

# The New Audio

Understanding the Spotify  
Listener in Belgium

*Wave 2*



# Music for everyone

Spotify is all the music you'll ever need.

ACTIVE USERS:

**100 million**

SUBSCRIBERS:

**40 million**

REVENUE PAID TO  
RIGHTS HOLDERS:

**\$5 billion**

NUMBER OF SONGS:

**30 million+**

NUMBER OF PLAYLISTS:

**2 billion+**

NUMBER OF MARKETS:

**60 markets**



# Company news

 Launched Programmatic Audio

 Spotify Fan Insights

 Spotify & Tinder match

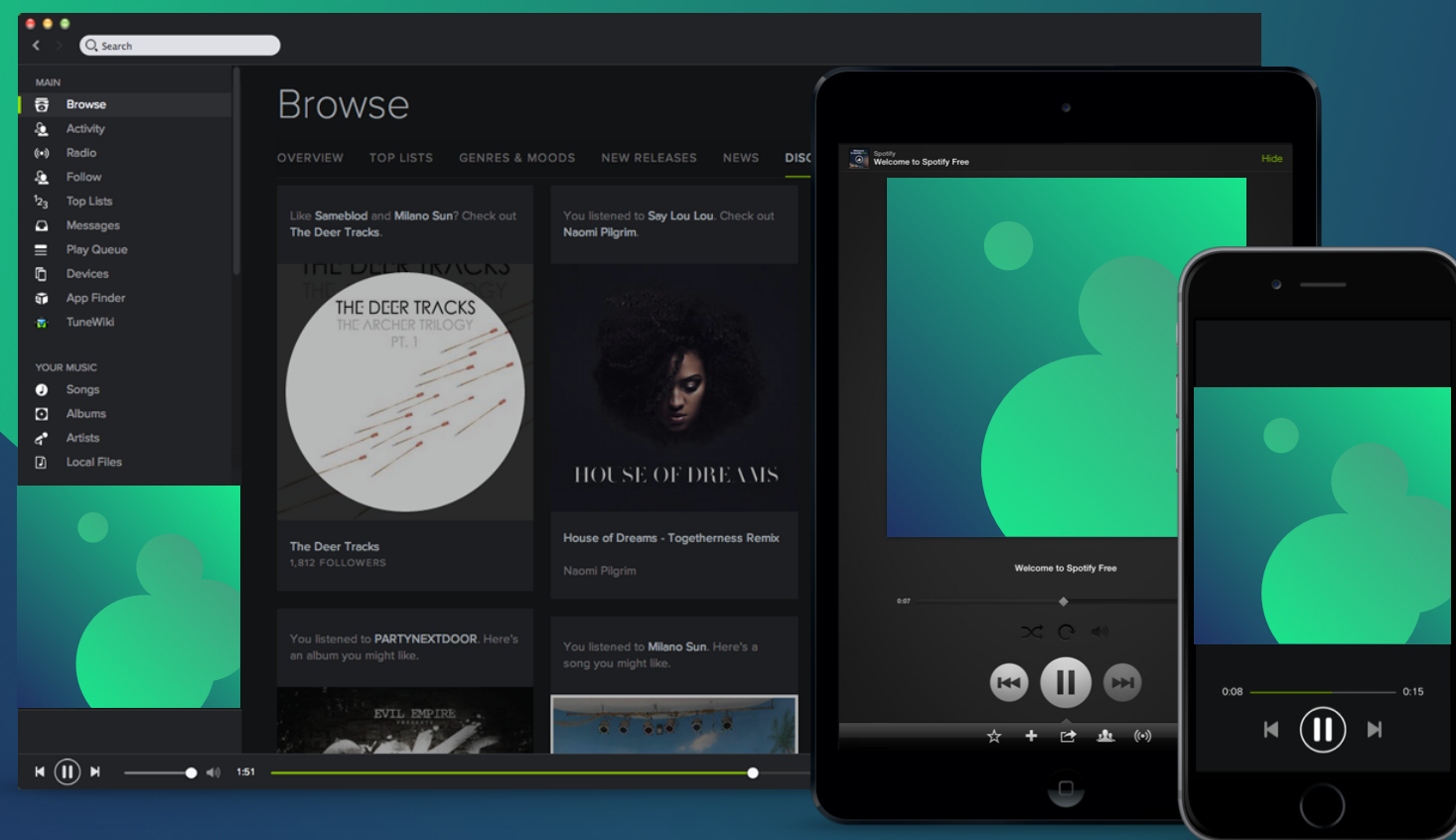
## GLOBAL PARTNERSHIPS



TESLA

JAGUAR

LAND ROVER





# Spotify across environments - ubiquity

On the road

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U B E R



*Ford*



TESLA

At home

---



On the go

---



 runkeeper



# Spotify Audio Ads

## HERE'S WHAT'S GREAT ABOUT AUDIO:



Only 2-3 mins of audio ads per hour



Display that provides engagement and CTA



100% SOV in a clutter-free environment



Full measurability of impressions and CTR



Audio Ads cannot be skipped or muted

## 1ST PARTY DATA + TARGETING



AGE



GENDER



GEO

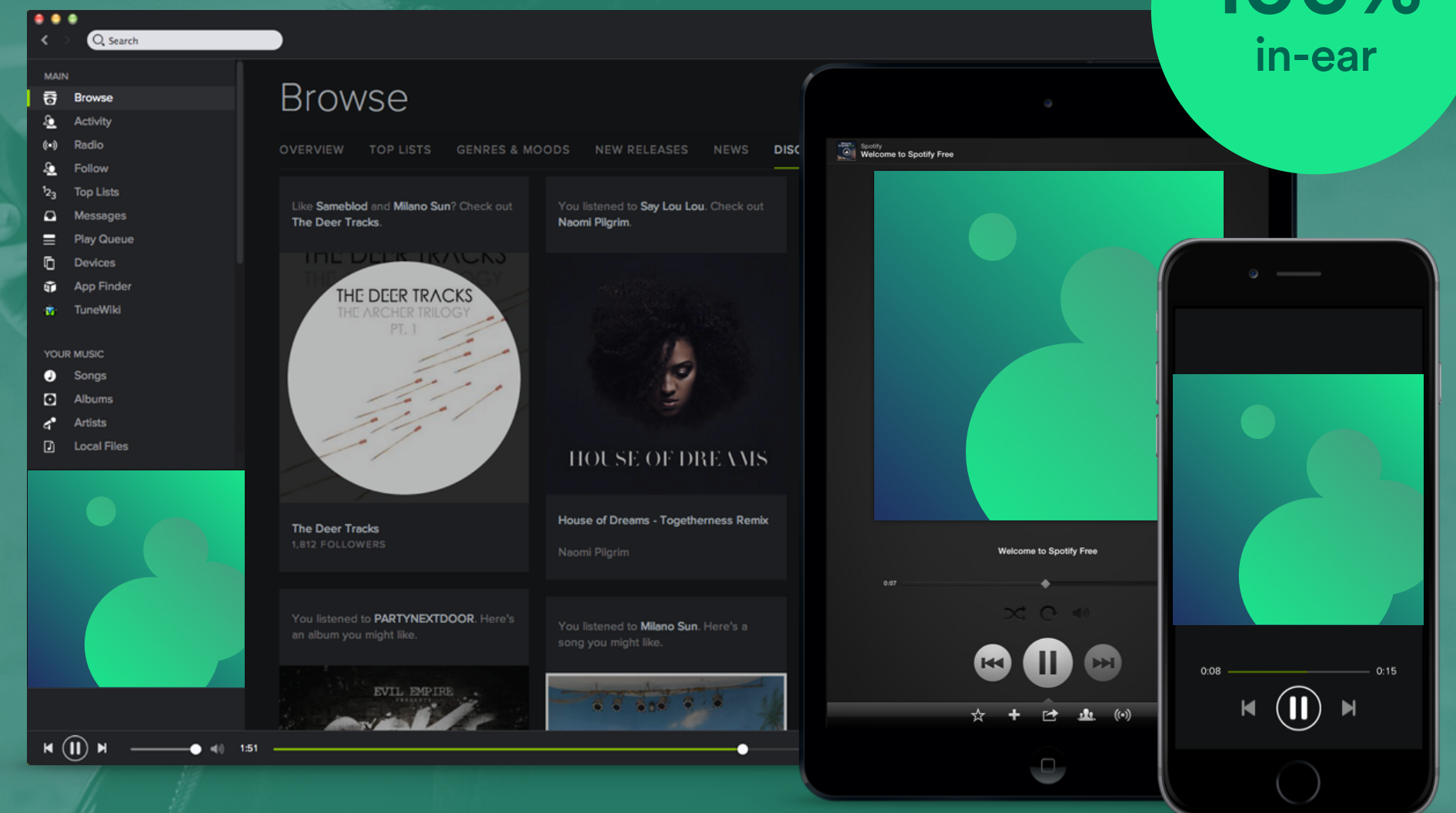


TIME



PLAYLIST +  
GENRE

100%  
in-ear





# The New Audio

#SpotifyNewAudio



# The **New Audio Study** investigates:



## Quantity of the audience

What is the overall and incremental reach of Spotify Free and local radio channels?



## Quality of the audience

What are the differences between Spotify Free users and the overall radio population?



## Listening behaviours

What are the listening behaviours of Spotify Free vs traditional radio (time of day, moments, attention)?



# Methodology

## Vendor:

- TNS (Kantar Media company)

## Scope:

- 20 Spotify markets
- Continuous research program (second wave in Europe)

## Who we surveyed:

- 2009 people in Belgium ages 15-64 years.
- The data we present in this study is based on online population.

## How we surveyed them:

- Standardised questionnaires (with market specific input) through TNS Online Panels

## Timing of the survey:

- May 2016



# How exactly is the weekly reach calculated?

- ▶ It's calculated through a probabisation method developed by TNS, and shows weekly reach in a more realistic way.
- ▶ It represents the chance that someone listens to a station on an average week.

## The probabilisation technique is based on 2 questions:

- ▶ Frequency of listening: How often does someone listen to a specific station (never, 1 day a week, 2 days a week, etc)?
- ▶ Last time listened: When was the last time they listened to this station (yesterday, the day before, last 3 days, etc)?





# Audience reach



Weekly Reach (Overall)

# Spotify Free is the largest digital music service in terms of weekly reach

2015

2016

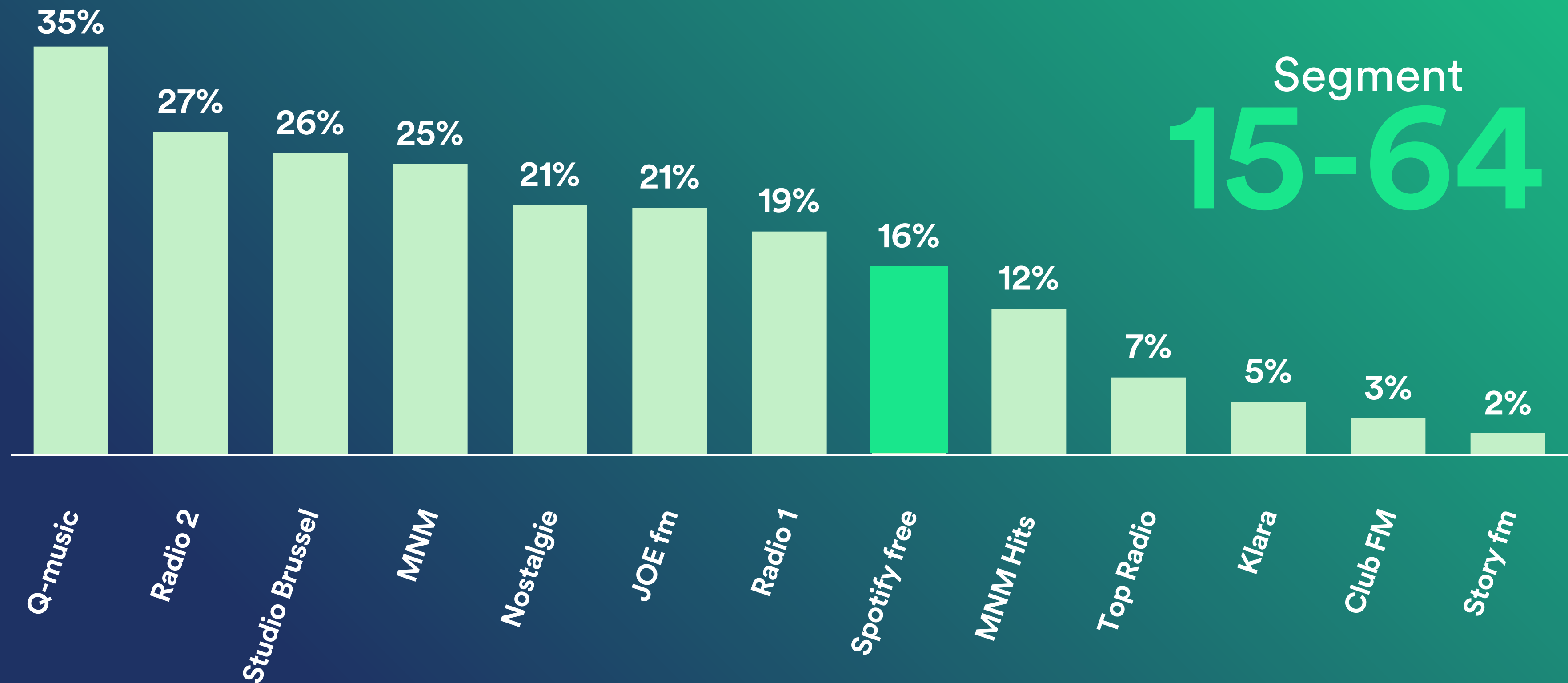
Spotify (Free) 10,0%

Spotify (Free) 14,1%



Weekly Reach (Overall)

# Spotify Free is the 8th largest 'radio station' in the **North** in terms of weekly reach

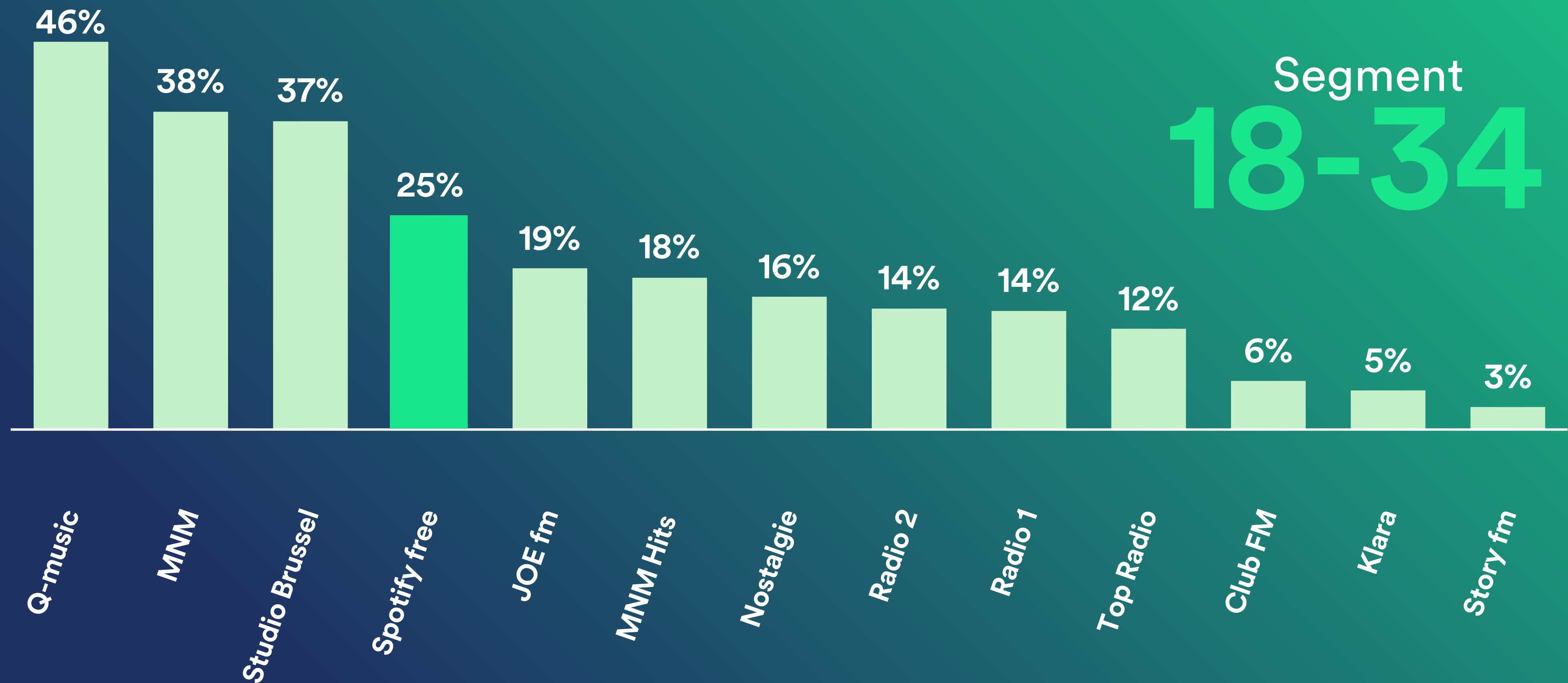


Segment  
**15-64**



Weekly Reach (Overall)

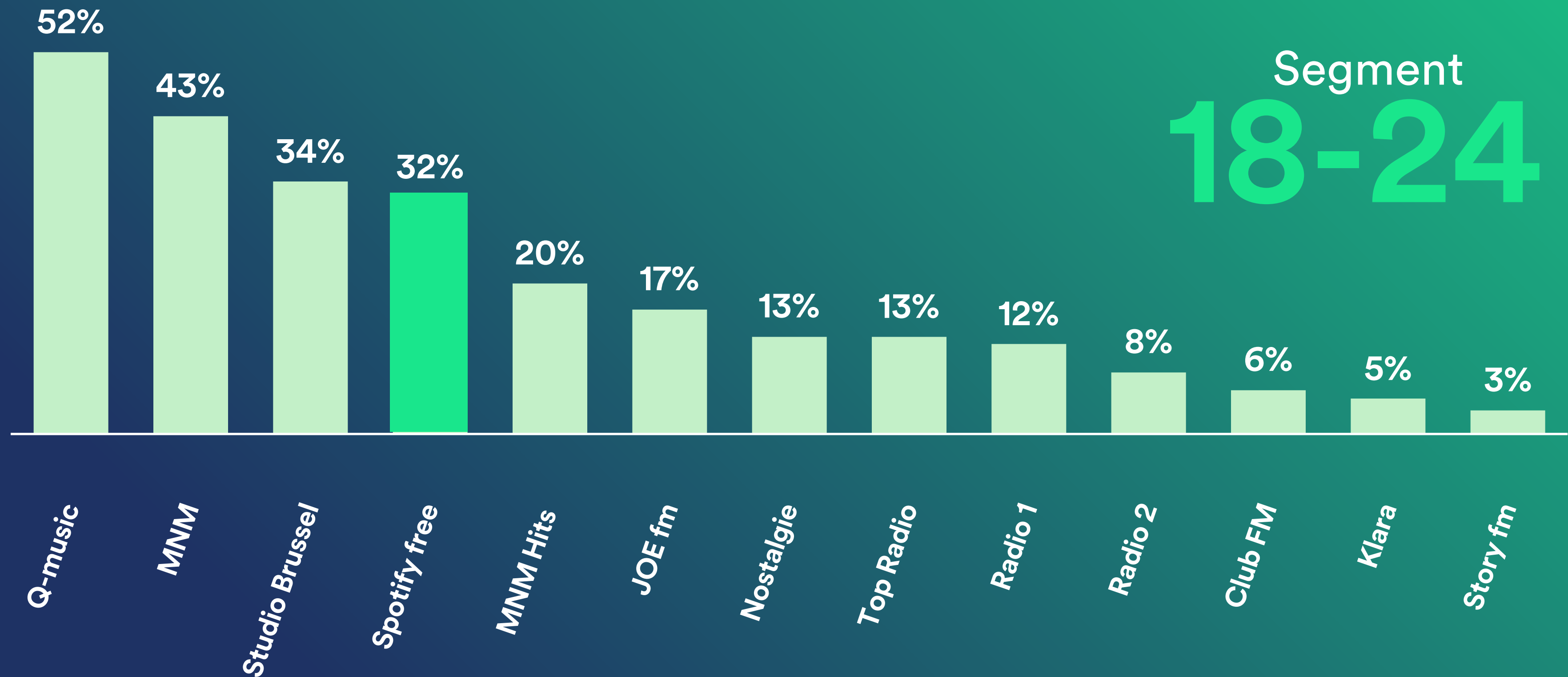
# Spotify Free is the 4th largest 'radio station' in the **North** in terms of weekly reach





Weekly Reach (Overall)

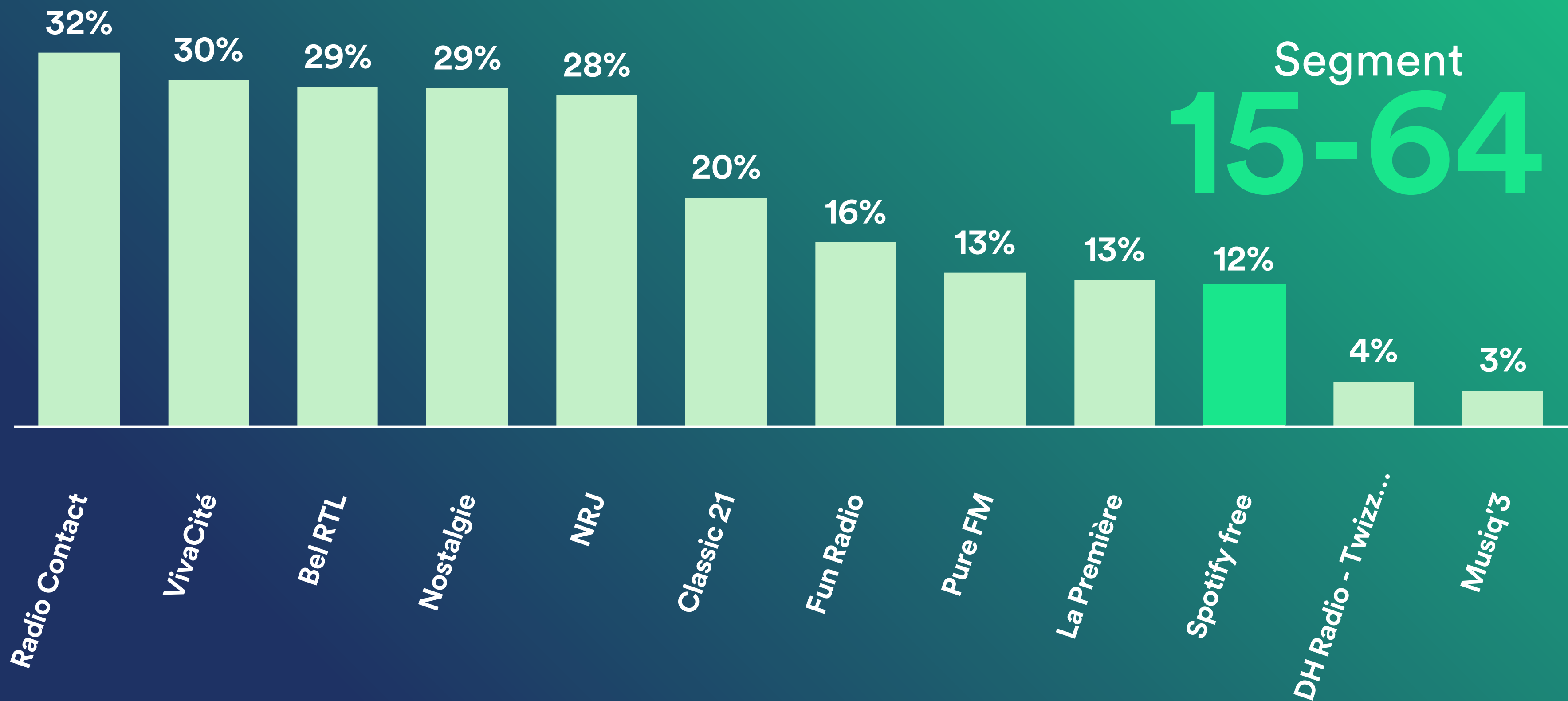
# Spotify Free is the 4th largest 'radio station' in the **North** in terms of weekly reach





Weekly Reach (Overall)

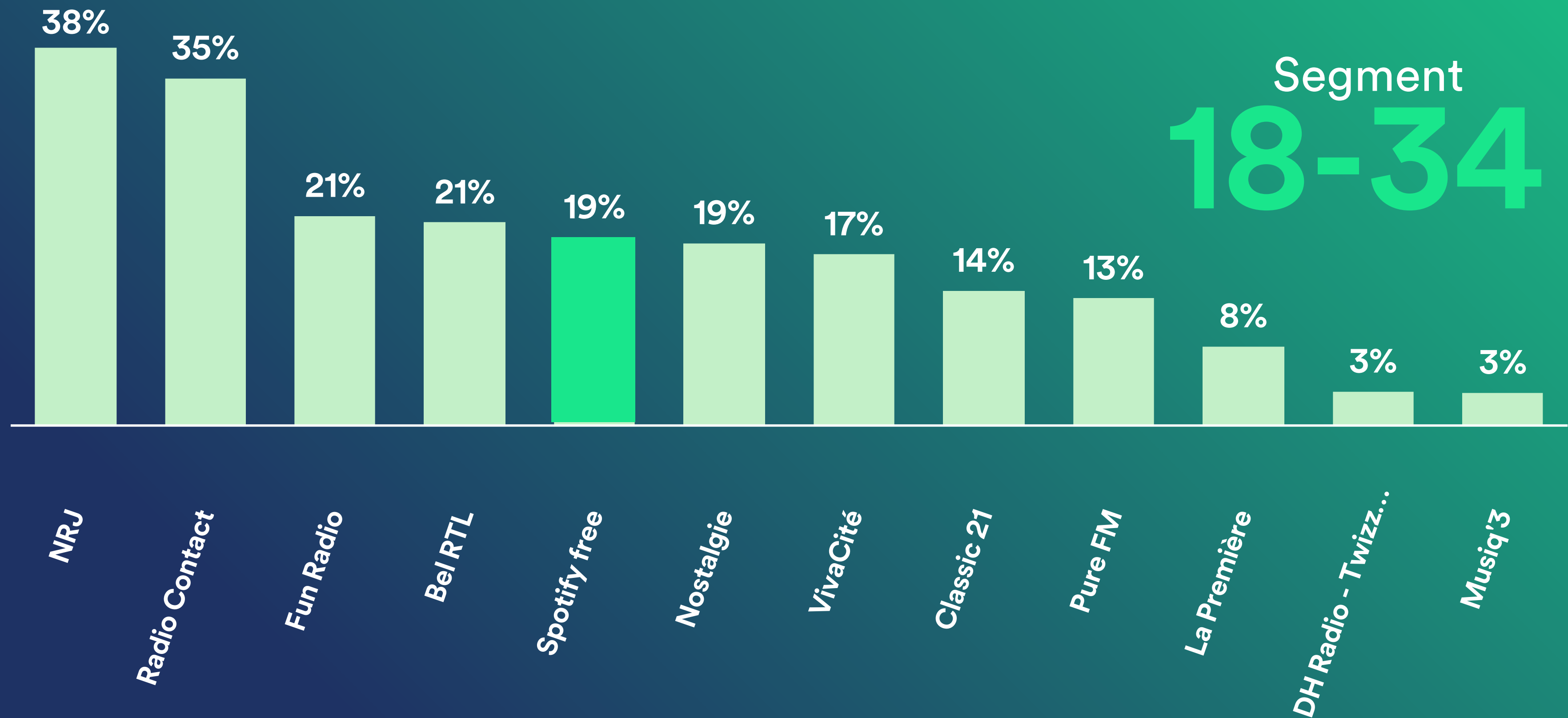
# Spotify Free is the 10th largest 'radio station' in the South in terms of weekly reach





Weekly Reach (Overall)

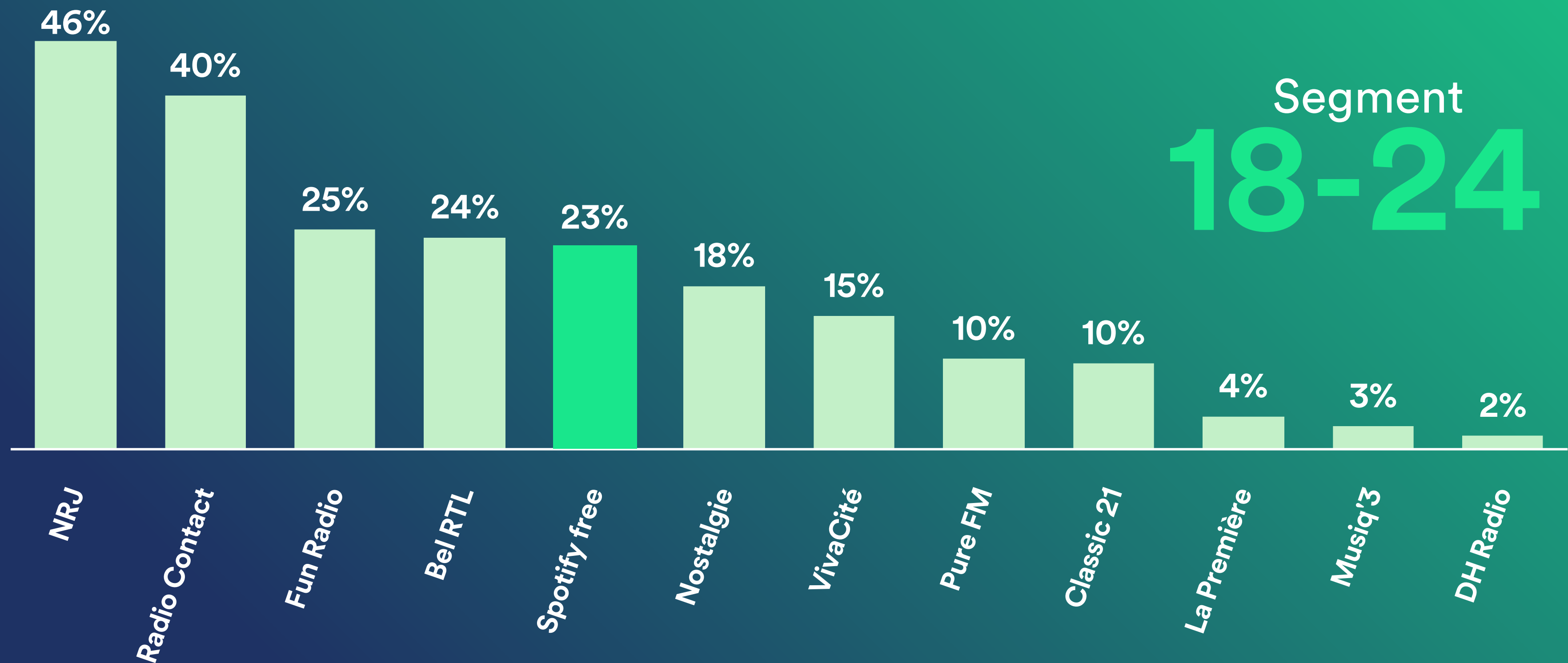
# Spotify Free is the 5th largest 'radio station' in the South in terms of weekly reach





Weekly Reach (Overall)

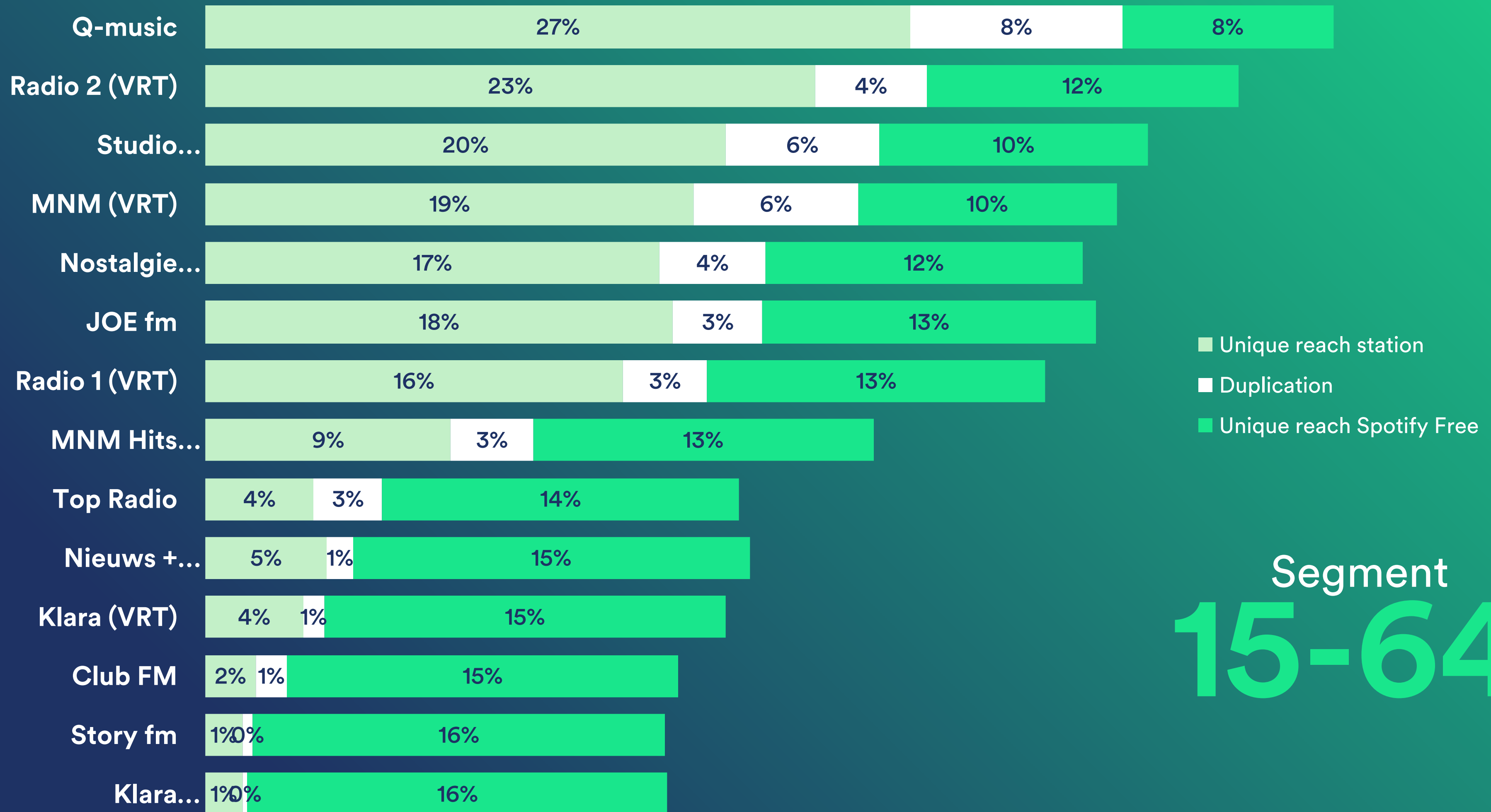
# Spotify Free is the 5th largest 'radio station' in the South in terms of weekly reach



Segment  
**18-24**



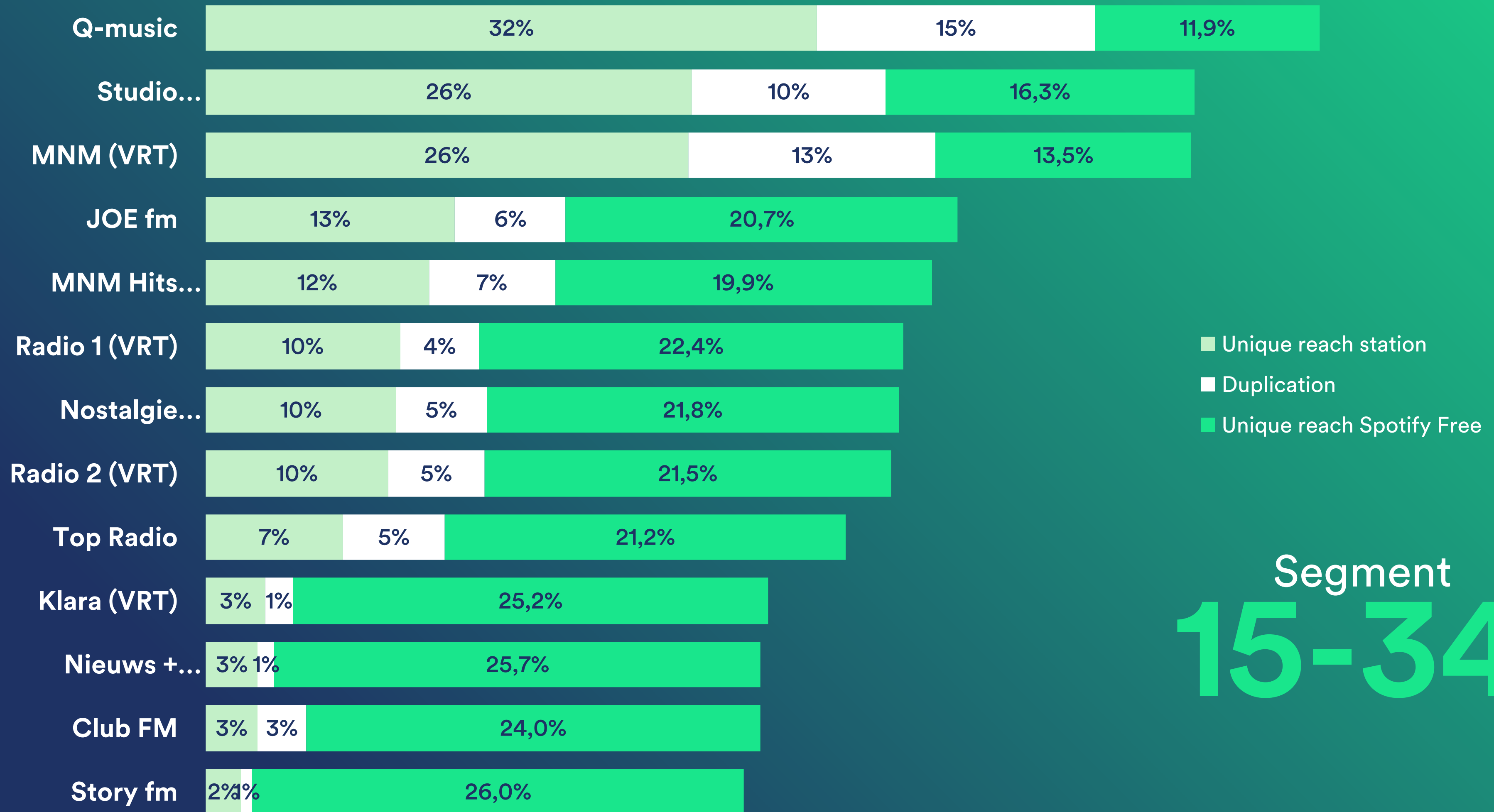
# Spotify Free North provides unique added reach



Segment  
**15-64**



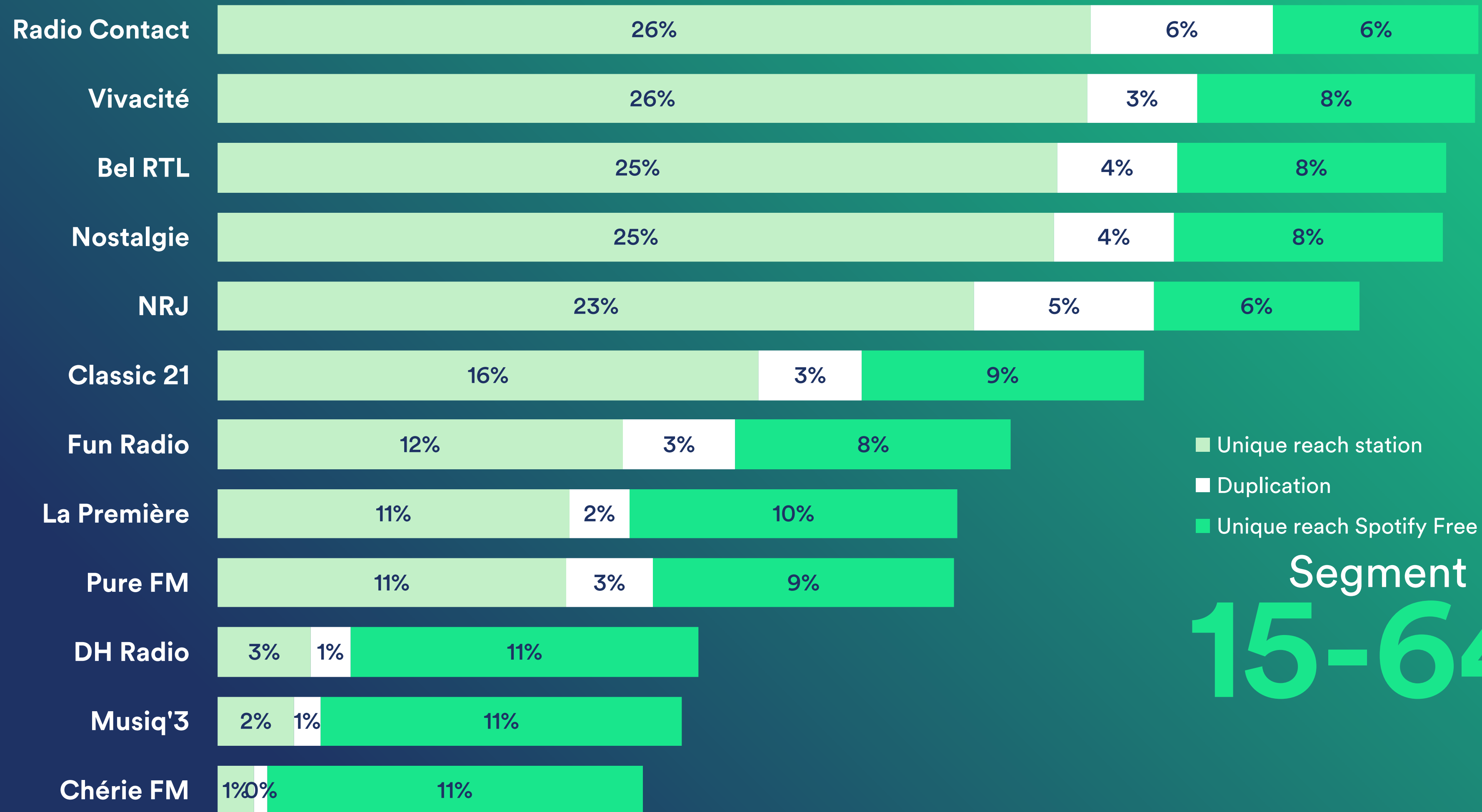
# Spotify Free **North** provides unique added reach



Segment  
**15-34**



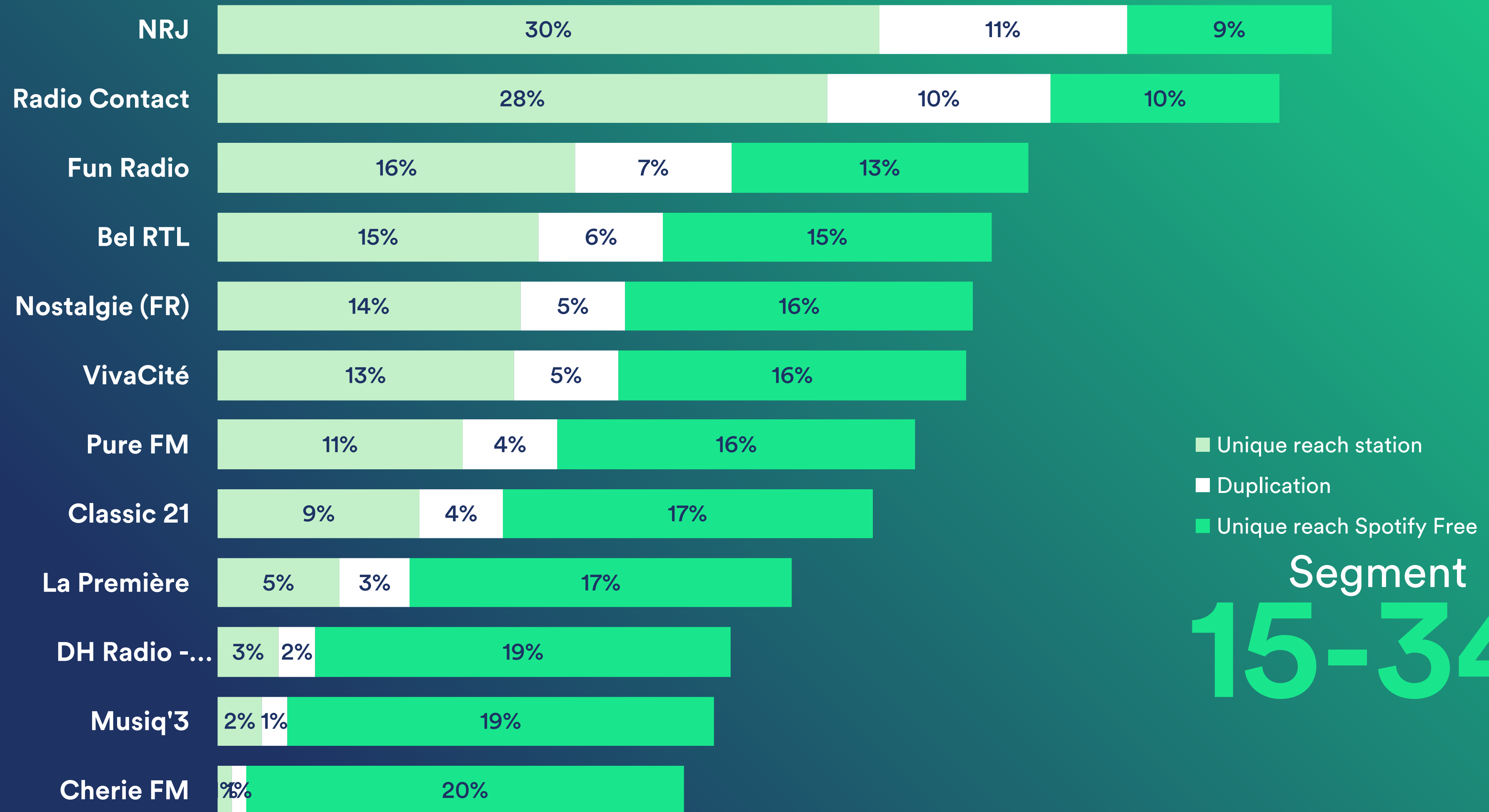
# Spotify Free **South** provides unique added reach



Segment  
**15-64**



# Spotify Free **South** provides unique added reach



Segment  
**15-34**



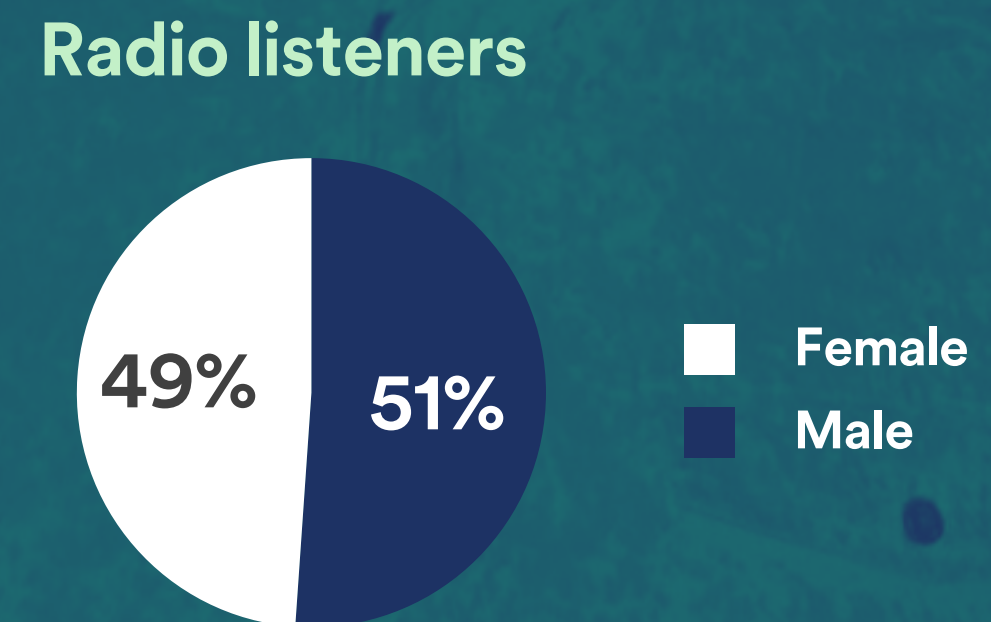
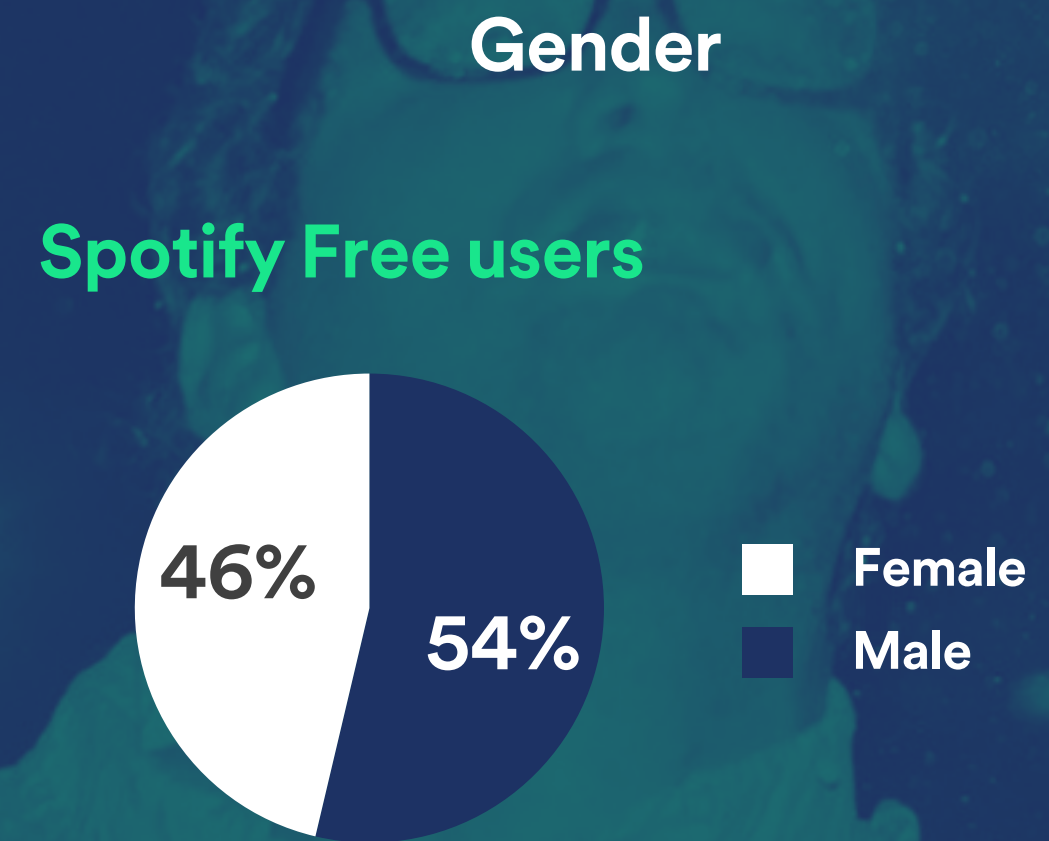
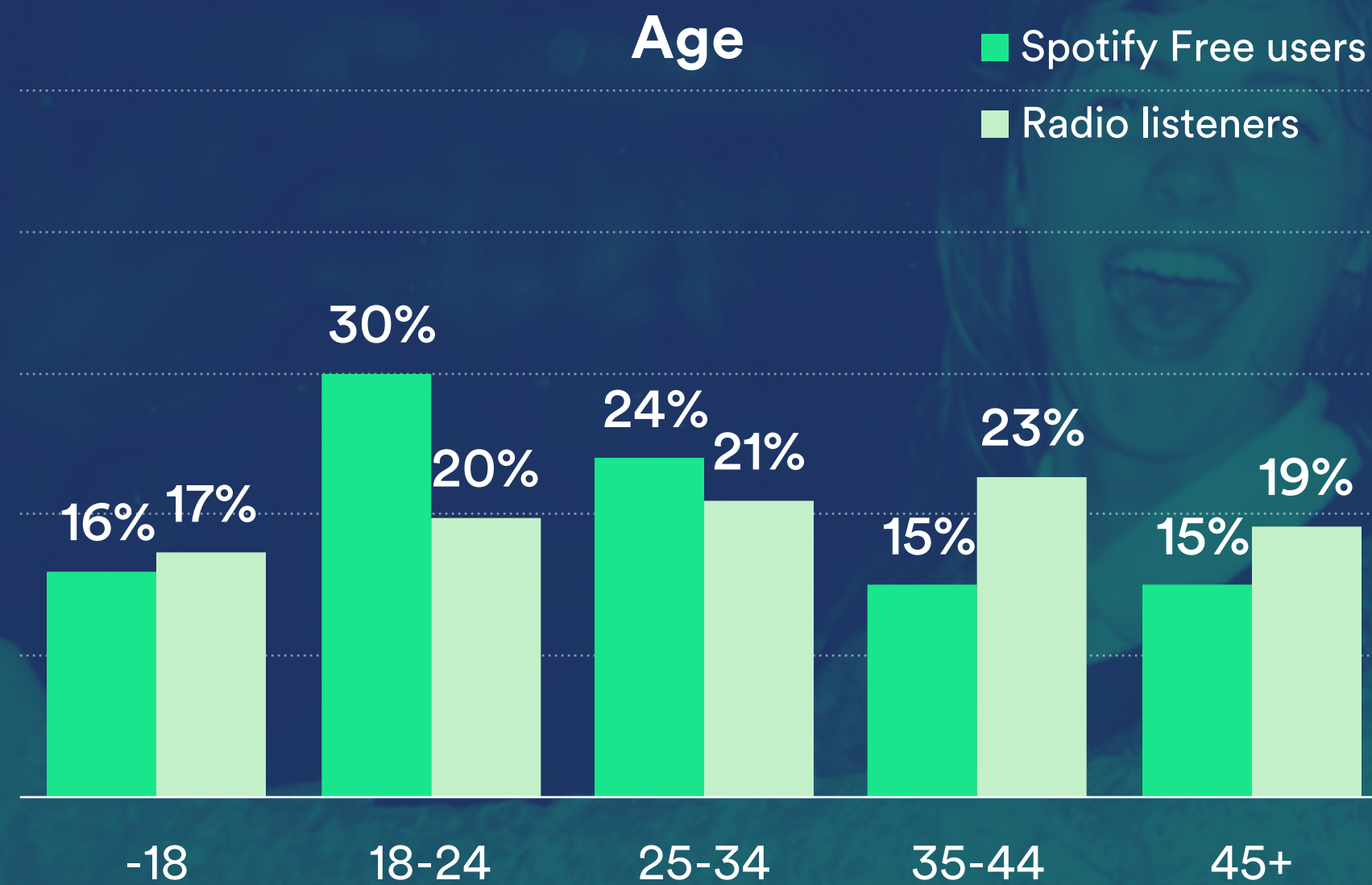
# Listening Behaviour





# Audience – Age & Gender

2016

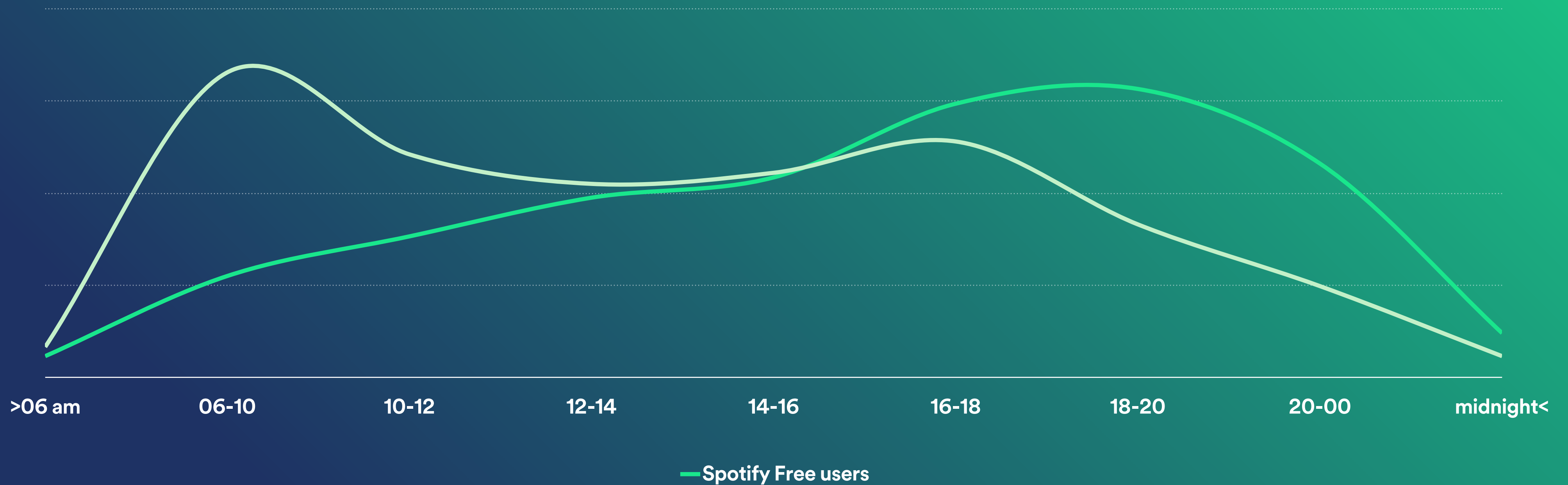


n=274 online interviews with Spotify Free users  
n=1841 online interviews with radio listeners



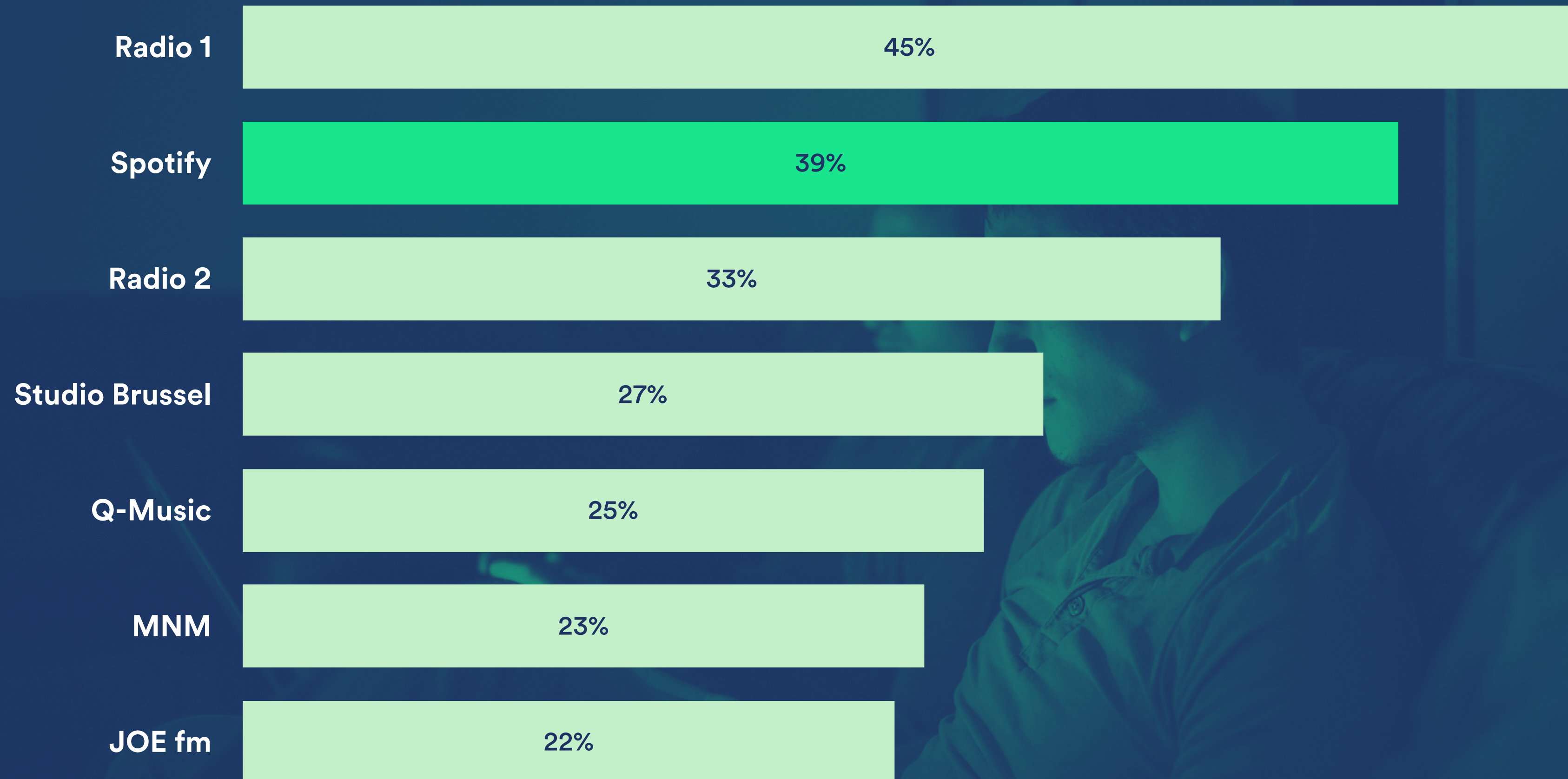
# Radio peaks in the morning while Spotify Free builds up reach throughout the day; hence they are playing a complementary role

## Intraday Listening





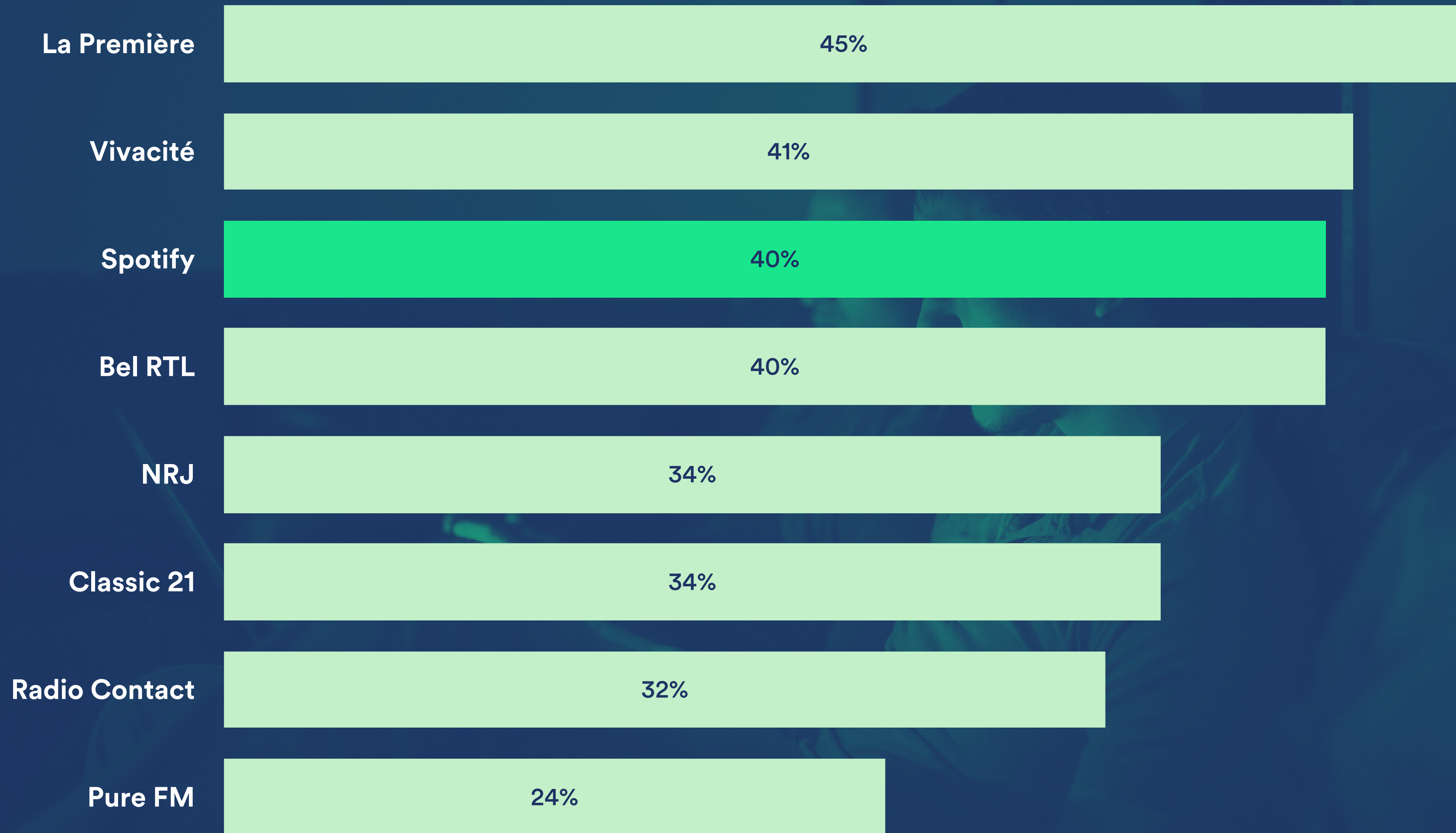
# Attention while listening



n=274 online interviews with Spotify Free users  
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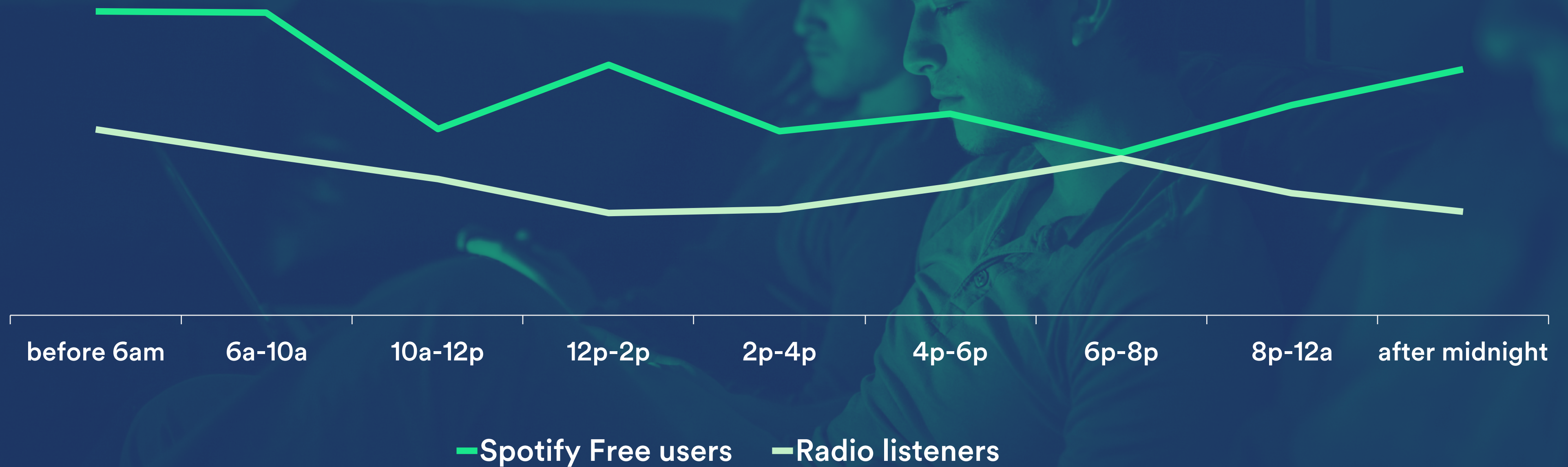
# Attention while listening



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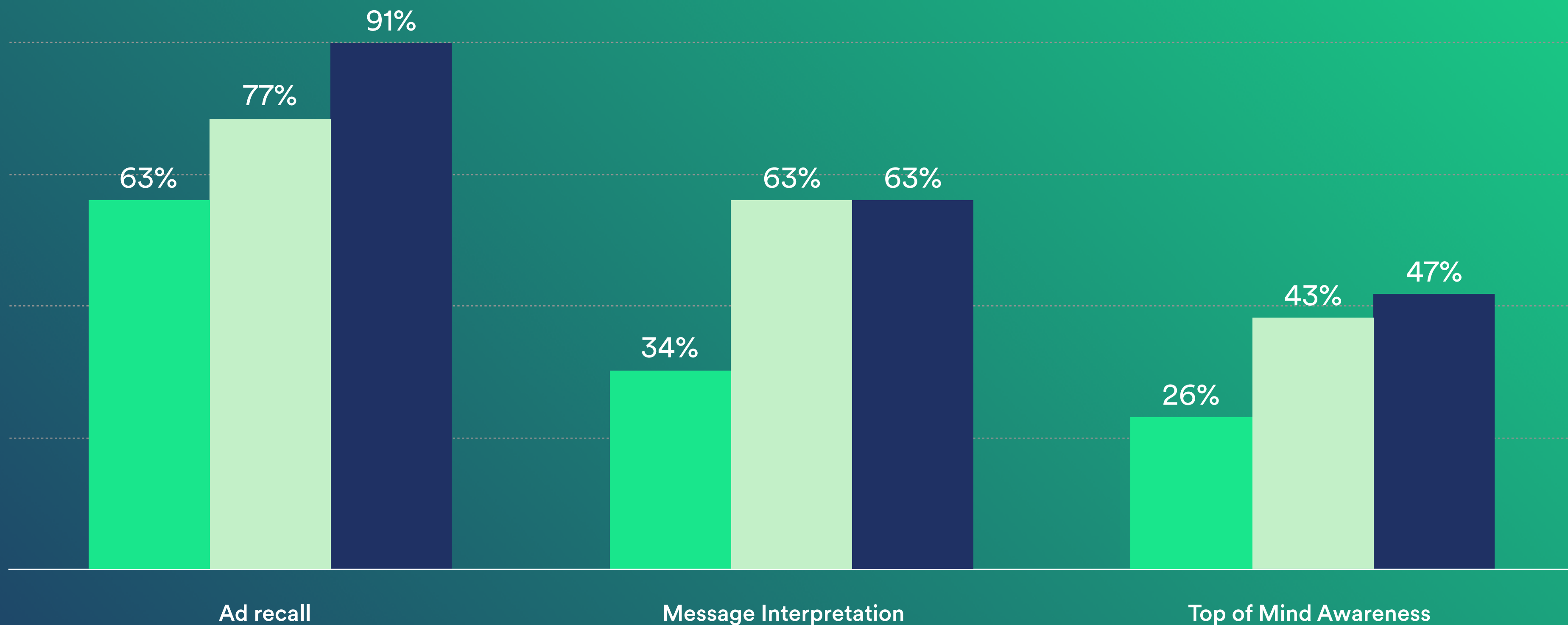
# Attention is the highest during early morning and late evening...



n=274 online interviews with Spotify Free users  
n=1841 online interviews with radio listeners



# Proving the campaign impact



**Spotify and radio create a clear synergy effect in a media plan!**



# Highlights



Spotify Free provides **duplicated and unique audience reach** to commercial radio, especially among millennials.



Spotify is consumed through **various moments** of the day with **high attention**.





**Thank You!**