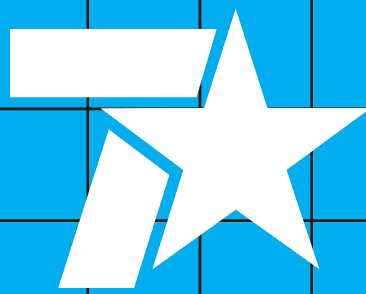


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TASTEMAKERS OF THE FUTURE

GEN ALPHA AKA GEN A

IS THE GENERATION THAT IMMEDIATELY FOLLOWS GEN Z. BORN SINCE 2010, THIS GENERATION WAS BORN IN THE SAME YEAR THAT THE IPAD LAUNCHED.

BY 2025

THERE ARE PREDICTED TO BE

2.2 BILLION

GEN ALPHAS GLOBALLY
(MAKING THEM THE LARGEST
GENERATION IN HISTORY)

Music and technology have always been intertwined, and together have helped shape culture and individual identity. At the centre of driving adoption sit the younger generations. Repeatedly teens and younger generations represent early adopters that discover and populate new platforms until they expand into the mainstream. They have consistently been the barometers of changing tastes and behaviours in music consumption and further afield. Innately curious, creative and time rich, they often provide the catalyst for trends and are tastemakers of future consumption.



There has increasingly been a focus on Gen Z as their behaviours are understood more by the mainstream, but in this paper we focus on the often-neglected younger edge of Gen Z and introduce the behaviours and make-up of the next cohort - Generation Alpha.

Gen Alphas have already been deemed “upagers” – their experience of adolescence in a digital age means they are more socially aware at a young age and become consumers more quickly. Gen Alpha will be the most culturally diverse generation in history, and this reality is shaping their expectations.

Together Gen Alpha and the younger edge of Gen Z offer an important yardstick for the future direction of travel, not just of media habits but broader popular culture.

After all, brands don't exist in a bubble, they exist in culture. Music has a huge influence on culture and youth audiences drive music innovation more than any other segment. So whatever cohort of audiences a brand targets, we need to keep an eye on where the cultural sands are shifting into the future.

TRIBAL TO MOSAIC TRIBAL TO MOSAIC

TRIBAL TO MOSAIC TRIBAL TO MOSAIC

TRIBAL TO MOSAIC TRIBAL TO MOSAIC



TRIBAL TO MOSAIC TRIBAL TO MOSAIC

TRIBAL TO MOSAIC

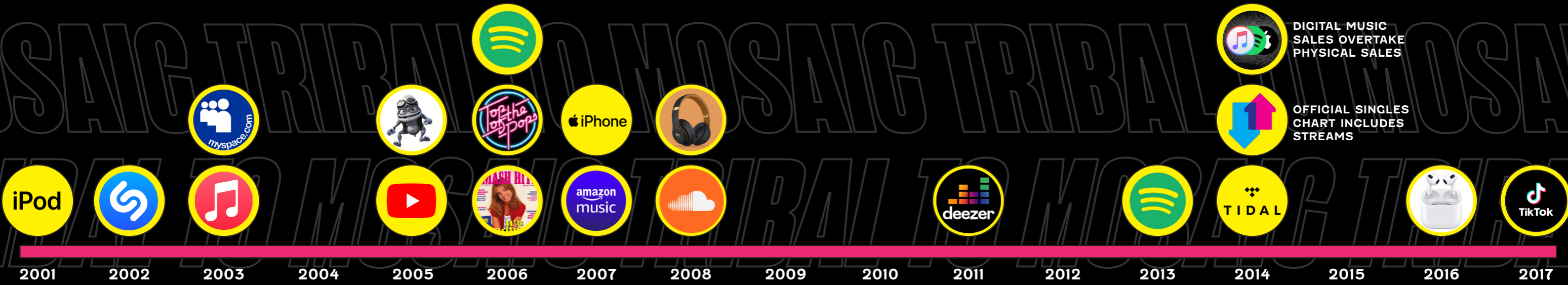
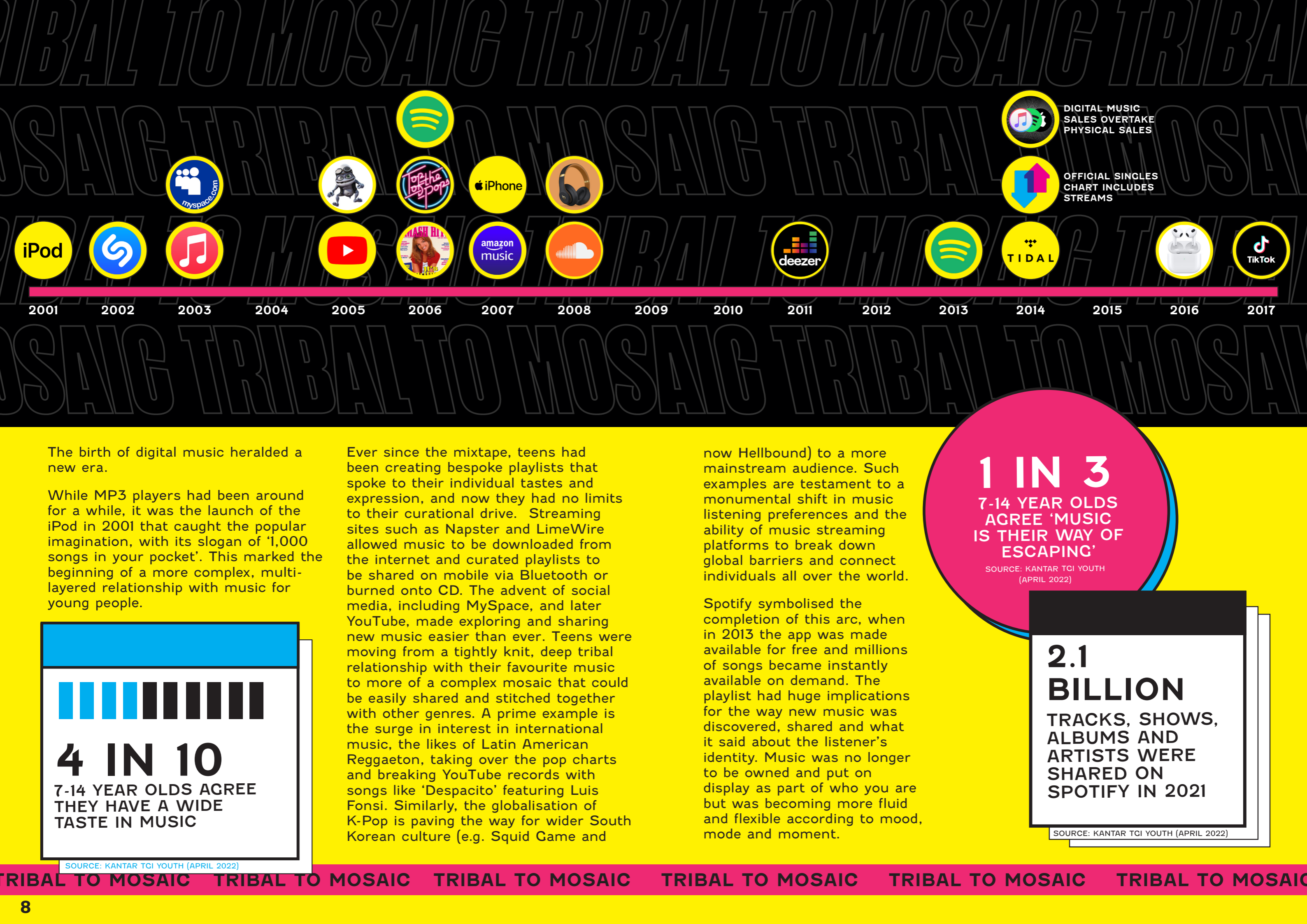
Music has evolved over the years in line with technology. It was the invention of the phonograph in the late 19th century that gave rise to the very first stirrings of popular or 'pop' music. Since then, tech innovation and cultural evolution have continued to move the music landscape forwards.

From the emergence of jazz, blues and country music in the 1920s which became accessible to a national audience, to the rise of music celebrities such as Frank Sinatra and Ella Fitzgerald during the 1940s, the popularity of such artists revealed an entirely untapped market: teenagers.

But it was arguably the birth of rock n roll that helped music to engage the young masses. In 1951, Alan Freed started a late-night R&B radio show called The Moondog Rock & Roll House Party and began referring to the music he played as 'rock n' roll'. Taking its name from a blues slang term for sex, the music obtained instant notoriety, gaining widespread support among teenage music fans and widespread dislike among the older generations.

During the 1960s and 70s, the genres of rock n' roll branched out in all directions, from psychedelic rock to folk, from surf music to soul and disco, from glam rock to punk. Hip-hop first became popular among black youths in the late 1970s, when record spinners in the Bronx and Harlem started to sample short fragments of songs rather than the entire track.

Whatever genre teens adopted, it was often associated with a deep tribal identity with its own slang, fashions and rituals. The explosion of genres continued through to the end of the 1990s, and teens picked from an array of distinct music scenes from house, techno, rap, grunge, goth, drum n bass and death metal. During this time, teens experimented with the breadth of deeply rooted scenes available as they expressed their own identity to the world. This was soon to shift again with the onset of the digital revolution.



The birth of digital music heralded a new era.

While MP3 players had been around for a while, it was the launch of the iPod in 2001 that caught the popular imagination, with its slogan of '1,000 songs in your pocket'. This marked the beginning of a more complex, multi-layered relationship with music for young people.

Ever since the mixtape, teens had been creating bespoke playlists that spoke to their individual tastes and expression, and now they had no limits to their curational drive. Streaming sites such as Napster and LimeWire allowed music to be downloaded from the internet and curated playlists to be shared on mobile via Bluetooth or burned onto CD. The advent of social media, including MySpace, and later YouTube, made exploring and sharing new music easier than ever. Teens were moving from a tightly knit, deep tribal relationship with their favourite music to more of a complex mosaic that could be easily shared and stitched together with other genres. A prime example is the surge in interest in international music, the likes of Latin American Reggaeton, taking over the pop charts and breaking YouTube records with songs like 'Despacito' featuring Luis Fonsi. Similarly, the globalisation of K-Pop is paving the way for wider South Korean culture (e.g. Squid Game and

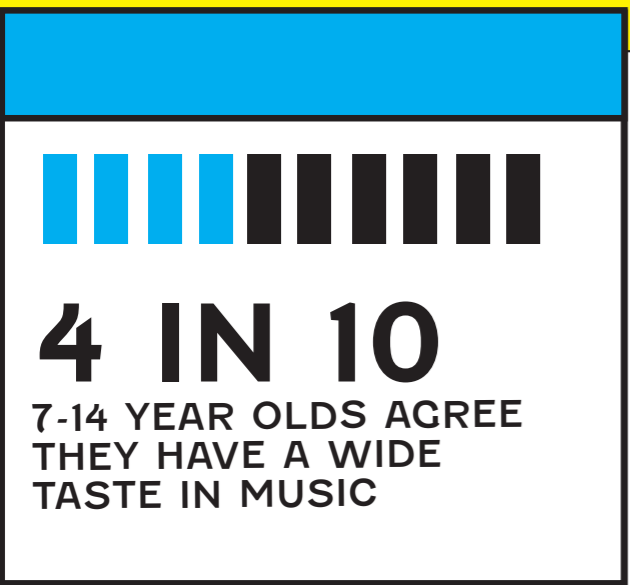
now Hellbound) to a more mainstream audience. Such examples are testament to a monumental shift in music listening preferences and the ability of music streaming platforms to break down global barriers and connect individuals all over the world.

Spotify symbolised the completion of this arc, when in 2013 the app was made available for free and millions of songs became instantly available on demand. The playlist had huge implications for the way new music was discovered, shared and what it said about the listener's identity. Music was no longer to be owned and put on display as part of who you are but was becoming more fluid and flexible according to mood, mode and moment.



1 IN 3
7-14 YEAR OLDS
AGREE 'MUSIC
IS THEIR WAY OF
ESCAPING'

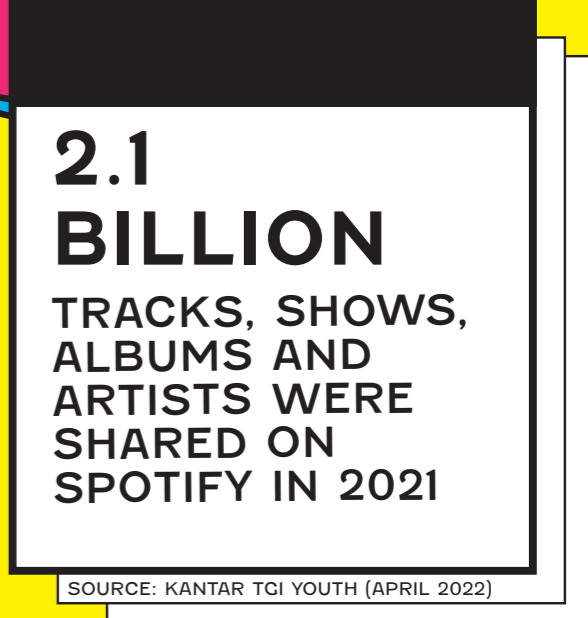
SOURCE: KANTAR TGI YOUTH
(APRIL 2022)



4 IN 10

7-14 YEAR OLDS AGREE
THEY HAVE A WIDE
TASTE IN MUSIC

SOURCE: KANTAR TGI YOUTH (APRIL 2022)



**2.1
BILLION**

TRACKS, SHOWS,
ALBUMS AND
ARTISTS WERE
SHARED ON
SPOTIFY IN 2021

SOURCE: KANTAR TGI YOUTH (APRIL 2022)

EVOLVING DISCOVERY AND CONSUMPTION

MY FAVOURITE ARTIST IS EMINEM AND I LIKE HIM BECAUSE HIS MUSIC HYPES ME UP AND I LISTEN TO HIS MUSIC ON APPLE MUSIC.

ALBIE, 11YRS

I REALLY LIKE BILLIE EILISH SHE IS COOL, AND I LIKE THE BEATLES - MY FAVOURITE SONG IS 'HERE COMES THE SUN'.

CICELY, 9YRS

I ENJOY GORILLAZ BECAUSE OF THEIR GREAT VOCALS AND AMAZING BASS.

MOLLY, 12YRS

Beyond the explosion of the breadth of music consumed, technology has also changed music discovery in the 21st century.

iPads and tablets aimed primarily for kids' use have not only made it easier for younger children to become introduced to the world of music at an earlier stage, but also enabled greater exposure to a whole host of music genres and artists that perhaps lie outside traditional music aimed towards children.

Whilst discovery has been through an evolution from shared to solo and back to shared, the fan club mentality is still very much present, with technology only enabling it further. The first global fan club phenomenon emerged with opera singer Jenny Lind who was adored by fans in the 1800s. Since then, we've witnessed the immense power of teen idols and the hysteria they evoke, encapsulated by their names such as 'Beatlemania', 'Jacksonmania' and 'Bieber Fever', to paint a picture of the gravity of these fan clubs. Technology-driven innovation such as teen magazines and MTV and now social media provide a platform for them to connect outside of gigs to fuel the fandom.

TOP STREAMING SERVICES (7-10YRS)

YOUTUBE

AMAZON MUSIC

SPOTIFY

7-14 YEAR OLDS ARE
27% MORE LIKELY

THAN THE AVERAGE TO ALWAYS LISTEN TO PRE-MADE PLAYLISTS AS OPPOSED TO SELF-MADE ONES

SOURCE: KANTAR TGI YOUTH (APRIL 2022)

1 IN 3
7-14 YEAR OLDS AGREE THEY 'LIKE TO LISTEN TO NEW BANDS'

SOURCE: KANTAR TGI YOUTH (APRIL 2022)

TOP STREAMING SERVICES (11-14YRS)

SPOTIFY

YOUTUBE

AMAZON MUSIC / APPLE MUSIC

As such, music's role to connect and share with others, has been amplified. Spotify continues to roll out even more social features on the platform such as blended playlists and 'Friend Activity', with more than 22 million collaborative Spotify playlists made in the past year. The music streaming app is becoming akin to a social network in its own right, where teens' music tastes are more visible and widely shared. Spotify are leaning into the trend for discovery to happen in the social graph, recently announcing that people will be more easily able to see what their friends are listening to in real time.

As a result, this has enabled music tastes and genres to continue to diverge, with teens finding opinion leaders in friends, influencers, and celebrities, who come from varied backgrounds. Our research demonstrates that the result of this is a set of interlinked audiences for each genre, with rap and hip-hop listeners mixing the greatest number of genres.

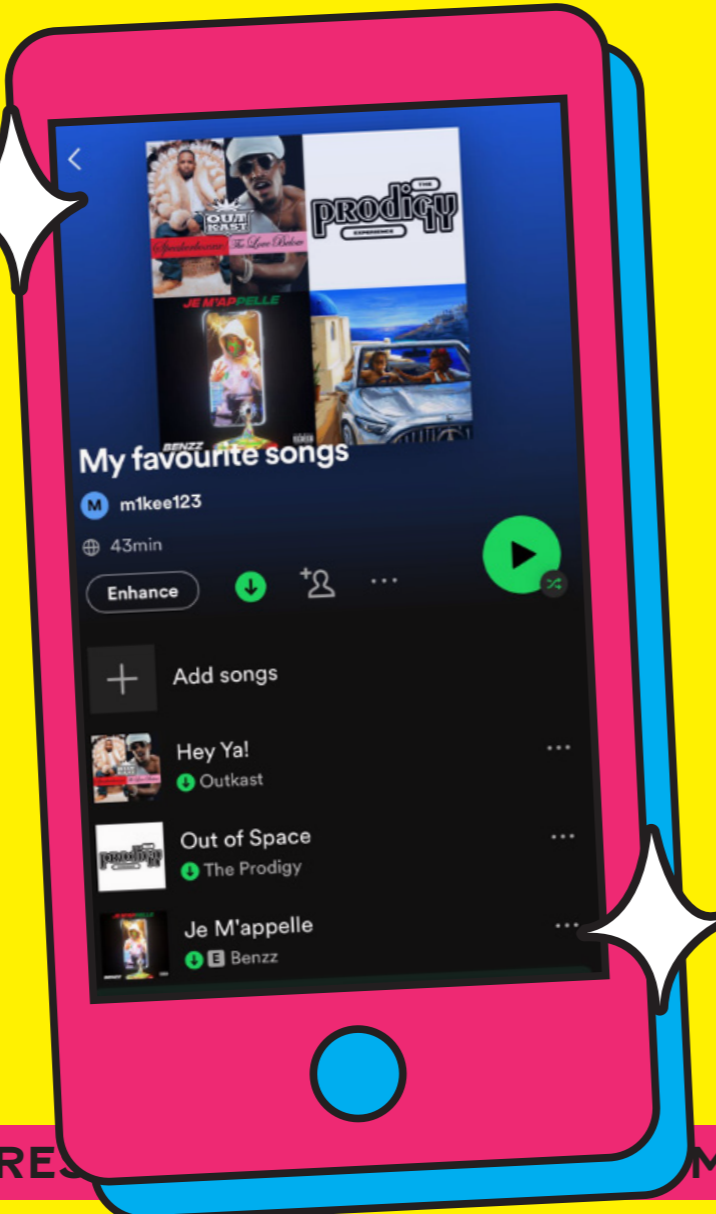
Teens now use an amalgamation of music genres as signals for more complex and varied self-identities. Mingling in different circles within the world of music, they no longer tie down their loyalties to one artist or genre, instead building trends that follow culture as opposed to genres and effectively leading to a more 'genre-less' music community.

NEW WAVE OF MUSIC EXPRESSION

OF MUSIC EXPRESSION

With each wave of youth there tends to be a rapid rise of a new digital platform, powered by a young army of digital natives who make them playgrounds for rich user-generated content.

Where the young go others tend to follow. Each platform shapes new forms of consuming music content which inevitably cross into the mainstream and begin to challenge the norms for how industry stakeholders both market and monetise music content. For example, YouTube became a holistic platform to host behind the scenes content and music videos – becoming a powerful marketing tool in its own right, then a revenue generator through licensing and advertising revenue and ultimately a chart eligible distribution platform.



I FIND OUT ABOUT DIFFERENT MUSIC THROUGH JUST APPLE MUSIC OR JUST ON YOUTUBE BY FOLLOWING THE MUSIC CREATORS I LIKE AND THEIR CONTENT
MOLLY, 12YRS

SCROLLING ON TIKTOK I HAVE FOUND MUSIC THAT I LIKE THAT I THEN ADD TO MY SPOTIFY PLAYLIST.
MILO, 12YRS

I FIND NEW MUSIC BY WATCHING YOUTUBE SHORTS ON THE FOOTBALL VIDEOS.
ALBIE, 11YRS



TikTok is experiencing its own evolution. 'Sound on' shared music samples first instigated dance trends, and later broader trends intersecting with fashion, beauty, travel and food verticals. By embedding music into the very core of the platform users have an additional avenue for creativity. Trending Sounds charts allow users to hunt success, but also share a sense of belonging and community by visibly being part of a cultural moment. Music discovery is happening organically and at scale on the platform, and it is being driven by the youngest users of TikTok that are disproportionately powering real-world outcomes.

With the switch from tribal to mosaic and music listening determined by mood, mode and movement we've seen music listening become more of a complementary medium rather than identity defining.

This shifting focus on music has implications for discoverability in new environments, and accessibility to more audiences. The gaming landscape is a prime example of this. Platforms such as Roblox, Minecraft and Fortnite have thrived in their role as 'the new after school club' where kids play with their friends, while also discovering new content. In Roblox, the group chat functionality allows for a seamless shared experience, which has been leveraged by artists such as Lil Nas X, whose live concert in December 2020 was watched 33million times.

27%



OF MINECRAFT USERS ARE MORE LIKELY TO SAY THEY USE ONLINE SOCIAL SPACES TO INTERACT WITH BRANDS

SOURCE: CWI



I REALLY LIKE TRAVIS SCOTT, HE DID A PERFORMANCE IN FORTNITE WHICH I WATCHED WITH MY FRIENDS.

MILO, 12YRS

A NEW WAVE OF MUSIC

54% ROBLOX ACTIVE PLAYERS

UNDER 13 YRS SOURCE: STATISTA

ARE UNDER 13 YRS 54%

ROBLOX ACTIVE PLAYERS ARE

Interestingly, kids aren't using gaming environments to mirror their appearances and personalities in the physical world — they're using it to experiment with new looks and identities. Providing them with an outlet for creativity and exploration for the full mosaic of their personalities. Music is a core element of this online expression with the savvy music marketers integrating virtual merchandise opportunities into the platform for audiences to experiment and express themselves through their avatar.

Once again, we're seeing younger generations changing how society behaves, with music at the front of the cultural curve. The physical limitations of age thresholds for real life gigs or the practical barriers of affordability have been removed.

NEW TO ME

To the younger edge of Gen Z and Gen A, the entire concept of 'newness' is different to generations before. No longer determined by the moment a track became available, but the symptom of an on-demand, digitally facilitated music industry distribution model in which 'new' simply means 'new to me'.

It's a concept gaining in momentum attested by the considerable commercial and chart success for music catalogue backlist. It differs from the more nostalgic levers that we saw pulled by Three in 2013 when they sampled Fleetwood Mac's 'Everywhere' to trigger recognition of a track long forgotten with their playful Dancing Pony advert. The emphasis is less on older audiences re-discovering a long-forgotten track and more on younger people discovering music for the first time which they identify as 'new'.



2 IN 10
 11-14 YEAR OLDS
 LISTEN TO 6+
 HOURS OF MUSIC
 PER WEEK
SOURCE: KANTAR TGI YOUTH
 (APRIL 2022)

24%
 OF 7-10 YEAR OLDS
 AGREE THEY 'LIKE
 THE SAME MUSIC AS
 THEIR PARENTS'
SOURCE: KANTAR TGI YOUTH
 (APRIL 2022)

NEW TO ME NEW TO ME



Kate Bush's 'Running Up That Hill (A Deal with God)' reached the coveted number 1 spot in the chart in Summer 2022 despite being released originally in 1985. On the face of it, this looks like a typical response to a TV sync with the track having been featured prominently in Season 4 of Netflix's Stranger Things. However, while democratisation of digital access through Spotify and TikTok helps makes consuming a sync more accessible, it also makes the reality of delivering a number 1 track all the more challenging. Success can only be delivered at scale and indicates how endemic the 'new means new to me' behaviour is with Kate Bush herself crediting 'all these young people hearing this song for the first time and discovering it.'

Where music leads other categories soon follow. We've already seen the behaviour beginning to crossover to other entertainment categories such as books with #BookTok racking up 46.6 billion views and seeing older releases such as Madeline Miller's 2011 novel The Song of Achilles race to the top of the fiction charts in 2021.

FINAL THOUGHTS

When we consider the disproportionate influence of youth audiences on music – and in turn, music’s influence on popular culture at large, it is clear why it is important to stay tuned (no pun intended) to what’s happening next.

Will an overindulgence of immersive virtual gigs place a greater premium on shared lived experiences at sweaty IRL venues, or will we go full circle back to the era of limited-edition releases controlled by NFT drops on the blockchain?

Today’s teens are tomorrow’s most influential cultural touchstone and seldom revert to previous generational behaviours in terms of their consumption preferences and habits. Once the genie is out the bottle, it cannot be put back.

TAKEAWAYS

- ☺ Music acts as a barometer for shifting trends in culture and consumption habits
- ☺ Young audience engagement can be the catalyst for crossover. The perceived cultural kudos of a movement adopted by youth can act as a cultural tipping point or multiplier effect
- ☺ Cross-generational music can engage across cohorts, and provide opportunities to tap into shared meaning
- ☺ Curiosity + Community = a winning formula with a younger generation who naturally lean towards social and discovery led environments
- ☺ Understanding the importance of individuality and diversity will help engage this generation who offer size, influence and future spending power that will succeed previous generations

A NOTE ON METHODOLOGY

the7stars’ people first and agile approach ensures we are constantly abreast of changes in attitudes and behaviours in the UK.

We fielded bespoke questions to the Kantar TGI Youth panel in October 2021 and April 2022.

Kantar TGI Youth provides an industry gold standard source of insight, with a breadth of robust data, refreshed twice a year with a panel of 6,000+ 7-19 year olds.

To bring to life the data from our bespoke quantitative study, we also recruited 15 kids across the UK, ranging from the ages of 7-14 years to gain an in depth understanding on their music tastes and consumption habits.

