



The Togetherness Effect

WHY BRANDS SHOULD BE PAYING ATTENTION TO CO-LISTENING

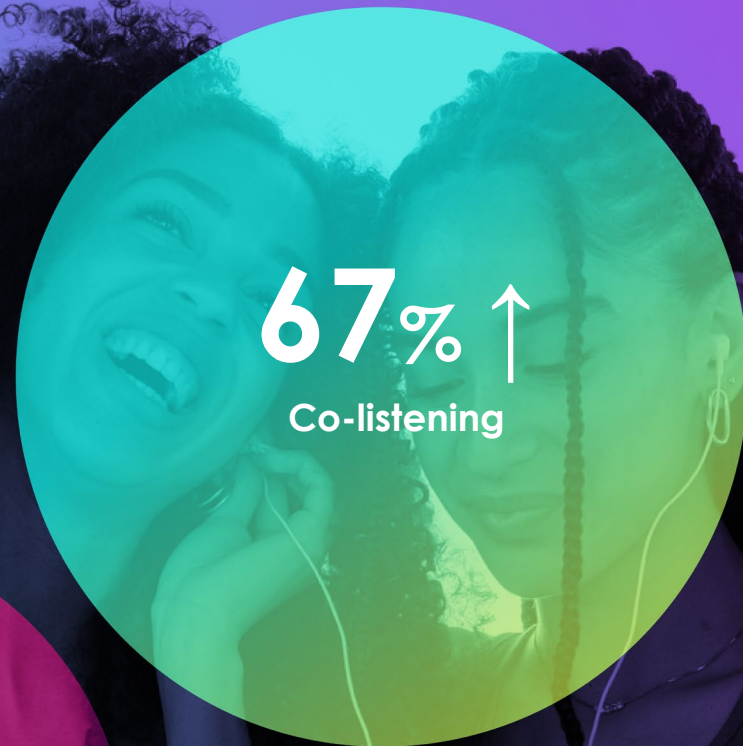
From previous research, we know...

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

♥ CVS

TYPES OF DIGITAL AUDIO ADS TESTED



Product-focused audio ad



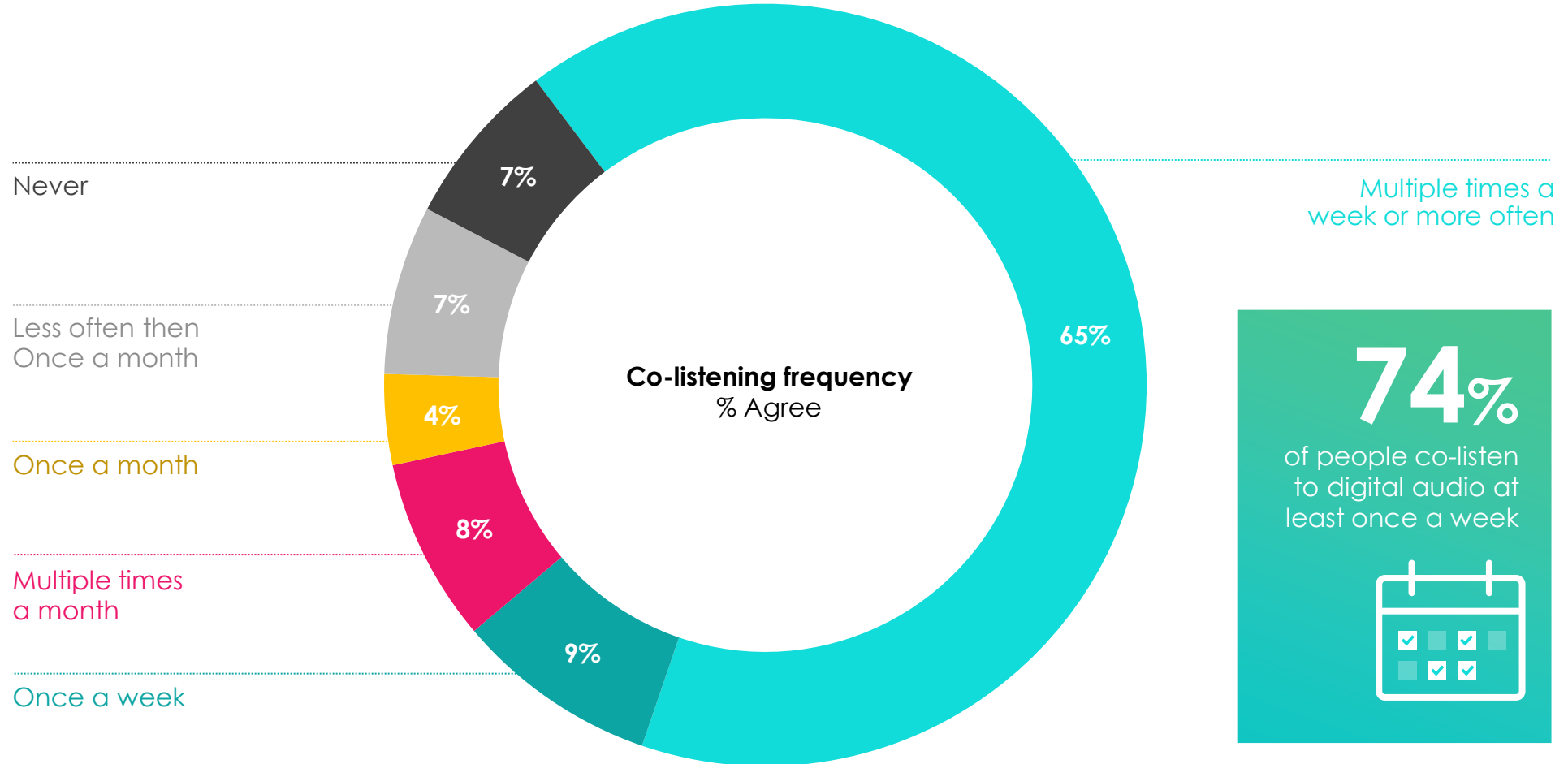
Story focused audio ad

A person is seen from behind, wearing large headphones and looking at a laptop screen. The scene is dimly lit with a pinkish-purple hue. Several thin, curved lines in shades of pink and green are overlaid on the image, creating a sense of digital connectivity or sound waves. The overall mood is modern and tech-oriented.

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.

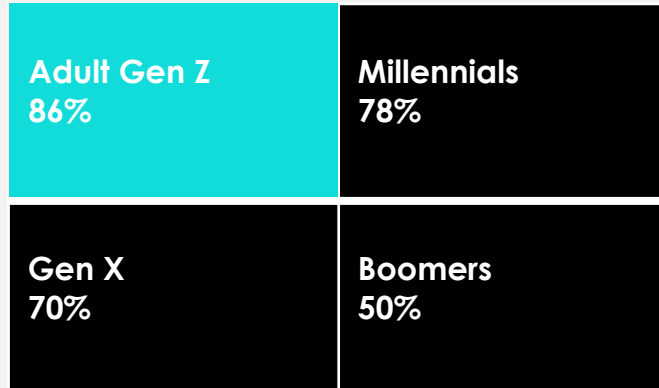
Note: This is segmented by those who solo listened during their survey experience to eliminate co-listening bias.

Who are co-listeners?

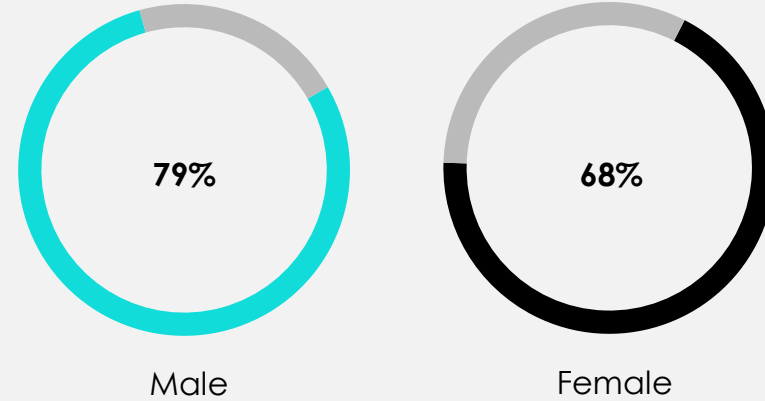
Co-Listening frequency...

% who co-listen once a week or more often

... by generation



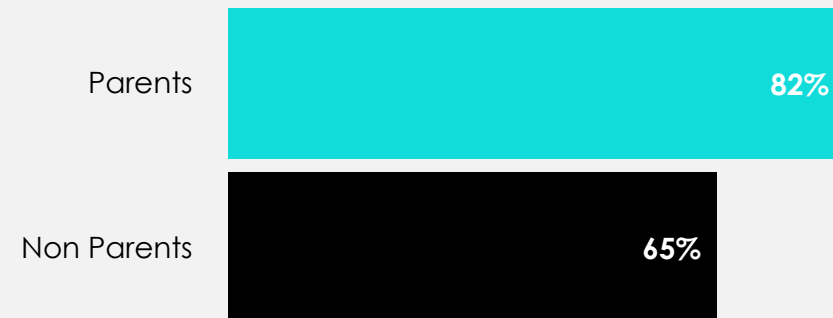
... by gender



... by ethnicity



... 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

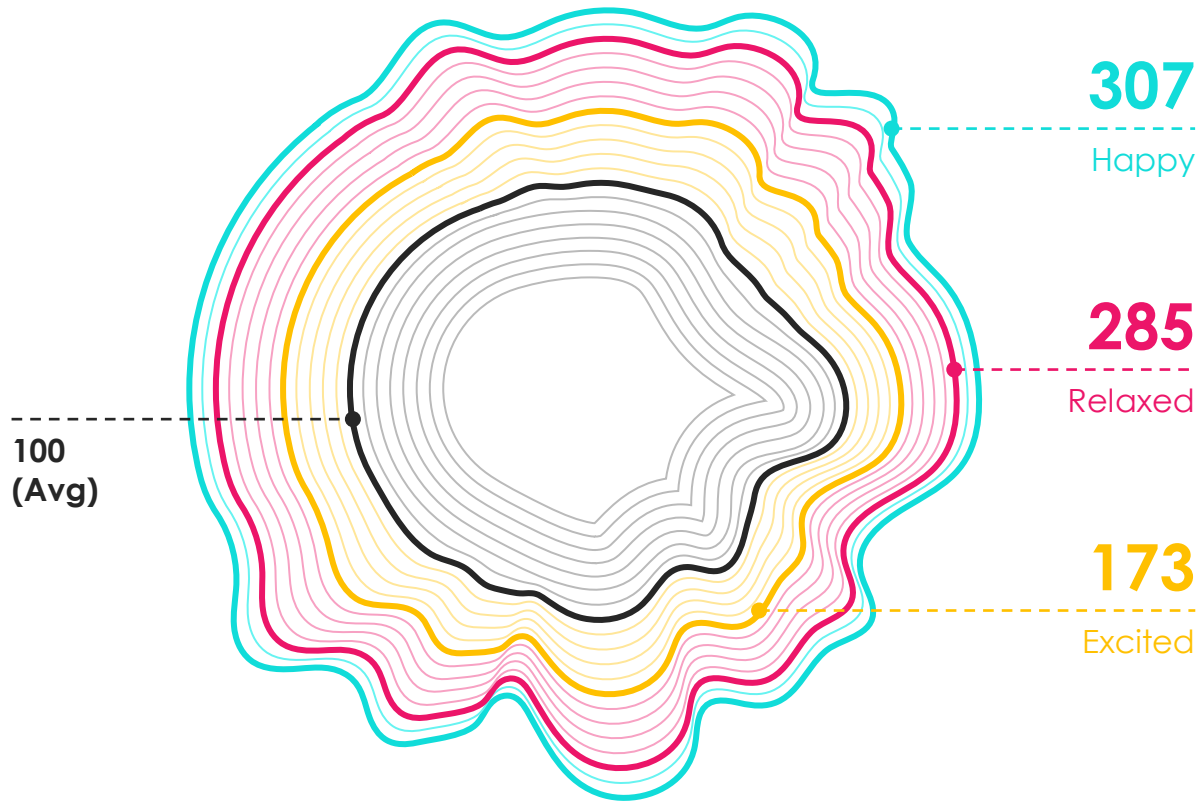
Q: What are some reasons as to why you listen to digital audio with others? Be specific.

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

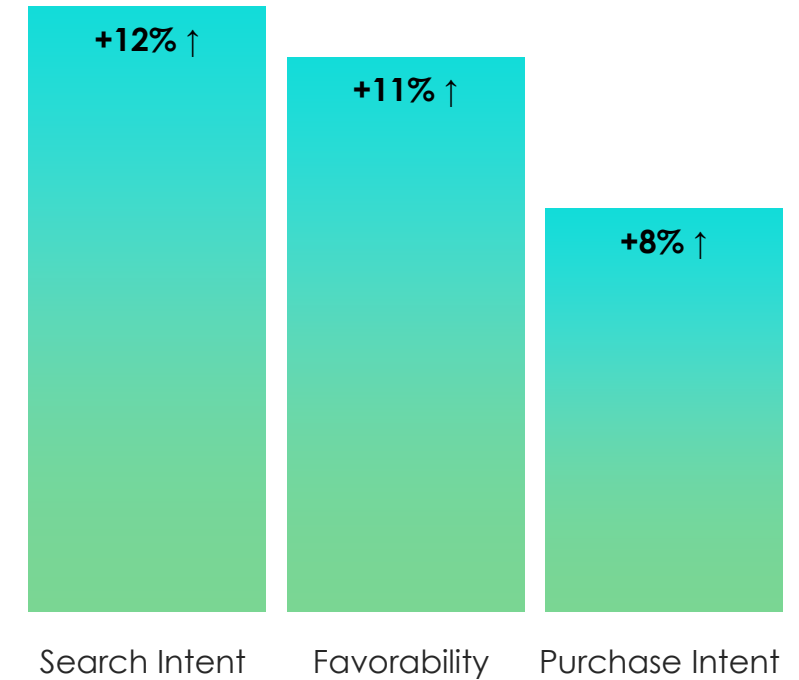
Indexed

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

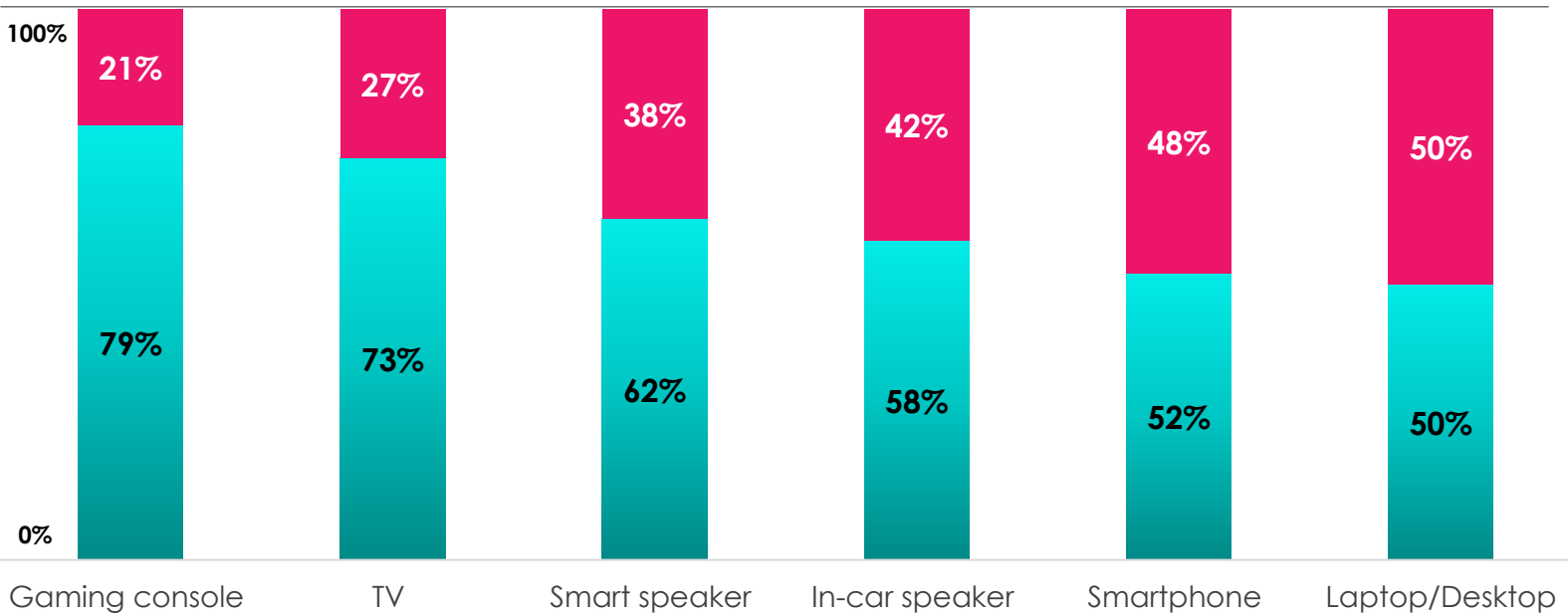
How Advertisers Should Tap Into Co-Listening

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

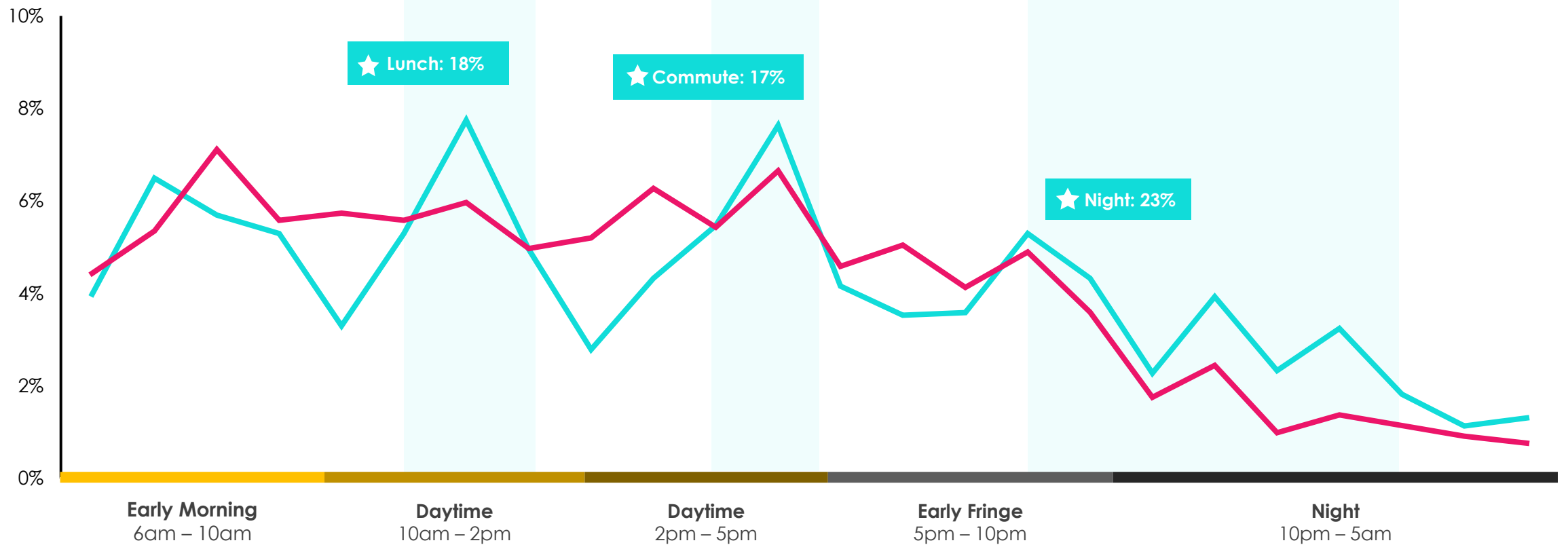


Co-listening Sessions n=1,757; Solo-listening Sessions n=1,308
Q: For your session yesterday, which device did you primarily use? Select one.
Source: MAGNA, "Digital Audio Expansiveness: Growing Landscape & Opportunities", 2020.

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

Time of day

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

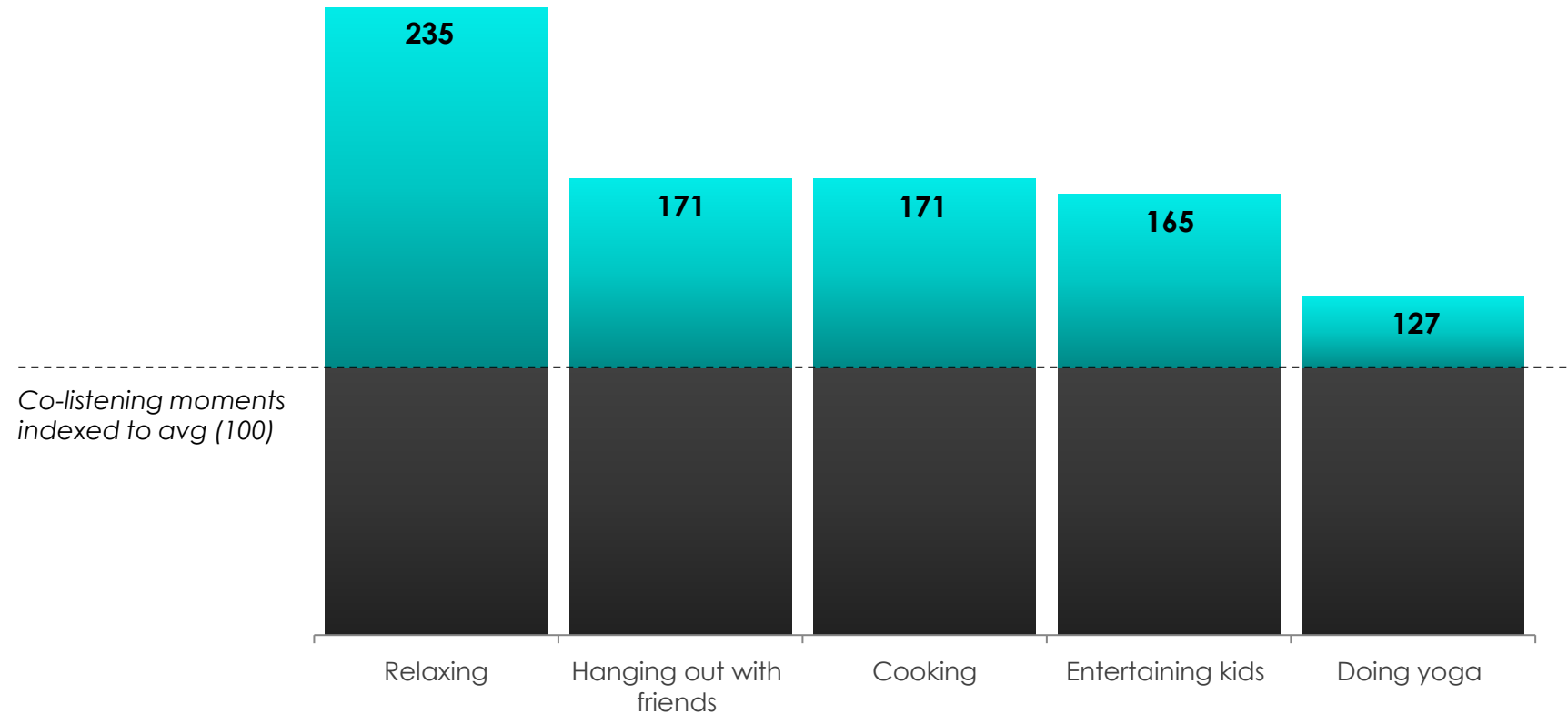


Co-listening sessions n=1,757, Solo-listening sessions: 1,307
Q: For your {audio/video} sessions yesterday, what time did you start? Select one for each option.
Source: MAGNA, "Digital Audio Expansiveness: Growing Landscape & Opportunities", 2020.

Work top moments in when targeting co-listeners

Top 5 co-listening moments % Selected

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 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.

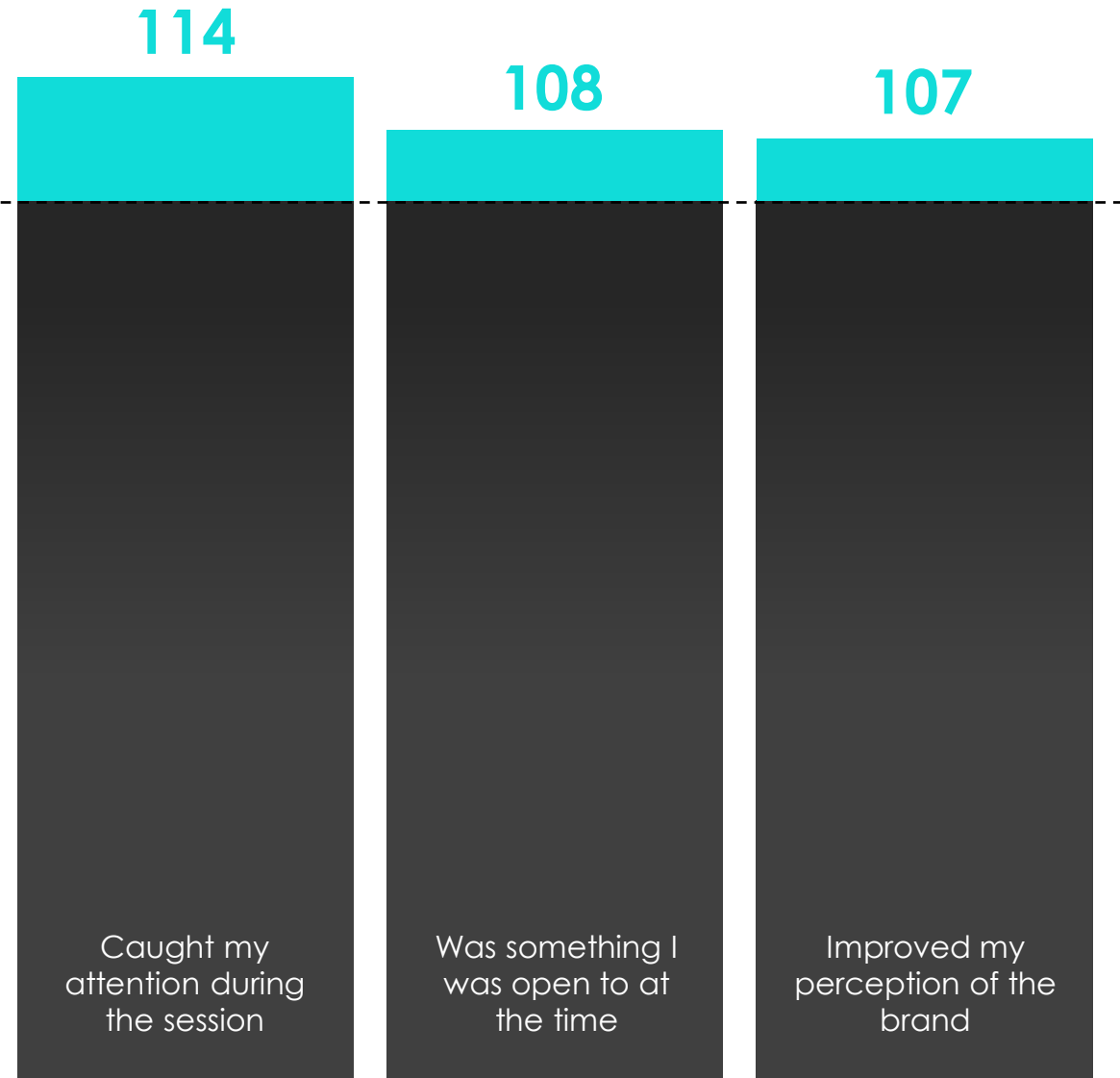
Use creative focused on storytelling to draw in co-listeners

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.

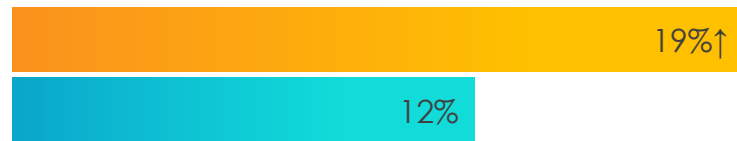
Brands should consider podcasts where they may benefit from leaned-in co-listening

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