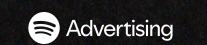


WEKNOWTHE CONVERSATION AROUND GENZISINCREDIBLY NOISY. BUT WEBELIEVE SPOTIFY OFFERS SOMETHING DIFFERENT ::

an intimate, deeper understanding of this generation through the music, podcasts, playlists, and fandoms that form the soundtrack of their lives. Because Spotify is their essential companion throughout their day, our streaming data offers valuable insight into their attitudes and trends, serving as a powerful predictor of what's in store for culture at large. So, if you want to understand Gen Z, tune into what they're streaming on Spotify. And if you want to connect with this generation in meaningful ways — we can help with that, too.









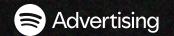








Gen Z is craving connection more than ever — while other forms of online activities contribute to feelings of loneliness, music and podcasts are a catalyst for catalyst for true connection online and irl.'





AUX CONTROLLING

"ICREATE BLENDS WITH NEARLY EVERY PERSON I MEET, SO I CHECK THOSE DAILY. I ALSO LISTEN TO MY DAILY MIXES FOR UPDATED SONGS." — 20 YEAR OLD GEN Z. CANADA



Social media is ever present, but Zs tell us it's contributing more to feelings of isolation than togetherness... In fact, 67% of American Gen Zs believe people are more lonely today than they were 10 years ago.¹

But not everything Gen Z does with a phone is harmful, 64% agree, "Spotify is the ultimate antidote to doom-scrolling," and they're actually using Spotify to forge connections by sharing music and podcasts to break the ice with each other.

Music has brought people together since the dawn of civilization, but what's new is the technology that makes connecting and sharing easier and more fun:



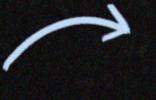
BLEND WITH FRIENDS:

Blend is a Spotify feature where two users can merge their musical tastes into one shared playlist. Gen Z users account for 60% of all Blend playlists created and shared in the last two years.³



BLEND WITH CELEBS:

Fans can also create Blend playlists with creators like Charli XCX, Diplo and Lizzo. Gen Z made up 55% of streams of Celebrity Blends from 2023 through Q1 2024, highlighting how Spotify curates connections between fans and their favorite creators, too.³



COLLAB PLAYLISTS:

Gen Zs accounted for 52% of all collaborative playlists created this year.³



SHARING PROFILES:

Think of that one friend who's always in charge of the party playlist – the go-to DJ everyone trusts for the vibe. For Gen Z, Spotify is that friend. They shared user profiles 32 million times, making up 67% of all profile shares – more than any other generation.³

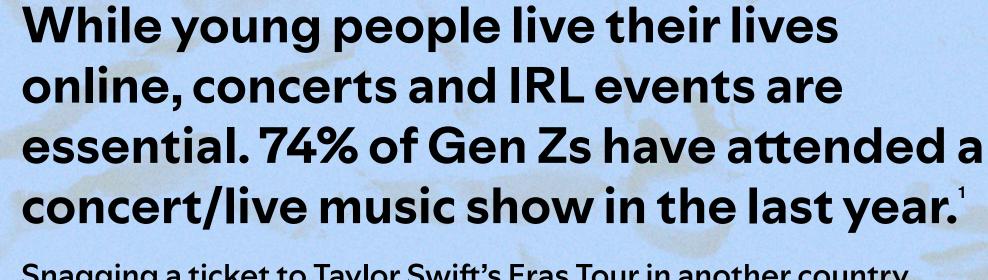


SHARING PRE-RELEASES:

With a +328% YoY increase in Gen Zs sharing album pre-releases, we see how online sharing is second nature to them. But on Spotify, it means something deeper. When Gen Z shares, they aren't just sharing music – it's sharing a piece of themselves. It's how they introduce each other to artists they're passionate about, creating more personal connections in the process. ³



Z'SLIVE OUTLOUD EXPERIENCES



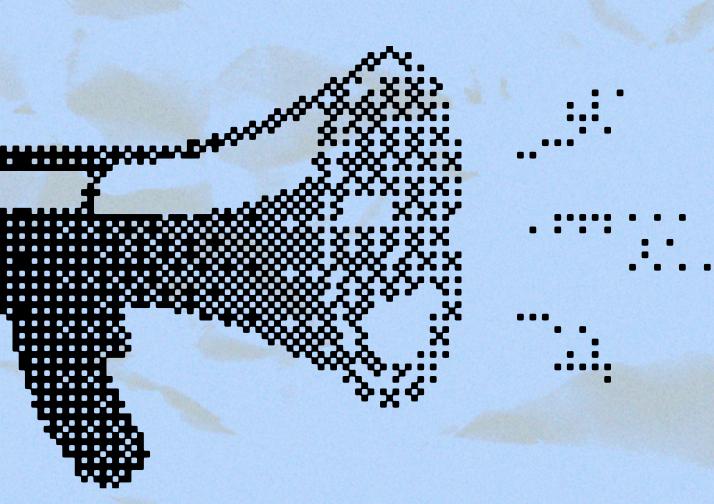
Snagging a ticket to Taylor Swift's Eras Tour in another country has both economic impact and cultural cache, and is ushering in a new paradigm for live music events where fans are willing to cross country lines.

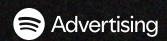
It doesn't have to be a sold out arena for Zs to come together IRL to connect over their shared passions. Nearly half of Gen Zs have attended an in-person listening party for a new album or song.¹

Fueled by the intimate relationship people have with podcast hosts, we're seeing live experiences take hold for podcasters too. 37% of Gen Zs have attended a live, show or taping of a podcast and 36% of Gen Zs have attended an in-person watch party for a new episode of a video podcast.¹



In the first five months of 2024, they watched 2.9 billion minutes of video podcasts – a 58% increase compared to last year during the same time period.²







FRIENDS STREAM TO CONVENE, TO CELEBRATE,& TO COMMEMORATE

"I CREATE PLAYLISTS FOR CERTAIN SEASONS, ACTIVITIES, OR MOODS — AND I OFTEN SHARE THEM WITH FRIENDS TO BUILD A GREATER CONNECTION."

— 17 YEAR OLD GEN Z, USA

Gen Zs are hosting and attending more casual social events, and are tapping Spotify playlists to set the vibe. They're streaming music and podcasts through connected devices, including smart TVs, gaming consoles and speakers, showing a growing trend in communal listening.

Spotify users are more likely than non-users to curate the vibe for life's big moments. With Spotify's Jam feature, multiple people can blend their musical tastes into a shared playlist.

Gen Z makes up the majority of Jams (45%) with 2.2 Billion streams of Jams from its launch in October 2023 - April 2024.³

Gen Zs in the US are 118% more likely to stream on a game console compared to Millennials.¹

of Gen Zs agreed that a good playlist is the glue that holds a successful party together

(e.g. house party, dinner party, Halloween party, etc.).²

USER GENERATED PLAYLISTS RUN THE GAMUT:

Laying by the Pool Music

Hype Songs Before Soccer Practice

Study Playlist (Rory Gilmore's version)

Excited for the Future





GENZ SWIPES RIGHT FOR GOOD MUSIC & PODCAST TASTE

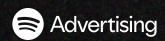
From ghosting to situationships, Gen Zs are in the dating trenches. But when it comes to romantic connections, Zs consider music and podcast compatibility essential. They're sharing songs and podcast episodes to express how they feel and seek validation. In fact, niche dating apps are emerging to help young people connect around music.

of Zs say they would prioritize music compatibility over a potential partner's looks.

of Gen Zs agreed that "sharing similar music tastes with a potential love interest connects us more deeply." ²

"I USE PLAYLISTS TO DESCRIBE MY MOODS OR LIFE PERIODS. RIGHT NOW I'M WORKING ON MY COLLABORATION WITH MY GIRLFRIEND. WE BOTH ADDED MUSIC TO IT SINCE WE MET, AND THE TYPE OF MUSIC WE BOTH EXPERIENCED FROM THE BEGINNING OF OUR RELATIONSHIP TO NOW IS REFLECTED IN THAT PLAYLIST."

- 24 YEAR OLD GEN Z, USA





TAKEAWAY FOR BRANDS

Gen Zs aren't just craving deeper connections with friends and romantic partners - they want more from brands too. Spotify creates authentic opportunities for brands and fans to connect both online and offline. Brands can surround some of these social features on Spotify, like Wrapped, and organically become part of what's happening on our platform.

We also know that concerts are a must-have for Gen Z, but ticket prices are making concerts inaccessible. Brands can add tangible value by hosting or sponsoring live concerts and events for Zs featuring artists and podcast hosts that they love. Spotify's new suite of branded events allow advertisers the opportunity to sponsor some of Spotify's biggest franchises both on and offline – which can deliver tangible value.

On Spotify, brands can tap into the rich online and real world communities where Gen Z is already connecting. By creating a value exchange, brands can engage Gen Z throughout the day on all of their devices. Brands should think multi-format (audio, video, display) and cross-device to meet your audience where they are.

of Gen Zs said that a brand sponsoring live music events, concerts or would make them more likely to buy that brand in the future.









From creating playlists for hyperniche moments to moody jams to introspective podcasts, Zs are turning to Spotify to meticulously soundtrack and share the defining formative "firsts" of their teens and 20s



FORMATIVE ***

Gen Z is going through the intense emotions and pivotal life experiences synonymous with coming of age — from their first kiss to their first night away at college to their first day of work.

Gen Z streamed 86M minutes of playlists with the word "first" in the title (like first kiss, first date, first breakup).¹

As they soundtrack these moments, they're creating the memories and music tastes that will resonate with them forever.

This phenomenon, known as the "reminiscence bump," explains why we remember and hold onto the music of our teens and early 20s. For Gen Z, Spotify is soundtracking their formative "firsts," linking these sounds to powerful moments in real time. In the past this happened offline, but now Spotify is powering these firsts in real time and in turn, brands can too.

90/0

of Gen Zs agreed, "the music I'm into right now will always have a cherished place in my heart." ²

More than any other gen, the top Daylist words for Gen Z are:







The trend of "romanticizing your life" became a call to action for Zs to appreciate what was right in front of them, and they're still striving to live in the now. 80% of Gen Zs said they often or sometimes feel like the main character in a movie while listening to music and podcasts during everyday activities.1

Gen Z still accounts for 72% of POV playlists created, which plays into their desire to portray themselves and their lived experiences as unique. And this year, music categorized by the mood "iykyk" was the most streamed by Gen Z, which further plays into the speed at which the cultural zeitgeist shifts. Because Zs are so 'online' they place value on being on the inside of cultural trends. 2

"I USE PLAYLISTS FOR DIFFERENT MOODS. I HAVE ONE TO HYPE ME UP AND GET ME AWAKE, ONE FOR WHEN I NEED TO CRY AND REVEL IN MY SÁDNESS. A VILLAINOUS ONE, ROMANTIC ONE. I MAKE MOST OF THESE FOR MY WRITING AS WHEN I'M WRITING A NOVEL OR SCREENPLAY MUSIC USUALLY HELPS ME **GET THE MOOD CORRECT."**

— 15 YEAR OLD GEN Z, CANADA

POV:

you're in love with someone you can never have

POV:

mom picked you up from school in the white toyota minivan

POV:

you're the crazy old cat lady at 17

POV:

you're starting a new life, moving to a new city, and everything is changing

CULTURE Vext

Spotify also helps snap
them into the present —
serving as the soundtrack
for every moment, activity,
or even fantasy. 89% of

VIBE-Y
WORDS

MOVIE
INSPIRED

of Gen Zs a
a song du
or signifi

MULLED CIDER

DOWNTOWNVIBES

MYSTERIOUS

VANILLA GIRL

FLOATY

LIMINAL

CALM BEFORE THE STORM FANFICORE

VAMPIRIC

ROMANTASY

GOBLINCORE

VINTAGE HOLLYWOOD

FAIRY TALE

HEIST VILLAIN

of Gen Zs agreed, "hearing a song during a special or significant moment makes it an unforgettable soundtrack for my memories." 3

SEASONAL²

RAIN

AUTUMN

SWEATER
WEATHER

SNOWDROP

CHOCOLATE

Gen Zs said they often

or sometimes feel fully

present in the moment

while listening to music

The words that appear in the title of Gen Zs'

highlight how they use music to set vibes and

streamed most by Gen Z: "babysitting" "pre_

hardstyle," "let 'em cook," "shower," "reading,"

game" "skateboarding" "Speedrun," "gym

"hanging out," "basketball" and "shower". 2

Daylists more than any other generation's

We also see that activity and movement-

based playlists are on the rise. In 2024,

the following activity moments were

and podcasts during

everyday activities.1

live out fictional scenarios.²

¹ Source: Spotify Culture Next Vol 6 survey C1, July 2024

Source: Spotify First Party Data, 2023 - Q12024
 Source: Spotify US Culture Next Vol 6 survey C4, July 2024



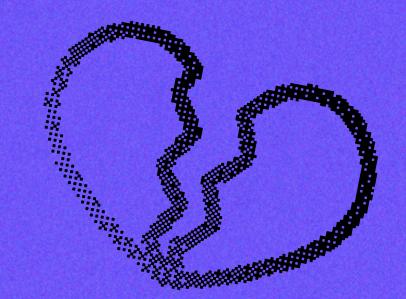


THE SAD TO GLAD GIRL PIPELINE

Gen Z is an introspective generation; they're creating and consuming content that lets them feel their emotions. While Gen-Z is notorious for tapping into sad music, this trend is about how they're experiencing and exploring all of their feels — on the wide spectrum from sad to joyful, and everything in between.

Zs' most streamed niche playlists reflect a wide range of feels, from "Sad Crying Mix" to "Feel Good Happy Mix."

Coined "Emo Hour" – Zs stream throughout their days, but they listen at night more than other gens when they can be more introspective.



"I USE PLAYLISTS TO EXPRESS MY HIGH AND LOW MOODS SUCH AS EXCITEMENT OR HEARTBREAK. I USUALLY ENJOY FINDING SONGS TO EXPRESS HOW I FEEL BECAUSE I DON'T LIKE TO TALK ABOUT THEM. THE BEAT IS WHAT INSPIRES ME AND THE OVERALL MOOD OF THE SONG."

- 22 YEAR OLD GEN Z, CANADA









Gen Z streamed DJ more than 3 billion times this year¹

But even though they recognize AI can help them

with tactical skills for when they have great ideas

but lack the know-how to execute them, 87% of

complement human creativity, not replace it."3

Gen Zs believe "Al should be used to enhance and

More streaming moments means more opportunities for discovery, and Spotify's recommendation engine is up for the task. While Al is a hot topic now, it's not new to Spotify.

We've been using Machine Learning in our products since we launched Discover Weekly in 2015. Thanks to the signals we get from users, we can provide hyper-personalized experiences. In turn Gen Zs have become power users of Spotify's Al-powered features like DJ and daylist, which supercharge discovery. The good news for brands? We apply this streaming intelligence to power our consumer experience AND our ad products.

The newest feature is DJ, which has seen a widespread embrace by Gen Z. DJ is a personalized Al guide that knows you and your music taste so well that it can choose what to play for you. Gen Z listening of DJ increased by 34% YOY¹, and 79% of Gen Zs agreed, "Spotify's Al features make my overall listening experience feel like it's tailored just for me, turning every session into an epic, personalized soundtrack." ²

108%

increase in Niche
Mix playlist streams
compared to last year.1

142%

increase in streams of Repeat Rewind compared to last year.¹

63%

increase in Gen Z's streaming of personalized playlists

(like daylist, Discover Weekly, On Repeat, Release Radar, Time Capsule, and Wrapped) compared to last year. Versus with Millennials, who increased by 38%, and older gens that increased by just 32%.¹

Source: Spotify First Party Data, 2023 - Q1 20242 Source: Spotify Culture Next Vol 6 survey D8, July 2024

Source: Spotify Culture Next Vol 6 survey D8, July 2024
Source: Spotify US Culture Next Vol 6 survey D7, July 2024

TAKEAWAY FOR BRANDS

Just like their music and podcast preferences, brand preferences that Gen Zs adopt during these formative years will be their loyal "go-to's" throughout their lives.

When we asked Millennials to think about the first brands they used across a range of verticals, they told us they have positive memories of...

the TV channels they watched in high school/college

their first computer/laptop

their first car¹

fast food brands they visited in high school/college high places they shopped for clothing/

accessories in high school/college

Place your brand at the center of these formative moments on Spotify with ads that allow Gen Z to feel a wide emotional range, whether it leverages a mood, an introspective moment, or just the sensitivity to always be there at a certain time of day.

Zs are looking for support and guidance as they navigate new life experiences, and brands can be there by creating or sponsoring audio-visual companions to their formative "firsts." Spotify transforms once-lost moments, like doing chores or commuting to work, into opportunities for profound introspection or learning. For advertisers, this opens up opportunities to reach engaged audiences in these otherwise unreachable "in-between" moments of life.

of Gen Zs agreed, "Brands that create playlists for specific moods and moments feel more in tune with my life." 2



of Gen Zagree, "I trust Spotify with my personal data more than other apps", 3 so take advantage of Spotify's rich suite of targeting to find your audience wherever and whenever they're streaming.

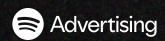
Level up your creative with Spotify's new Al powered ad creation tools to develop resonant audio creative.





TREND3

Culture's niche appeal won't change any time soon, but the next big wave of culture just might be (gasp!) mainstream.





GENZSARE XX VEERINGAWAY FROM THE FRINGE

Zs have a reputation for their adventurous tastes, but they're also defining a widespread embrace of mainstream culture, across both music and podcasts — proving they're a gen that wields the power of their scale. 74% of Zs describe their generation as mainstream rather than fringe — a stark increase from 2021 when only 59% agreed.'

Zs are driving the steady rise in popularity of mainstream genres and artists and are responsible for catapulting more and more artists into the Billions Club.

of Gen Z agree, "Niche and underground cultures are increasingly going mainstream." 2





MAINSTREAM MINISTREAM MINIST

Mainstream culture is being embraced by all the cool kids, in part, because it's become more interesting, more inclusive and more relevant than ever. "Popular music" now includes signals from a wide range of genres, from trap and country to reggaeton to dark electro and EDM — and beyond.

Worldpop was Gen Z's top genre on Spotify in 2023 through Q1 2024, proving that pop has evolved to incorporate new, global sounds.²

Artists such as Cypriot singer-songwriter Artemas, Ludmilla, whose music ranges from Brazilian funk to samba and pagode, and Chappell Roan, who creates "drag-inspired" darkpop sounds, stepped onto the global mainstream stage in a matter of months.¹



O streams in May 2023 >> 172M in April 2024

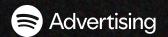
10M streams in April 2023 >> 21.6M in May 2024 which is an increase of 112%

In 2024, Ludmilla became the first Black Latin American artist to reach one billion streams on the app.

CHAPPELL ROAN

690K streams in April 2023 >> **77.2M** in May 2024, an increase of **11082**%

Source: Spotify First Party Data, 2023 - Q12024





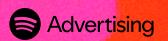


Speaking of Chappell Roan, who is credited as a leader in the current "lesbian pop renaissance..." Brat Summer took 2024 by storm as young women abandoned the polished, femme, clean-girl aesthetic of pop's past in favor of messy, chaotic party-girl vibes and blending genres from Country and Dance. It's an evolution of Zs' antihustle pro languishing culture, which stands in stark contrast to girl-boss hustle culture that Millennials brought to popularity.

"THE BRAT MOVEMENT IS NOT GOING AWAY. WE SEE CHARLI XCX'S RAW, HONEST SONGWRITING AS PART OF A LARGER SHIFT TOWARD MORE AUTOBIOGRAPHICAL AND HONEST SONGWRITING. ARTISTS LIKE ZACH BRYAN, NOAH KAHAN, GRACIE ABRAMS AND CLAIRO ARE EMBRACING A MORE RAW, LESS PRECIOUS, LESS POLISHED APPROACH, WHICH IS RESONATING WITH GEN Z." — JOHN STEIN, NA HEAD OF EDITORIAL, SPOTIFY









SPOTIFY SOUNDTRACKS SHARED CULTURAL MOMENTS

Big podcasts spark the cultural moments and Instagram comments threads that Zs connect over. Among 18- to 24-year-olds, the most-listened to podcast is The Joe Rogan Experience, which is also the most popular podcast in the world, indicating Zs are swimming with the mass currents.¹

Now, listening to the latest episode of a trending podcast almost comes with as much cultural cache as watching the latest episode of a trending TV show.

Gen Z is **184%** more likely to listen to Anything Goes with Emma Chamberlain and some of her top episodes include "analyzing couple behavior," "sex," and "are you living for you".

Every year, we see the ripples of cultural tentpoles echoing on our platform — from big box office releases like Deadpool & Wolverine, where we saw 100K "Deadpool" user generated playlists to the The Olympics, where we saw 16.5M podcast episodes with Olympics in the title. Niche memes and internet culture are also amplified.

DEMURE EFFECT

A week from Jools Lebron's viral posts, user generated "demure" playlists on Spotify have increased by nearly **2,500%** in the US.

In addition to pop culture podcasts, globally, Religion & Spirituality is one of Gen Z's fastest-growing categories, increasing +85% YoY.²

+53%

Business & Technology

+45%

Government

+39%

History

Some of the top shows amongst Zs in these categories are:³



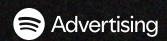
Morning Brew Daily



The Founder Podcast



The Rest in History





TAKEAWAY FORBRANDS

Think like a fan, act like a creator. As Zs embrace the mainstream, they expect brands to tune into — and add value to — pop culture conversations.

Show up like a fan on Spotify by surrounding the mainstream genres and playlists that Zs are flocking to and heavy up your advertising in pop culture podcasts so that you're embedded in the cultural conversation.

If you're partnering with on-the-rise artists, act like a creator and show your support for next gen pop stars by amplifying their creative on Spotify.

Among the most popular playlists for Gen Z are Today's Top Hits (#10) and RapCaviar (#20).



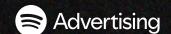
34.5 MILLION SAVES



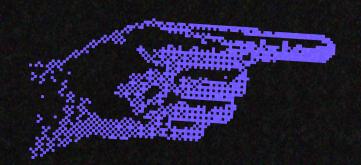
16 MILLION SAVES

Today's Top Hits

Rap Caviar







THANKS FOR READING.

For this installment of Culture Next, we conducted a combination of quantitative and first-party data analysis that explored distinct segments of Gen Z (15-24) based on life stage, as well as their Millennial (25-40) counterparts. We fielded a global quantitative survey via Rep Data among 7,700 respondents in July of 2024 (with approximately 500 respondents in each of the following markets: Australia & New Zealand, Brazil, Canada, France, Germany, India, Indonesia, Italy, Japan, Mexico, Philippines, Singapore, Spain, United Kingdom, and the United States of America. Findings were additionally grounded in Spotify's unique Streaming Intelligence and first-party data.

