## BACKGROUND:

❑ We surveyed 1,500 US consumers balanced to census to track Spotify subscriber trends and to ask users about how they allocate their time on two fronts a) new music vs. catalogue music vs. spoken word and b) self-curated playlists vs. playlists created by others.

## FINDINGS:

❑ **Content**
  ❑ Respondents appear to believe they are listening to catalogue and new music at very similar frequencies, with new being only slightly higher than catalogue. 32% of Spotify users listen to podcasts/comedy/poetry regularly or occasionally. Overall, users believe they spend 23.1% of their time on Spotify listening to spoken word content.
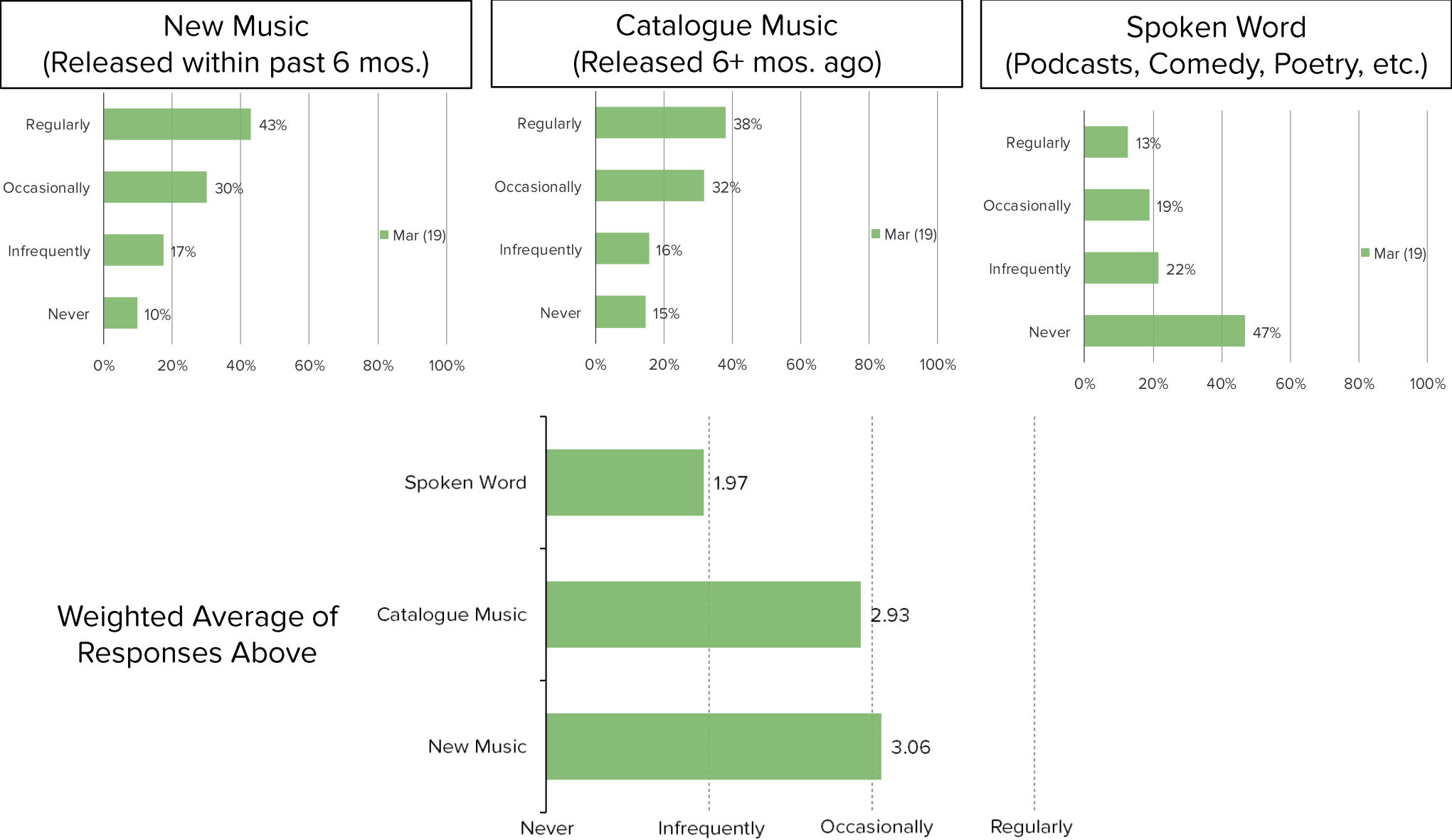
❑ **Playlists**
  ❑ Spotify users show a clear preference for listening to playlists created by themselves over playlists created by others.

❑ **Subscriber Trends**
  ❑ Account holder trackers for Spotify have been flat in recent months in our monthly survey. Over-time, Spotify has grown into Pandora's user base, and Spotify's users have been less likely over-time to be users of Pandora. Spotify's net promoter score has remained strong and consistently above Pandora's.
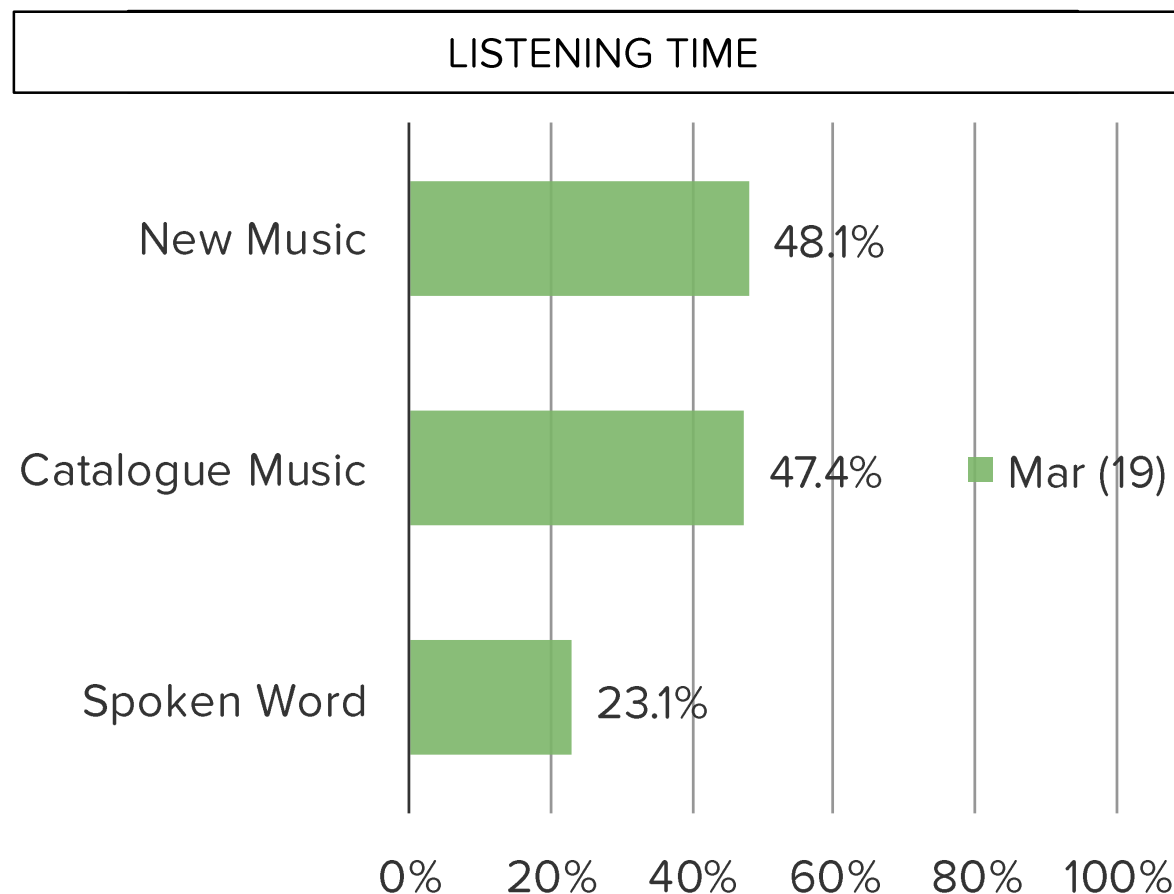
# How often do you listen to the following on Spotify?
Posed to Spotify account holders.

## New Music (Released within past 6 mos.)

| | |
|---|---|
| Regularly | 43% |
| Occasionally | 30% |
| Infrequently | 17% |
| Never | 10% |

Mar (19)

0%  20%  40%  60%  80%  100%

## Catalogue Music (Released 6+ mos. ago)

| | |
|---|---|
| Regularly | 38% |
| Occasionally | 32% |
| Infrequently | 16% |
| Never | 15% |

Mar (19)

0%  20%  40%  60%  80%  100%

## Spoken Word (Podcasts, Comedy, Poetry, etc.)

| | |
|---|---|
| Regularly | 13% |
| Occasionally | 19% |
| Infrequently | 22% |
| Never | 47% |

Mar (19)

0%  20%  40%  60%  80%  100%

## Weighted Average of Responses Above

| | |
|---|---|
| Spoken Word | 1.97 |
| Catalogue Music | 2.93 |
| New Music | 3.06 |

Never    Infrequently    Occasionally    Regularly

N = 237 Spotify Account Holders

**What percentage of your listening time on Spotify do you dedicate to the following? (Fill-In)**
Posed to Spotify account holders.



LISTENING TIME

New Music 48.1%
Catalogue Music 47.4% ■ Mar (19)
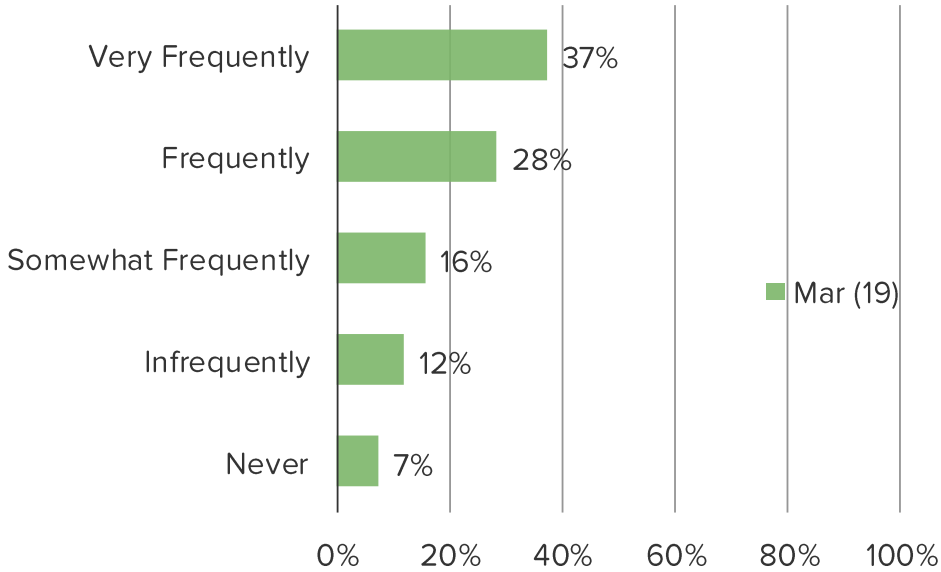Spoken Word 23.1%

0%　20%　40%　60%　80%　100%

Respondents were asked to enter a percentage of their listening time on Spotify that they spend on each of the above. New music was defined to them as songs released in the past 6 months, catalogue as songs released 6+ months ago, and spoken word as comedy, podcasts, poetry, etc.).
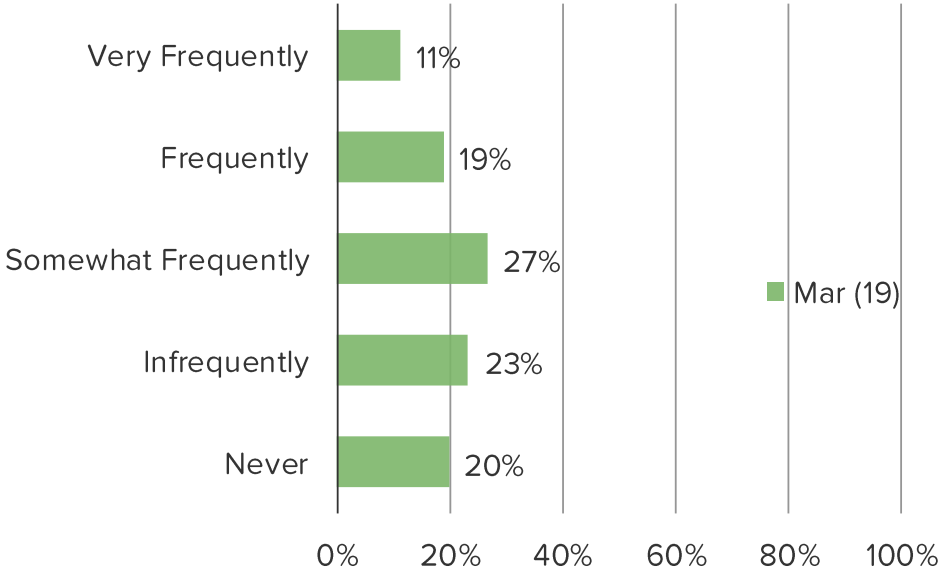
N = 237 Spotify Account Holders

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## How often do you listen to the following on Spotify?
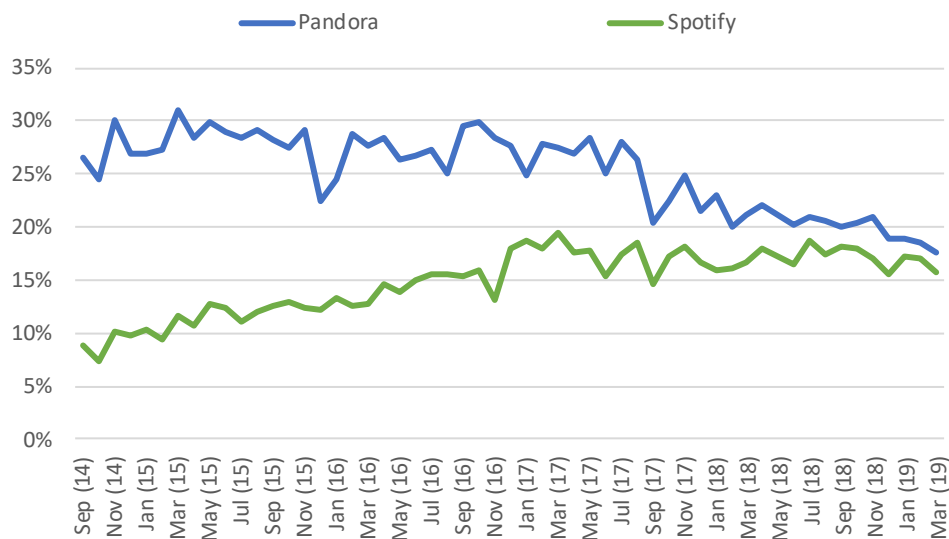Posed to Spotify account holders.

### PLAYLISTS BY ME

| | |
|---|---|
| Very Frequently | 37% |
| Frequently | 28% |
| Somewhat Frequently | 16% |
| Infrequently | 12% |
| Never | 7% |

■ Mar (19)

### PLAYLISTS BY OTHERS

| | |
|---|---|
| Very Frequently | 11% |
| Frequently | 19% |
| Somewhat Frequently | 27% |
| Infrequently | 23% |
| Never | 20% |

■ Mar (19)

| | |
|---|---|
| Playlists created by others | 2.79 |
| Playlists created by me | 3.76 |

Never    Infrequently    Somewhat Frequently    Frequently    Very Frequently
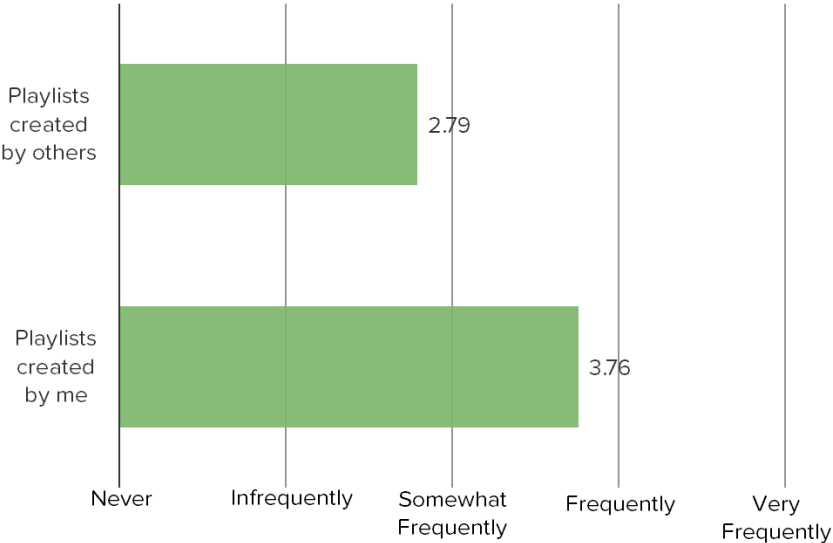
N = 237 Spotify Account Holders

**What percentage of your playlist listening is... (Fill-In)**
Posed to Spotify account holders.



PLAYLISTS BY...

Playlists by Others — 38.3%

Playlists by Me — 71.0%

■ Mar (19)
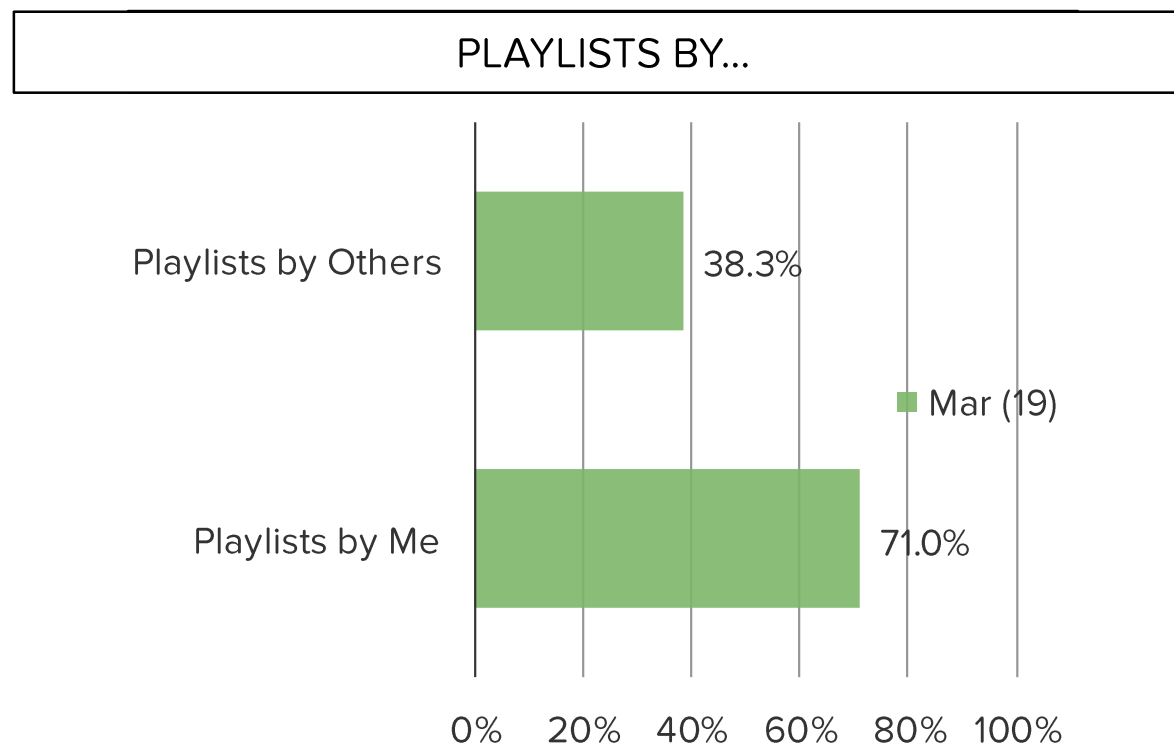
**Respondents were asked to enter a percentage of their playlist listening time on Spotify that they spend on each of the above.**
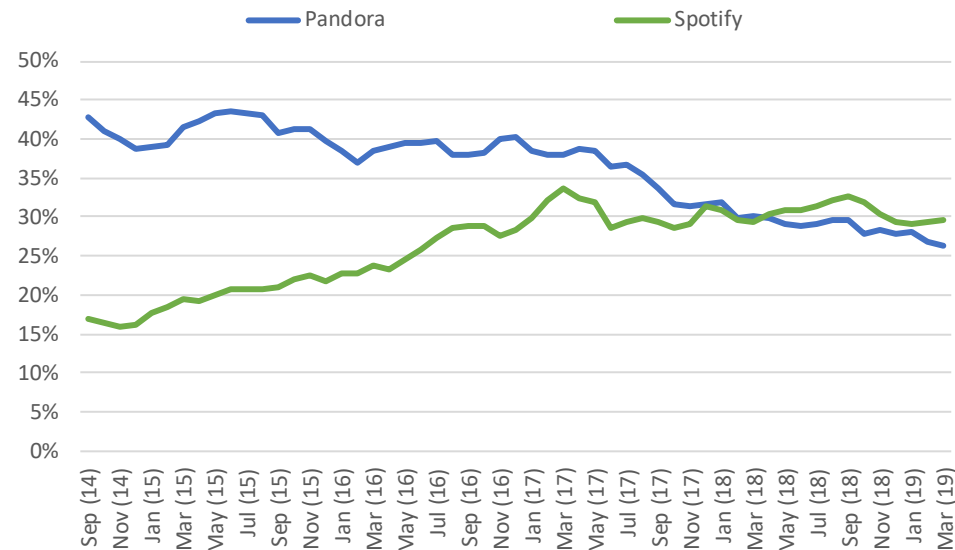
N = 237 Spotify Account Holders

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**Do you currently have an account with any of the following streaming services?**
Posed to all respondents.


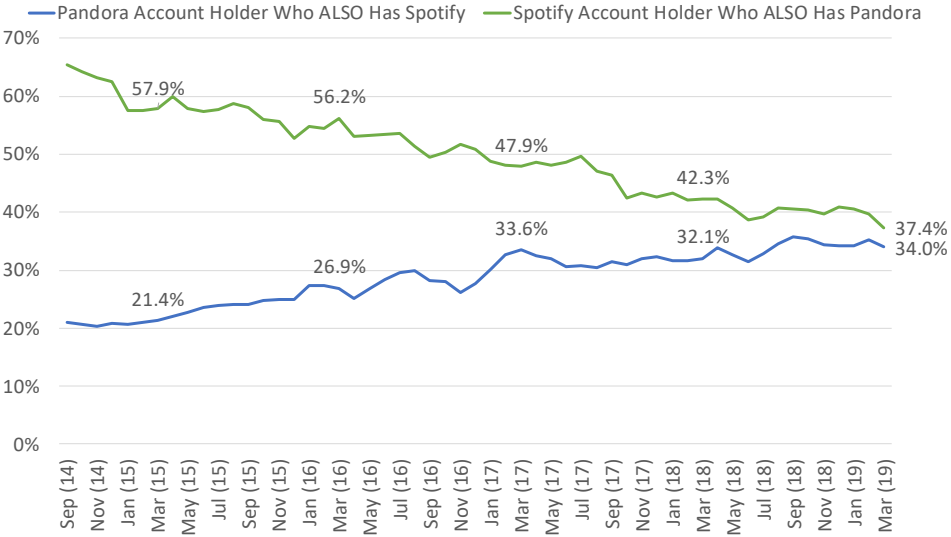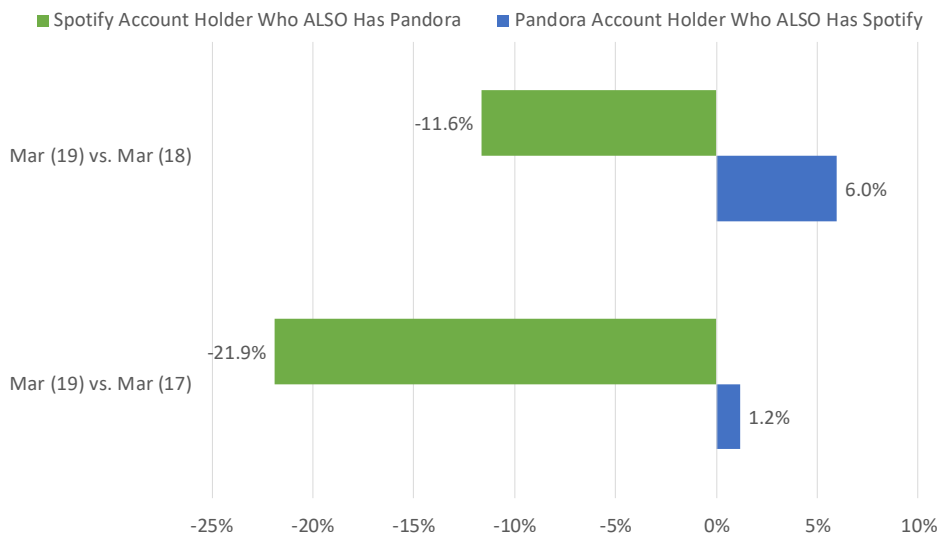
N = 1,500 US Consumers Per Wave, Balanced To Census

## Account Crossover
Posed to account holders.



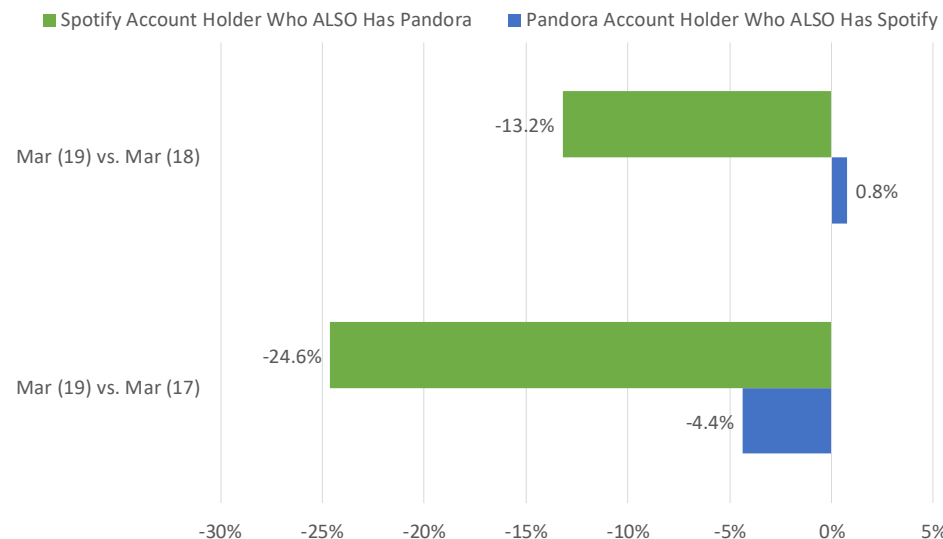N = 4,500 US Consumers Per Wave (Three Month Moving Average) Balanced To Census

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## Account Crossover
Posed to Millennial account holders.

### ACCOUNT CROSSOVER – MILLENNIALS

— Pandora Account Holder Who ALSO Has Spotify — Spotify Account Holder Who ALSO Has Pandora
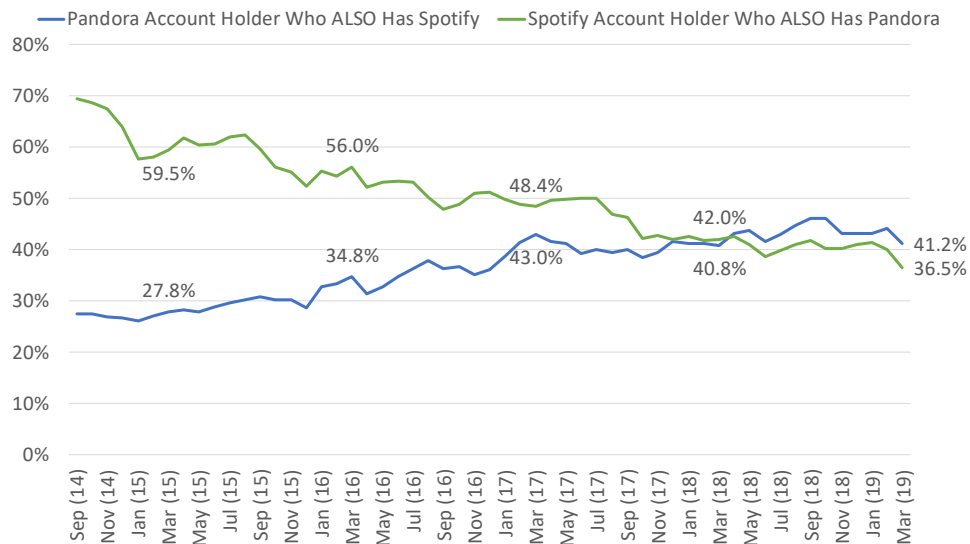


### YoY CHANGES – MILLENNIALS

■ Spotify Account Holder Who ALSO Has Pandora   ■ Pandora Account Holder Who ALSO Has Spotify



Mar (19) vs. Mar (18): -13.2% / 0.8%
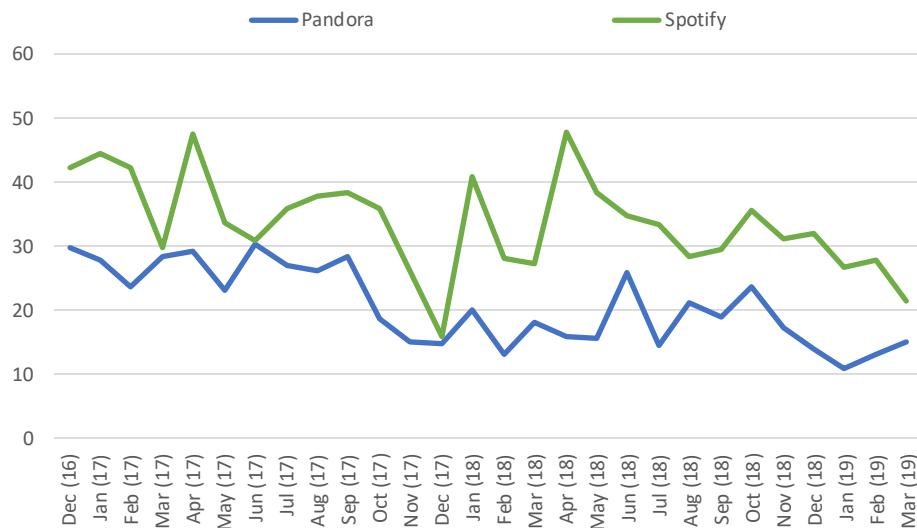Mar (19) vs. Mar (17): -24.6% / -4.4%

N = 4,500 US Consumers Per Wave (Three Month Moving Average) Balanced To Census
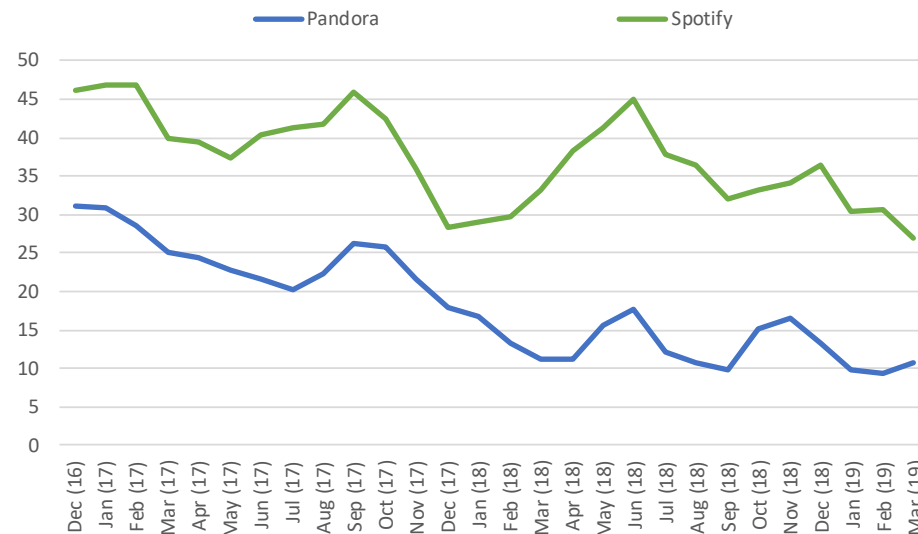
# Would you recommend to a friend or colleague?
Posed to account holders.



ALL RESPONDENTS



MILLENNIALS

N = 4,500 US Consumers Per Wave (Three Month Moving Average) Balanced To Census