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**Audio Update
March 2018**

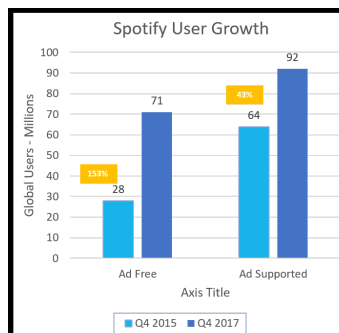
Spotify - behind the numbers

74% of monthly streams are AD FREE

As total number of Spotify users increases, the greatest growth is seen in pure play (ad free) subscriptions.

Spotify has experienced strong growth between Q4 2015 and Q4 2017, largely driven by increasing its subscriber base by 153%, closing the gap between ad free and ad supported users. Ad free (pure play subscribers) are the power users with 630 streams per month vs. 222 streams by those using the ad supported platform. (Source: Spotify F1

Filing/MEDIA Research analysis)



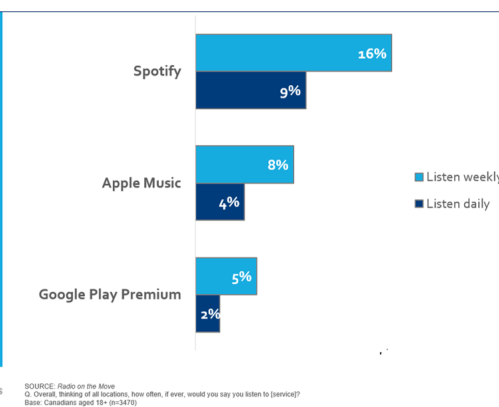
Inactive users, both paid and ad supported, grew from 1 million in Q1 2016 to 4 million in Q4 2017.

Source: Spotify F1 Filing/Music Industry Blog_Mar23/18



In a recent analysis conducted by Audience Insights, 16% of Canadians report using Spotify weekly and 9% daily. (Source: Radio On The

Move Feb 2018)

**One-in-six
Canadians
listen to
Spotify
weekly –
fewer than 1-
in-10 daily.**



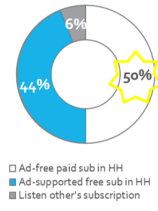
Service	Listen weekly	Listen daily
Spotify	16%	9%
Apple Music	8%	4%
Google Play Premium	5%	2%

  SOURCE: Radio on the Move Q4 Overall. Branding at all locations, how often, if ever, would you say you listen to [service]? Base: Canadians aged 18+ (n=3470)

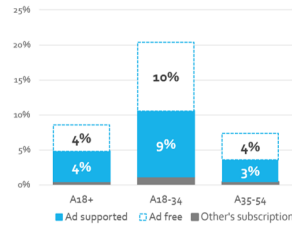
Of those 9% of Canadians who listen to Spotify daily, **over 50% do not hear ads**. Ads on Canadian AM/FM stations reach 79% more Canadians daily. For Ad 1834, the difference is 63%.

Half of Spotify's power users access an ad-free subscription — frequency that lies beyond the reach of advertising.

Subscription Type: Listen to Spotify at least daily



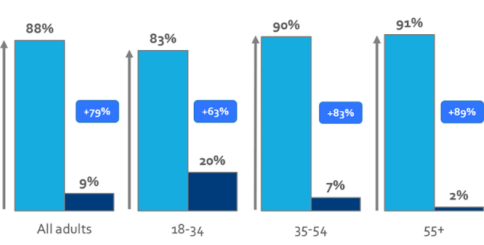
Listen to Spotify daily: by subscription type



SOURCE: Radio on the Move Q1 17 Overall: Ranking of all locations, how often, how often, if ever, would you say you listen to Spotify? Q1 17 Thinking of all the time you may listen at home, in the car, or at work, how much time in total do you spend listening to AM or FM radio stations during a typical weekday? Base: Canadians, aged 18+ who listen to Spotify daily (n=252)

AM/FM Radio still has a big lead over all Spotify for daily listening—across all demos.

Listen to AM/FM on "a typical weekday" vs Listen to Spotify daily



SOURCE: Radio on the Move Q1 17 Overall: Ranking of all locations, how often, how often, if ever, would you say you listen to Spotify? Q1 17 Thinking of all the time you may listen at home, in the car, or at work, how much time in total do you spend listening to AM or FM radio stations during a typical weekday? Base: Canadians, aged 18+ (n=3476)

Advertisers diverting dollars from AM/FM radio into Spotify are losing reach as more users are choosing ad free platforms, including the Millennials who many believe don't listen to radio. AM/FM radio reaches 83% of Millennials, daily.

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