



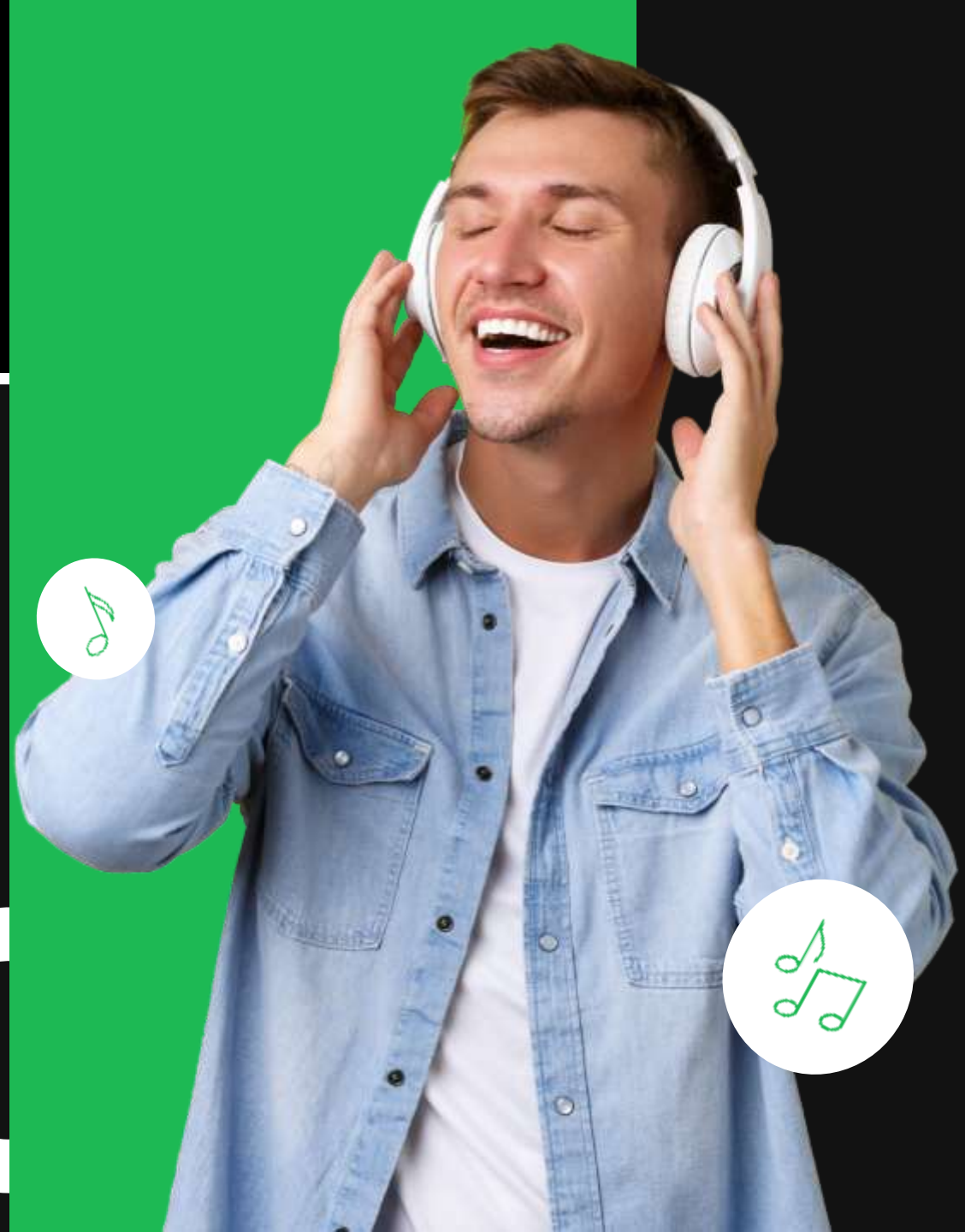
2024

Spotify India

A Case Study Presentation

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MARKET SIZE (In India)

- Revenue = \$531.9 Million
- Annual Growth Rate = 7.55%
- Exp. Market in 2027 = \$661.7M
- No. of Users by 2027 = 104.1 M
- User Penetration Rate = 6.3%

Spotify (India Overview)

- Launched in India-2019
- 31% Market Share(2024)
- 62 Million Active Users
- 3 Million Paid Users
- 30-35% Annual Growth Rate



MUSIC STREAMING MARKET LANDSCAPE

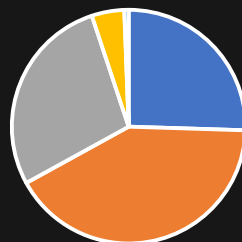
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REGULATORY ENVIRONMENT

- Copy right laws- Platforms must adhere to the Copy Right Act 1957.
- Data privacy regulations- Compliance with India's Digital personal Data Protection Bill, 2003.
- Licensing and Royalties**
- Intellectual property rights**

Users by Age



18-24 yrs 25-34 yrs 35-44 yrs
45-54 yrs 55-64 yrs

MAJOR PLAYERS

- Spotify- 31% market share with 62 M users.
- Wynk Music- 0.5 M users
- Apple Music- 0.2 M users
- JioSaavn- 0.8 M users
- Gaana- 1.4 M users
- YouTube Music
- Amazon Music

Market Share (%)



Spotify Wynk Apple
JioSaavn Gaana



ECOSYSTEM ACTORS

- Growing space for independent creators & artists.
- Dominated by global labels
- Telecom Partnerships: Jio (with JioSaavn) and Airtel (with Wynk) leverage bundled data plans to drive streaming adoption.
- Users - Youth and regional listeners drive demands.



SPOTIFY USER REVIEW

➤ Strengths

- 🏠 Localised & Global Catalog
- 🔍 Personalization
- 📄 Pricing and Accessibility
- ➕ User Experience & Interface
- 💜 Social &Interactive Features

➤ Area of Improvements

- 🔖 Excessive ads on free tier
- 🚩 Offline listening & downloads
- 🖼️ Podcast Interface
- 🏷️ Regional lyrics unavailable
- 📞 App stability & Audio quality



Interesting Features of Spotify

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- Discover Weekly – Highly personalised playlist delivered weekly.
- Daily Mix – Personalised Playlists for different moods and activities.
- Released Radar – Personalised playlists with new releases from followed artists.
- Podcasts – Extensive podcast library with strong original content.
- Regional playlists for linguistic diversity.
- Real time campaigns like IPL playlists to tap into local events.
- Curated Playlists
- Wrapped Annual Statistics

COMPETITOR'S ANALYSIS

GAANA	JIOSAAVN	APPLE MUSIC	WYNK MUSIC
10% Market share	24% Market share	5% Market share	13% Market share
₹99/month and ₹399/year	₹89/month and ₹399/year	₹119/month	₹40/month and ₹349/year
Social sharing and collaborative playlists	Integrates with Jio ecosystem for user retention	Targets premium Audience with apple ecosystem	Primarily focuses on Airtel customers
60% focus on regional and vernacular content	35% users in Tier 2/3 cities	High quality streaming	Operated by Bharti Airtel
Gamification(Streaks and Rewards)	Exclusive partnerships with artists and labels	Features spatial audio, lossless streaming and exclusive content	Limited features updates

PRODUCT OUTCOMES



Personalization – Better algorithms increases session time by 10min/day.



Localised Playlists – Regional play lists boost engagement by 15% among Tier-2/3 users.



Interactive Features – Introduce gamification(Badges and Rewards)



Real-Time Campaigns – Focusing on integrating with cultural and sporting events to boost relevance.



Social Sharing – users sharing play lists increases their listening time by 25%.



Drive Premium Subscriptions – Like ad-free listening, high quality audio, offline playback.



Focusing on Regional Content



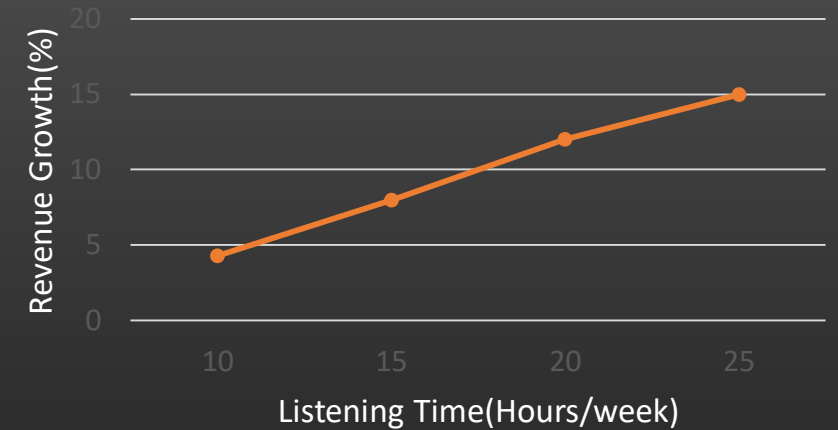
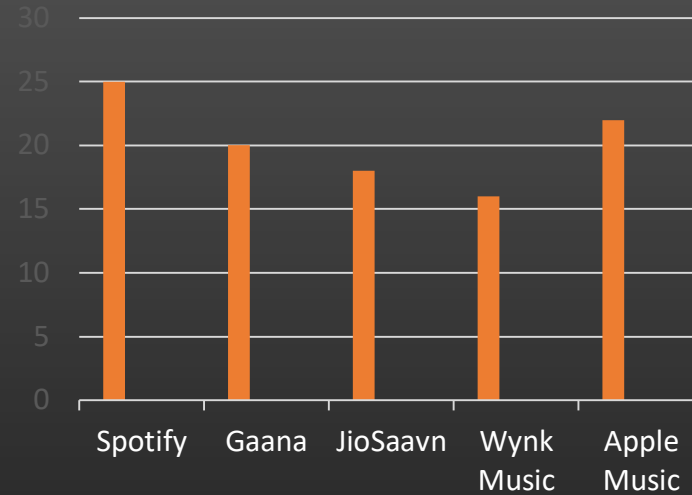
Focusing on emerging formats like short audio content



Reduce Churn – Improve user retention through personalised experiences, exclusive contents and strong community features.

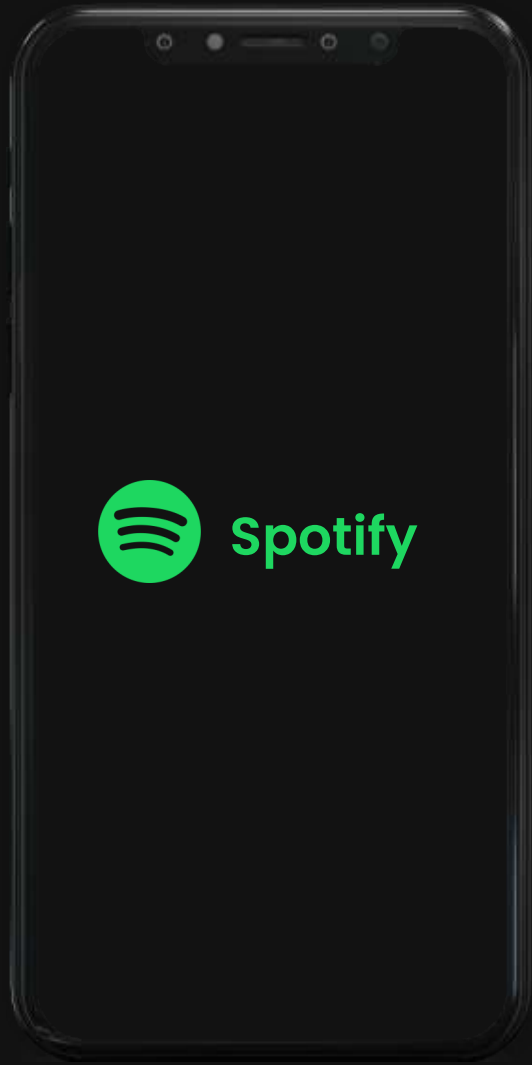


Time spent listening(hours/week)



Why Time Spent Listening Matters ?

- **Increased Revenue through Ad-Monetization** – Higher engagement leads to premium subscriptions and increases advertising revenue. Spotify generated €11.72 billion in global revenue in 2023, with €3.85 billion from ad-supported models, meaning more listening = more ad impressions.
- **Retention and Churn** – Higher time spent correlates with better user retention, as engaged users are 70% more likely to remain on the platform and less likely to churn to competitors.
- **Enhanced User Experience** – Longer listening sessions indicate a more satisfying and personalized experience.
- **Music Discovery**: Longer time increases exposure to new artists, supporting Spotify's partnerships with labels.
- **Competitive Advantage** – Platforms with more listening time are better positioned to negotiate licensing agreements and offer better content recommendations.



Thank You



Despacito

Luis Fonsi, Daddy Yankee



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