

The New Audio

Reaching the Spotify Listener in Europe





Streaming is now mainstream.

The biggest digital music services have grown their audiences. Listening habits are changing, as some younger listeners bypass traditional radio in favor of streaming radio, and older listeners spend more time with new content distribution channels. As people find new ways to access music, they're soundtracking their lives according to the rules of our on-demand age. They listen on the go and across devices, taking full advantage of mobile and connected platforms. They listen throughout the day, not just during their morning drive. And they listen in the moments that make up their lives, from exercising and commuting to partying, studying and more.

Spotify is invested in helping marketers navigate this new landscape to grow the pie for the audio advertising industry. That's why we've commissioned research to quantify the reach and quality of our free audience in 10 countries across Europe. Conducted by TNS, this study marks the first time Spotify has been measured directly alongside commercial radio. We hope the results help demystify today's audio consumer and shed more light on how digital and broadcast platforms complement one another.

The audio advertising industry continues to grow. New content distribution channels will enable the audio medium and audio advertising to flourish. It all starts with knowing where, when and how your audience listens.

Jonathan Forster, VP of EMEA Sales, Spotify

We wanted to know

- 01 How does the reach of Spotify's free service in Europe compare to radio?
- 02 How does the reach compare to other streaming services?
- 03 Is Spotify's free audience listening behavior different from the radio audience?

10 markets surveyed

Timeframe: May-June 2015

20,000+ respondents ages 15-64
(at least 2,000 respondents per market)

Spotify Free users compared to the online population
(the subsequent use of "Spotify" throughout refers specifically to Spotify Free and its free users)



*The data presented in this study is based on the online population in Europe (79% of the total population.) Respondents were surveyed with standardised questionnaires including market-specific input through TNS online panels.

KEY FINDINGS

Audience Reach and Listening Behavior

Spotify's free service delivers unique audience reach.



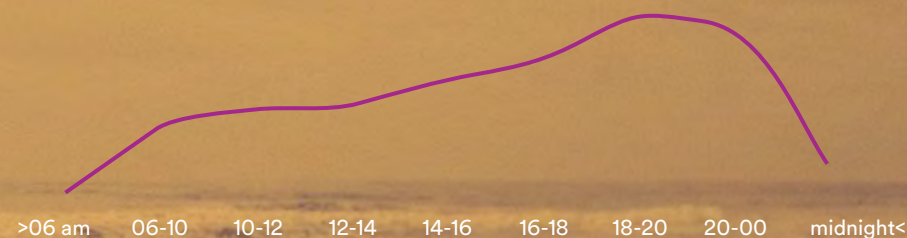
In 8 of 10 markets, Spotify is the top audio streaming service.

10%

Average incremental reach is 10% per channel.

Spotify's audience listens across the day, making it a strong compliment to an audio buy.

While radio listening activity overindexes in the morning, Spotify listening builds steadily throughout the day, peaking in the afternoon and early evening.



Spotify captures attention.



40%

of Spotify Free listeners on average pay full or most of their attention when they're listening, considerably higher than most commercial radio stations.

United Kingdom

Spotify provides significant incremental reach to every radio station in the UK and across all age groups, with up to 21% added reach among 15-34 year-olds.

Spotify has a 14% incremental reach in relation to both Heart FM and Capital FM, and 15% in relation to Kiss FM.

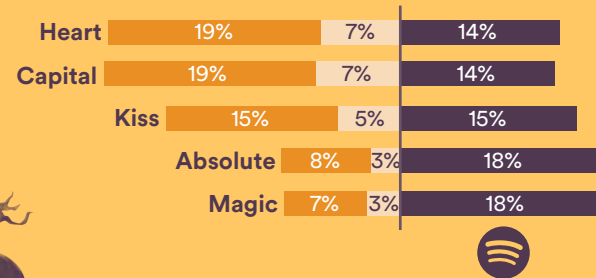
Spotify listening builds steadily throughout the day and peaks in the evening, while radio listening peaks during morning drive-time.

Spotify is the second most active listening 'radio station' in the UK compared to commercial stations.

With an overall weekly reach of 14.4%, Spotify is the second-largest digital music service in the UK.



Spotify provides incremental reach to every radio station across all age groups, particularly younger listeners.



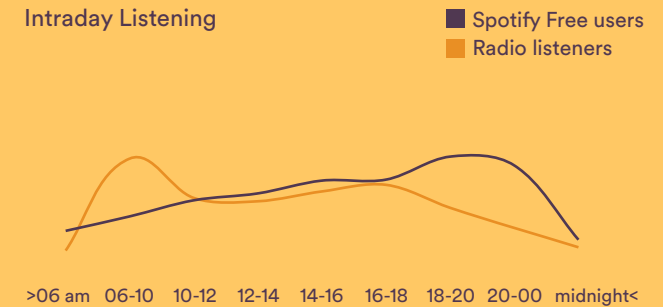
Segment 15-34

Unique reach station
Duplication
Unique reach Spotify Free

N=916 online interviews

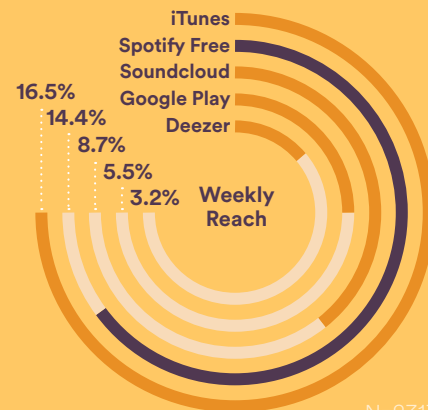
Spotify listening builds steadily throughout the day and peaks in the evening, while radio listening peaks in the morning.

Intraday Listening



N=333 online interviews with Spotify Free users
N=519 online interviews with Capital listeners

Spotify is the second-largest digital music service in the UK.



Spotify & TNS Research

N=2313 online interviews

Spotify is the second most active listening 'radio station' in the UK compared to commercial stations.



N=listened to the station during the last 12 months

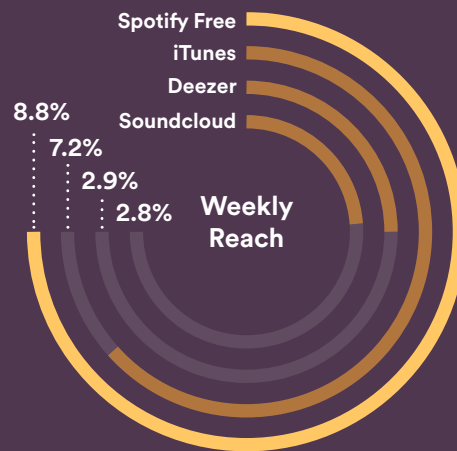
Germany

Spotify adds incremental reach to every radio station in Germany.

With a weekly reach of 8.8%, Spotify is the largest digital music service in Germany.

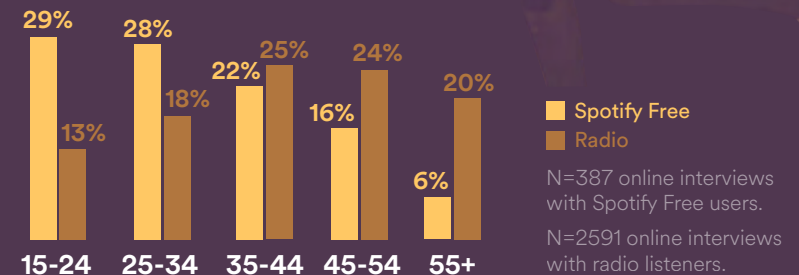
Spotify carries a significant presence in every region across Germany but is especially popular in Bremen, Hamburg, Rheinland-Pfalz and Niedersachsen.

Spotify is the largest digital music service in Germany.



N=2864 online interviews

Spotify users are on average 8.5 years younger than radio users.



Spotify
33.5 years old

VS.

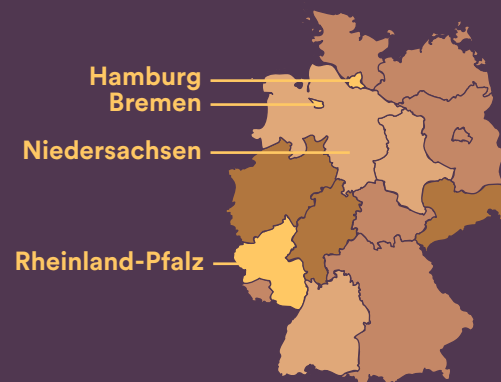
Radio
41.9 years old

Spotify has a significant presence in every region across Germany.

Segment 15-64

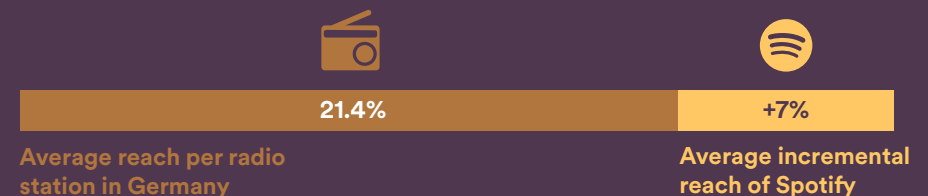
OVERALL AVERAGE

8.8%



N=2864 online interviews

Spotify adds 7% of an average incremental reach per radio station.



France

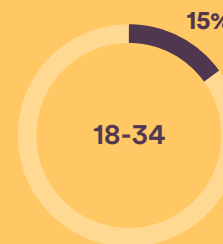
Spotify is the most attention-grabbing 'radio station' in France compared to commercial stations.

Spotify reaches 15% of 18-34 year-old consumers in France weekly.

Spotify provides incremental reach to every radio station across all age groups. For the 20-49 segment, Spotify provides a 5% unique added reach over NRJ, 8% over RMC and 7% over RTL2.

Spotify reaches 15% of 18-34 year-old consumers.

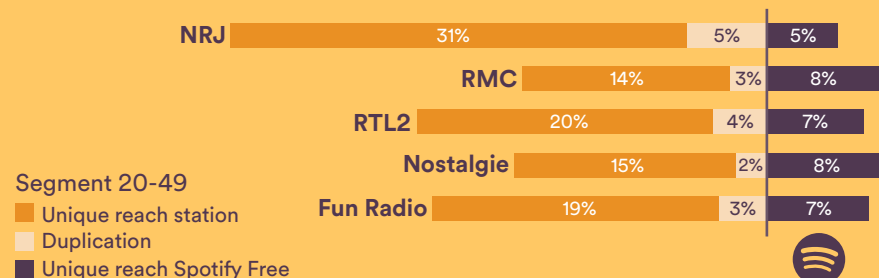
Weekly Reach



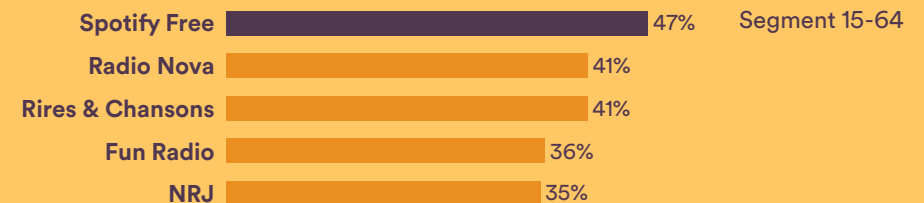
N=694 online interviews



Spotify provides incremental reach to every radio station across all age groups.



Spotify is the most active listening 'radio station' in France compared to commercial stations.



Spain

With an overall brand awareness of 76%, and 94% among 15-24 year old consumers, Spain is one of the most mature Spotify markets.

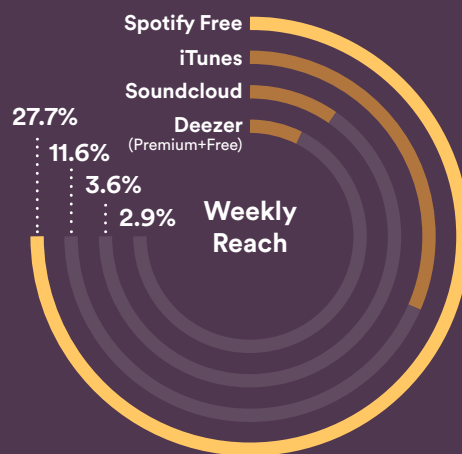
Spotify reaches 27.7% of the overall online population weekly, making it the largest digital music service in Spain and the third largest 'radio station' for the 15-34 segment.

Spotify is the most attention grabbing 'radio station' in Spain compared to commercial stations.

Spotify provides very high unique added reach among young consumers: +36% over M80 Radio, +20% over Europa FM and +16% over Los 40 Principales.

Spotify carries a significant presence in every region across Spain and is especially popular in Andalucia, Extremadura, Navarra and Madrid.

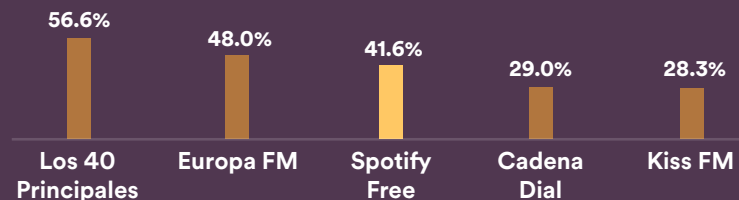
Spotify is the largest digital music service in Spain with a 27.7% weekly reach...



N=2027 online interviews

...and is the third largest 'radio station' for younger target groups.

Segment 15-34



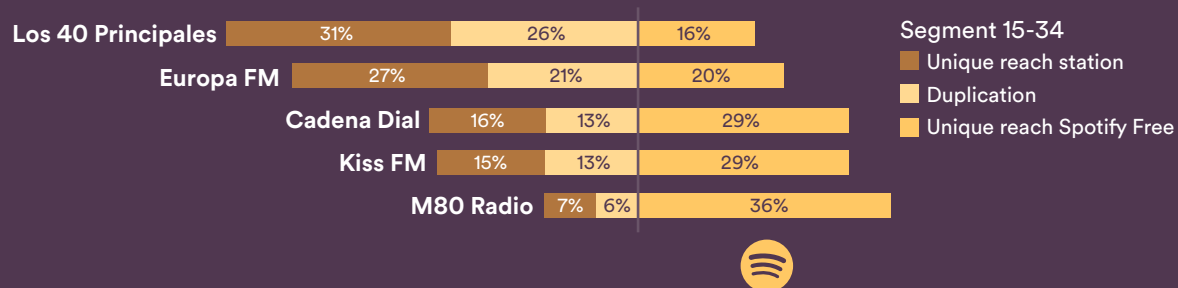
N=689 online interviews

Spotify is the most attention grabbing 'radio station' in Spain compared to commercial stations.



N=listened to the station during the last 12 months

Spotify provides incremental reach to every radio station across all age groups, especially young consumers.



N=689 online interviews

Spotify has a significant presence in every region across Spain.



N=2027 online interviews

Sweden

With an overall weekly reach of 18.1%, Spotify is the fourth largest 'radio station' in Sweden.

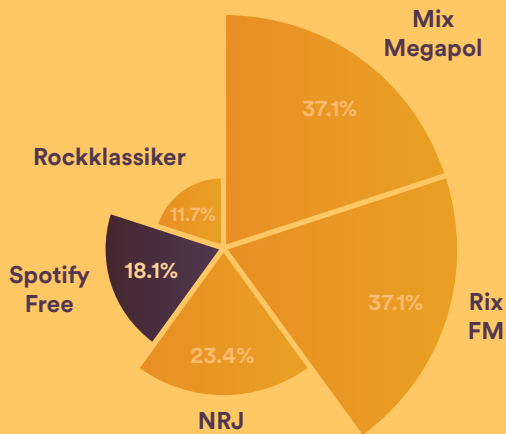
Spotify provides incremental reach to every radio station across all age groups: +10 over Mix Megapol, +10% over Rix FM and +13% over NRJ.

Spotify carries a significant presence in every region across Sweden; especially in Västerbotten, Gävleborg and Kronoberg.

Spotify listening builds steadily throughout the day and peaks in the evening while radio listening peaks in the morning.

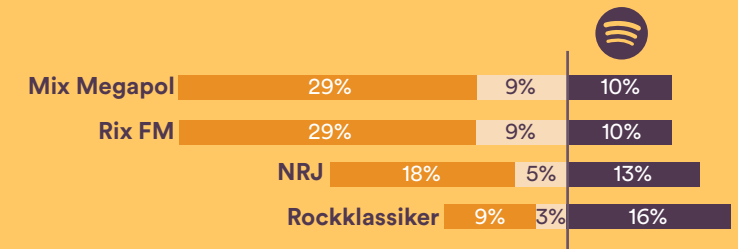
Spotify is the most attention-grabbing 'radio station' in Sweden compared to commercial stations.

With a weekly reach of 18.1%, Spotify is the fourth largest 'radio station' in Sweden.



Weekly reach / Segment 15-64
N=2003 online interviews

Spotify provides unique added reach to commercial radio stations.

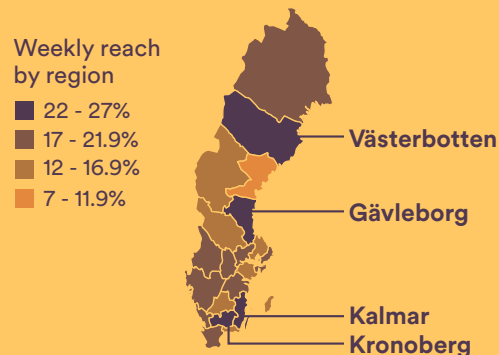


Weekly reach / Segment 15-64

Unique reach station
Duplication
Unique reach Spotify Free

N=2003 online interviews

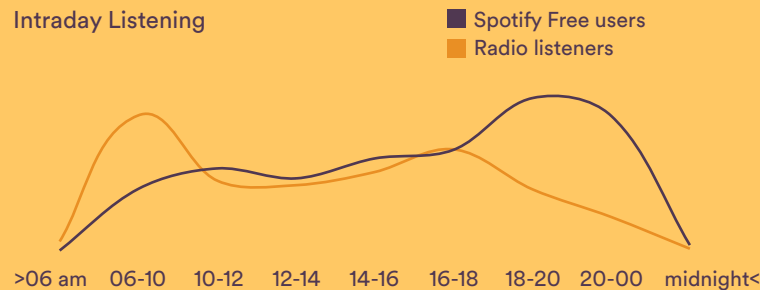
Spotify has an important presence in every region across Sweden.



Spotify & TNS Research

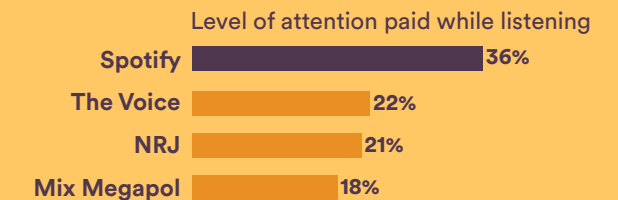
N=2003 online interviews

Spotify listening builds steadily throughout the day and peaks in the evening while radio listening peaks in the morning.



N=363 online interviews with Spotify Free users
N=973 online interviews with Mix Megapol listeners

Spotify is the most attention-grabbing 'radio station' in Sweden compared to commercial stations.



N=listened to the station during the last 12 months

Italy

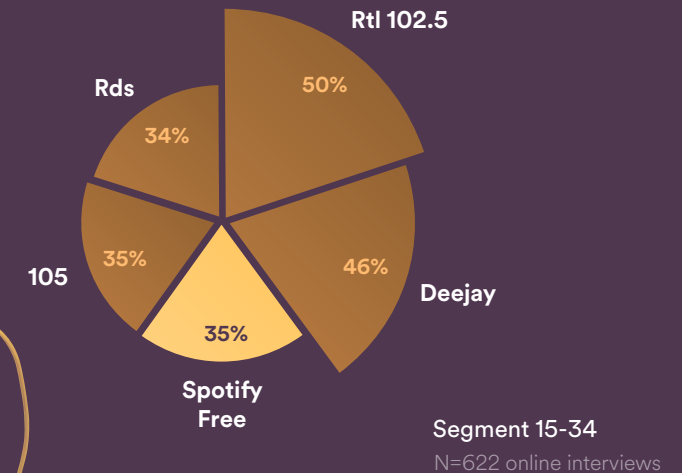
Spotify is the largest digital music service in Italy and the third largest 'radio station,' with a 20.7% overall weekly reach that climbs to 35% for 15-34 year-olds.

Spotify provides incremental reach to every radio station across all age groups, particularly for the 15-34 segment.

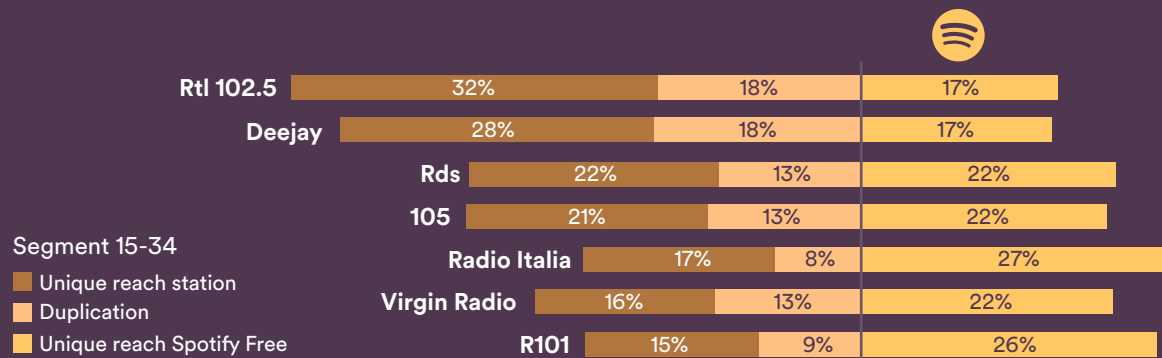
Spotify is the most attention-grabbing 'radio station' in Italy compared to commercial stations.



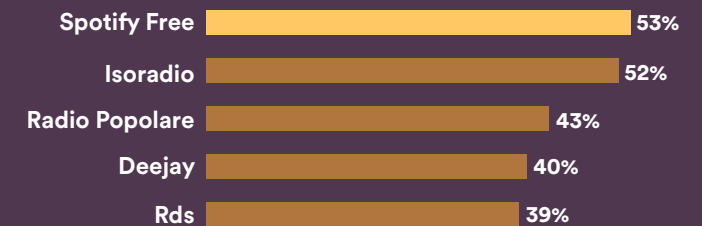
Spotify is the third largest 'radio station' in Italy.



Spotify offers a very high unique added reach for radio advertisers, especially among the 15-34 segment.



Spotify is the most attention-grabbing 'radio station' in Italy compared to commercial stations.



Norway

With an overall weekly reach of 17%, Spotify is the third largest 'radio station' in Norway.

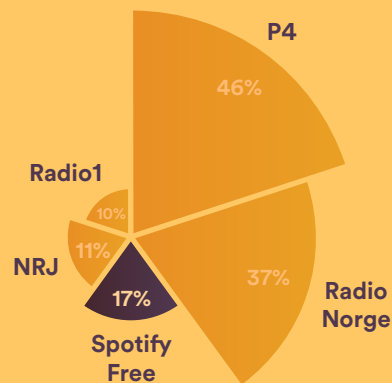
Spotify provides incremental reach to every radio station across all age groups.: +8% over P4, +9% over Radio Norge and +14% over NRJ.

Spotify carries a significant presence in every region across Norway; especially in Møre and Romsdal, Hedmark and Hordaland.

Spotify listening builds steadily throughout the day and peaks in the evening while radio listening peaks in the morning.

Spotify is the most attention-grabbing 'radio station' in Norway compared to commercial stations.

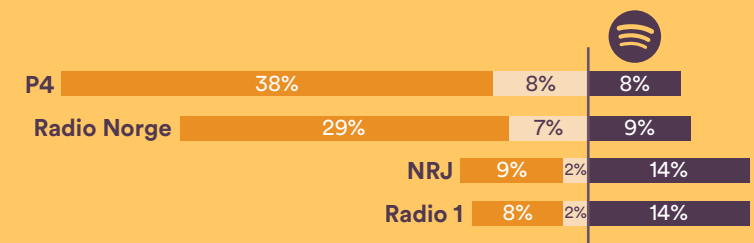
With a weekly reach of 17%, Spotify is the third largest 'radio station' in Norway.



Weekly reach / Segment 15-64

N=2000 online interviews

Spotify provides unique added reach to commercial radio stations.



Weekly reach / Segment 15-64

Unique reach station

Duplication

Unique reach Spotify Free

N=2000 online interviews

Spotify has an important presence in every region across Norway.

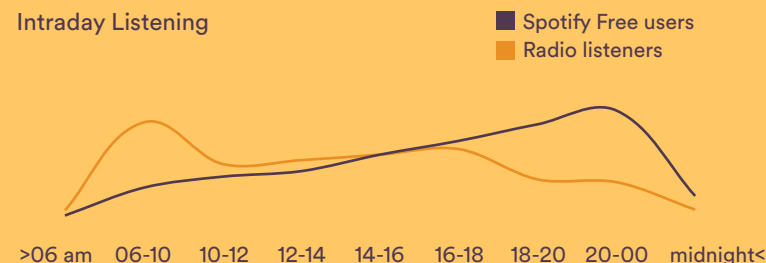
Weekly reach by region

- 19 - 21%
- 17 - 18.9%
- 15 - 16.9%
- 13 - 14.9%

Møre and Romsdal Hedmark
Hordaland Oslo

Spotify listening builds steadily throughout the day and peaks in the evening while radio listening peaks in the morning.

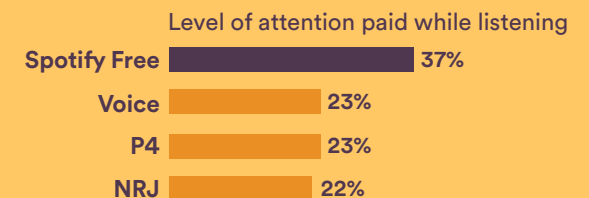
Intraday Listening



N=329 online interviews with Spotify Free users

N=1114 online interviews with P4 listeners

Spotify is the most attention-grabbing 'radio station' in Norway compared to commercial stations.



N=listened to the station during the last 12 months

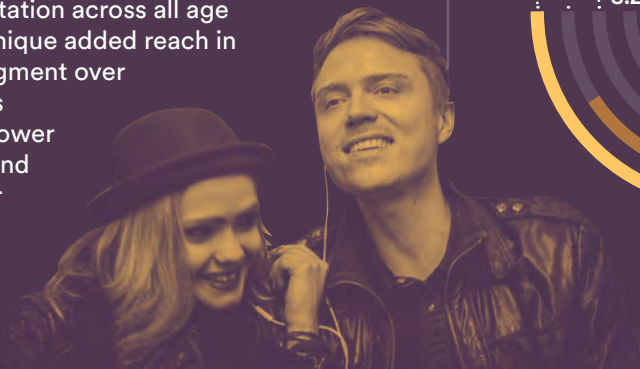
Turkey

With a weekly reach of 20.1%, Spotify is the largest digital music service in Turkey.

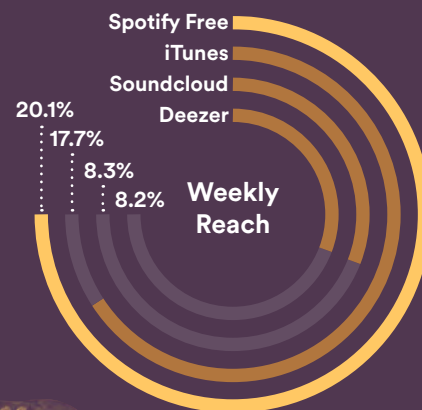
Spotify has overall brand awareness of 49% among the online population, and more than 60% brand awareness below the age of 34.

Across the 15-34 age group, Spotify is the 6th largest 'radio station' in Turkey in terms of weekly reach, which climbs as high as 28%.

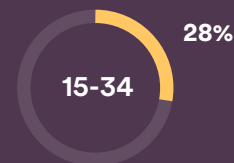
Spotify provides incremental reach to every radio station across all age groups. Its unique added reach in the 15-34 segment over Power Turk is +14%, over Power FM is +15% and over Number One FM is +16%.



Spotify is the largest digital music service in Turkey with a 20.1% overall weekly reach...



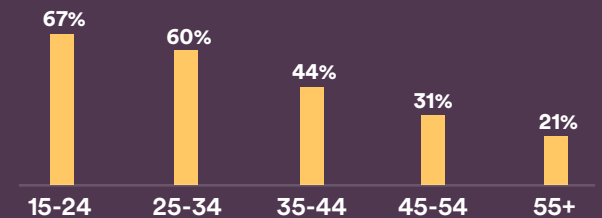
...and has an even higher reach among 15-34 year old consumers.



N=2016 online interviews

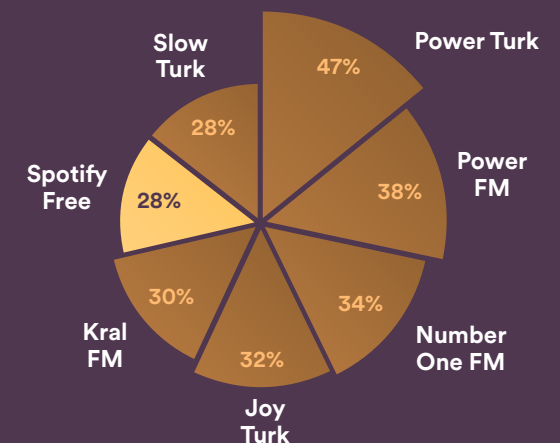
N=1004 online interviews

Spotify has high brand awareness, especially among millennials.



N=2016 online interviews

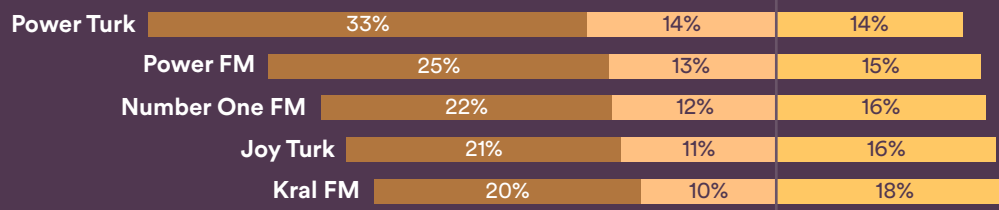
Spotify is the sixth largest 'radio station' in Turkey among younger target groups.



Segment 15-34

N=1004 online interviews

Spotify provides unique added reach to radio stations.



Segment 15-34

Unique reach station
Duplication
Unique reach Spotify Free

N=1004 online interviews

Finland

With a weekly reach of 18%, Spotify is the sixth largest 'radio station' for 20-49 year-olds in Finland.

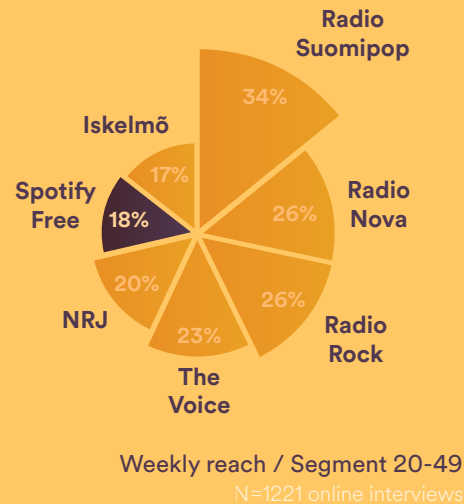
Spotify provides incremental reach to every radio station across all age groups: +12 over Radio Suomipop, +13% over Radio Nova and +15% over Iskelmõ.

Spotify carries a significant presence in every region across Finland; especially in Pohjanmaa, Keski-Suomi and Satakunta.

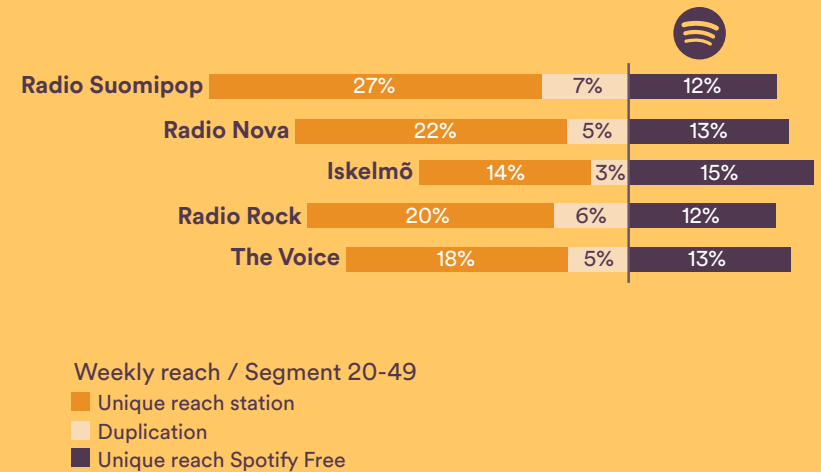
Spotify listening builds steadily throughout the day and peaks in the evening while radio listening peaks in the morning.

Spotify is the second most attention-grabbing 'radio station' in Finland compared to commercial stations.

With a weekly reach of 18%, Spotify is the sixth largest 'radio station' in Finland.



Spotify provides unique added reach to commercial radio stations.



Spotify has a significant presence in every region across Finland.

Weekly reach by region

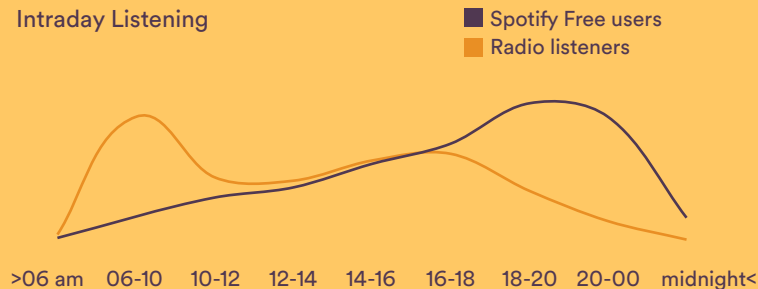
- 34 - 44%
- 24 - 33.9%
- 15 - 23.9%
- 6 - 14.9%



Spotify & TNS Research

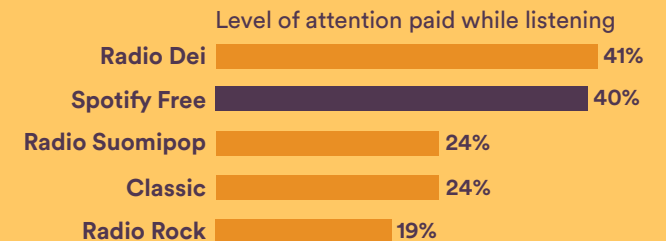
N=2007 online interviews

Spotify listening builds steadily throughout the day and peaks in the evening while radio listening peaks in the morning.



N=304 online interviews with Spotify Free users
N=633 online interviews with Radio Suomipop listeners

Spotify is the second most attention-grabbing 'radio station' in Finland compared to commercial stations.



Denmark

With an overall weekly reach of 13%, Spotify is the third largest 'radio station' in Denmark.

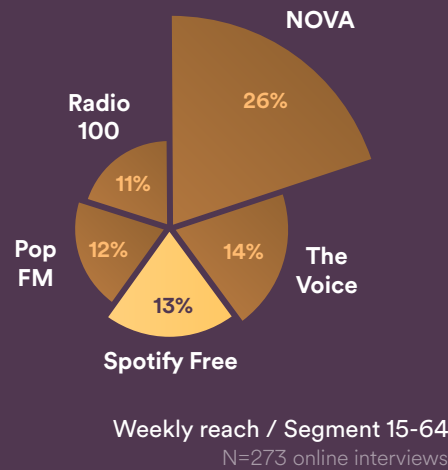
Spotify provides incremental reach to every radio station across all age groups: +8% over NOVA, +10% over The Voice and +11% over Pop FM.

Spotify carries a significant presence in every region across Denmark; especially in the Aarhus and Aalborg areas.

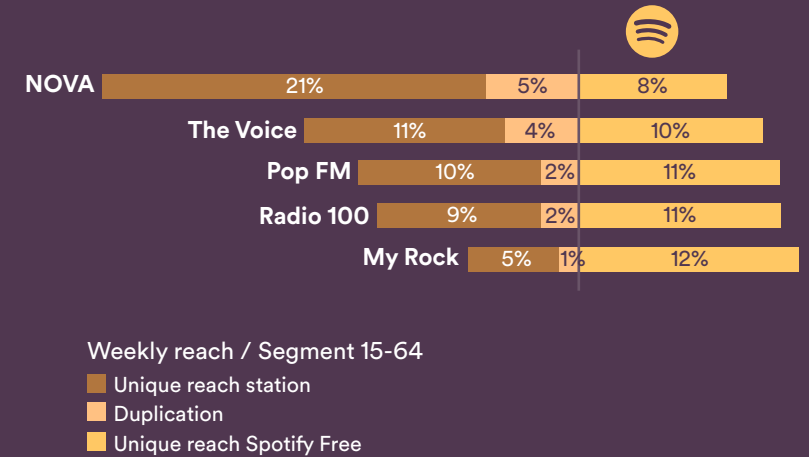
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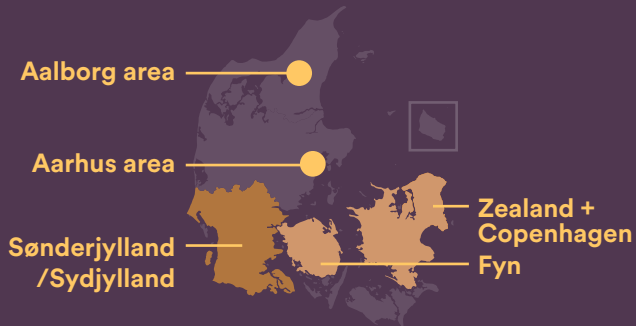


Spotify provides unique added reach to commercial radio stations.

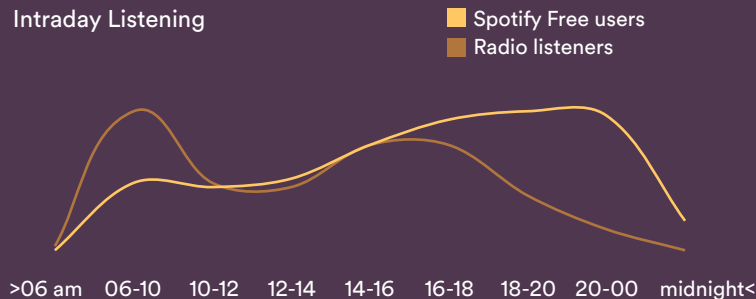


Spotify has a significant presence in every region across Denmark.

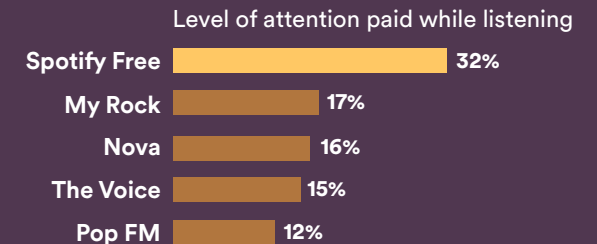
Weekly reach by region
■ 14% ■ 13% ■ 12%



Spotify listening builds steadily throughout the day and peaks in the evening while radio listening peaks in the morning.



Spotify is the most attention-grabbing 'radio station' in Denmark compared to commercial stations.



Top Tips.



Leverage Spotify's free service to achieve unique audience reach.

By allocating audio advertising budget to Spotify, brands can extend the reach of their campaigns and connect with an audience of actively engaged consumers.



Advertise on Spotify to capture consumers' attention throughout the day.

Spotify Free users listen throughout the day, and especially in the afternoon and evening, while radio listening overindexes in the morning. This makes Spotify an essential element for an always-on audio campaign.



Learn more about The New Audio.

spotify.com/brands

