our generation is going to be known for creation.”

— KIX, 18, ATLANTA

pandemic. “Gen Z has nothing to lose and everything to gain,” said Makayla, 23, in Vancouver. Perhaps that, combined with skepticism toward corporations, is why many American Zs are eager to start their own thing — 65% of those we spoke to said they plan to be, or already are, their own boss.¹¹ And in July, 59% said they’re more inspired to start a business than

When we asked Zs what gives them more creative freedom than past generations, “access” was a running theme, which makes sense: These digital natives have never known a world where they couldn’t pull up virtually any piece of content at any time. “Today’s platforms offer a lot of learning opportunities,” said prolific digital content creator Lele

Pons, 24, whose deep understanding of platforms has garnered her over 41 million followers on Instagram. “You can watch a five-minute tutorial and learn Photoshop skills or a dance routine.”

On Spotify, we see this play out in audio — our fans around the world have 60 million songs and more than 1.5 million podcasts at their fingertips.¹³ In particular, we’ve seen people using podcasts to educate themselves on topics of all kinds, from gaming (*The Besties*) to science (*Science Vs*) to sports (*The Ringer NBA Show*) and pretty much everything else, getting unprecedented access to unfiltered thoughts.

The pandemic has highlighted Zs’ penchant for bending online platforms to fit their needs. TikTok played host to endless quarantine memes and videos, converting personal expression into an act of fostering community and providing release. As Vox wrote, the app “is useful as a place to see how other people are living through this extremely unprecedented crisis.”¹⁴ Meanwhile, another platform helped Zs virtually create new societal norms from scratch: Zoom. Though developed for business, the conferencing service was quickly commandeered to host birthday parties, jam sessions, beer pong, blind dates, and, of course, college classes — hence, the burgeoning business of young entrepreneurs making and selling “Zoom University” merch.¹⁵

Indeed, tech platforms don’t just provide the opportunity to discover — they also enable Zs to collaborate, create, and independently share, sell, and promote their work. “What makes our generation unique,” said Pons, “is that

Shaolinn, 18, Virginia
Beach, Virginia



66% of U.S. Zs said their generation is ready to rebuild society from the ground up.

SOURCE: Spotify Trends Survey among 500 US respondents 15-40, July 2020

there are a lot of ways people can turn their passions into careers.”

“We are in this era where you can build something and then find passionate people to do it with you,” said New York nonprofit founder Larissa “Larz” May, 25. “There’s an opportunity to be scrappy because of the platforms and technology we have.” Virginia R&B artist **Shaolinn**, 18, agrees. “If you want to put your music out there, you can put your music out

there,” she said. “All it really comes down to is if you’re motivated to push your creativity.” She was. Shaolinn passed on college, released her first single at 17, and won REVOLT Summit’s 2019 “Be Heard” competition in Atlanta.

As Kix put it at the start of the year, “Our generation is going to be known for creation.” And when we checked in with his American peers in July, 74% said they agree with that exact sentiment.¹⁶



Finn, 24,
Surrey, U.K.

BRAND TAKEAWAYS

A sizable 90% of Zs across the U.S. told us that they love understanding how ideas are born, and that doing so makes them feel a part of the creative process.¹⁷ Brands can resonate with this audience by supporting and speaking to this creator mindset.

1

SPONSOR ENTREPRENEURIAL PODCASTS. Zs are into entrepreneurship and, of course, there's a podcast for that — many, actually. Connect with them through this passion point by sharing a relevant message about the do-it-yourself mentality on shows like *The Pitch*, *Without Fail*, or *StartUp Podcast* — Zs and millennials make up 70% of the latter's audience.¹⁸ Our Business & Tech package includes those podcasts and more.

2

BUILD CAMPAIGNS AROUND CREATORS. Support the ingenuity and resourcefulness of young creators. For instance, Vans launched a weekly personalized playlist experience called "Off The Wall Wednesday" that helps listeners discover emerging artists they'll enjoy based on their listening history. The campaign helped Vans continue to "champion creative expression" by utilizing Spotify's Streaming Intelligence.

3

GET CREATIVE WITH AUDIO. Audio offers a unique opportunity to deeply engage listeners using minimal production resources. That scrappiness makes the ad medium essential at all times, and especially when brands' usual ways of working are disrupted. Spotify Ad Studio offers free audio ad production, including custom voiceover, allowing creative teams to produce new messages easily and get them live quickly.

Families embrace audio at home

Parents and kids are tuning into audio — but it's not just about being connected, it's about strengthening connections.



Nikki and Malcolm, 34, Brooklyn

ON SPOTIFY ACROSS 2019, we witnessed a 263% leap in listening among Zs and millennials to kid-friendly and family-relevant podcasts on smart speakers.¹⁹ And in the first half of 2020, as people began to self-quarantine, we saw another significant shift: Kids playlist streams have risen 19% so far this year,²⁰ and Spotify Free users collectively hit 21 million monthly minutes of family and parenthood playlist listening,²¹ underscoring audio's role in providing both function and fun at home. When you zoom out to include virtual assistants, voice activation, connected cars, and smart homes, it's clear that sound is changing the way families interact — with one another, and with the world beyond their living rooms.

When we spoke to parents late last year, they told us audio is changing how they check in on their kids throughout the day, call them for dinner, and put them to bed. For instance, Brittney, 34, in Boulder, Colorado, said she uses her Amazon Echo as an intercom with her children. And Ester, 31, in nearby Arvada, Colorado, essentially tucks the whole family in with a simple phrase: “We say, ‘Alexa, we’re going to bed,’ and our smart home locks our front door, turns off the TV and lights, and turns on our fan.” This sort of setup will be increasingly common — the global smart home market is forecast to reach \$53 billion in two years.²² Meanwhile, 72% of American parents told us they own a smart speaker,²³ and 60% of those who don’t are planning to buy one within the next year.²⁴

Audio can even transform a rote task into recreation. That’s why Matt Lieber, head of podcast operations at Spotify and cofounder of Gimlet Media, helped

develop *Chompers*, a two-minute, twice-daily podcast for kids to play while they brush their teeth. He saw the effect in his own home: “It took this moment of the day that was kind of a chore and turned it into something my children look forward to. So now they actually ask me, ‘Hey, is it time to brush my teeth?’”

Audio also helps make informal education an everyday thing. Families told us they often use voice assistants to answer questions, find out a sports score, or settle bets. “When we’re at the dinner table, my mom brings Siri into the conversation quite a bit,” said Ella, 17, in Brooklyn. “We were wondering if the root of a word was Latin or Greek and she just asked Siri. I think it helps her stay in the conversation rather than diverting her attention entirely to her phone.” In our survey, 84% of American

how the world works.” While watching TV, “you play no role in the content, [but] interacting with touch screens and for that matter interacting with these voice-activated technologies allows that to happen in spades.”²⁷

With COVID-19’s arrival, at-home learning became essential and audio’s role became apparent. *The New York Times* pointed out that for parents suddenly acting as teachers, “smart speakers make for wonderful homework helpers.”²⁸ And the Bello Collective shared a detailed guide for working podcasts into a homeschooling regimen to “keep [kids’] minds growing and curiosity satisfied.”²⁹ Notably, 80% of American parents who listen to podcasts told us the medium has become a very helpful educational tool,³⁰ and when we caught up with Ester again in July, she

“Having the speakers on is a way for us to connect as a family.”

— MALCOLM, 34, BROOKLYN

parents said technology has fueled their family’s discovery “exponentially,”²⁵ and 72% said today’s kids are “light years” ahead of where they were at their age as a result.²⁶

As Dimitri Christakis, a director at the Seattle Children’s Research Institute, told NPR, the interactive nature of new technology helps children “understand

said storytime podcasts had become a new household favorite. It’s not just about listening in. The quarantine-inspired *The Kids Are All...Home* podcast combined practical learning and creative thinking by showing children how to create their own mini-podcasts. The show then edited together entries from around the world, fostering community in the process.

More than ever, audio has been helping families connect — in July, 77% of American parents told us music does exactly that,³¹ and the kids seem to agree. As Ella explained, “We didn’t play music in our house much before [the pandemic] because we weren’t all home together very often, but now we’ve all been sharing our respective music and it’s really nice.” Meanwhile, Malcolm, 34, in Brooklyn, frequently streams songs to dance to and sing along with his toddler. “Having the speakers on is a way for us to connect,” he said. On Spotify — which works with connected speakers from **Amazon, Google, Sonos, and more** — we’ve seen this directly: Spotify Free users with children in the home are 56% more likely to listen on speakers.³²

With so much music available on demand, parents can also easily call up the sounds of their pre-parent days, allowing their kids to connect with their younger selves. “My father once had tears in his eyes showing me a song on YouTube,” said Brennan, 30, of Topanga, California. “He recalled having to walk the long route home just to pop into a particular cafe to play this song on the jukebox. Now he can listen with a few clicks anytime he wants to.” In our survey, 70% of young Americans said listening to their parents’ music gives them a better sense of who their parents are,³³ and 84% of parents said music is a way they bond with their kids.³⁴

In other words, audio isn’t just useful at home — it’s a multigenerational touchpoint, and these days, that means a lot. When we asked Zs and millennials in July what central theme says the most about their life right now, their top answer was “family” by a wide margin.³⁵



Ella, 17,
Brooklyn

83%

of U.S. parents said being connected is fundamental to thriving today.

SOURCE: Spotify Trends Survey among 500 US respondents 15-40, July 2020



Jonathan, 38,
Brooklyn

BRAND TAKEAWAYS

Families are embracing screenless entertainment options and devices that help streamline their day-to-day. Developments in audio make this more possible than ever, giving brands ample reason to consider it in their marketing efforts.

1

JOIN THE FAMILY. Audio plays a role in family moments morning to night. Target podcasts, playlists, and genres to be there when they listen to stories, belt out tunes from their favorite animated films, or stream lullabies before bed. And use Spotify's connected home and in-car targeting to serve contextual creative messaging: the sizzling sounds of dinnertime, or sing-alongs that soundtrack socially distanced school trips.

2

ENGAGE THE THEATER OF THE MIND. Imagination isn't just for the kids. Use audio to take your audience places video can't. Spark memories and engage emotions by utilizing immersive 3D sound coupled with good storytelling. Whether it's the sudden "pop!" of a bottle of bubbly or a warm voice leading them through a familiar scene, such details transport listeners to a space where your message can ring out.

3

FIND YOUR VOICE. On Spotify, people spend most of their time doing something else while they're listening — families are no exception. But unlike TV ads, audio stays with them as they move back and forth between chores and play. To stand out in screenless moments, establish an audio signature or distinctive voice that represents your brand when your ad plays via a family's smart speaker or connected car.



Left to right:
Shea, 21, Bianca,
23, Deja, 22,
New York City

Self-discovery builds community

Zs and millennials are discovering new ways to find themselves across shifting passion points and niche obsessions.

THE CONCEPT OF self-discovery isn't unique to Zs and millennials, but they're doing it differently thanks to the access and connectivity technology offers. Through our research, we found that young people are increasingly forming identities based on niche interests, and bonding with others who share those interests around the world — 70% of American Zs and millennials said it's much easier to feel connected to a community today thanks to digital platforms.³⁶ And when asked about the elements that fuel their self-discovery, 76% cited music³⁷ and 68% cited podcasts.³⁸

Brennan, for one, said social media helps him flesh out his identity: “Over

that there are more than 2 million topic-specific forums within Reddit,⁴¹ an ever-growing number of private meme groups and gaming networks, and, on Spotify, 4,028 microgenres to discover alongside over 1.5 million podcasts representing myriad areas of expertise or obsession.⁴² Notably, 75% of U.S. podcast listeners we surveyed said the medium allows people to connect with each other.⁴³

According to our research, online platforms have even fueled IRL connections for Zs and millennials. Cazzy, 23, in Vancouver, has traveled around North America to meet his social media friends. “I have found a very supportive and friendly community,” he told us,

people through social media — the only place she felt like herself. “My family has a very closed-minded point of view when it comes to race, poverty, and gender,” she said, so she and her online friends created a physical scene for self-described “weird people” like them to grow their community. “I found my real family.”

Similarly, New York's Angry Babes collective promotes shows that serve women, people of color, and LGBTQ+ people, both performers and audiences. “The whole point,” said cofounder Mickala, 23, “was to create a safe space where people like us can feel comfortable, not be looked at, and connect, because we don't often have

“Over time, I've reinvented my own presence and thereby my perception of the world around me.”

— BRENNAN, 30, TOPANGA

time, I've reinvented my own presence and thereby my perception of the world around me. What keeps me coming back is the ability to constantly adjust and alter my own little ecosystem of interests.”

In talking to young people, we found defining interests that ran the gamut from fanfiction to paranormal activity to '60s Nigerian pop — 66% of Americans surveyed said they have a passion others would consider obscure,³⁹ and 69% proudly identify as a “weirdo.”⁴⁰ Of course, the internet offers endless ways to explore obscurities. Consider the fact

“often someone to talk to in the late hours about niche topics or when I just want to complain about something.” Then there's Jack, 35, in London, a music producer who found his real-life peers in an online community for techno enthusiasts at age 17. His experience underlines the evolution of this trend over the years — what was then novelty for him is the norm for youth today.

For instance, Guadalajara's Andrea, 25, got involved with the all-female CyberWitches crew, who throw music events around Mexico, after finding her

that space to say, “This is who I am. I'm a rager. I'm a screamer.”

Such gatherings ceased as the pandemic took hold, but music emerged as an online activity capable of meaningfully uniting globally scattered groups. From Ben Gibbard's acoustic “Live from Home” series, to the “Verzuz” beat battles, to Spain's 12-day Cuarentena Fest, to Travis Scott's *Fortnite* concert (attended by 12.3 million gamers⁴⁴), communal livestreams evoked an in-the-crowd feeling and, as *Pitchfork* wrote, encouraged “a diminished sense

of hierarchy between artist and the fan, leading to interactions that can be much more social.”⁴⁵ For some artists, livestreaming led to a streaming bump on Spotify similar to what they see after tours.⁴⁶ For her part, Andrea DJed a Zoom-powered festival that raised funds for immigrants in need.

Among American Zs and millennials we talked to, audio was consistently identified as a powerful force for community-building: 80% said music streaming services offer a gateway to other cultures,⁴⁷ and we’ve seen this — in one month last year, over 60% of Spotify users discovered an artist from a country outside their own.⁴⁸ Plus, 73% believe music is a great way to find community,⁴⁹ and it’s good for maintaining community, too. In response to quarantine, Melbourne’s Rani, 20, said she and her friends made a collaborative Spotify playlist “purely dedicated to music that was for when we all could get together again. Whenever anyone thought of a good song to add, they would put it on the playlist. This was such a great way to get everyone’s spirits lifted.”

A testament to the rise of niche culture is the way that artists who stand out as “different” have become beacons to like-minded fans across the world. The 2020 Grammys were essentially a celebration of genre subversion. Z superstar Billie Eilish — who held last year’s record for most songs (14) on Spotify’s Global Top 50 Chart at once⁵⁰ — swept the ceremony with her dark mix of alt-pop, EDM, and trap. And Lil Nas X performed his country-rap hybrid “Old Town Road” with a hip-hop legend, a trendsetting DJ, a K-pop idol group, a viral yodeller, and a ’90s country star.



Jack, 35,
London

70%

of U.S. Zs and millennials said it’s easier to feel connected to a community today thanks to digital platforms.

SOURCE: Spotify Trends Survey among 500 US respondents 15-40, January 2020

The remix featuring the latter, Billy Ray Cyrus, was Spotify’s fifth most streamed track of 2019.

We’ve also seen this sort of category-defying approach to taste reflected in the popularity of genre-free playlists like [POLLEN](#) (1.3 million followers) and [LOREM](#) (650,000).⁵¹ According to our study,

45% of U.S. millennials and Zs listen to at least 5 genres regularly,⁵² underscoring the fact that exploring what’s different is encouraged and, ironically enough, a source of camaraderie.



Makayla, 23,
Vancouver, Canada

BRAND TAKEAWAYS

Young people are proud of their unique, multidimensional identities, and brands can be a part of that — 69% of American Zs and millennials said brands have the power to create communities based on common interests and passions.⁵³ Help them celebrate their individuality.

1

TUNE INTO NEW TARGETING. Rather than targeting only age and gender, marketers should dimensionalize their strategies by including specific interests. On Spotify you can reach audiences based on topics like Gaming, Travel, or TV & Film, which are informed by the playlists and podcasts users listen to. Plus, you can utilize our Streaming Intelligence to reach people based on artist affinity and the subgenres they love.

2

LIVE IN THE MOMENT. Streaming audio lets you see which devices your audience uses and what times they're listening. Multi-device users stream Spotify 2.5 hours per day,⁵⁴ which provides a wide range of identifiable moments, from Workout to Cooking to Party and Chill. Use context to be heard — for instance, [CORE Hydration reached fitness enthusiasts](#) specifically while they were working out, biking, or running.

3

REACH PASSIONATE COMMUNITIES. Podcasts are often hosted by creators with very niche passions, and flocked to by like-minded listeners. There are shows about every topic imaginable — whether secret societies, Pokémon, or Roman history — so determine what your audience is into and use Spotify's podcast category packages to target a range of shows based on content, from Comedy to Music to Gaming to True Crime.

Progress overtakes partisanship

Young people expect brands to take a stand, but what they really want is engagement and inspiration instead of posturing.



Nina, 28, Berlin

WE ALREADY KNEW that young people expect their culture to mix with civics. But from talking to American Zs and millennials in both January and July, we learned that they prioritize finding collective purpose in order to drive change over leaning into partisan labels that slow progress. They're tired of the same old corrupt systems (66%),⁵⁵ and less interested in political parties than they are in moving forward (71%).⁵⁶ What's more, 72%⁵⁷ of U.S. respondents said they plan to vote in 2020's presidential election — 2016 turnout hovered around 50% for these age

including trans visibility, women's rights, loneliness and mental health, and, especially, climate action. As Aayushi, 18, in New Delhi, told us bluntly, "The only way this environmental damage will slow down is if the [whole world] is willing to change its thought process, its lifestyle, and its culture into a more sustainable pattern."

But as the year progressed, one cause emerged as the defining issue: the global Black Lives Matter movement, part of what's made 2020 a "cultural wake-up call" to 83% of American respondents.⁶¹ Virtually everyone we interviewed in

do what I can," said Rani. "I want to ensure that I am regularly educating myself on this, attending protests when I can, donating, supporting Black businesses and platforms, and so on." We saw this spirit of engagement reflected on Spotify: Our [Black Lives Matter playlist](#) picked up 1,900% more followers and a 130,000% increase in streams over the first two weeks of June.⁶²

Uniting all of these passionate issues are some fundamental themes. For one, they've all been linked in various ways to the call for racial justice and equality — and, more broadly, to the goal of

“We need to fight against all the old people who want to hang onto their old ways.”

— MAKAYLA, 23, VANCOUVER

groups⁵⁸ — and that was *before* the year's most galvanizing events. When we spoke to them again, the number had grown to 77%⁵⁹ — unsurprising considering 88% of Zs and millennials said the global pandemic and/or racial justice movement have personally impacted their lives.⁶⁰ When we checked back in with Makayla in Vancouver, she was fired up: "We need to fight against all the old people who want to hang onto their old ways. We are going to do whatever we can."

As we spoke to Zs and millennials around the globe at the top of the year, several causes emerged as areas of focus,

July was moved to act in the wake of the police killing of unarmed Black man George Floyd. Mael protested in Atlanta. Kenneth was inspired to submit opinion articles to a major Jakartan newspaper. Finn in Surrey vowed to offset his privilege through direct action. Guadalajara's Andrea took the opportunity to educate her mother on the issues at play, and Rani in Melbourne tuned into Black-hosted podcasts to educate herself.

"The movement has taught me that simply not being racist isn't enough, and to actively use my voice and platform to

building a better future for those at risk. That impulse among Zs and millennials appeared in the early days of the pandemic, too, highlighting the strength of purposeful action over divisive politics. In our July survey, 78% of Americans told us that, in light of the times, they've been inspired to do more good.⁶³ *The New York Times* reported that hundreds of mutual-aid networks arose across the U.S. in mid-March, allowing neighbors to help neighbors with everything from groceries to transportation to cash.⁶⁴ And by late March, GoFundMe clocked over 14,000 small-business relief campaigns,⁶⁵ while

Patreon saw new patron growth jump 36%, showing the willingness of fans to support creators in this challenging time.⁶⁶ In later months, samaritans in Mumbai used crowdfunding to provide food, masks, and sanitation supplies to poor migrant workers stranded by lockdown.⁶⁷

Another theme common to these movements: representation for a diverse group of voices whether in media, at protests, or in the voting booth. Efforts around the latter underscore these generations' resistance to old-school partisanship. For instance, organizations like LeBron James' More Than a Vote focus on increasing participation among those whose rights have been suppressed — not those who plan to vote a certain way. Kix and Mael volunteered for a similar group, The New Georgia Project, skipping class to register voters at other schools. "You just have to bring people in numbers," said Mael. "We have to educate enough people to let them know we can turn the state any color." And as 20-year-old anti-gun-violence activist Emma González wrote in her recent appeal for engagement, "We aren't looking for someone on the left or on the right; we are looking for someone who will help us move forward."⁶⁸

Likewise, when we asked American Zs and millennials what they want to see out of brands, 93% chose "purpose" over "politics."⁶⁹ "I constantly have corporate propaganda shoved down my throat," said Kenneth, adding that he finds it "quite hard to trust brands." But building trust doesn't mean catering to audiences' every whim — young people mainly want to see conviction. When asked which behavior would most damage their

perception of a brand, their top pick was making false or misleading commitments to social or environmental causes.⁷⁰

Brands getting it right are making purposeful decisions to encourage civic engagement, sometimes at the cost of immediate profits. Patagonia and Lush Cosmetics were among those who temporarily closed their offices and stores so employees could participate



71%

of U.S. Zs and millennials are less interested in political parties than they are in moving forward.

SOURCE: Spotify Trends Survey among 500 US respondents 15-40, August 2020

in 2019's global climate strike.⁷¹ Lyft's "Ride to Vote" campaign offers free or discounted rides to the polls.⁷² And in response to the Black Lives Matter movement, many stood out: Ben & Jerry's issued a legislation-focused call to investigate reparations. PayPal committed more than half a billion dollars to supporting Black- and minority-owned businesses. Tech giants like Microsoft and IBM pledged to stop sharing facial recognition software with police. And NASCAR banned the Confederate flag from races despite knowing large swaths of fans would be upset.⁷³

As it turns out, that's exactly the sort of behavior Zs and millennials want to see from brands in times like these. Their advice for how brands should meet the moment: Be inclusive, be purposeful, give back, and be transparent. And topping the list: Take action.⁷⁴

As the pandemic hit, many brands did exactly that in ways that felt authentic. eBay launched an accelerator program for retailers in need of ecommerce sites, while Heinz introduced grants for independently owned diners.⁷⁵ L'Occitane produced hand sanitizer; Gap made masks, gowns, and scrubs; and Rosetta Stone offered free language courses to housebound students around the world.⁷⁶ At Spotify, we launched our own COVID-19 Music Relief project, matching donations up to \$10 million to organizations offering financial relief to those in the music community most in need. And as new cultural moments emerged, brands found ways to weave their message in — like partnering with Global Citizen and the World Health Organization to put on the *One World: Together at Home* televised benefit



Aayushi, 18,
New Delhi

concert, which raised \$127 million for frontline healthcare workers.⁷⁷

While Zs and millennials are by no means monolithic, they're strongly united on this: 80% believe brands need to bring genuine value to our society and not just

sell products.⁷⁸ As Nick, 30, in Oakland, California, put it, "Taking action that actually influences younger generations has to clearly demonstrate that you're willing to lose profit or customers for something you stand for."

BRAND TAKEAWAYS



Mickala, 23,
Brooklyn

Brands should increase transparency in their business practices to show their communities what they stand for. But keep in mind: These generations have no problem identifying imposters, so taking action and staying accountable remain critical.

1

SUPPORT MOVEMENTS, NOT MOMENTS. Trans awareness is a year-round concern, breast cancer doesn't take a break once the pink ribbons are put away, and teaching Black history matters just as much in August as it does in February. Zs and millennials want to know that your brand is about more than just a timely hashtag. Activations throughout the year can help show that you are living up to your ethos.

2

WALK THE WALK. These generations want to know that your brand isn't just all talk. The sustainable shoemakers at [Allbirds](#) used a [playful multiformat campaign](#) to bring their message to life on Spotify. Their clever audio and video creative showed audiences that they could "meet their shoes" — specifically, the trees and sheep that serve as the eco-friendly source of the sneakers' materials.

3

PASS THE MIC. To ensure your message is both authentic and distinctive, let activists and community leaders speak to the causes your brand cares about. Use your platform to amplify these voices and tell their stories. P&G took this approach with the [Harmonize](#) podcast, whose debut season focuses on the Black male experience in America and features conversations with John Legend and Pusha T.



Andrea, 25,
Guadalajara,
Mexico

Sound is getting smarter

Audio isn't just ubiquitous in our everyday lives — it's also the most human of all technological mediums.

EMOTIONAL, THERAPEUTIC, personal — when we asked American Zs and millennials which qualities make sound powerful to them, those words rose to the top.⁷⁹ All of which supports the conclusion drawn from the rest of our research: Sound is the most human of technological mediums. At Spotify, we’ve often explored the fact that audio moves with us as we navigate our day. But as we increasingly use speech to control the tech in our headphones, homes, offices, and cars, that intimacy grows — 72% of Americans surveyed said voice makes us more sentimental toward our devices,⁸⁰ and 58% said sound is at the forefront of humanizing technology.⁸¹

Plus, there’s a demand for our tech to become more human. Nick in Oakland said he likes being able to customize the voice of his GPS app: “You can choose between British or Australian, male or female, Morgan Freeman or Snoop Dogg. I want variety.” And he’s not alone — 62% of American Zs and millennials said they like to choose the gender, accent, or style of voice used by their devices.⁸² Then there’s Alexa’s news-reading voice, which last year was upgraded to “selectively emphasize[e] certain words in a sentence the same way a real newscaster would.”⁸³

Familiar voice creates an immediate and personal connection between speaker and listener — like the relationship between podcast hosts and followers: 77% of U.S. podcast fans said it’s easy to feel emotionally connected to a host and that tuning in is like listening to a friend.⁸⁴ Moreover, when asked what they like most about podcasts, their top answer was that they’re trustworthy.⁸⁵ That realness goes beyond the people talking. With social distancing, many

podcasts began recording remotely. Audio quality took a hit, but as Nicholas Quah and Caroline Crampton wrote in *Vulture*, “These are deeply irregular times, and less than perfect audio quality may well be something that communicates the humanness of the myriad podcast and radio folk working to get their shows



Left to right: Ella with friends Ines and Phebe

72%

of U.S. Zs and millennials say voice technology makes us more sentimental toward our devices.

SOURCE: Spotify Trends Survey among 500 US respondents 15-40, August 2020

out to supply their communities in these extraordinary times.”⁸⁶

That dovetails with the fact that hearing is the fastest and most immersive sense, thus a potent BS detector. According to an episode of *Radiolab*, “It takes our brain at least one-quarter of a second to process visual recognition. But sound? You can recognize a sound in 0.05 seconds.” In other words, as a guest auditory neuroscientist told the show, “Eyes lie, but the ears don’t.”⁸⁷ While social media, especially visual, has fostered a culture of flawlessness, audio emphasizes what’s natural. According

Asked to pinpoint their sources of audio self-care, American Zs and millennials named streaming music and mood-based playlists as their top two picks.⁸⁹

Sure enough, as COVID-19 took hold, we saw Spotify listeners adding mellower-than-usual songs — acoustic, instrumental, lower BPM, etc. — to their playlists.⁹⁰ And in our July survey, 85% reported that the mood of their music had changed to match the times,⁹¹ while 77% said music had helped keep them sane.⁹² As Vancouver’s Makayla said, “Chilled-out, soulful music has been getting me through these hectic times

stay informed or entertained,⁹⁶ and 1 in 4 said they listen to mental-health-related podcasts.⁹⁷ Nina, 28, in Berlin tunes into *Mental Illness Happy Hour*, which aims to raise awareness around such struggles and stigmas. “It makes me feel less alone with my thoughts,” she said, “and it often opens up my mind or changes my perspective on myself or situations where I feel stuck.”

As social distancing began, self-improvement podcasts also saw an uptick as people turned to guided meditation and wellness talks to help them decompress and stay calm.⁹⁸ And

“I get lost in podcasts — in the same way you do when you read a book.”

—STEPHANIE, 32, SAN FRANCISCO

to Larz, whose [#HalfTheStory](#) nonprofit urges young people to share their most human attributes online, that benefit is right on time: “Gen Z is over perfection.”

Embracing flaws can also mean exploring self-improvement, and 73% of U.S. Zs and millennials said they use audio to cope with stress and anxiety.⁸⁸ Nick listens to music to “adjust my mood,” Brennan in Topanga told us tuning into jazz allows him to “ignore unnecessary inner conflicts,” and Ella in Brooklyn said, “I never save single songs to my library — when I find a song I like, I add it to one of my three mood playlists.”

where my mind races 24/7.” And as evidenced by Italy’s balcony sing-alongs, the prevalence of Pop Smoke’s “Dior” at protests,⁹³ and online events like Yo-Yo Ma’s [#SongsOfComfort](#), music’s ability to uplift isn’t just a solo perk. In fact, 79% of American Zs and millennials believe it can unite people in these culturally fraught times.⁹⁴ Among their top reasons? Music’s power to generate positivity, channel complex feelings, and integrate diverse voices.⁹⁵

Podcasts also have a place — 54% of U.S. respondents said they’re turning to podcasts more often these days to

with less commuting and more working from home, we saw a bump in streaming across devices like computer desktops, TVs, smart speakers, and gaming consoles.⁹⁹ All of which reinforces the humanity of sound — both its flexibility and importance as a source of personal comfort.



Brennan,
30, Topanga,
California

BRAND TAKEAWAYS

Streaming audio doesn't just reach listeners in screenless moments — the format allows brands to connect in personal contexts, when Zs and millennials are engaged and attentive. Audio feels human, which makes it the perfect mode for your message.

1

TALK TO *YOUR* CUSTOMER, NOT *THE* CUSTOMER. Increasingly, it feels like our audio knows us personally. Make your message direct by speaking to a super-specific target audience in an identifiable contextual moment. For instance, [heycar](#) reached automotive enthusiasts while they were in the car, urging them to look around at their old ride and consider whether it was time for something new.

2

THINK BEYOND THE CTA. Podcast fans feel connected to their favorite shows' hosts, and you can join that circle of trust. Consider ads that unobtrusively weave your brand into podcast content your audience loves — 81% of U.S. podcast listeners told us they took action after hearing ads during an episode, including looking up a product, connecting with the brand on social media, and talking about the brand with others.¹⁰⁰

3

EXPAND YOUR REACH WITH AUDIO. Audio is a powerful medium on its own, but adding it to visually driven campaigns also ups the impact significantly, as your ads reach people in entirely different moments and mindsets. Consider a holistic strategy that includes both elements, as campaigns with video *and* audio have been shown to drive a 30% lift in brand awareness and 122% lift in ad recall on Spotify.¹⁰¹

CONCLUSION

IN A YEAR of drastic shifts and constant uncertainty, we hope this report has shown you where culture is headed. The Zs and millennials we spoke to are full of inspiration, passion, and innovation, and they're pushing to make society more inclusive and fair. We've given you plenty of stats to digest, but there's one more we couldn't resist sharing: 80% of Americans we surveyed in July told us they remain hopeful that this difficult time will bring change for the better.¹⁰²

As these young people rewrite our social norms, they're also dreaming up new ways to create, new ways to engage with technology, and new ways to connect with their families — the ones they were born into and the ones they choose. At Spotify, understanding these shifts is integral to our work of connecting the world through audio. That's why we'll keep listening over the next year and beyond — and we recommend all those reading this do the same.



Bianca, New York City



SOURCES: ^{1,3,5,7,9} Spotify Trends Survey among 5,500 respondents 15-40 in AU, BR, CA, DE, ES, ID, IN, IT, MX, UK, US, January 2020; ^{2,4,6} Spotify Trends Survey among 2,000 respondents 15-40 in BR, DE, UK, US, July 2020; ⁸ *Forbes*, "Student Loan Debt Statistics In 2020: A Record \$1.6 Trillion," February 2020; ⁹ MarketWatch, "Half of young Americans say their degree is irrelevant to their work," August 2019; ^{10-12,16,23,25,31,39-40,47,60-61,63,74,91-92,94-96,102} Spotify Trends Survey among 500 US respondents 15-40, July 2020; ^{13,35,42,50-51} Spotify First Party Data, global, 2020; ¹⁴ *Vox*, "This week in TikTok: Bored teens are making self-isolation content," March 2020; ¹⁵ *The New York Times*, "We Live in Zoom Now," March 2020; ^{17,26,33-34,36,38,43,49,52-53,55,57,70,78-79,81-82,84-85,88-89,97} Spotify Trends Survey among 500 US respondents 15-40, January 2020; ¹⁸ Spotify First Party Data, March 2019; ¹⁹ Spotify First Party Data, global, 2019; ²⁰ Spotify First Party Data, free users, global, January/July 2020; ²¹ Spotify First Party Data, free users, global, April 2020; ²² Statista, "Forecast market size of the global smart home market from 2016 to 2022," February 2020; ^{24,30,56,59,69,80} Spotify Trends Survey among 500 US respondents 15-40, August 2020; ²⁷ NPR, "Alexa Can Help Kids With Homework, But Don't Forget Problem-Solving Skills," January 2019; ²⁸ *The New York Times*, "Smart Speakers Can Go Beyond Music," March 2020; ²⁹ Bello Collective, "A Survival Guide for Parents: Introducing Podcasts into Homeschooling," April 2020; ³² Spotify & Kantar TNS Research, US, 2019; ⁴¹ *Redditmetrics.com*, updated April 2020; ⁴⁴ *Engadget*, "Travis Scott's 'Fortnite' concert drew 12.3 million concurrent viewers," April 2020; ⁴⁵ *Pitchfork*, "How Livestreaming Is Bridging the Gap Between Bands and Fans.," March 2020; ^{46,90,98-99} Spotify For the Record, "How Social Distancing Has Shifted Spotify Streaming," March 2020; ⁴⁸ Spotify For the Record, "Spotify Listeners Are Discovering Music from Around the World," December 2019; ⁵⁴ Spotify First Party Data, global, 2019, based on daily content hours / daily active users, free users multiplatform; ⁵⁸ United States Census Bureau, "Voting in America: A Look at the 2016 Presidential Election," May 2017; ⁶² Spotify for Brands, "This June, Celebrate Black Creators of Past and Present on Spotify," June 2020; ⁶⁴ *The New York Times*, "Feeling Powerless About Coronavirus? Join a Mutual-Aid Network," March 2020; ⁶⁵ *The New York Times*, "GoFundMe Confronts Coronavirus Demand," March 2020; ⁶⁶ Patreon, "COVID-19 and the Creative Economy: Takeaways from Patreon's Data Science Team," March 2020; ⁶⁷ DW, "How crowdfunding is helping India's poor in the age of COVID-19," May 2020; ⁶⁸ *Washington Post*, "The Democrats Are Moving Left. Will America Follow?," November 2019; ⁷¹ *Vox*, "Some brands are closing stores for the global climate strike. That's a big deal.," September 2019; ⁷² *Lyft.com*, "Expanding Voting Access in 2020," January 2020; ⁷³ JUST Capital, "These Are the Corporate Responses to the George Floyd Protests That Stand Out," June 2020; ⁷⁵ Ad Age, "How Marketers Responded to Coronavirus in the First Three Months," May 2020; ⁷⁶ CNN, "Shop these 31 brands that are giving back to coronavirus relief efforts," March 2020; ⁷⁷ *Forbes*, "The Story Behind The World's Biggest Charity Concert: What Was It All For?," April 2020; ⁸³ *The Verge*, "Alexa's news-reading voice just got a lot more professional," January 2019; ⁸⁵ *Vulture*, "Coronavirus Is Changing Podcasting, Fast," March 2020; ⁸⁷ Radiolab, "Ears don't lie," December 2012; ⁸⁹ *Pitchfork*, "Pop Smoke's 'Dior' Is a Radical Addition to the Protest Music Canon," June 2020; ¹⁰⁰ Crowd DNA & Spotify, "We're All Ears," US, 2018; ¹⁰¹ Nielsen Brand Effect on Spotify, September 2019