

UNDERSTANDING PEOPLE THROUGH MUSIC:

# Millennial Edition



# Methodology

In 2017, Spotify commissioned Ypulse, a youth marketing research firm, to survey 7,000 and qualitatively interview 600 millennials across the United States, the United Kingdom and Australia. Our qualitative discussions revealed the why behind the what, asking a series of questions to understand devices, locations, occasions and emotions in order to produce a ‘Day in the Life’ depiction of Spotify users as they stream music.

Spotify analyzed these behavioral diaries alongside our first-party streaming intelligence to get a richer contextual understanding into the behaviors we see on our platforms every day. For US, AU, and UK audiences, we analyzed our users’ demographics, platform usage, playlist behavior, feature usage, and music tastes to inform our first-party segmentation. The insights in this white paper are derived from this research, unless otherwise specified.

For US audiences specifically, we crafted a suite of behavioral segments by analyzing our users’ streaming habits on Spotify alongside their broader interests, lifestyle and shopping behaviors, fueled by our trusted third-party data providers. For this study, we compiled these data sets to understand millennials across all three markets. Note: advertisers can only target by third-party segments in the US.

# Defining Millennials

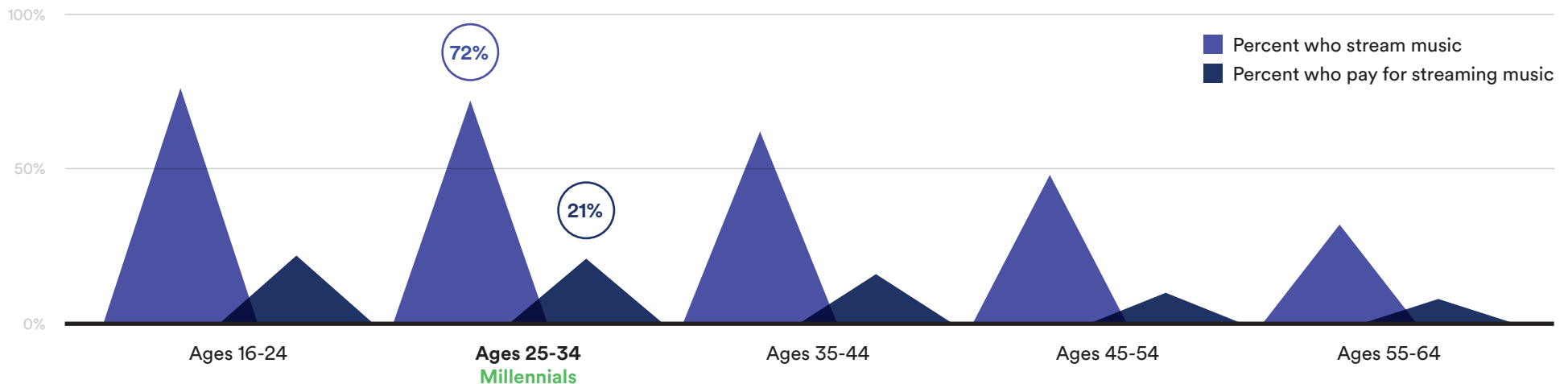
Millennials, or those born between 1982 and 2000, number more than 83 million, making up more than a quarter of the U.S. population. Similarly, millennials number 15.5 million in the UK (24% of the total population) and 6.4 million in Australia (26% of the total population).

Raised in a boom, millennials are optimistic, idealistic and believe their lives will go according to plan. They were the first fully digital generation, ushering in dramatic changes to the way that media is consumed and technology is used. Steeped in a culture of discovery, engagement and sharing, along with mad tech skills, millennials have a voracious appetite for music, with music streaming their preferred consumption platform.



**What is music to millennials?**  
74% say **music defines who they are**

Streaming Music Audiences by Age Groups<sup>1</sup>



**62% of Spotify audience are millennials<sup>2</sup>**

<sup>1</sup> GlobalWebIndex Q4 2017

<sup>2</sup> Spotify First Party Data, March 2018

# Key Takeaways

Music is a vital part of daily life, defining who they are and sustaining them through the moments in their lives: big, small, happy, sad, alone and together.

Millennials list **music as their #1 passion**, followed by food, fitness, fashion, sports and gaming.<sup>1</sup>

Millennials stream via mobile and listen to music everywhere and throughout the day and night. Streaming is a continuous soundtrack to their lives. Even when they engage with other media, it is always on.

**46% browse social media while streaming music.**<sup>2</sup>

Their social currency is based on discovering something new and sharing it with their friends so they're always on the hunt for the next artist, playlist or single.

**59% say they like being the first of their friends to discover a new music artist/group.**<sup>1</sup>

They turn to streaming to enhance and regulate every moment. Spotify is the indispensable part of their lives that they never get bored with, rely on and trust.

Millennials name **Spotify as their #1 platform for discovery and variety of music and recommendations.**<sup>2</sup>

Forget the music tribes of generations past (mods, rockers, punks, grunge). Because they use streaming to access music from all over the world and across the ages, millennials are eclectic and wide-ranging in what they consume.

**85% say their music taste doesn't fall into one specific genre or category.**<sup>1</sup>

<sup>1</sup> Ypulse syndicated research of millennials in the U.S.

<sup>2</sup> Spotify & Ypulse millennial research, 2018

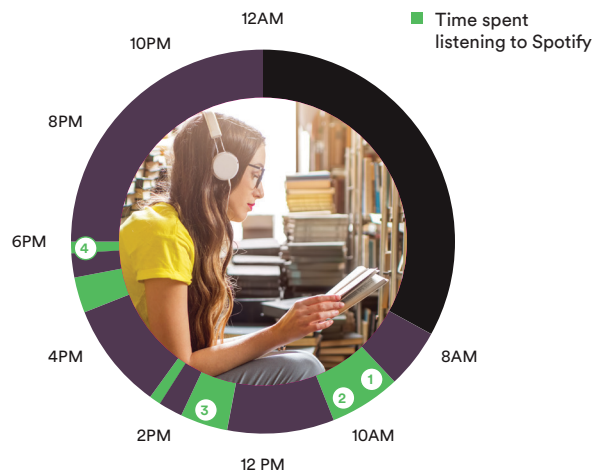


Let's delve into the lives of some living, breathing millennials that allowed us to record a day in their musically-infused lives...

## Monday

**Katherine, Female, 26, UK**

Spotify playlists are Kate's mood ring, mirroring what she's feeling at any given moment. Pop hits spin while she's in spin class, international music stimulates her mental state throughout the work day and her pregame playlist gets her in the mood for a fun Friday night with friends. Whatever you're feeling or doing, there's a playlist for that.



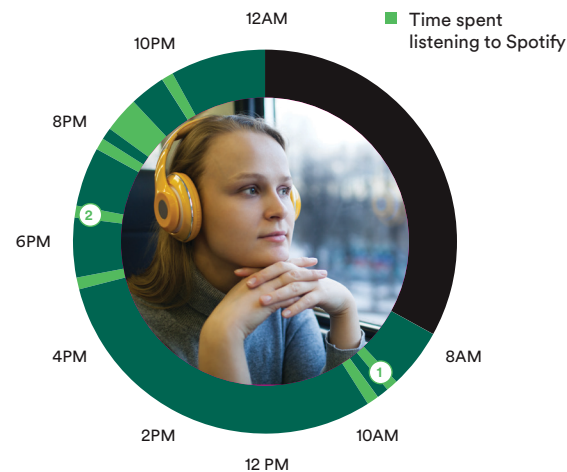
- 1. Monday motivation:** "I heard this old rock song on TV last night, so I'm listening to it this morning to get motivated to study all day."
- 2. Focus on the task at hand:** "Music really helps me stay focused when I'm studying for my linguistics certification exams."
- 3. Device juggler:** "When I'm working, I play Spotify on my phone and use the internet on my tablet to do research."
- 4. My choice:** "Spotify is so much better than other apps because I can choose more of what I listen to."

"Spotify has such a wide selection. Without it I'd really be restricted in what I can listen to."

## Wednesday

**Portia, Female, 20, Australia**

Portia uses Spotify to jump-start her day, using rock and electro-pop to fuel her morning run. She'll get a chance to fill in a bit of web-surfing and YouTube during the day, but switches the tunes back on for her evening commute. Spotify sets the mood in the evenings, where Broadway musicals and indie rock compete to create her personal soundtrack.



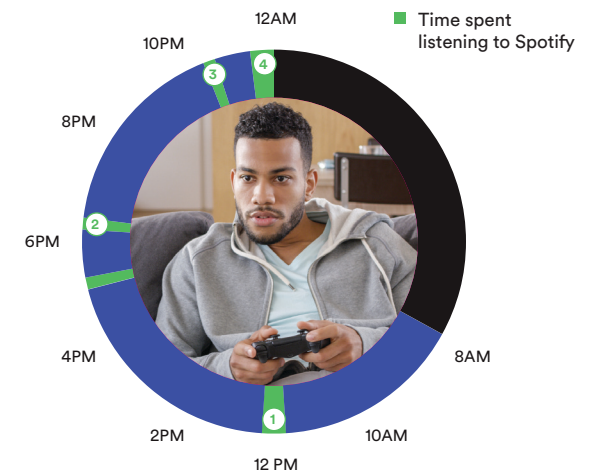
- 1. Exercise incentive:** "When I go out running as it makes me want to jog until the next song finishes."
- 2. Time filler:** "I listen to music on my train commute. It fills in that space in which I have nothing to do for an hour."

"Music helps me visualize my life like a movie when I feel alone."

## Friday

**Benedict, Male, 21, UK**

Ben uses Spotify to increase the intensity of his passions by mixing Calvin Harris with Call of Duty or to stay current by listening to new releases as he prepares to go out with his mates. There's a playlist to match every mood and situation and Ben makes sure that the mood, the moment and the music are all in sync.



- 1. Pleasant vibes:** "It's a lovely day out—I'm walking through town to my parents' place, listening to pop."
- 2. Gaming soundtrack:** "I'm playing Call of Duty with my partner while listening to Calvin Harris."
- 3. Going out:** "I'm meeting up with my mates tonight. I like to listen to new releases so I know what to expect when I'm heading out."
- 4. Ease into bedtime:** "Listening to Spotify as I relax in the bath before bedtime. It's my happy place when I'm listening alone."

"The thing I love about Spotify is their playlists. If Spotify was a person it'd be vibes."



# Millennial Streaming Playbook

- ① Streaming music is core to how millennials define and express themselves. They choose Spotify as their top music platform.
- ② Because they are so musically diverse and stream every moment, there are many opportunities for marketers to connect with this audience in ways that take genre, mood and context into consideration.
- ③ Spotify's unique mix of formats across audio, video and display — and understanding of context — offer many relevant ways to connect with millennials.

Learn how in our guide below.

## LEAN IN

## ON THE GO



### Working

Capture their attention through high impact formats like homepage takeover and video.

#### HOW TO TARGET

##### Platforms

Cross-platform, including mobile, desktop and connected devices

##### Time of Day

Afternoon (global)<sup>7</sup>

##### Genres & Subgenres

Crunk  
Alternative metal  
Acoustic pop

##### Real-Time Playlist

Focus (available globally)

##### Product Recommendations

Homepage takeover  
Sponsored playlist<sup>1</sup>  
(*Deep Focus*, *Brain Food*, *Peaceful Piano*, *Intense Studying*)<sup>2</sup>



### Chilling

Users are more leaned in and attentive during chill moments, so engage them with video and audio ads that tell a story and match this relaxed mood.

#### HOW TO TARGET

##### Platforms

Cross-platform, including mobile, desktop and connected devices

##### Time of Day

Late afternoon (global)<sup>7</sup>

##### Genres & Subgenres

Album rock  
Alternative metal  
Contemporary country

##### Real-Time Playlist

Chill (available globally)

##### Product Recommendations

Audio everywhere  
Sponsored playlist  
(*Chill Hits*<sup>3</sup>, *Mellow Pop*<sup>3</sup>, *Easy Afternoon*<sup>2</sup>)



### Chores

In this moment, think about audio storytelling that transports your audience to a less mundane experience.

#### HOW TO TARGET

##### Platforms

Cross-platform, including mobile, desktop and connected devices

##### Time of Day

Afternoon  
(Saturday & Sunday)<sup>5</sup>

##### Genres & Subgenres

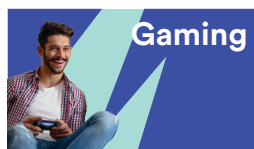
Album rock  
Alternative metal  
Contemporary country

##### Real-Time Playlists

Housework  
(available in US only)

##### Product Recommendations

Audio everywhere  
Branded content podcasts  
Sponsored podcasts  
Sponsored playlist  
(*Afternoon Acoustic*, *Relax & Unwind*, *Good Vibes*<sup>2</sup>)



### Gaming

Reach gamers on their consoles with music-driven messaging that matches the gaming content. Consider crafting your ads to complement game storyline and characters.

#### HOW TO TARGET

##### Platforms

Gaming console  
Cross-platform, including mobile, desktop and connected devices

##### Time of Day

Evening (global)<sup>7</sup>

##### Genres & Subgenres:

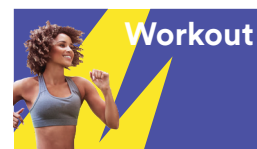
Dwn trap  
Antiviral pop  
Adult standards

##### Real-Time Playlists:

Gaming (available globally)

##### Product Recommendations:

Audio everywhere  
Sponsored sessions (video)  
Sponsored playlist  
(*Power Gaming*<sup>4</sup>)



### Workout

Focus on music-driven audio messages that match the beat. Consider telling a motivating story with video and display outside the moment.

#### HOW TO TARGET

##### Platforms

Mobile audio

##### Time of Day

Weekday morning & evenings  
(global)<sup>7</sup>

##### Genres & Subgenres

Big room  
Dirty South  
Canadian pop

##### Real-Time Playlist

Workout, Yoga  
(available globally)

##### Product Recommendations

Audio everywhere  
Sponsored sessions (video)  
Sponsored playlist  
(*Beast Mode*<sup>6</sup>)



### Partying

Create audio ads that entertain and liven up the party atmosphere through music-driven messaging. For those partying at home, consider multimedia campaigns across connected devices.

#### HOW TO TARGET

##### Platforms

Cross-platform, including mobile, desktop and connected devices

##### Time of Day

Friday and Saturday evenings  
(global)<sup>7</sup>

##### Genres & Subgenres

Crunk  
Big room  
Contemporary country

##### Real-Time Playlists

Party (available globally)

##### Product Recommendations

Audio everywhere  
Sponsored sessions (video)  
Sponsored playlist  
(*Get Turnt*<sup>2</sup>)



### Driving

Millennials' eyes and hands are busy while driving, so audio is a key format. Use storytelling that captures their imagination and their senses.

#### HOW TO TARGET

##### Platforms

Car

##### Time of Day

Thursday and Friday morning and evenings (global)<sup>7</sup>

##### Genres & Subgenres

Crunk  
Banda  
Alternative Metal

##### Real-Time Playlists

Commute, Road Trip  
(available globally)

##### Product Recommendations

In-car audio  
Audio everywhere  
Branded content podcasts  
Sponsored podcasts  
Sponsored playlist (*Evening Commute*, *Family Road Trip*<sup>2</sup>)

<sup>1</sup> Sponsored Playlist availability by market may be subject to change.

<sup>2</sup> Available in U.S. only.

<sup>3</sup> Available in UK only.

<sup>4</sup> Available in AU only.

<sup>5</sup> US-specific data.

<sup>6</sup> Available in the US, UK, and AU.

<sup>7</sup> Available globally.