

Company background

A pioneer in music streaming, Spotify is the largest and most well-known audio streaming service in the world. Founded in 2006 by Swedish entrepreneurs Daniel Ek and Martin Lorentzon, Spotify offers music, podcasts, and other media streaming using a subscription model (Colón, 2024). Ek and Lorentzon's goal was to create a way for people to legally listen to and download copyrighted music, as music piracy had become widespread in the 2000s.

After reaching streaming agreements with music labels, they designed the free subscription allowing access including advertisements and without downloading, and two versions of a paid subscription. Paid subscriptions allow full access, downloading for offline listening, and no advertisements (Colón, 2024). Spotify now offers four different premium plans, including family and student pricing, one basic plan, and a free plan. The service can be accessed via a website browser or app on any device, including TV, car, game consoles, watches, and more, and is available in all countries except China (*Supported Devices for Spotify*, n.d.).

With an extremely wide range of music options, users can create custom playlists that they can share with friends or make available to the public as well as playlists that Spotify curates to the user's taste and algorithm. The company also collaborates with major podcast creators and audiobooks of different genres, under the "Spotify for Podcasters program" (Colón, 2024). Partnerships also include Samsung, Amazon, Google, Sony, The New York Times, and social media platforms such as Facebook and Snapchat (Colón, 2024). Spotify recently released an option called "DJ", which is an AI-generated, never-ending playlist that streams users' recommended and most-played songs from various genres, creating the DJ effect of flowing each song to the next.

The company's competitors include Apple Music, Amazon Music, and YouTube as well as Pandora, iHeartRadio, and Deezer. However, with over 100 million music tracks, 5 million podcast titles, and 300,000 audiobooks, Spotify dominates the market with its 600 million users and over 230 million paying subscribers (Colón, 2024). The range of services that Spotify offers caters to all users and taps into a consumer need that has not been met before.

Mission statement

- Mission: to foster artist potential and creativity by providing a platform for sharing their art and inspiring billions of fans (*About Spotify*, n.d.).
- Goal: to revolutionize the audio market with the addition of podcasts and audiobooks (*About Spotify*, n.d.).

Brand positioning

To: Music artists, podcasters, audiobooks, users/fans

Brand is the: Music and audio streaming

That: Free or paid subscription with various benefits, a one-stop-shop for all streaming needs

Because: Satisfies the need for legally downloading and sharing copyrighted music, is widely accessible for all demographics, and allows upcoming or established artists to share their work and grow their community of fans

Statement of problem or opportunity

With the vast amount of streaming data that Spotify collects from millions of users, the idea was born to create a personalized year-end review campaign called Spotify Wrapped. The first launch was in 2013 as a thank you to listeners but quickly grew traction when fans and artists shared their Wrapped on social media, launching it as a marketing goldmine for Spotify. Since 2016, many streaming platforms and industries such as Apple Music and Duolingo have tried to copy the wrapped messaging but have not come close to the impact of Spotify's campaign (de Guzman, 2023).

The 2023 Spotify Wrapped campaign was the most exciting and innovative celebration thus far. This review included top artists, albums, songs, and podcasts reflecting the year's soundtrack for over 574 million fans (*Here's What's in Store*, 2023). The Wrapped experience, found on the app or any browser, takes the user through various Instagram story-esque graphics, with the AI DJ guiding through the music with commentary about how the user's preferences have come together. Spotify fans looked through their top five artists and genres, a listening character specific to their tastes and habits called "Me in 2023", and a city that matched their listening called "Sound Town" (*Here's What's in Store*, 2023). Certain major artists, including Taylor Swift and SZA, even recorded video messages for their top fans. Podcasters, songwriters, and artists received their own Creator Wrapped experience, highlighting how their fans enjoyed their work.

While Spotify is already well-positioned in the market, the Wrapped campaign was needed to amplify the relationship between themselves and their publics and between the artists and the fans. Millions of listeners and creators shared their 2023 Wrapped highlights on Instagram and TikTok, which maintained Spotify's relevance and positioning in the media. The campaign also promoted concerts and merchandise, strengthening their partnerships with various brands, venues, and major artists. This was also an opportunity to maintain subscriptions by encouraging users excited to see next year's Wrapped. Spotify's media stakeholders also benefitted from the campaign, with a plethora of articles created about fan reactions to artists and podcasts and how this was important for the music and streaming industry moving forward. Spotify's strategy of enacting a sense of nostalgia and a positive end-of-year reflection was something their loyal users will never forget.

Research

With Spotify being the first company to take advantage of an unmet need in the audio streaming market, this campaign is an opportunity to continue catering to consumers and setting yearly business objectives. The use of algorithms and data collection identifies audience preferences and adapts the application to cater to their specific taste. Understanding that most artists and podcasts want their content to be on Spotify provides certainty that they are the first place fans will go to hear new music and episodes. With the free Spotify subscription, the constant advertisements for various brands and companies are not only a measurement for business growth but also an opportunity to leverage these relationships with the Wrapped campaign.

Research Goals

Who are the biggest artists and creators at this time and how do we highlight them to garner the most attention? What are the current social media trends that we can participate in so that fans will share our content? Which companies or brands would be important to collaborate with and what can they offer the audiences? Who are the influencers or celebrities who are fans of Spotify and will authentically participate in the campaign? How do we measure success both financially and personally to the brand image?

Research Methodology

To answer these questions, quantitative measures can be collected with an email and text survey. Because every Spotify user has a registered email address or phone number, a large

amount of data can be collected from the key audience. Everyone wants to talk about how their Wrapped turned out, so they will likely be willing to complete a survey describing their attitudes and feelings towards the campaign and Spotify as a whole, which gives the company an idea of how their service is impacting the population. The survey can ask about the quality of the Wrapped review and if there was enough information about their year of listening, the usability of locating the campaign and being able to save and share, and if they enjoyed the social media aspect as it becomes widely circulated.

Qualitative research can be collected via social media monitoring during the peak days of the campaign. Recording positive or negative feedback from both users and artists would garner insight into the campaign's relevance and if it offered enough content to be exciting and important. Spotify can measure any increase or decrease in followers on their social media and what the fans, artists, creators, and celebrities are saying and sharing online. The company can also record the number of clicks on its website and any new downloads of the app, which are both linked on their Instagram page. This would also help maintain Spotify's media literacy and improve their strategies moving forward, both for Wrapped or any other campaigns that can be planned around what is happening in the media and if it relates to them.

An analysis of similar campaigns and services from other companies that have already been done would also be valuable for understanding Spotify's competitors. A cross-examination should be done on Apple Music, which is also a popular streaming service and known to be their greatest competitor. The comparison should include Apple Music's usability and accessibility, types of audio and music content they have that is not available on Spotify, any subscription plans including price differences, and any campaigns and promotional materials both on and off social media. This could help identify how Spotify can differentiate itself so that the campaign stands alone in the minds of consumers and their stakeholders who should want to continue collaborating with them.

Situation analysis

Internal: Strengths

- Established brand and awareness of services: Data shows that Spotify has millions of users, paying subscribers, music tracks, podcasts, and audiobooks (Colón, 2024).

- Diversity of content: Users can find any genre of music (rap, R&B, country, classical, rock, etc.) and any types of podcasts and books (true crime, comedy, informational, self-help, etc.).
- Accessibility: Easy-to-use application and website, diversity of subscription plans, offline listening and sharing, organization of personal library and playlists.

Internal: Weaknesses

- Financial instability: Because Spotify only has a free or paid subscription plan, a lot of revenue relies on maintaining partnerships and advertisements.
- Lack of service diversity: Spotify's focus is music and audio streaming, so there is little room to offer more services and expand its market.
- Artist royalties: Many artists criticize how little Spotify pays them, making it not a very profitable partnership.

External: Opportunities

- Partnerships: Various brands, social media platforms, news websites, record labels, influencers, and ownership of major podcasts (Colón, 2024).
- Influencer marketing: Opportunities for paid or unpaid collaborations on social media, at events, and especially during the Wrapped campaign (users want to see who their favorite content creators are listening to).
- Covid-19/ Popularity of fitness: During the pandemic, going on walks and working out at home became extremely popular, giving people more time and reason to listen to music, curate their playlists, and listen to books and podcasts.

External: Threats

- Internet dependability: Spotify is an online service so it depends on users' access to the internet, which can be impacted by environmental changes, cyberattacks, malfunctions, etc.
- Competitors: The streaming market is competitive and has major companies such as Apple and YouTube that offer the same services, as well as platforms that give higher royalties to their artists.
- Copyright and record labels: Spotify has to follow strict copyright regulations, deal with increased piracy, and music labels that may decide to work with the competitors instead (*Ultimate Guide to Spotify for Record Labels*, 2024).

Strategic insights

- Social media: With the opportunities within social media and influencer marketing, Spotify can bandwagon the trends surrounding music and entertainment. Spotify's own Instagram account can be used to repost and share positive reactions to the year's Wrapped. They can also acknowledge the beauty of having different interests and music tastes since most people end the year with a diverse range of top genres and artists.
- Artists and Podcasters: Because of Spotify's issues with royalties, they should use the campaign to uplift and celebrate the artists and podcasters at a greater extent. While they already make an effort to showcase mega-artists to their fans, a part of the campaign can highlight artists and smaller podcast creators who are now starting to show on users' Wrapped. This would also encourage artists who work with other streaming platforms to collaborate with Spotify since it is an amazing marketing opportunity and a way of increasing their visibility in the industry.
- Collaborations/ Expansion of services: Offering exclusive access to merchandise and concerts is an important part of Spotify's collaborations with brands and companies who help offer these opportunities. The Wrapped campaign can promote these via social media, email communications, and from the artists themselves. This would also help combat their limited service offering and expansion into the entertainment market.
- Competitors: Each year, Spotify claims popularity with its Wrapped campaign. With its major competitors who offer similar services, they must find a way to reestablish a feeling of excitement and exclusivity each time. Stakeholders includes free users and subscribers, influencers and celebrities, record labels, artists, podcasters, and audiobooks, as well as company and media partnerships. The design of the campaign must adapt to benefit each stakeholder and measure which aspects of the campaign they should keep or take out. The feedback received from surveys, social media, and competitor analysis can be applied not only to how the campaign "wraps up" but also to ways they can improve the quality and affordability of their service. The 2023 Wrapped campaign proved how much potential there is for Spotify to benefit from people's love of music and audio content, and the significance of maintaining a unique connection to their community of fans and artists.

Communication goals

- Maintain a sense of community with Spotify users: A major goal of the campaign was to strengthen brand loyalty by creating an experience that Spotify's community of users can share and relate to (Wu, 2023). Part of this was maintaining consistent messaging by providing users with the same feedback using content personalized to their taste. Social media was used to encourage engagement and create visually aesthetic content curated to the specific trends and overall culture of 2023. This helped with brand recall for consumers by maintaining Spotify's relevancy and uniqueness outside of being an effective audio streaming service.
- Create the most personal and shareable Wrapped: With the features and data stories included in Wrapped 2023, Spotify marketed the campaign as "the realest Wrapped ever" (Spotify's Head of Global Marketing, 2023). The campaign curated specific playlists based on the users' listening habits and provided personalized and well-thought-out messaging packaged to be easily shared and saved. Spotify's goal in 2023 was to mix nostalgia with a modern lens, bringing a positive and playful energy that translated across all languages and cultures (Spotify's Head of Global Marketing, 2023).

Communications objectives

- Gain one million new subscribers and encourage users to continue using Spotify after campaign completion (hypothesis): Financially, Spotify utilizes the campaign to maintain subscriptions and combat their competitors in the audio streaming industry. After completing the 9th annual Wrapped in 2023, Spotify brought in over 225 million monthly active users, grew user engagement by over 40% over 170 markets and gained seven million subscribers (Spotify Reports, 2024).
- Understand audiences aged 18-34 through culture and social media literacy: The data that Spotify collected provided insight into the listening habits of key demographics, such as Gen Z streaming "heartbreak" playlists and Millennials streaming wellness and self-love playlists and podcasts (2023 Wrapped for Advertisers, 2023). This helped both Spotify and other brands acknowledge the cultural state of groups that are most heavily on social media.

- Maintain hundreds of partnerships with brands and stakeholders (hypothesis): Measuring the performance of content is important for Spotify and its partners to ensure they are reaching their target audience (Wu, 2023). Part of this is the interactions between Spotify, the users, artists and relevant companies both within the campaign and in the media.

Target audiences

- **Young adults:** Spotify's primary target audience is young adults, especially Gen Z and millennials ages 18-34. These groups likely live in households of three or more, are majority female and live in the U.S. (Larkin, 2023). This is an important demographic because they are technologically advanced in both Spotify's platform and social media. These groups are increasingly investing in following music trends and discovering new artists easily, making Spotify's playlist curating and sharing so appealing to them. One subcategory, college students, also have a specific lifestyle that makes Spotify important to them. Whether they are studying, walking to class, working out or hosting and attending events, music is an extremely integral part of their daily lives. Spotify even offers a student discount which appeals to their financial status (Larkin, 2023).
- **Music artists and podcast creators:** Spotify relies on its partnerships with various artists and podcasters to produce content. Based on my years of experience using Spotify, I hypothesize that this demographic is made up of various ages, nationalities, religions, geographic regions and incomes. There are young and upcoming artists and podcast creators who generate little revenue, well-established artists such as Taylor Swift and late icons such as Elvis Presley as well as artists and creators from around the world influenced by different languages and religions. Spotify must maintain relationships with these creators so that they can establish a large and diverse community of fans.
- **Influencers:** Spotify also collaborates with influencers who engage in promotional events, marketing campaigns and brand collaborations (Target Audience Types, 2022). Maintaining these relationships was especially important for the Wrapped campaign, as the influencers' participation amplified the social media and content generation aspect. Based on my own experience viewing the Wrapped campaign on social media, I hypothesize that these influencers are in the 18-34 age group, are based mostly in the U.S. and have mostly positive attitudes toward music and entertainment. Their popular

culture literacy also increases the probability that their followers will listen to the music and podcast episodes that they recommend or even create themselves.

Current audience brand perception

Spotify is a platform for music and podcasts that has a subscription fee for no advertisements.

Users can create a personal library and share music with friends (hypothesis).

Desired audience brand perception

Spotify is the ultimate destination for music, podcast and audiobook online and offline listening. The company provides artists the creative opportunity to share their work with fans and cater to a diverse community of listeners (About Spotify, 2024).

Key message mapping

- **Single-minded message:** “Think of 2023 Spotify Wrapped as a celebration of the realest listening moments that defined our year. From the song you secretly couldn’t stop streaming to the artists and podcasts you had unwavering admiration for” (Spotify 2023 Wrapped, 2023).
 - Spotify acknowledged the “chaotic” consumption of culture and technology in 2023 by providing fans with meaningful data and highlighting their listening habits from various moments throughout the year (Spotify 2023 Wrapped, 2023).
- **Young adults:** “Gen Z’s affinity for nostalgia and their desire to discover and explore new (to them) artists” skyrocketed globally over the past year. Millennials were the key audience driving the wellness space (2023 Wrapped for Advertisers, 2023).
 - Older teens led the trend in streaming catalog artists, which are those who haven’t released new material in at least a year and a half. The popularity of wellness content for Millennials included “meditation, mindfulness, yoga, relaxation and self-love playlists and podcasts” (2023 Wrapped for Advertisers, 2023).
- **Music artists and podcast creators:** “Podcasts keep the cultural conversation flowing, and they’re reaching an engaged audience” (2023 Wrapped for Advertisers, 2023). “Understanding [music artists’] total audience helped identify growth areas and measure how effectively they converted casual listeners into true fans over time” (Spotify for Artists, 2023).

- Spotify defined a new segment called “super listeners”, who on average increased artist and podcast streams by over 20%. This has helped creators “dive deeper into [their] fanbase and stay connected with them (Spotify for Artists, 2023).
- **Influencers:** “In 2023, all Spotify ad formats saw a positive lift in driving brand awareness and recall. Variety was the spice of life and ad campaigns” (2023 Wrapped for Advertisers, 2023).
 - Gen Zs were heavily driven by video content, including message sharing on social media platforms by creators who resonated with their audience and established new and excited listeners (2023 Wrapped for Advertisers, 2023).

Strategies

- Create a personalized experience that users can share with other consumers (Spotify’s Head of Global Marketing, 2023).
 - The 2023 Wrapped campaign provided Spotify users with a compilation of their top artists, songs, podcasts, genres and other data stories about their “taste profiles” (Spotify’s Head of Global Marketing, 2023). All content could be saved, shared and talked about with friends, family and others on social media.
- Utilize partnerships with artists, podcast creators, influencers and brands (Guide, 2023).
 - Spotify also generated Wrapped experiences for artists and creators so they could further understand their fans and how their content was consumed throughout the year. Social media was used to highlight Spotify’s relationship with influencers and brands who took part in the campaign by sharing their own Wrapped, encouraging users to share their Wrapped and promoting events, concerts and merchandise for a range of artists and podcasters (Guide, 2023).
- Use the Spotify data to create a campaign that tells a compelling story and stands out against competitors (Guide, 2023).
 - Spotify generated data on their millions of users and strategized their most creative campaign thus far, telling a story of cultural uniqueness for people of all demographics. The 2023 Wrapped campaign not only summarized users’ listening but maintained a theme of nostalgia, fluidity in taste, inspiration and community (Guide, 2023). This stood out from campaigns that other streaming platforms, such as Apple Music and YouTube, have done to follow Spotify’s campaign.

- Position Spotify Wrapped 2023 to recognize target audiences and maintain relevancy (2023 Wrapped for Advertisers, 2023).
 - Spotify launched the campaign in December 2023 when people began reflecting on their year, which made Wrapped a moment in popular culture that users wanted to be a part of (2023 Wrapped for Advertisers, 2023). This established Spotify in the media, allowed them to monetize on current trends and connected them with a wide range of their audience who participated in the campaign (2023 Wrapped for Advertisers, 2023). It also may have drawn in new groups of people who felt a desire to be part of this campaign too.

Tactics

Global events

Spotify developed real-life events to promote Wrapped, artists, partners and 2023 listening trends. Lil Yachty, PinkPantheress and Ice Spice, major artists in the rap and R&B industry, sailed from downtown Atlanta in Lil Yachty's "Lil Yacht" promoting their latest album and songs (Here's What's in Store, 2023). In Indonesia, Spotify gave users real haircuts to promote Indonesian singer Mahalini's song "Sial", meaning "bad luck", as the city's local belief is that getting a haircut wards off bad luck. Spotify also released a special list of "Spotify Singles" from artists worldwide including Japan, South Africa, Sweden, Italy and Indonesia (Here's What's in Store, 2023).

Social campaign for songwriters and producers

Since 2020, Spotify's Wrapped campaign has included a beta of songwriter and producer pages, which allows fans, collaborators and industry partners to know more about the creators of their favorite songs (A New Way to Share, 2020). In 2023 Spotify launched the "Songwriter Wrapped microsite" experience since this group had grown substantially and become a vital target audience. They also conducted a social campaign for music makers, where artists and fans could fill in the blanks on their favorite songwriters, lyrics, products and beats from 2023 "to acknowledge and celebrate the creativity and work from their top creators" (How Spotify Made Wrapped, 2023).

Wrapped listening parties

Spotify collaborated with a few artists who hosted invite-only live audio rooms for top fans. Here they could interact, listen to music together and allow artists to promote their

merchandise (How Spotify Made Wrapped, 2023). The goal was to use the listening data in a unique way that connected artists and fans on a personal level

Billboards

Spotify conducted a “special billboard moment” to reveal the global top artist, Taylor Swift, in several cities across the world. Clues were shared around the world 48 hours before the reveal, with puzzle pieces on various billboards featuring Easter eggs and a video promotion (Spotify's Head of Global Marketing, 2023). Billboards were also used globally to promote artists such as SZA, Olivia Rodrigo and more with unique designs and slogans that were relevant to the artist. They also played on social media trends and maintained the “real and realest” theme to promote the campaign.

Merchandise and tickets

In 2022, Spotify's Wrapped resulted in their highest merchandise sales. In 2023, Spotify's objective was for artists to earn additional revenue by allowing them to create and launch their unique merchandise. Wrapped 2023 was the first time artists in the U.S. and Canada could set up “Wrapped-specific merchandise discounts” for their top listeners of the year (How Spotify Made Wrapped, 2023). Spotify also made artists' ticket and merchandise offers more accessible and prominent within the Wrapped experience including in-app and via email (How Spotify Made Wrapped, 2023).

Records

Spotify wanted to highlight the top trends in the entertainment space that gave rise to a diverse range of artists, genres and listeners and why it was culturally significant. A main focus for press and news releases about the 2023 Wrapped campaign discussed the most listened to artists, songs, albums and podcasts that impacted popular culture trends, differentiating the moods and attitudes between gen-z, millennials, baby boomers and other demographics (The Top Trends of 2023 Revealed, 2023). “For the Record”, Spotify's online newsroom, published an article outlining notable trends for each month in 2023 and listeners' fascination of Spotify's use of AI. These discussions raised awareness for thousands of songs and playlists that are curated to distinct feelings and moments, including break-ups, pickleball, the Barbie movie, hit shows on HBO and more (The Top Trends of 2023 Revealed, 2023).

Press

A written interview was conducted with Louisa Ferguson, Spotify's global head of marketing experience, who gave meaningful and engaging insights into the 2023 Wrapped campaign. The interview, which can be found on Spotify's website, included her descriptions of why this campaign was unique and the overall experience the user could expect in a fun and lighthearted way that was personable to Ferguson. She also talked about her predictions for her Wrapped with an interactive playlist of her top songs attached to the article, which then directed the user to locate their own (Spotify's Head of Global Marketing, 2023).

Social media

An important aspect of the campaign was Spotify's own social media accounts, specifically Instagram and TikTok. The accounts were used from pre-launch teasing of the campaign until the very end, and maximized partnerships with influencers, artists and creators (2023 Wrapped for Advertisers, 2023). Spotify was consistent in reposting people's Instagram stories sharing their Wrapped, highlighting records and other data from the campaign, linking merchandise and tickets and more. Spotify's Instagram and TikTok feeds were filled with influencers and celebrities talking about Wrapped and promoting their own favorite music and podcasts (Spotify Instagram and TikTok). This was an earned media strategy because Spotify could rely on feedback from listeners and community engagement. YouTube was also used to explain the various features of the campaign that did not exist before. While Spotify had many internal and external tactics to target all of its audiences and maximize the campaign, its use of social media tied the campaign together and packaged it in a culturally significant way.

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