The Togetherness Effect

Why Brands Should Be Paying Attention to Co-Listening
Co-listening = higher attention to advertising

Paid Full or Some Attention To Ads
Based on Representative Media Diaries - % Selected

From previous research, we know...

<table>
<thead>
<tr>
<th>Co-listening</th>
<th>Listening alone</th>
</tr>
</thead>
<tbody>
<tr>
<td>67%↑</td>
<td>58%</td>
</tr>
</tbody>
</table>

Co-listening Sessions n=1,136, Solo-listening sessions n=570
Q: How much attention did you pay to the ad(s) that played during your audio session? Select one.
↑ = Statistical significance between the two groups at >=90% confidence level.
We conducted research to explore co-listening experiences and the impact of ads during them.
How we did it

**STEPS**

Recruited digital audio listeners from a representative online panel

- Total n= 1,357
- Co-listeners n= 678
- Solo-listeners n= 679

Listeners answered standard demographic and media consumption questions. Once users qualified for solo or co-listening, they were randomized to receive a test or control ad. Listeners played digital audio for ~30 mins on either a smartphone, speaker, or laptop/desktop.

Survey focused on brand metrics, ad opinions and typical co-listening behaviors

**TWO VERTICALS**

- T Mobile
- CVS

**TYPES OF DIGITAL AUDIO ADS TESTED**

- Product-focused audio ad
- Story focused audio ad
The Landscape
What You Should Know About Co-Listening
Co-listening is a natural behavior for most people

Co-listening frequency
% Agree

Multiple times a week or more often
65%

Never
7%

Less often than Once a month
7%

Once a month
4%

Multiple times a month
8%

Once a week
9%

74% of people co-listen to digital audio at least once a week

Sample size n=679
Q: How often do you listen to digital audio with others? Select one.
Note: This is segmented by those who solo listened during their survey experience to eliminate co-listening bias.
Who are co-listeners?

Co-Listening frequency...
% who co-listen once a week or more often

... by generation

<table>
<thead>
<tr>
<th>Generation</th>
<th>Adult Gen Z</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>86%</td>
<td>78%</td>
<td>70%</td>
<td>50%</td>
<td></td>
</tr>
</tbody>
</table>

... by ethnicity

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>Hispanic or Latino/a/x</th>
<th>White or Caucasian</th>
<th>AAPI</th>
<th>Black or African American</th>
</tr>
</thead>
<tbody>
<tr>
<td>90%</td>
<td>73%</td>
<td>71%</td>
<td>70%</td>
<td></td>
</tr>
</tbody>
</table>

... by parents v. not

<table>
<thead>
<tr>
<th>Group</th>
<th>Parents</th>
<th>Non Parents</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>82%</td>
<td>65%</td>
</tr>
</tbody>
</table>

Note: This is segmented by those who solo listened during their survey experience to eliminate co-listening bias.
Most people co-listen to bond or uplift mood

Why people co-listen
Open-ended responses

"I enjoy sharing songs with my wife that I think she’ll like, and watching her expression as she listens."

"It is a fun and special bonding moment"

"Sharing something I want them to hear or hanging out listening to music together"

"Be able to listen to some upbeat music together to make the mood better"

"Puts us in a good mood, to have fun, to sing our hearts out"

"mood elevator"

Co-listening only, n=679
Q: What are some reasons as to why you listen to digital audio with others? Be specific.
Note: This is segmented by those who solo listened during their survey experience to eliminate co-listening bias.
Positive mood during co-listening pays off

Indexed
Individual emotion to average of all emotions (100)

100 (Avg)

100

Happy
307

Relaxed
285

Excited
173

Brand impact during co-listening
Delta (Exposed – Control)

Search Intent

Favorability

Purchase Intent

+12%↑

+11%↑

+8%↑

Q: Which of the following best describes your mood during your audio experience today? Select one.

↑ = Statistical significance between exposed and control groups at >=90% confidence level

Co-listening only, Sample size n=679
Exposed n=468, Control n=211
Action Items

How Advertisers Should Tap Into Co-Listening
To pursue co-listeners, target on connected devices like gaming consoles, TVs, and speakers

Devices used for listening
% co-listening vs. solo-listening for each device

- **Gaming console**
  - Co-Listening: 21%
  - Solo-Listening: 79%
- **TV**
  - Co-Listening: 27%
  - Solo-Listening: 73%
- **Smart speaker**
  - Co-Listening: 38%
  - Solo-Listening: 62%
- **In-car speaker**
  - Co-Listening: 42%
  - Solo-Listening: 58%
- **Smartphone**
  - Co-Listening: 48%
  - Solo-Listening: 52%
- **Laptop/Desktop**
  - Co-Listening: 50%
  - Solo-Listening: 50%

Q: For your session yesterday, which device did you primarily use? Select one.

Consider targeting common downtimes such as lunch, commute times, and night

**Time of day**
Co-Listening - % of session start times

- **Lunch:** 18%
- **Commute:** 17%
- **Night:** 23%


Q: For your (audio/video) sessions yesterday, what time did you start? Select one for each option.
Work top moments in when targeting co-listeners

Top 5 co-listening moments
% Selected

While co-listening, people are relaxing more than anything else, opening opportunities for advertisers to use ads that appeal to a ‘relaxed’ mind state.

Co-listening moments indexed to avg (100)

<table>
<thead>
<tr>
<th>Moment</th>
<th>% Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relaxing</td>
<td>235</td>
</tr>
<tr>
<td>Hanging out with friends</td>
<td>171</td>
</tr>
<tr>
<td>Cooking</td>
<td>171</td>
</tr>
<tr>
<td>Entertaining kids</td>
<td>165</td>
</tr>
<tr>
<td>Doing yoga</td>
<td>127</td>
</tr>
</tbody>
</table>

Co-listening sessions n=1,757
Q: What else were you doing while you were listening, if anything? Select all that apply.
Use creative focused on storytelling to draw in co-listeners

Co-Listening – Ad opinions
% Strongly/Somewhat Agree

Audio Ads:

Storytelling vs Product-Focused

Caught my attention during the session 114
Was something I was open to at the time 108
Improved my perception of the brand 107

Storytelling ads indexed to product-focused ad (100)

Co-listening only, Brand 1 only
Storytelling ad n=117, Message focused ad n=117
Q: How much do you agree or disagree with the following statements about the ad? Select one for each option.
Brands should consider podcasts where they may benefit from leaned-in co-listening

Mood by content type during co-listening - % Selected

- Podcast
- Music

<table>
<thead>
<tr>
<th>Mood</th>
<th>Podcast</th>
<th>Music</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excited</td>
<td>19%↑</td>
<td>12%</td>
</tr>
<tr>
<td>Focused</td>
<td>13%↑</td>
<td>4%</td>
</tr>
<tr>
<td>Curious</td>
<td>9%↑</td>
<td>2%</td>
</tr>
</tbody>
</table>

Brand impact from co-listening podcasts
Delta (Exposed – Control)

- Podcast
  - Search Intent: +17%↑
  - Willingness to learn more about the brand: +10%↑

- Music: No significant impact

Co-listening only; Podcast n=219, Music n=460
Podcast: Exposed n=154, Control n=65; Music: Exposed n=314, Control n=146
Q: Which of the following best describes your mood during your audio experience today? Select one.
Q: How likely are you to search for information about the following [brand category]? Select one.
Q: How much do you agree or disagree with the following statements about [brand]? Select one for each option.
↑ = Statistical significance between exposed and control groups at >=90% confidence level.
Recommendations
INVEST IN CO-LISTENING

Advertisers should explore untapped listening patterns to optimize for maximum impact

TEST MULTIPLE STRATEGIES FOR REACHING CO-LISTENERS

Consider Spotify moments, ad message, time of day, content type, and device to reach co-listeners
Thank You