





Spotify Match

Where Your Music
Taste Finds Your
Perfect Match




 Spotify Today


 The Insight


 Introducing Spotify Match


 SWOT Analysis


 Positioning

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 Pricing Strategy

 Promotion & Distribution

 Market Sizing & Launch Plan

 Risks, Ethics & Safety



Match

 Lokesh A 

Spotify Today

POSITIONING STATEMENT

To **music listeners worldwide**, our streaming platform is the audio entertainment service that **personalizes discovery through AI-driven recommendations** because of its unmatched algorithm, 100M+ track catalog, and freemium accessibility.

751M

Monthly Active Users

Q4 2025

290M

Premium Subscribers

+10% YoY

\$4.5B

Quarterly Revenue

Record Q4

33.1%

Gross Margin

Record High

Differentiated marketing strategy — segments by demographics (Gen Z/Millennial-heavy), psychographics (music-driven lifestyle), and behavioral bases (discovery seekers vs. curators). This demographic perfectly overlaps with the dating app market: 61% of Tinder users are 18-34.

Play

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The Insight



Spotify knows your music taste better than you do. What if that data could predict romantic compatibility?

THE PROBLEM
Dating apps are broken. Tinder paying users dropped from 10.8M to 9.8M. Bumble down 16% YoY. Swipe fatigue is real — users want authentic connections, not curated bios. The \$6B+ market is growing, but the biggest players are shrinking.

THE OPPORTUNITY
Music taste is deeply personal. Spotify has years of unfiltered listening data on 751M people — the most authentic personality signal any platform has ever had. No one else can build this.

GROWTH STRATEGY
 Diversification (Ansoff Matrix): New product (dating) into new market (singles seeking relationships). Highest risk quadrant, but mitigated by Spotify's existing 751M user base, AI engine, and zero new downloads required.



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Introducing Spotify Match

A dating feature built into Spotify Premium. No swiping. No bios. Your listening history IS your profile.

"The only dating feature where your taste speaks before you do."



Music Match Score

Algorithm compares listening history, top genres, playlists, and Wrapped data to generate a % compatibility score with nearby users. No swiping. No bios. Your listening history IS your profile.



Song-First Chat

Instead of an opening line, you send a song. Conversations start around shared music — reducing awkwardness and creating instant common ground. Think of it as a built-in icebreaker.



Blend Dates

Matched users get a shared 'Blend' playlist (this feature already exists on Spotify!) that evolves as both keep listening — a living soundtrack of the relationship.

GROWTH STRATEGY

Diversification (Ansoff Matrix): New product (dating) → New market (singles seeking relationships). Highest risk quadrant, but mitigated by leveraging Spotify's existing 751M user base and AI recommendation engine. No new app to download — it lives inside Spotify.



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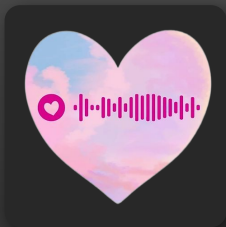


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SWOT Analysis

S & W = internal (under our control) | O & T = external (in our environment)



Strengths (Internal +)

- Deepest music taste data of any platform (751M users)
- Existing social features: Blend playlists, Group Sessions, Wrapped
- AI recommendation engine — core competency (VRIO: valuable, rare, inimitable)
- Brand equity among 18-34 demo: exact overlap with dating app users
- Record 33.1% gross margin — financial capacity for new product development

Weaknesses (Internal -)

- Zero experience in dating or social matching — new category
- Repurposing listening data raises privacy concerns (GDPR, CCPA)
- Service intangibility: 'music compatibility' is abstract, hard to demo
- Risk of alienating users who want Spotify to stay purely about music
- Match quality is unpredictable — service variability challenge

Opportunities (External +)

- Dating app market: \$6B+ revenue, projected ~\$21B by 2032
- 'Swipe fatigue': Tinder subs down from 10.8M peak, Bumble users -16% YoY
- Gen Z values authenticity over curated profiles — psychographic trend
- No major competitor uses deep music data for matching — blue ocean
- PURE app proves niche dating with differentiated USP can thrive (\$100M rev)

Threats (External -)

- Match Group / Bumble could add Spotify API integrations defensively
- Dating app safety regulations tightening globally (political/legal environment)
- User safety risks: harassment, catfishing — any incident hurts Spotify's core brand
- 'App-free dating' counter-trend among Gen Z (cultural environment shift)
- New regulatory classification as 'dating service' could add compliance burden



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POSITIONING STATEMENT

To **single Gen Z and Millennial music lovers**, our Spotify Match feature is the **music-based dating experience** that creates **authentic connections through shared taste instead of curated profiles** because **no other platform has the depth of personal listening data that Spotify does.**

		More Benefit	Same Benefit	Less Benefit
Price	Higher Price	Hinge+ (\$50/mo) eHarmony (\$36/mo)		
	Same Price	SPOTIFY MATCH (\$0 add-on to Premium \$11.99)	Bumble Premium (\$30/mo)	
	Lower Price		Tinder Free (limited)	Bumble Free (very limited)

'More for the same' — Spotify Match adds a dating feature at no extra cost to Premium subscribers. The differentiation: your real, unfiltered listening behavior as the basis for compatibility. No dating app can replicate this.



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The Product

Spotify Match as a whole product (Ch. 7) and brand extension

Core Product

Music-taste compatibility matching — the algorithm that compares two users' listening histories and generates a % match score. This is the fundamental reason to use Match.

Augmented Product

Song-first chat, shared Blend playlists that evolve over time, 'Date Night' playlist generator, concert suggestions for matched pairs, and match expiration timers. These features differentiate Match from anything else on the market.

Extended Ecosystem

The entire Spotify listening experience IS the product. Every song you listen to makes the algorithm smarter. Wrapped becomes a dating profile. Your Daily Mix becomes a conversation starter. This creates massive switching costs — leave Spotify, lose your Match profile's depth.

Services marketing (Ch. 7): Match faces intangibility (can't preview chemistry), inseparability (only works on Spotify), variability (match quality varies), perishability (matches expire in 48hrs).

Brand extension: 'Spotify Match' extends the master brand into dating — leveraging existing brand equity (personalization, youth, fun) while 'Match' signals a new category.



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Pricing Strategy

CAPTIVE-PRODUCT PRICING (Ch. 9)

Match is 'free' but requires Spotify Premium (\$11.99/mo) — just like Amazon sells Kindle at cost and profits on ebooks, or printers are cheap but ink is expensive. The core product (music) funds the add-on (dating). The real revenue isn't from Match itself — it's from converting Spotify's 461M free users to Premium to access the feature.

OPTIONAL-PRODUCT PRICING

Super Match boost

\$2.99/mo — 5 highlighted profiles/day

See Who Liked You

\$4.99/mo — reveals matches

Profile Boost

\$1.99 each — one-time purchase

PRODUCT LINE PRICING

Spotify Free

\$0/mo

No access to Match

Spotify Premium

\$11.99/mo

Match included (5 matches/day)

Match Power-Ups

\$2.99-\$4.99/mo

Unlimited matches + extras

This mirrors Spotify's existing listener pricing (Free → Premium → Family) and follows the same freemium conversion funnel, with Match as the new incentive to upgrade.



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Promotion & Distribution

DISTRIBUTION (PLACE)

Zero-level channel — direct-to-consumer through Spotify's existing app across 180+ markets. No separate download, no new profile creation. You just opt in. This is THE competitive advantage: zero friction. Every dating app requires a new download, a new profile, new photos. Match requires one toggle.

PROMOTION MIX (Pull Strategy)

Viral Social Campaign

'What's Your Music Match?' — shareable compatibility scores on TikTok/Instagram. Users post % match with friends and crushes. Mirrors Wrapped's viral shareability (300M+ users in 2025).

Influencer Marketing

Partner with couples who share music taste overlaps. Micro-influencers (10K-100K followers) in music/lifestyle niches — higher engagement rates, more authentic to the brand.

In-App Discovery

Push notifications to Premium users, banner in home feed. Integration into next Wrapped: 'Your most compatible listener this year was...' Zero-cost owned media promotion.

Sales Promotion

'Match Week' launch event — double daily matches for 7 days. Referral program: invite a friend, both get free Super Match boost. Creates urgency during introduction stage of PLC.



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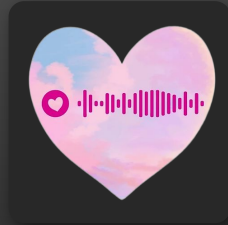


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Market Sizing & Launch Plan

MARKET SIZING (Bottom-Up)

of buyers: 290M Premium subscribers

Single & 18-34:

~40% = 116M eligible users

Opt-in rate:

Target 5% = 5.8M Match users

Direct rev (10% buy power-ups):

~\$21M/yr

Real value:

Premium conversion lift from free users. If Match converts just 1% of 461M free users → 4.6M new Premium subs = ~\$660M/yr in new subscription revenue.

LAUNCH PLAN



Q3 2026

Beta in 3 college markets (Boston, LA, London) — concept testing with 50K users



Q4 2026

Expand to US/UK Premium users — introductory campaign, viral TikTok push



Q1 2027

Iterate on algorithm — add podcast taste and concert history as signals



Q2 2027

Global rollout to 20+ markets — evaluate PLC stage (growth vs. fad?)

Fad vs. Fashion (Ch. 8): Is music-based dating a fad (quick rise, quick decline) or a fashion (gradual adoption, longer lifecycle)? Our launch strategy accounts for both — beta testing before full investment, with a built-in pivot to 'Spotify Friends' (social matching without dating) if the dating angle declines.



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Sustainable marketing (Ch. 16): meeting present needs while preserving future generations' ability to meet theirs

User safety (harassment, stalking)

Mandatory opt-in, photo verification, block/report tools, no real-time location — only city-level proximity. Partnership with safety organizations.

Brand dilution ('Spotify isn't a dating app')

Position as a feature, not a product. Match lives inside Spotify, doesn't rebrand it. If it fails, it's a feature removal, not a brand crisis.

Privacy backlash (using listening data)

Full transparency, granular opt-in controls, anonymized matching until mutual consent. GDPR/CCPA compliance from day one. Users can delete Match profile without affecting Spotify account.

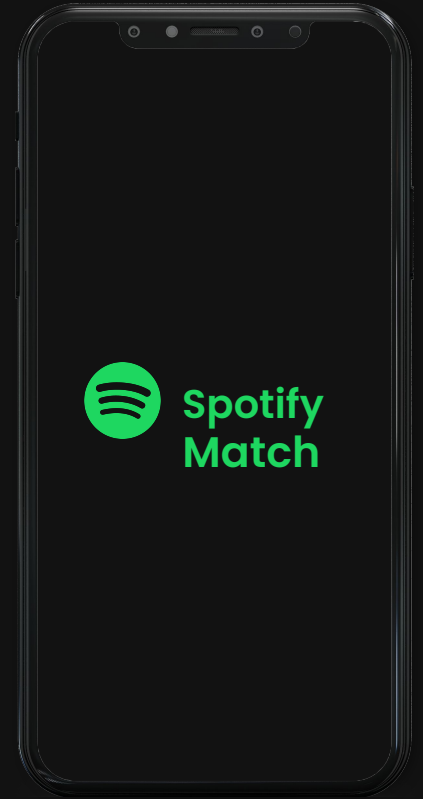
Regulatory classification as 'dating service'

Proactive compliance with emerging dating safety regulations. Independent algorithmic audit to prevent bias. Age verification for users under 18.

Ethical concern: algorithmic fairness

Matching algorithm must not discriminate by race, gender identity, or other protected characteristics. Regular audits. Aligns with societal marketing concept (Ch. 16) — society's interests alongside company profits.

Thank You!



Spotify Match
Lokesh Addagiri



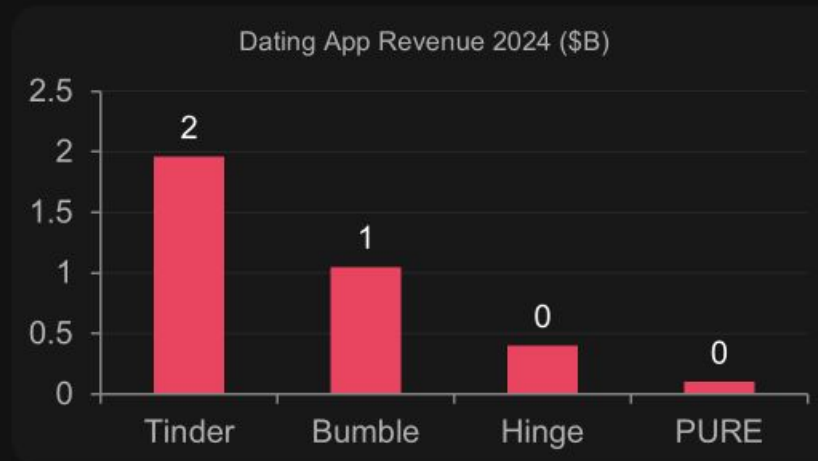
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EXHIBIT SLIDES

Additional depth for reference — not intended to be presented

Exhibit 1: Spotify Financials & Dating Market



Spotify's quarterly revenue dwarfs the entire dating app industry. Even modest Match success significantly boosts Premium conversion rates. Dating app users skew 18-34 (61%+ of Tinder), overlapping perfectly with Spotify's core demographic.

Exhibit 2: Perceptual Positioning Map

How singles perceive dating options: Authenticity vs. Monthly Cost



Spotify Match's unique position: highest authenticity (real behavior vs. self-reported) at lowest cost (\$0 add-on). No competitor can occupy this space — competitive advantage through data moat (Ch. 6).

Exhibit 3: Full Promotion Mix Detail

Advertising (Digital)

Targeted Instagram/TikTok ads: 'Your Wrapped said you're 87% indie folk. Someone nearby is too.' Google ads targeting 'dating app alternative' and 'meet people with same music taste.' Spotify's own Ad Studio for audio ads between songs on the free tier. Programmatic display on music blogs and lifestyle sites.

Content Marketing

Data-driven blog posts: 'The genres most likely to lead to lasting relationships.' YouTube/TikTok series: 'First Date, First Song' — couples share the song they sent as their first message. Artist partnerships: 'Matched over Radiohead' stories. This is owned media that builds brand authority.

Public Relations

Press releases to Billboard, Pitchfork, TechCrunch, The Verge. Frame as 'Spotify reinvents dating' — newsworthiness drives earned media. Crisis comms plan ready before launch for any safety incidents.

Sales Promotion

'Match Week' at launch: double daily matches. Referral: invite a friend, both get Super Match boost. Valentine's Day special: 'Your Perfect Match Playlist' campaign. These drive trial during introduction stage of PLC.

Exhibit 4: Product Life-Cycle Strategy Detail

Development (Now)

We are currently in the idea generation and concept development stages | This presentation serves as the marketing strategy development phase. Next steps: business analysis (cost modeling), product development (build the matching algorithm), and concept testing (beta with 50K users in college markets). Customer-centered development: surveying Spotify users about willingness to use music-based matching.

Introduction (Year 1)

Build awareness and trial. Heavy digital promotion (viral TikTok campaign). Introductory features only. Expect low direct revenue but measure Premium conversion lift. Key metrics: opt-in rate, weekly active users, messages sent per match. Promotional pricing: free for all Premium users (no additional charge).

Growth (Years 2-3)

If engagement holds: expand features (voice notes, concert matching, group matching for friend groups). Introduce optional-product pricing (power-ups). Expand internationally. If trending toward fad: pivot early to 'Spotify Friends' (social matching without dating).

Maturity / Decline

Maturity: build loyalty through relationship milestones ('1 year of shared Blends!'). Defend against imitators. Decline: the matching infrastructure can pivot to friend-finding, networking, or roommate matching. The algorithm is the asset, not the dating wrapper.

Exhibit 5: Branding & Brand Extension

Brand Extension Strategy (Ch. 7)

'Spotify Match' uses the master brand + sub-brand model. 'Spotify' provides instant recognition and trust; 'Match' signals dating. Similar to Apple → Apple TV+, Apple Fitness+. Risk: if Match fails or generates bad PR, it reflects on core Spotify brand. Mitigation: position as a feature, not a standalone product — easy to remove without brand damage.

Brand Association Transfer

Spotify's associations (personalized, music-obsessed, fun, youthful) transfer positively to dating. But Spotify is NOT associated with romance — this is a new association to build. Campaign lean: don't compete with Hinge on seriousness. Compete on personality and authenticity. 'Your Wrapped, but for love.'

Brand Experience as Differentiator

Brand positioning must be communicated through customer experience, not just ads (Ch. 7). Every touchpoint: the match reveal animation, the shared Blend that grows, the 'anniversary' notification when a couple's playlist hits 100 songs. These micro-moments build the brand and create emotional switching costs.

Exhibit 6: Ethics & Sustainability Deep Dive

Data Privacy & Consent

Strictly opt-in. Users choose which data is shared (genres only → top artists → full history). Anonymized matching until mutual consent. Users can delete Match profile without affecting Spotify. Sustainable marketing concept: society's interests alongside company profits.

Algorithmic Fairness

Must not discriminate by race, gender identity, or protected characteristics. Regular third-party audits. Transparent matching criteria. Music taste may correlate with demographics — algorithm must be tested for disparate impact.

Environmental Sustainability

Matching algorithms require compute resources. Spotify should offset carbon emissions from AI processing. From the sustainable marketing concept framework, Match should be in the quadrant that is both ethical AND strategically focused long-term.

Sustainable Marketing Concept

Spotify Match must be both ethical (Yes) and have a long-term strategic focus (Yes) — placing it in the sustainable marketing concept quadrant. Short-term growth at the expense of user safety or privacy would put it in the strategic planning concept quadrant — profitable but not ethical, and ultimately unsustainable.

Exhibit 7: Anticipated Q&A Questions

"What if people start using Spotify just to game their dating profile?"

That's actually a feature, not a bug — it drives engagement. And the algorithm weights long-term listening patterns over recent spikes, so gaming is difficult. The more you try to fake your taste, the worse your matches get.

"How is this different from Bumble adding Spotify to profiles?"

Bumble shows your top artist as a badge. Spotify Match compares your entire listening history — every song, every playlist, years of data. It's the difference between a bumper sticker and a personality test.

"What about people who share accounts or family plans?"

Match would only be available on individual Premium accounts, not Family or Duo plans. Spotify already separates listener profiles within shared plans — the data is already individualized.

"Isn't this just a fad?"

Maybe! That's why our launch strategy includes concept testing and a built-in pivot to 'Spotify Friends' if the dating angle declines. The matching algorithm is the asset — the dating wrapper is just the first use case.

"What segment of the market are you targeting?"

Concentrated marketing (niche): single, 18-34, music-obsessed, urban, digitally native. Psychographic: values authenticity over polished profiles. Behavioral: already active Spotify users (high engagement). This is the exact demo where dating apps and Spotify overlap.

Exhibit 8: Sources & References

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