

NIELSEN BRAND EFFECT ON SPOTIFY

LOWI

August 2021

METHODOLOGY

Campaign Exposure



- Spotify users within campaign target exposed to campaign media – Exposed group
- Other Spotify users within target demographic not exposed to media – Control group

Survey Recruitment



- Exposed and Control users invited to take survey via Spotify-branded audio & display ads
- User clicks display ad and redirected to survey on Nielsen's microsite

Data Collection



- Data shared with Nielsen in privacy-safe manner
- Ensure complete coverage across all Spotify ad formats and devices

Data Analysis

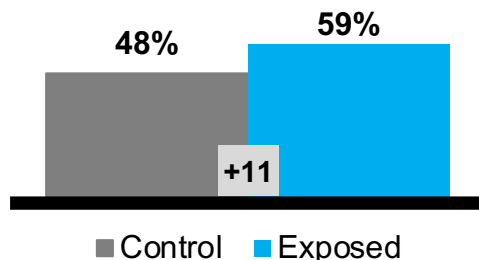


- Nielsen analyses data at overall level and at more granular cuts; Frequency, Ad Product, Platform, & Creative Groups

HOW TO READ RESULTS IN THIS PRESENTATION

CONTROL – Users not exposed to the Spotify campaign

EXPOSED – Users exposed to the Spotify campaign



Measure brand lift between **control** and **exposed** to understand the impact of the campaign within the Spotify environment

Signifies a positive difference at 90% confidence level

Signifies a positive difference at 80% confidence level

Signifies a negative difference at 90% confidence level

DELTA – Percent point difference between Control & Exposed

	Control	Delta
Ad Recall	48%	+11

SURVEY QUESTIONS – ENGLISH

Q1. Message Association (Price)

Which of the following telecom brands do you most associate with 'Fiber and mobile 25 GB for only € 34.95'?

- Lowi
- Jazztel
- Virgin
- O2
- None of the above

Q2. Message Association (Free GB)

Which of the following telecom brands do you most associate with 'This summer get 60 gigazos for free with any rate'?

- Lowi
- Jazztel
- Virgin
- O2
- None of the above

Q3. Intent

How likely are you to choose Lowi the next time you shop for one tariff for fibre and mobile?

- Definitely will
- Probably will
- May or may not
- Probably will not
- Definitely will not

Q4. Ad Recall

Do you recall seeing or hearing an ad for Lowi on Spotify in the last 7 days?

- Yes
- No

Q5. Segmentation-Tariff Usage

Which of the following best applies to you?

- I currently use Lowi for one fibre and mobile tariff
- I currently use one tariff for fibre and mobile services, which is not supplied by Lowi
- I currently do not use one tariff for fibre and mobile services
- I currently use Lowi for mobile services only
- I currently use Lowi for fibre services only
- None of the above

SURVEY QUESTIONS – SPANISH

Q1. Message Association (Price)

¿Cuál de las siguientes marcas de telecomunicaciones asocias más con 'Fibra y dispositivos móviles de 25 GB por solo 34,95 €'?

- Lowi
- Jazztel
- Virgin
- O2
- Ninguna de las opciones

Q2. Message Association (Free GB)

¿Cuál de las siguientes marcas de telecomunicaciones asocias más con 'Este verano llévate 60 gigas gratis con cualquier tarifa'?

- Lowi
- Jazztel
- Virgin
- O2
- Ninguna de las opciones

Q3. Intent

¿Qué posibilidades hay de que elijas Lowi la próxima vez que contrates una tarifa para fibra y dispositivos móviles?

- Definitivamente lo haré
- Probablemente lo haré
- Puede que sí o puede que no lo haga
- Probablemente no lo haré
- Definitivamente no lo haré

Q4. Ad Recall

¿Recuerdas haber visto u oído un anuncio de Lowi en Spotify en los últimos 7 días?

- Sí
- No

Q5. Segmentation-Tariff Usage

¿Cuál de las siguientes opciones encaja mejor contigo?

- Actualmente utilizo Lowi para una tarifa de fibra y móvil
- Actualmente utilizo una tarifa para servicios móviles y de fibra, que no es proporcionada por Lowi
- Actualmente no utilizo una tarifa para servicios móviles y de fibra
- Actualmente uso Lowi solo para servicios móviles
- Actualmente uso Lowi solo para servicios de fibra
- Ninguna de las opciones

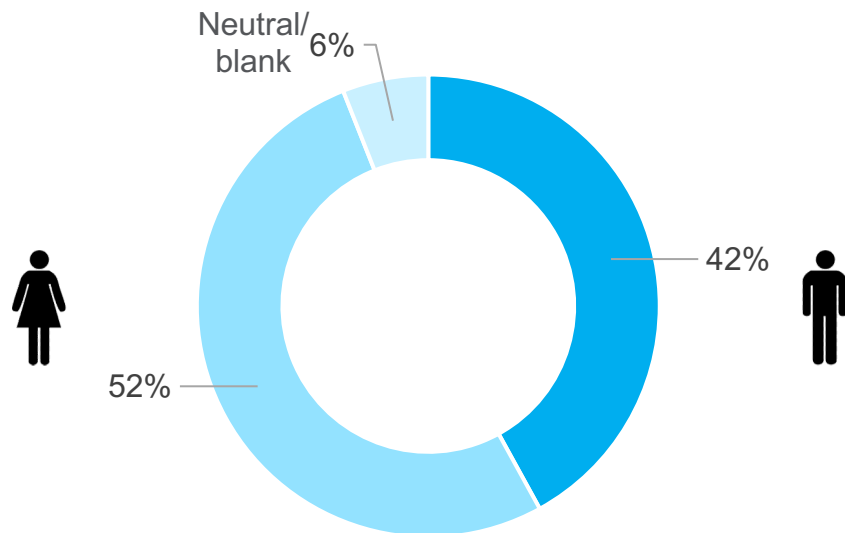
CREATIVE SNAPSHOTS



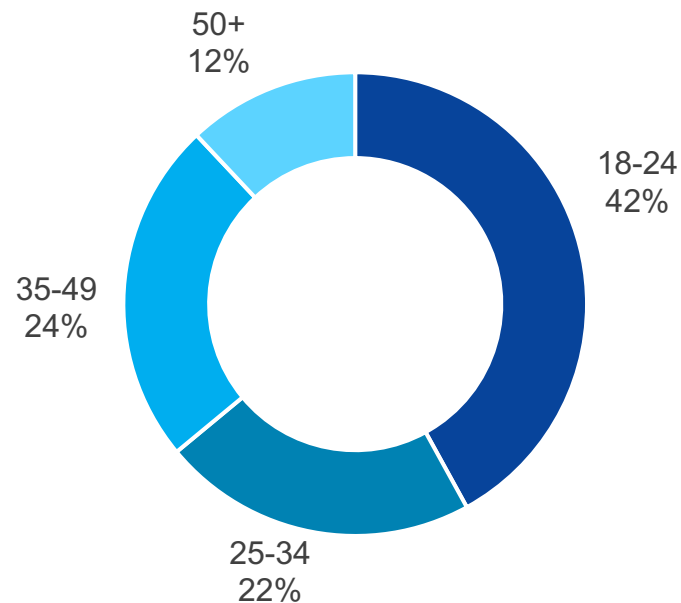
Video

CAMPAIGN RESULTS

SURVEY DEMOGRAPHICS

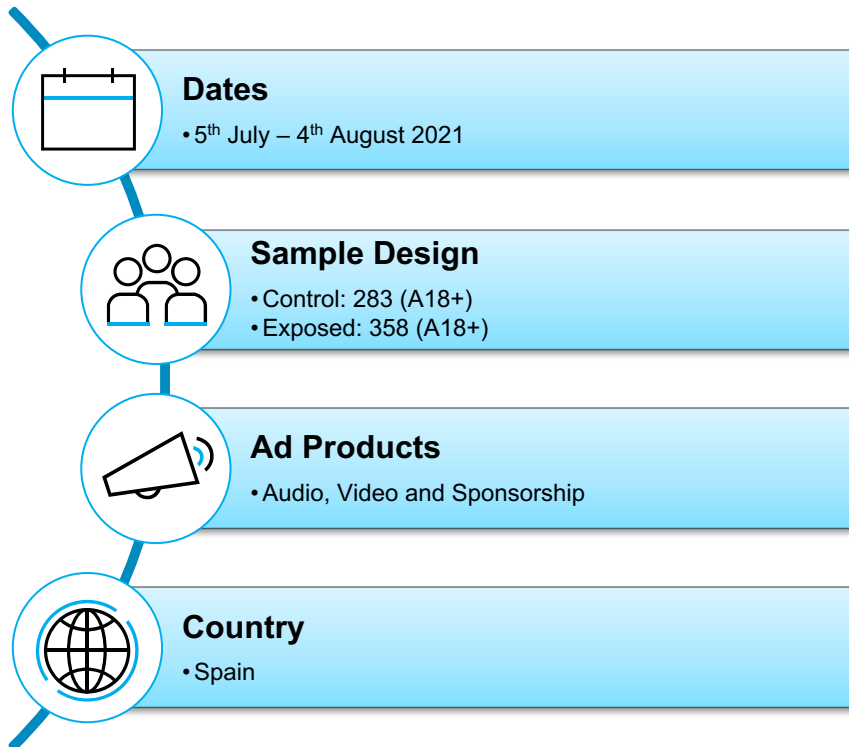


GENDER



AGE

CAMPAIGN DETAILS



Weighting Applied to Control Sample

Age

- 18-24 – 42%
- 25-34 – 22%
- 35-49 – 24%
- 50+ – 12%

Gender

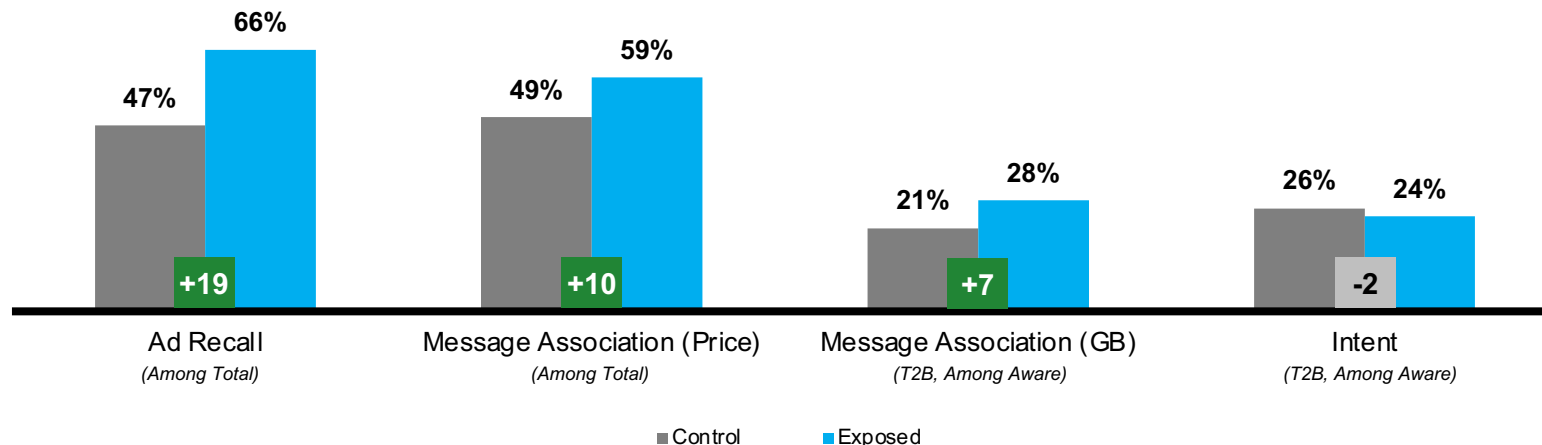
- Male – 42%
- Female – 52%
- Neutral – 3%
- Blank – 3%

Segmentation- Tariff Usage

- I currently use Lowi for one fibre and mobile tariff – 8%
- I currently use one tariff for fibre and mobile services, which is not supplied by Lowi – 54%
- I currently do not use one tariff for fibre and mobile services – 6%
- I currently use Lowi for mobile services only – 2%
- I currently use Lowi for fibre services only – 0%
- None of the above – 30%

As a result of the campaign, uplifts were seen across most metrics

Overall Metrics



Normative Deltas | Comparison to Overall EMEA Norm

Ad Recall – Avg. Delta

+26

Message Association (Price)– Avg. Delta

+9

Message Association (Free GB)– Avg. Delta

+9

Intent – Avg. Delta

+3



The campaign resonated more with males, driving an increase in association with both messages

Gender

	Male		Female	
	Control	Delta	Control	Delta
Ad Recall	46%	+21	47%	+16
Message Association (Price)	48%	+12	53%	+6
Message Association (GB)	16%	+11	24%	+5
Intent	24%	+4	26%	-5

Association with the pricing message rose with ages 35+, with the GB message also resonating with ages 18-34

Age Breaks

	18-24		25-34		35+	
	Control	Delta	Control	Delta	Control	Delta
Ad Recall	48%	+23	48%	+21	45%	+13
Message Association (Price)	57%	+6	50%	+10	41%	+14
Message Association (Free GB)	27%	+9	18%	+14	16%	+2
Intent	28%	-3	27%	+4	23%	-3

Sponsored Playlist strengthened performance across most metrics

Audio and Mobile Headliner were also useful in shifting Association with the message around price

Non Mutually Exclusive Data:

Product Types

	Control	Audio	Sponsored Playlist
Ad Recall	47%	+22	+19
Message Association (Price)	49%	+16	+11
Message Association (Free GB)	21%	+5	+7
Intent	26%	+3	-1

Control (n=283), Exposed- Audio (n=158), Mobile Headliner (n=96), Sponsored Playlist (n=341)
**Groups are not mutually exclusive; data includes all exposures within 7 days of survey being taken*

Increase 90% c.i.
 Decrease 90% c.i.
 Increase 80% c.i.
 No significant movement

'Sponsorship' targeting tactic helped increase most metrics

Non Mutually Exclusive Data:

Targeting Tactics

	Control	ROS	Sponsorship
Ad Recall	47%	+23	+19
Message Association (Price)	49%	+16	+11
Message Association (Free GB)	21%	+4	+8
Intent	26%	+2	-2

 Increase 90% c.l.
  Decrease 90% c.l.
  Increase 80% c.l.
  No significant movement

Control (n=283), Exposed- ROS (n=175), Sponsorship (n=354)

*Groups are not mutually exclusive; data includes all exposures within 7 days of survey being taken

Exposure to Creative 1 or Creative 2 helped raise most metrics, with Creative 2 driving slightly larger increases

Non Mutually Exclusive Data:

Creative Themes

	Control	Creative 1	Creative 2
Ad Recall	47%	+15	+24
Message Association (Price)	49%	+10	+13
Message Association (Free GB)	21%	+6	+9
Intent	26%	-2	+0

Control (n=283), Exposed- Creative 1 (n=213), Creative 2 (n=227)

*Groups are not mutually exclusive; data includes all exposures within 7 days of survey being taken

Increase 90% c.i.
 Decrease 90% c.i.
 Increase 80% c.i.
 No significant movement

The 30s Audio ads were useful in driving uplifts in Association with both messages

Non Mutually Exclusive Data:

Ad Length Groupings

	Control	15s Audio	30s Audio
Ad Recall	47%	+23	+18
Message Association (Price)	49%	+16	+10
Message Association (Free GB)	21%	+5	+10
Intent	26%	+3	-3

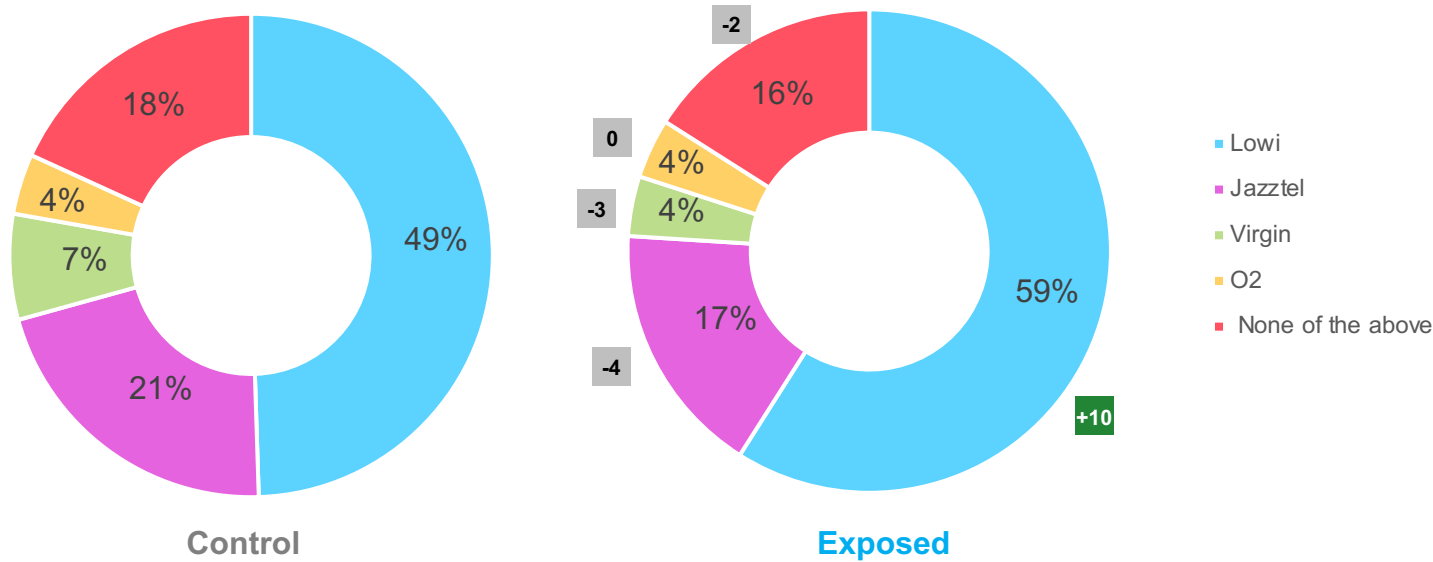
Control (n=283), 15s Audio (n=164), 30s Audio (n=274)

*Groups are not mutually exclusive; data includes all exposures within 7 days of survey being taken

 Increase 90% c.i.
  Decrease 90% c.i.
  Increase 80% c.i.
  No significant movement

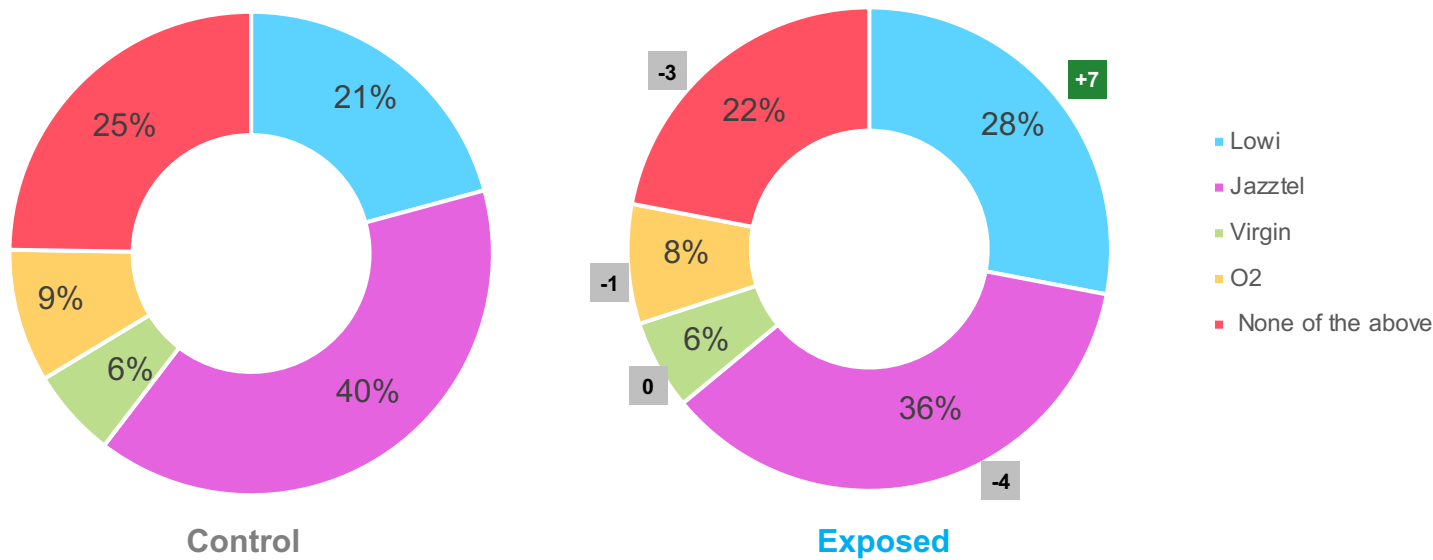
Association rose among those exposed, with Lowi being the brand most associated with the 'Price' message

Message Association (Price) - Distribution



Association of Lowi with the 'Free GB' messaging increased among those exposed

Message Association (Free GB) - Distribution



INSIGHTS AND RECOMMENDATIONS

Insights	Recommendations
<ul style="list-style-type: none"> • Big room for growth • Ad Recall, Message Association with 'Price' and Free GB' increased among those exposed to the campaign 	<ul style="list-style-type: none"> • Continue to use clear branding cues • Continue to call out the key message across all content
<ul style="list-style-type: none"> • The campaign helped uplift Association with both messages among Males • Association with the 'Free GB' message strengthened with ages 18-34, whilst association with the price message resonated most with those over 35 	<ul style="list-style-type: none"> • Creatives focus on female to improve the intent metric • As the campaign resonated the most with males, consider targeting this audience in future campaigns
<ul style="list-style-type: none"> • Exposure to Sponsored Playlist increased Association with both messages, with Audio or Mobile Headliner ad formats and ROS Targeting Tactics also supporting uplifts in Association with the 'Price' message • Exposure to both Creative 1 and 2 contributed to the growth in Association with both messages 	<ul style="list-style-type: none"> • Continue to use similar ad formats, targeting tactics and several creative themes as these helped drive most metrics • Combining one or several formats and different audio length depending on the objective • Different creatives per attribute

APPENDIX

STATISTICAL TESTING

A natural variance in scores is expected when estimating a population. To verify if the difference between two populations (here, exposed and control) can be simply attributed to **natural variance** or is due to the **impact of ad exposure**, Nielsen employs a statistical test. We test for the possibility of a true increase **or** a decrease between test and control by using a two sided t-test.

Nielsen uses a significance level of 90% (or a p-value of 0.10). Simply put, this means we are **90% confident** the measured difference between the two groups is **not** due to random chance, and if we repeated the experiment 100 times, we would get similar results at least **90 out of 100 times**.

Three primary variables work together to impact the statistical significance:

Sample size

As sample size increases, the metric score becomes more stable, and more likely to reflect the measured population. The larger the sample sizes of the two groups, the smaller the difference between the groups needs to be in order for us to declare it a statistically significant difference.

Difference in size

The larger the difference between the two sample scores, the easier it is to declare it statistically significant.

Baseline

For lifts where the control group is near 0% or 100%, statistical testing can be more sensitive. For example, this can result in scenarios where a metric's lift from a very high or very low baseline is statistically significant whereas the same lift on a different metric from a more moderate baseline is not.

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