The New Rules of Youth Culture

2025 Audience Report

For 15 years, Boiler Room has provided a definitive lens on global club culture while amplifying the vital grassroots communities that drive it forward.

In the five years since we published our last audience report, a global pandemic, political upheaval and growing anxieties around the climate have profoundly transformed how we live. But through all this change, one thing remains constant: youth culture isn't just surviving – it's thriving.

For our biggest audience study to date, we set out to better understand the Boiler Room community as a subset of a wider global youth population. We uncovered how young people have emerged as leaders of cultural innovation, using music, creativity, and community to adapt to or resist the surrounding forces.

One thing remains constant: youth culture isn't just surviving – it's thriving.

Who are we when we refuse to be defined by polarisation? How do we balance digital and analogue, global and local, individuality and collective action? How do we pursue pleasure with purpose and navigate financial challenges with creativity?

For our community, music isn't just entertainment. It's a tool for connection, a catalyst for well-being, and a platform for cultural exchange. It's where global sounds meet local scenes, and individual expression becomes a collective celebration of self. In every corner of the world, we see music and creativity being used as a way to push boundaries, build new communities, and rewrite the rules.

Methodology

Our audience study compares the Boiler Room community with their peers from across the globe, providing a robust benchmark to understand how our audience sits within broader youth culture today.

Moving beyond rigid generational labels like Gen Z or Millennial, we focused on people aged 18-34, who share more commonalities than differences.

By surveying both Boiler Room members and a wider youth panel across key global markets, we've created a rich picture of what makes our community distinct.

1,746

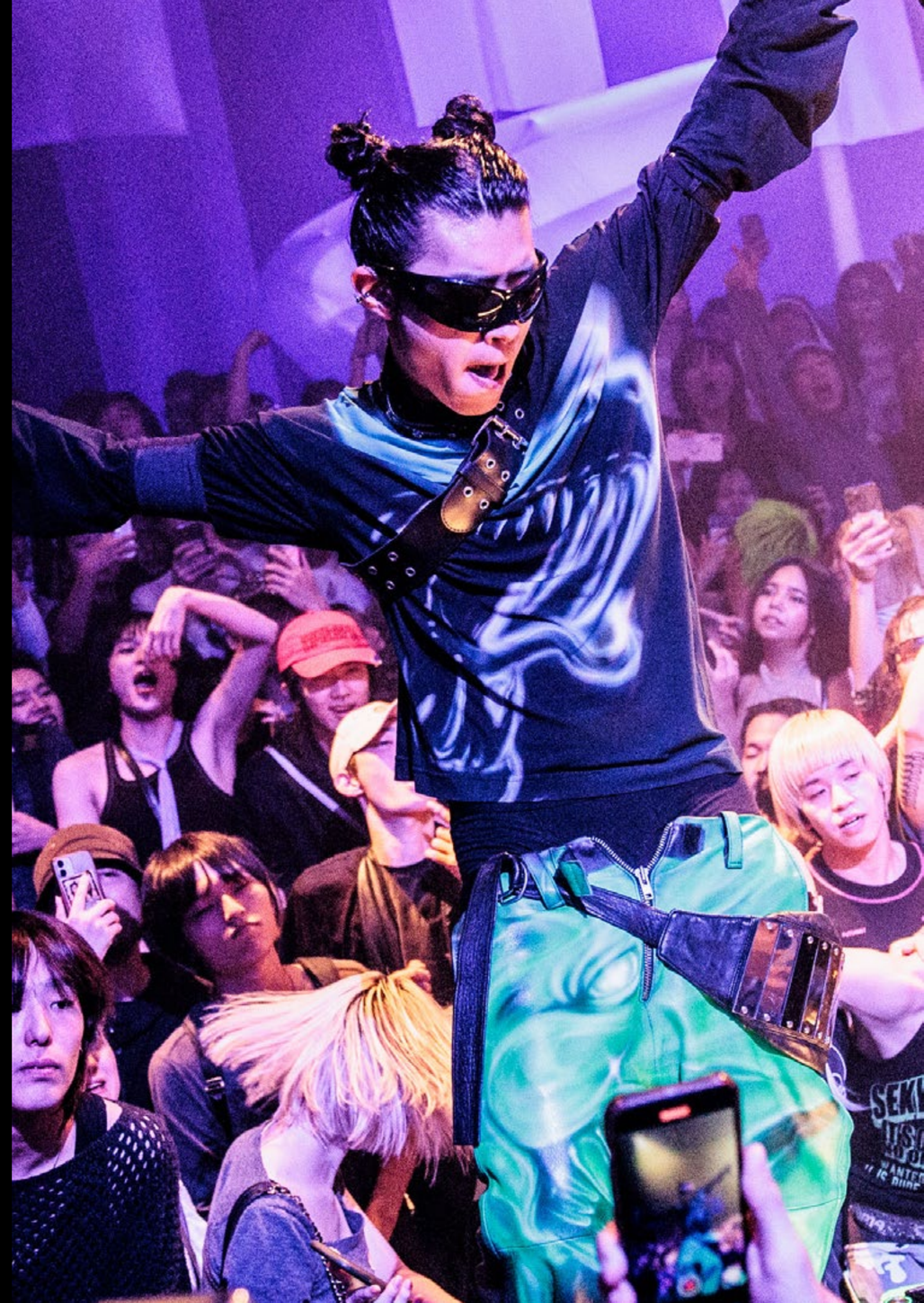
participants from Boiler Room's community across UK, USA, Australia, France, Spain, Germany, Mexico, Japan and India with additional input from almost 50 other global markets.

8,300+

respondents in total.

6,575

contrasting peer group participants aged 18-34 across 13 global markets.



The New Rules Of Youth Culture

We've identified five expansive themes that tell a story about the distinctive culture, identities, lifestyles and values of the Boiler Room audience and of young people today.

1 Rooted in the collective

Redefining community and celebrating diversity and inclusion are essential to thriving together.

2 The new mindfulness

Balance is key. They blend health, social life, and fun, knowing that wellbeing means more than just sobriety.

3 Technological scepticism

They embrace digital tools but are wary of over-reliance.

4 Spending where it matters

Financially fragile, but purposeful in their spending.

5 Finding resilience in purpose

Despite everything, they are optimistic, adaptable, and creative – ready to shape the future with intention.

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Rooted In The Collective

Unity in the community

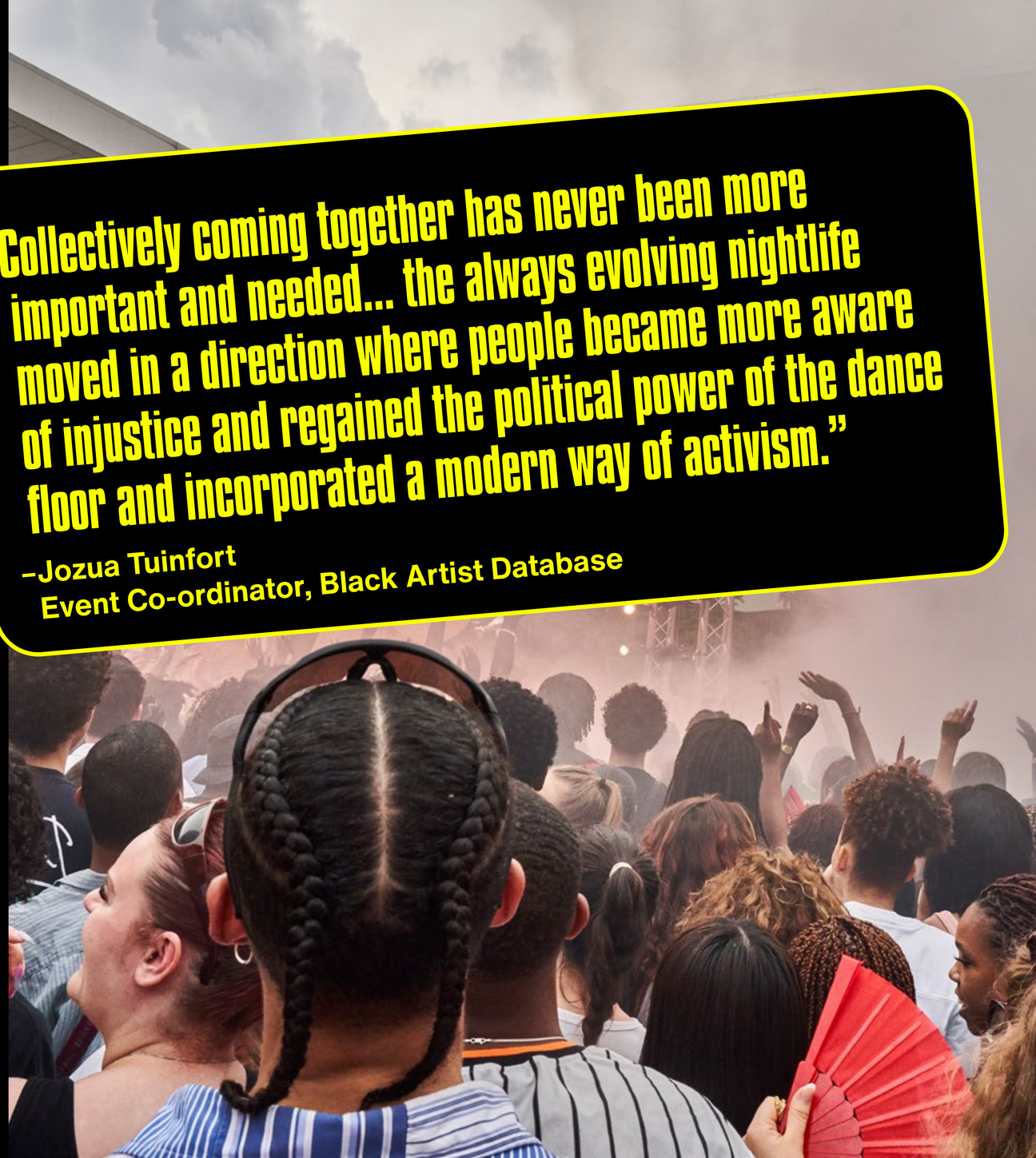
45% of our community identify as LGBTQIA+, with 7.2% identifying as non-binary, trans, or gender-fluid – well above the general population.

Since our last survey in 2019, heterosexual identification among the Boiler Room community has dropped by 28%, signalling a positive shift that more young people today feel comfortable to be out and express their sexuality. A growing number of our community identifies as bisexual (14% vs 9% in 2019) and gay (10% vs. 4% in 2019). Those expressing their identity beyond the gender binary feel they can show up authentically online, with 39% using multiple online identities.

Our audience is proud: 69% push for more LGBTQIA+ rights. They embrace multiculturalism (94%) and are twice as likely to have been born in another country to where they now live. They stand up for underrepresented groups and prioritise freedom of expression, safety, and trust.

Curious, adventurous, and ambitious, they seek true self-expression through community rather than individualism. They value authenticity over hype, with cultural congruence driving their brand choices.

Only 26% of those surveyed primarily identify with their nation. Instead, the focus is on their region, city, or local communities.



"Collectively coming together has never been more important and needed... the always evolving nightlife moved in a direction where people became more aware of injustice and regained the political power of the dance floor and incorporated a modern way of activism."

–Jozua Tuinfort
Event Co-ordinator, Black Artist Database

“Community in 2024 means both **refuge** and **action**... I’m at my best when I’m in rooms filled with more women and gender-diverse people, more people of colour and other backgrounds. In them, I find refuge as well as the **motivation** to bring my **best self** to the table.”

–Andreea Magdalina
Founder, SheSaidSo

Think globally, live locally

Our audience is 5x more likely than their peers to see diversity as key to a thriving community. Only 22% think immigration is too high, while 20% were born abroad - double the rate of the compared peer group.

92% of Boiler Room 18-34s agree that young people today are part of a global youth culture.

This is about solidarity; while our community is a diverse group, its unity comes from shared values and experiences that shape a global youth culture.

Our community sees freedom of expression, safety, and trust as the top three essentials for a thriving community, with about one-third of those surveyed selecting each.

They are also more curious (67% vs 45%), adventurous (52% vs 34%), and ambitious (50% vs 40%) than their peers. But it's not just about individuality – 65% agree that true self-expression comes from authentic connections in like-minded communities.

About two-thirds say "my community is my tribe, together we are stronger," showing the true value of collective strength.

The New Mindfulness

Big on balance

Our community is more health and wellbeing-focussed than ever, with 71% saying the pandemic increased their interest in these areas. This heightened focus is particularly relevant today, as 74% of our community reports that mental health challenges are common among their friendship circles.

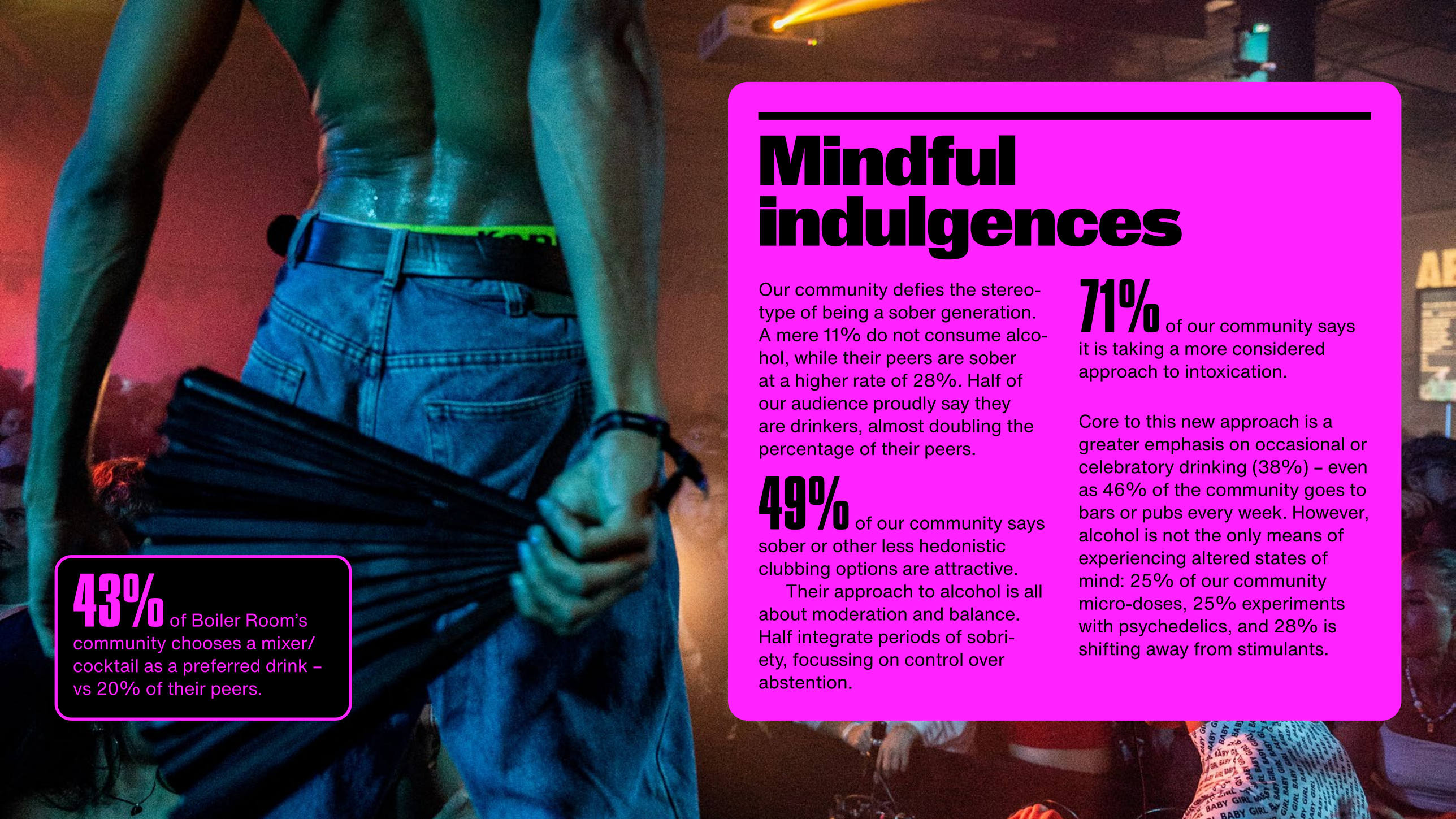
Two thirds of our audience watch what they eat and drink, 60% enjoy going to the gym regularly (up from 38% in 2019), three-quarters try to spend time in nature to support their health and wellbeing, and 25% cites health and wellbeing experts as a top influence.

48% of the Boiler Room community enjoys meditation.

83% of our community agrees that spending time with friends is key to their wellbeing.

57% actively optimise their sleep.

80% of our community agrees that music, dance and conviviality are important in combating the dangers of poor mental health and wellbeing.



43% of Boiler Room's community chooses a mixer/ cocktail as a preferred drink – vs 20% of their peers.

Mindful indulgences

Our community defies the stereotype of being a sober generation. A mere 11% do not consume alcohol, while their peers are sober at a higher rate of 28%. Half of our audience proudly say they are drinkers, almost doubling the percentage of their peers.

49% of our community says sober or other less hedonistic clubbing options are attractive.

Their approach to alcohol is all about moderation and balance. Half integrate periods of sobriety, focussing on control over abstention.

71% of our community says it is taking a more considered approach to intoxication.

Core to this new approach is a greater emphasis on occasional or celebratory drinking (38%) – even as 46% of the community goes to bars or pubs every week. However, alcohol is not the only means of experiencing altered states of mind: 25% of our community micro-doses, 25% experiments with psychedelics, and 28% is shifting away from stimulants.

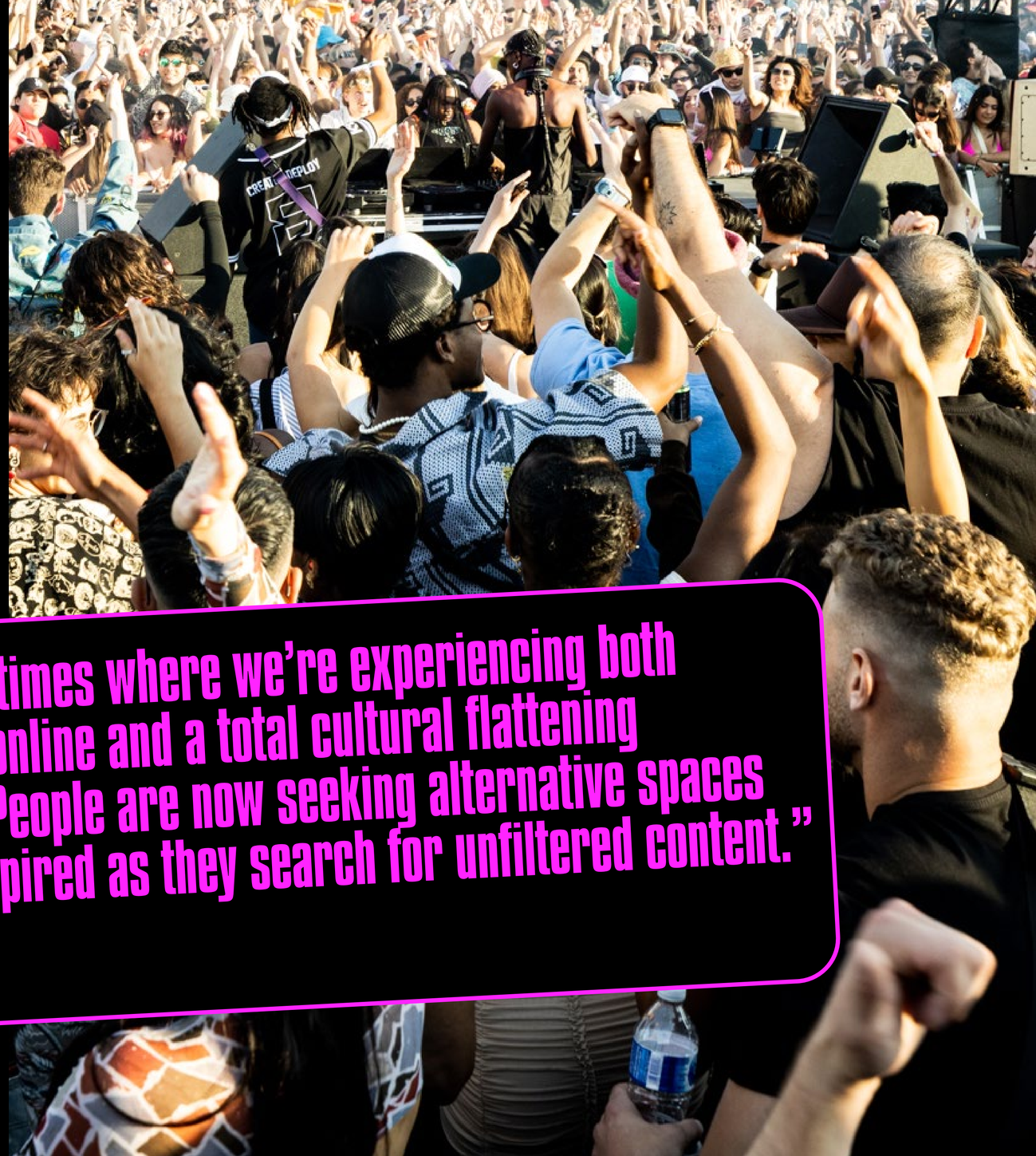
Pleasure and purpose

Our community values fun with purpose. 73% approach clubbing with intention, aiming to create safe, meaningful spaces that reflect their values. Mindful spending is on the rise, with members choosing social and clubbing options that support causes our community cares about.

Here, the thinking goes: money is tight, so let's try to spend it where it makes a positive difference to causes and people we care about.

Despite financial headwinds, events and experiences matter more than ever.

85% of our community members cherish time out at events, compared to 68% of their peers, and 34% say new experiences are a top priority – 4x more than peers.



"We're in paradoxical times where we're experiencing both unpredictable chaos online and a total cultural flattening through algorithms. People are now seeking alternative spaces to connect and be inspired as they search for unfiltered content."

–Rhianna Cohen
Creative Director, Mørning

"Clubs are **democratic spaces**, but they hold a special place for young people. There's something really important about the fact that most of us start going to clubs at the edge of adulthood — you could say they are the first cultural spaces that any of us get to really call our own. That's a big part of the **energy**, **experimentation** and **anarchy** of club culture."

–Amar Ediriwira
Creative Director, Boiler Room

Interconnectedness

Social media dominates today's discussions of youth mental health and well-being. Nearly half of our community spends over 4 hours a day on social and messaging platforms.

At the same time, they recognise the downsides of digital connectivity: 82% agree that it brings its own pressures, and 79% say they need to switch off from time to time.

Over half of Boiler Room's audience has between 500 and 4,999 followers, showing that connections extend far beyond immediate friendship circles, encompassing a broader, like-minded community. Online friendships are cultivated via Instagram likes and DMs, while TikTok allows for moments of connection between those with niche interests.

Mirroring shifts in wider society, attitudes towards digital connectivity and wellbeing are complex. 46% say it is good (definitely or probably) and 35% say it's bad (quite or very) – with only small numbers at each extreme (10% definitely good and 7% very bad).

89% of Boiler Room's community uses Instagram, compared to 75% of their peers.

42% use TikTok and X (formerly Twitter), while only 34% of us are still on Facebook, significantly lower than the 62% of peers.

Technological Scepticism

Digital hybridity

Our audience wants devices that enhance humanity, not dominate it – love/hate is how most describe their relationship with their phones. Still, 70% own an iPhone, nearly double that of their peers (37%).

57% of the Boiler Room community buys physical music today inc. CDs, cassettes and vinyl.

We may live highly digital lives, but most of our community still buys physical music. For some, it's nostalgia. For many, it's about a deep love of music and a respect for artistry. Physical formats let them connect with the individuality of the artists. After all, streaming platforms increasingly discourage users from engaging with complete albums, as playlists instead present music as fragmented content rather than cohesive artistic works.

"Retro technology trends are offering different ways to create and to connect cool people carrying old analog and digital photo cameras, video camcorders, iPods, Nokia phones, mp3 players. Those less-connected devices provide more control of the experience to their users." –Matas Petrikas, Producer, Author & Engin

Online evolution

Even in our digital-first world, 27% of our community says it can actually imagine life without the internet. Whether they would enjoy it, however, is another question altogether.

The majority thinks the biggest perks of being connected are convenience (84%) and global reach (85%). It makes life easier and lets us hear new voices from around the world.

In recent years, generative AI has taken centre stage, going from virtually unknown to impossible to ignore. 43% of the Boiler Room community is excited by the emergence of AI – compared to 63% of their peers. But they are more cautious about AI than most of their peers; 80% are worried about deep fakes, compared to 63% of their peers.

72% fear AI could erode trust in information. 66% are concerned about how it might affect creators' livelihoods – showcasing the Boiler Room community as deeply caring about music, and empathetic towards those who make it.

37% of Boiler Room 18-34s have learnt how to prompt AI models effectively (vs 22%).

4% of Boiler Room respondents are creating content for fame or fortune (vs 14% of peers).

They know how to harness the power of emerging tech to their advantage. Over half of the Boiler Room community create content: 29% produces visual content, 21% makes music, 19% creates video content, 17% writes and 11% write code. Their primary motivation is creative self-expression (32%) rather than seeking fame, followers or money.

"What we see happening is the post-peak-social-media era,where the **read-and-write dynamics** of the 2010s is being replacedby **binge consumption** of **algorithmic content...**

individual influencers are getting less important, compared to the trends that emerge through groups, through **repetition** and **remixing**."

–Matas Petrikas
Producer, Author & Engineer

Digital tools for real life connections

53% of all Boiler Room 18-34 year olds say IRL communities are more valuable than those formed online.

71% of the community agree digital can be a barrier to engaging with the people around us.

The rise of TikTok gives niche communities a voice. However, only 30% of our audience, compared to 45% of peers, agrees that the communities they are a part of are principally online. For our young people, the magic happens in real life – 73% believe online communities need to meet IRL to truly connect. At the same time, online spaces are seen as a supportive add-on.

To overcome divisions and build bridges between communities, our audience is twice as likely to suggest creating shared physical spaces (69%) over online ones (35%).

IRL wins out over online

79% of the community goes to a bar/pub at least monthly – compared to 48% of their peers.

Boiler Room's community is more socially active than their peers, seeing time spent on social media as a tool to fuel real-life connections.

They are nearly 50% more likely to attend live music events every month than their peers. Over 60% go clubbing regularly, they eat out more frequently and hit the gym more often – 73% go weekly.

59% of Boiler Room 18-34s eat out weekly vs 46% of their peers (93% vs 83% monthly)

Our audience is not buying into a fully digital future. Only 40% of the community members we surveyed expect to spend most of their time creating and sharing music online, compared to 52% of their peers. 39% prefer a hybrid approach, nearly double their peers.

When it comes to meeting people, they are more into IRL connections – 49% prioritise face-to-face (compared to 34% of their peers). However, our community uses dating apps more than its global peer group, signalling that some may view dating apps not only for romantic purposes but also for making friends or finding people with similar interests in music and events.

“Our audience is an ever-evolving **global** community, as invested in culture online as they are in real spaces. While online experiences can bridge borders and time zones, there’s no replacement for the sense of **connection** and **euphoria** of real-life experiences.”

–Amar Ediriwira
Creative Director, Boiler Room

Adapting to the future

When asked about the future of music events, our community overwhelmingly favours real-world gatherings over metaverse experiences - 76% believe music will bring more people together physically, while just 21% see events moving primarily into digital spaces.

What will shape the future of music? 36% of our community thinks it's AI, while 27% say the same of the Global South – reflecting the fact that 90% of Boiler Room 18-34s believe the music scene has never been so globally diverse.

It's clear that new tools, like AI, are also seen as enablers for connection, with 74% saying these innovations will help them become music producers themselves.

But don't discount nostalgia. 58% agree that as culture speeds up, nostalgia will take over music. TikTok is a major driver, with 55% saying it helps trends go viral faster and reach more people. Nostalgia is one way of responding to the fast pace of culture, but even more important is staying grounded in real-life communities.

Spending Where It Matters

Bills, bills, bills

34% of all 18-34 respondents say they'll never be able to afford to save enough to buy a home.

Part of our community's outlook is shaped by financial pressure – everyone is feeling the pinch. 75% worry about their financial future, up from 60% in 2019. 37% admit they are not confident when it comes to managing money.

More than previous generations, housing costs are hitting young people hard. 30% of our 18-34s live with their parents, and that jumps to 47% for those aged 18-24. Nearly half of young people (47%) are navigating the unstable private rental market. 74% per cent want to learn more about managing finances. At the same time, the focus is on making their money stretch as far as possible.

70% of Boiler Room 18-34s say it's better to reuse/recycle/refurbish than to buy new (vs 58%).

Our community puts its hard-earned money where its values are. 79% believe it's important to be conscious and purposeful when choosing brands. 76% are willing to pay more to support sustainability, up from 69% in 2019.

50% of 18-34s are more likely to put weekends away in their top three spending categories.

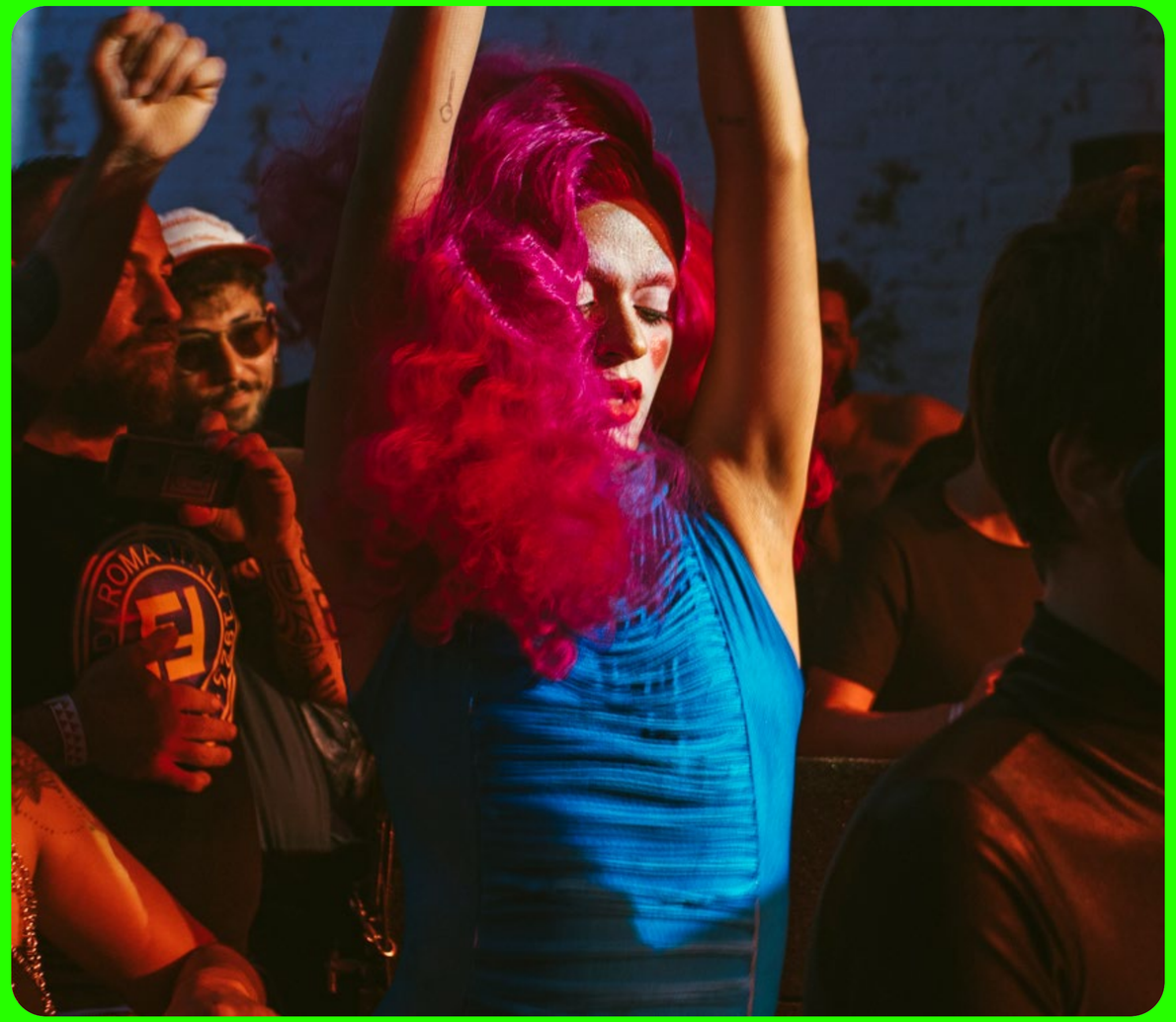
While more young people are increasing their spending on entertainment like TV, games, movies, and music due to the rising cost of living and post-pandemic effects, only 18% of the Boiler Room community see it as a top priority. They prefer to spend their money on experiences outside the home. Living in the moment is more important than stressing about the big picture. That said, they are eating out less to curb their spending, dropping from 73% to 59% weekly, shifting toward home deliveries and takeaways.

The new tastemakers

While money might be tight, our community is all about staying in the know. They're influential too - 64% say people ask for their advice before making purchases, while 57% believe their own buying choices influence their friends' decisions.

What sets them apart? They are less focused on their immediate circle. Only 15% of our audience members say people they know influence their choices, compared to 43% of their peers. And just 22% are influenced by close friends, compared to 41% of their peers. Boiler Room's community leads the way.

42% of Boiler Room 18-34s say cultural fit influences their brand choices vs 18% of peers.



Boiler Room's audience act as cultural tastemakers, their curious and creative nature drawing from diverse influences beyond their immediate circles. This is reflected in how they connect with brands - cultural fit has become their primary consideration, jumping from 15% in 2019 to 42% in 2024.

Despite the financial challenges, 62% of our audience is willing to pay more for a brand if they believe the brand is genuinely invested in supporting culture. As many as 65% are comfortable with brands in cultural spaces as long as the pairing feels authentic.

A genuine commitment to culture is essential, as 33% accept brands that truly support culture, while 21% assess each brand on a case-by-case basis. Experiences matter; 32% prefer brand interactions at events over mass ads, and 15% believe brand users, not those promoting the brands, define cultural fit. 72% of our community is willing to pay more for brands that back social causes, compared to 66% of their peers.

Finding Resilience In Purpose

Collective activism

Facing wars, climate crises, and the rise of the far-right, young people today feel they cannot stay politically complacent.

44% of Boiler Room 18-34s say Climate Action campaigns have had a major impact on them.

It is no surprise that about 75% of our audience says global movements like #MeToo, Climate Action, Black Lives Matter, and Free Palestine have influenced them, with 45% saying these political movements had a major impact, and 75% voted in their country's most recent election (compared to 68% of their peers).

While our community is less likely to join political parties or campaigns, they are more likely to hit the streets – 31% have joined a demonstration, and 26% have taken part in direct action. Compared to their peers, twice as many of the Boiler Room community describe politics and activism as a passion.

Radical buoyancy

While much commentary focuses on youth anxiety and fragility, our final theme reveals a different story about resilience and adaptability.

Despite the obvious challenges, 48% of the Boiler Room community remains optimistic about the future, compared to just 12% of their peers.

30% of our community sees money as a top priority, compared to 58% of their peers.

Describing finances as a passion is relatively rare in the Boiler Room community. Only 10% feels this way, compared to 25% of the peer group.

And just 32% put work in the top five of their priorities, versus 49% of their peers. Family plays a different role for our community – 44% considers it a top priority, compared to 86% of their peers. Instead, our audience prioritises music (59% vs 23%), new experiences (34% vs 9%), travel (26% vs 14%), and culture (23% vs 8%). It's all about living in, and enyoying, the moment.

Real world trust

Fully immersed in digital and social channels, young people today are aware of the dangers of technology. Hate thrives online, but the best way to bridge divides is by bringing people together – giving others a face, a name, and a story. This real-life exposure to diversity has boosted trust, with 36% of our community saying most people can be trusted, up from 30% in 2019.

52% feel the world is more dangerous now, compared to 73% of our peers – likely another benefit of the Boiler Room community's engagement in the real world.

Our Audience in 10 Points

1. Rethinking identity

They celebrate a multiplicity of identities, fusing individual expression with collective power.

2. Post-digital, hybrid pioneers

Our audience is made up of digital natives who prioritise real-life experiences and well-being.

3. Spend smart, live large

Amid greater financial pressures, they prioritises experiences, social pleasures, and relationships over work and money.

4. Balanced hedonists

This conscious generation balances well-being with an active social life. However, our community aren't teetotalers either – they still enjoy alcohol and nightlife, with an eye for moderation. Time with friends, music, and dancing are essential for health.

5. Purposeful pleasures

They champion intentional clubbing, valuing inclusive spaces and standing in solidarity with marginalised groups. They are mindful of their consumption and lifestyle choices.

6. Pragmatic technologists

Our community is eager for the next tech breakthrough, cautious of AI risks and metaverse hype, but already mastering tech to improve real-life experiences.

7. Creative producers

They are creators for the sake of self-expression, not fame. Curious and independent, they shape their own culture, free from the grip of headline influencers.

8. Social butterflies

While social channels may be core to entertainment and social connections, they don't cut it for brand impact. Instagram leads the way, with TikTok driving new conversations and fostering niche communities. But don't count X (Twitter) dead just yet.

9. Community champions

They thrive in local and interest-based communities, finding real fulfilment in IRL connections built on trust, safety, and freedom of expression.

10. Global spirits

Our community is deeply connected to a global youth culture, rejecting nationalism and embracing the diversity of the global music scene and the rise of the Global South.

A Cultural Blueprint For The Future

Boiler Room's audience is vibrant, curious, and resilient. They are proactive agents of change, and part of a culture shaped through music, community, and common values.

They approach the complexities of the world with open minds and a resilient sense of optimism. While online tools offer more gateways to connecting across borders and time zones, the power of real-life experiences in shared spaces remains stronger than ever.

Looking ahead, this synthesis of digital and physical, of pleasure and purpose, signals a profound shift in how young people are reshaping society. The rise of intentional spaces and conscious consumption suggests tomorrow's landscape will be shaped less by traditional gatekeepers and more by communities creating change from the ground up. Meanwhile, the preference for authenticity over marketing messaging hints at a future where brands must fundamentally rethink how they engage with youth culture.

Our research reveals not just trends, but a dynamic tapestry of identities, values, and aspirations that define a generation ready to reshape the world.

This report outlines the major themes and key findings from our audience research. Get in touch with us to explore deeper insights about the Boiler Room community - from detailed behavioral analysis to market-specific data across attitudes, beliefs and cultural trends.

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