



The Togetherness Effect

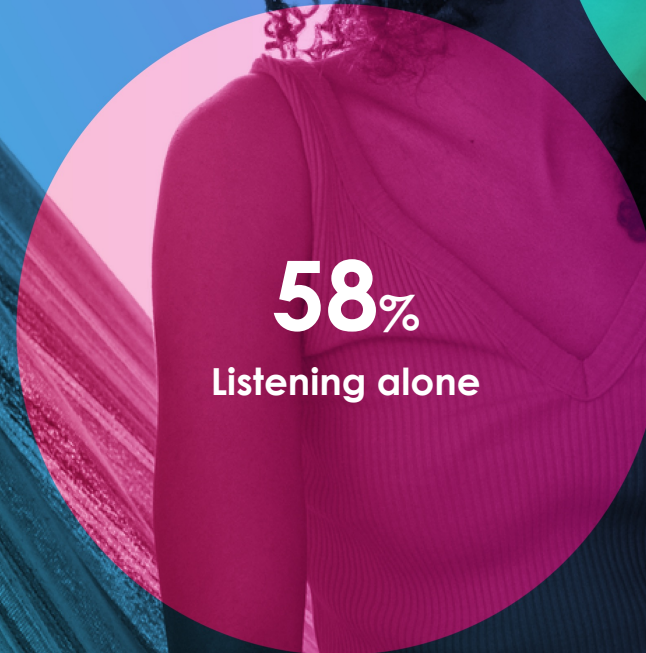
WHY BRANDS SHOULD BE PAYING ATTENTION TO CO-LISTENING

From previous research, we know...

Co-listening = higher attention to advertising

Paid Full or Some Attention To Ads

Based on Representative Media Diaries -
% Selected



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.
Source: MAGNA, "Digital Audio: Expansiveness: Growing Landscape & Opportunities", 2020.



**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



TYPES OF DIGITAL AUDIO ADS TESTED



Product-focused audio ad



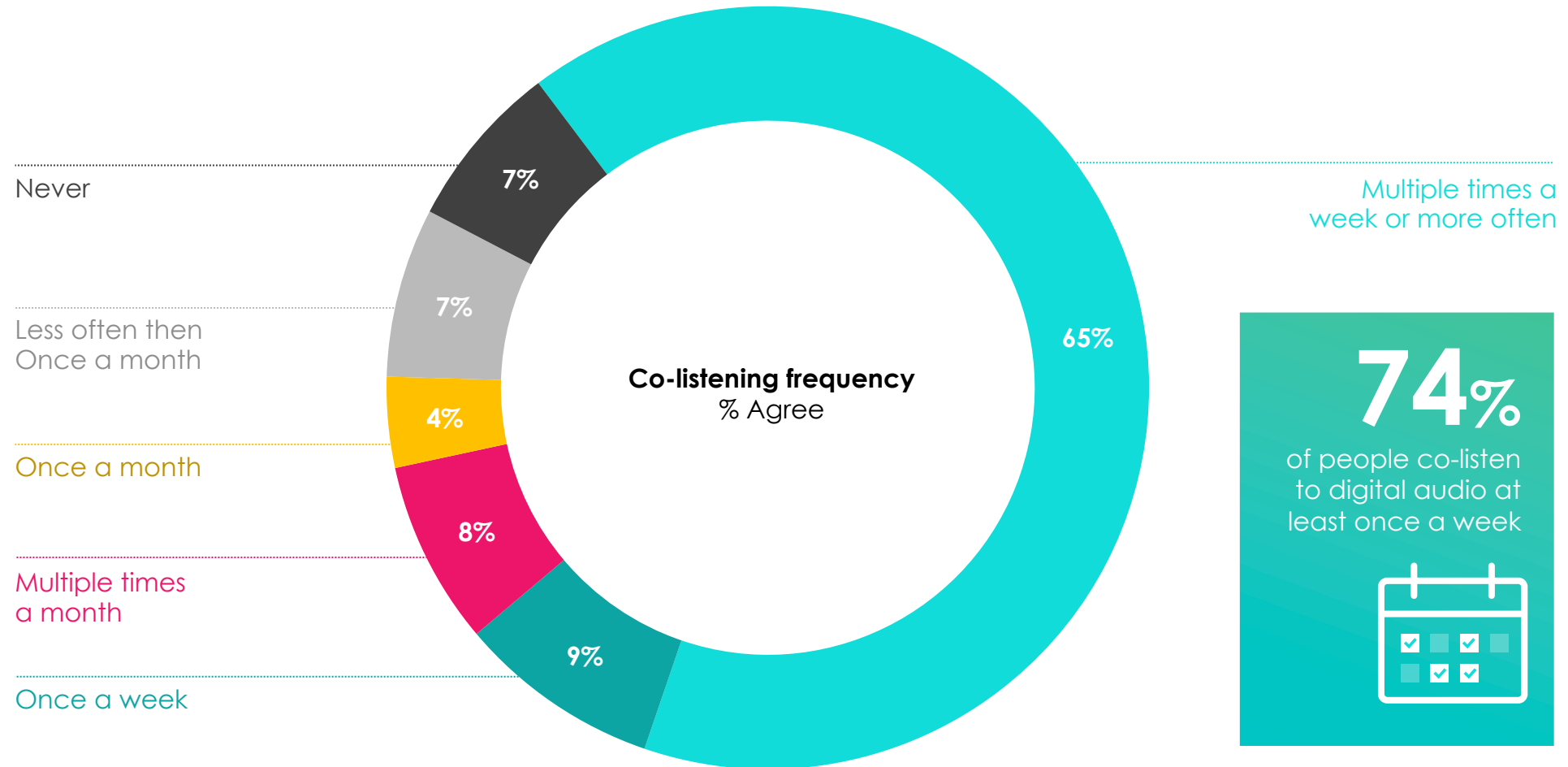
Story focused audio ad

A person with long brown hair is seen from behind, wearing large white headphones. They are looking at a laptop screen. The scene is dimly lit with a strong pink/magenta color cast. Abstract, thin, curved lines in pink and yellow sweep across the frame, suggesting sound waves or digital connectivity. The person's hand is visible near the laptop trackpad.

The Landscape

What You Should Know About Co-Listening

Co-listening is a natural behavior for most people



Sample size n=679

Q: How often do you listen to digital audio with others? Select one.

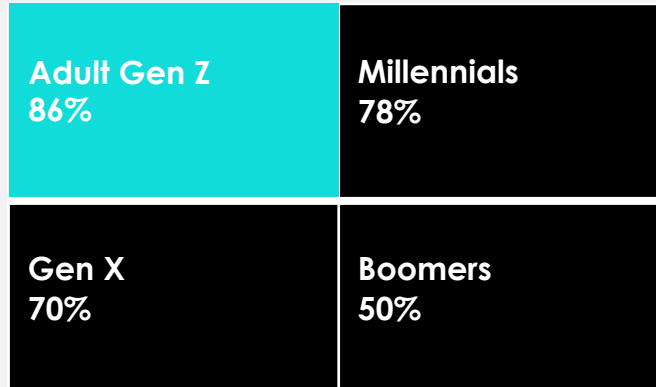
Note: This is segmented by those who solo listened during their survey experience to eliminate co-listening bias.

Who are co-listeners?

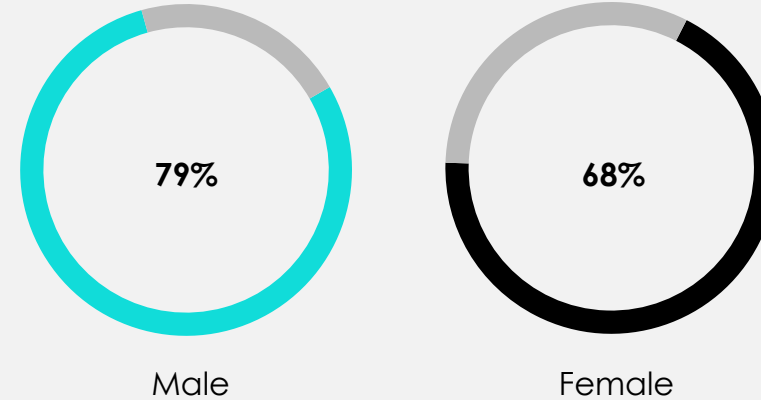
Co-Listening frequency...

% who co-listen once a week or more often

... by generation



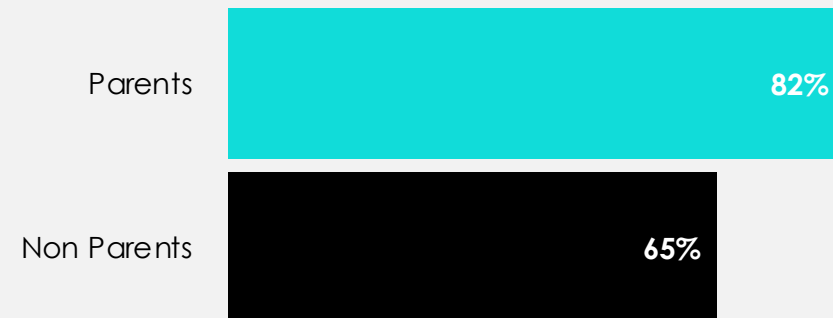
... by gender



... by ethnicity

Hispanic or Latino/a/x 90%	White or Caucasian 73%
AAPI 71%	Black or African American 70%

... by parents v. not



Gen Z n=78, Millennials n=309, Gen X n=224, Boomers n=68; Male n=338, Female n=341

Hispanic or Latino/a/x n=50, White or Caucasian n=524, AAPI n=49, Black or African American n=73; Parents n=334, Not Parents n=345

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.

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

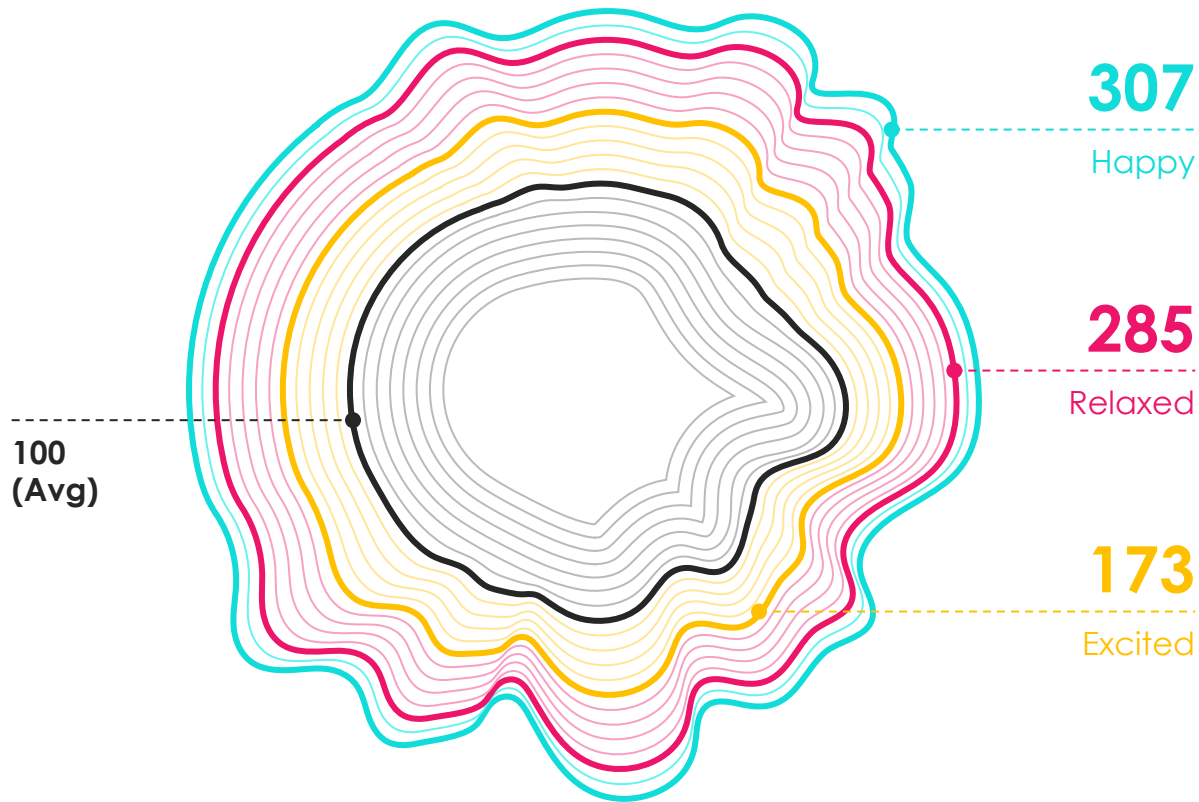
Q: What are some reasons as to why you listen to digital audio with others? Be specific.

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

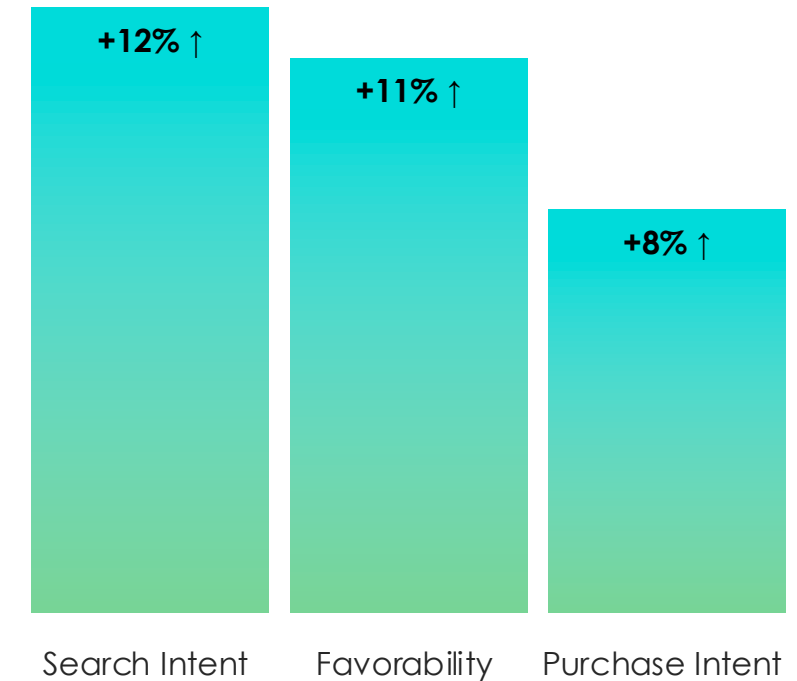
Indexed

Individual emotion to average of all emotions (100)



Brand impact during co-listening

Delta (Exposed – Control)



Co-listening only; Sample size n=679

Exposed n=468, Control n=211

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



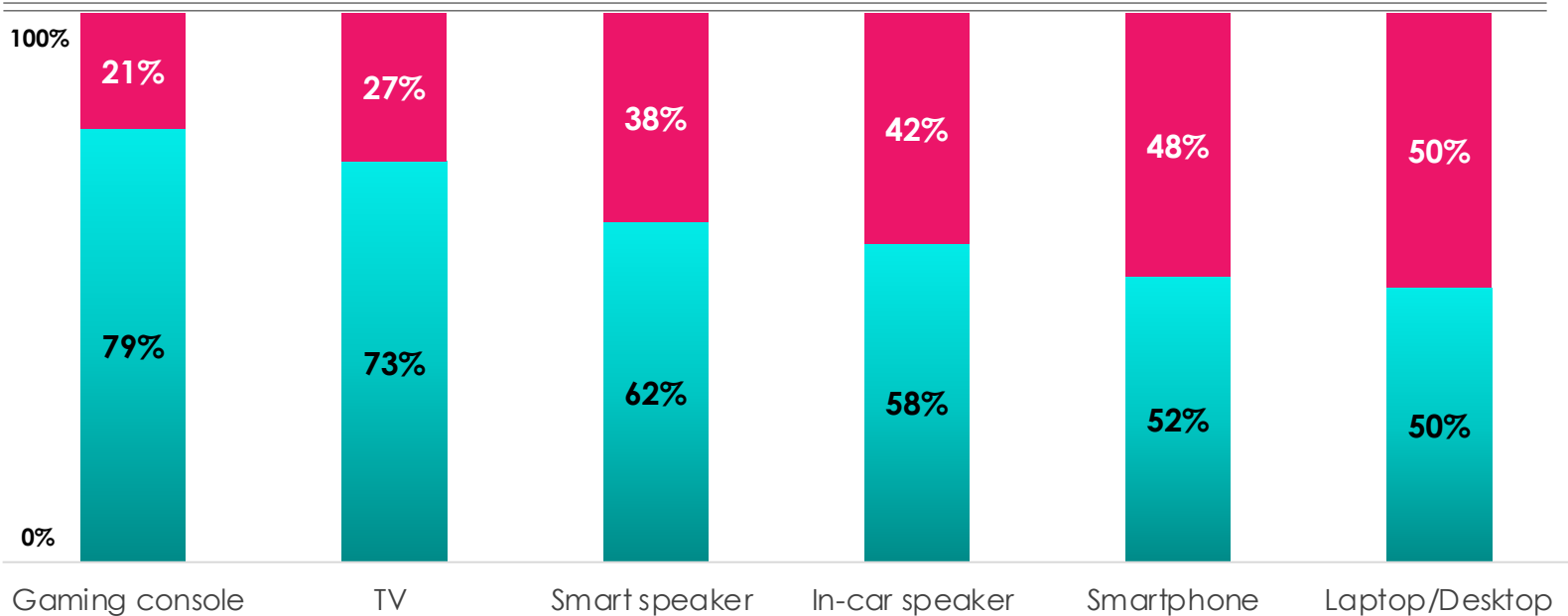
Action Items

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

■ Co-Listening
■ Solo-Listening

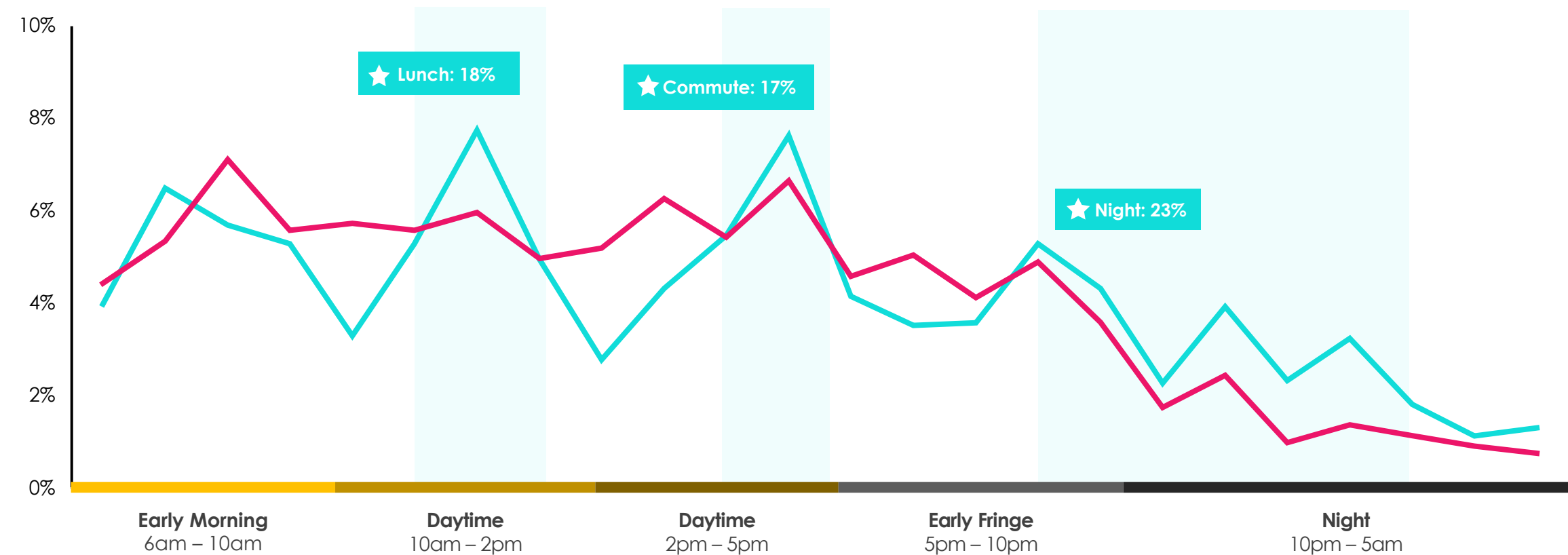


Co-listening Sessions n=1,757; Solo-listening Sessions n=1,308
Q: For your session yesterday, which device did you primarily use? Select one.
Source: MAGNA, "Digital Audio Expansiveness: Growing Landscape & Opportunities", 2020.

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

Time of day

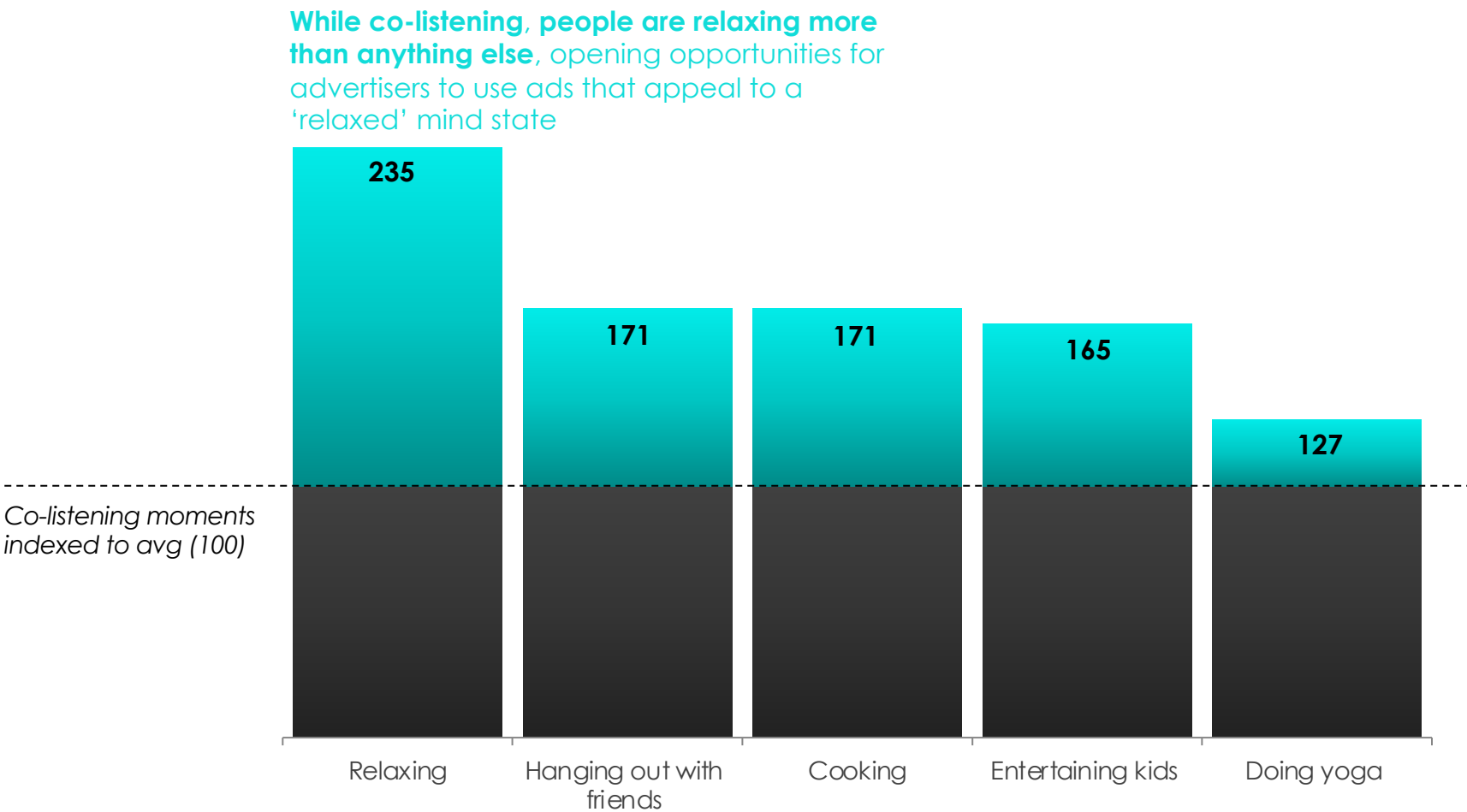
Co-Listening - % of session start times Co-Listening Solo-Listening



Co-listening sessions n=1,757, Solo-listening sessions: 1,307
Q: For your {audio/video} sessions yesterday, what time did you start? Select one for each option.
Source: MAGNA, "Digital Audio Expansiveness: Growing Landscape & Opportunities", 2020.

Work top moments in when targeting co-listeners

Top 5 co-listening moments
% Selected



Co-listening sessions n=1,757
Q: What else were you doing while you were listening, if anything? Select all that apply.
Source: MAGNA, "Digital Audio Expansiveness: Growing Landscape & Opportunities", 2020.

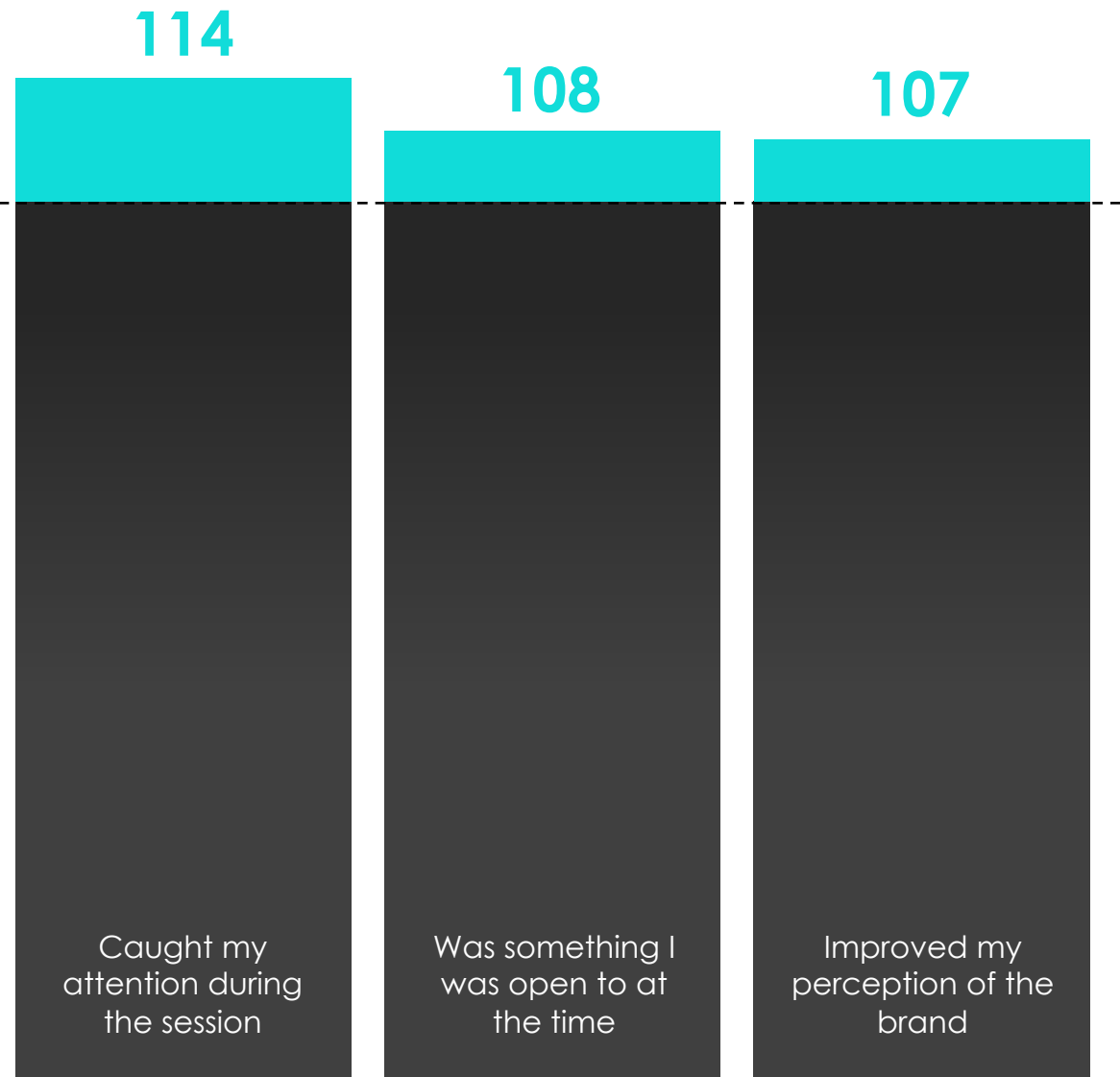
Use creative focused on storytelling to draw in co-listeners

Co-Listening – Ad opinions
% Strongly/Somewhat Agree

Audio Ads:



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.

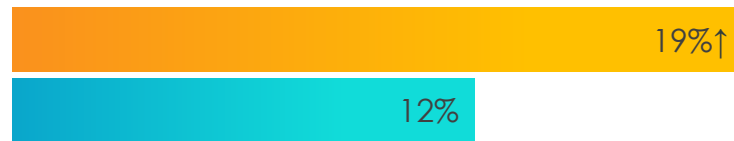
Brands should consider podcasts where they may benefit from leaned-in co-listening

Mood by content type during co-listening - % Selected

Podcast Music



Excited



Focused



Curious



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.

Brand impact from co-listening podcasts

Delta (Exposed – Control)

Podcast

Music:
No significant impact

+17% ↑
Search Intent

+10% ↑
Willingness to
learn more about
the brand

Podcast

Music:
No significant impact



Recommendations



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