

Presented by:  
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# Sonya.

# Today's Agenda

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- 06** Competitive Pricing Analysis
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# Introduction

We are Spotify Product Managers, asking Sony for an investment to develop our new product, Sonya.

# Current Landscape

- After years of double-digit growth, smart speaker adoption has hit a “great stall,” rising only marginally (35.0% → 36.6%) from 2021–22.
- While the US smart-speakers market has plateaued, features like Spotify Radio and DJ have been on the rise.
- Apple, Google, and Amazon have focused their smart speakers on general voice assistance, none of them using the technology to extend the listening experience into something more immersive or personalized than a regular speaker.

# What is Sonya?

**Sonya** is a smart speaker that reimagines Spotify's Daylist as a continuously updating, real-time experience.

While serving fixed playlists on demand, Sonya can also generate a live feed that adapts dynamically throughout the day based on time, weather, previous listening behaviors, and verbal user prompts.

Sonya also incorporates environmental cues such as changing light, movement, and environmental noise levels to adapt for the consumer.



# Motivation

## For Spotify:

### Spotify needs a hardware foothold

Spotify currently depends on others' ecosystems and lacks a dedicated device that fully supports its personalization features.

→ Sonya lets Spotify control the listening environment and collect richer in-home usage data.

### Growing demand for personalized audio

Gen Z listening of AI-driven features increased **34%** from 2023-2024

**79%** of Gen Z say “Spotify’s AI features make my experience feel tailored to me”

**72%** of Gen Z say “I trust Spotify with my personal data more than other apps”

→ Sonya opens a new way for Spotify to capitalize on this demand and trust from their users: leveraging its data in combination with new in-home data to create an even more personalized experience for listeners

# Motivation

## For Sony:

### **Growth opportunity in the smart speaker market**

Sony holds 9% of U.S. smart speaker ownership, leaving significant room for growth.

→ Even a 3–6% increase over the next few years would meaningfully strengthen Sony's position in the market.

### **Positioning Sony in the Era of AI-Driven Personalization**

Spotify is rapidly expanding its investment in AI and context-aware listening, making personalization not just a feature, but a core part of the listening experience.

→ Sonya creates an opening for Sony to pair its hardware expertise with Spotify's software intelligence, aligning its brand with the future of adaptive audio.

# Our Differentiators

*What Makes Sonya Unique?*

01

## Real-Time, Dynamic Playlist Generation

- No current smart speaker **updates** your Spotify playlist as you listen
- Amazon/Google speakers only play playlists. They don't generate new ones in real time.

02

## Voice-Driven Preference Correction

- Amazon Echo/Google Nest only support **basic voice commands**
  - Don't integrate voice commands into Spotify's recommendation algorithm
- Uses voice feedback as a training signal

03

## Atmospheric Intelligence

- On top of weather & time of day cues, Sonya also takes into account lighting changes, movement, noise levels, etc.
- Echo/Nest can schedule routines, but **don't intelligently select music based on environmental conditions**

04

## Deep Spotify Integration

- Most smart speakers don't modify or generate Spotify recommendations
- The **only speaker** that personalizes Spotify at the algorithm level

# Sonya vs Current Smart Speakers

Feature	Amazon Echo	Google Nest	Apple Homepod Mini	Sonya
Spotify Voice Control	Limited	Limited	Limited	Yes
Real-Time Playlist Generation	No	No	No	Yes
Atmospheric Detection	Room Adaptation Technology	Room/Media EQ	None	Atmosphere + Behavior Fusion
Personalized Spotify Integration	No	No	No	Yes

# Pricing Strategy

**Amazon Echo: \$30–\$190**

**Google Nest Audio: \$99**

**Apple HomePod Mini: \$299**

**Sony's Entry-Mid Tier Speaker Pricing: \$179–\$350+**

## Option A: Hardware Only (\$149)

- Full adaptive personalization
- Deep integration with existing Spotify Premium account
- Best for existing Spotify Premium users

## Option B: Hardware + 6 Months Spotify Premium Trial (\$179)

- Full adaptive personalization
- Incentivizes new sign-ups
- Higher perceived value
- Sony wants new hardware customers & Spotify wants conversions

# Sonya Budget Breakdown

*How much will Sonya cost to develop?*

**01**

## Spotify's Software Development ~ \$8M

- Real-time recommendation engine & personalization
- Voice Assistant Integration (Natural Language Processing and Understanding → NLP/NLU)
- Daylist Live + mood-adaptive algorithms
- Spotify app integration & UI development
- Cloud infrastructure, testing, and quality control

**02**

## Sony: Hardware R&D ~ \$3.5M

- Acoustic engineering & sound profile tuning for premium quality.
- Hardware prototyping & industrial design
- Far-field microphone array development
- Sensor integration (light/movement detection)
- Firmware optimization & device reliability testing

**03**

## Marketing & Launch Strategy ~ \$31.9M

- Teaser campaign
- Hero Launch Video
- Influencer + Creator Partnerships
- Spotify In-App Promotion
- Sony retail + OOH

**04**

## Project Timeline & Operations

- 18-month development timeline (Spotify + Sony)
- Cross-company partnership management
- Beta testing with select Spotify Premium users
- Manufacturing + supply chain coordination
- Launch logistics and post-launch support

# Marketing: Rollout & Budget

## Phase 1: Teaser Campaign

- 6-second Spotify in-app teasers
- Tiktok/Reels reacting to moods

## Phase 2: Hero Launch Video

- YouTube pre-roll
- Spotify homepage banner
- Sony.com landing page takeover
- Instagram feed + stories

## Phase 3: Influencer + Creator Partnerships

- Lifestyle + music influencers start a “Ask Sonya for your vibe” trend
- UGC-style “unboxing”

## Phase 4: Spotify In-App Promotion

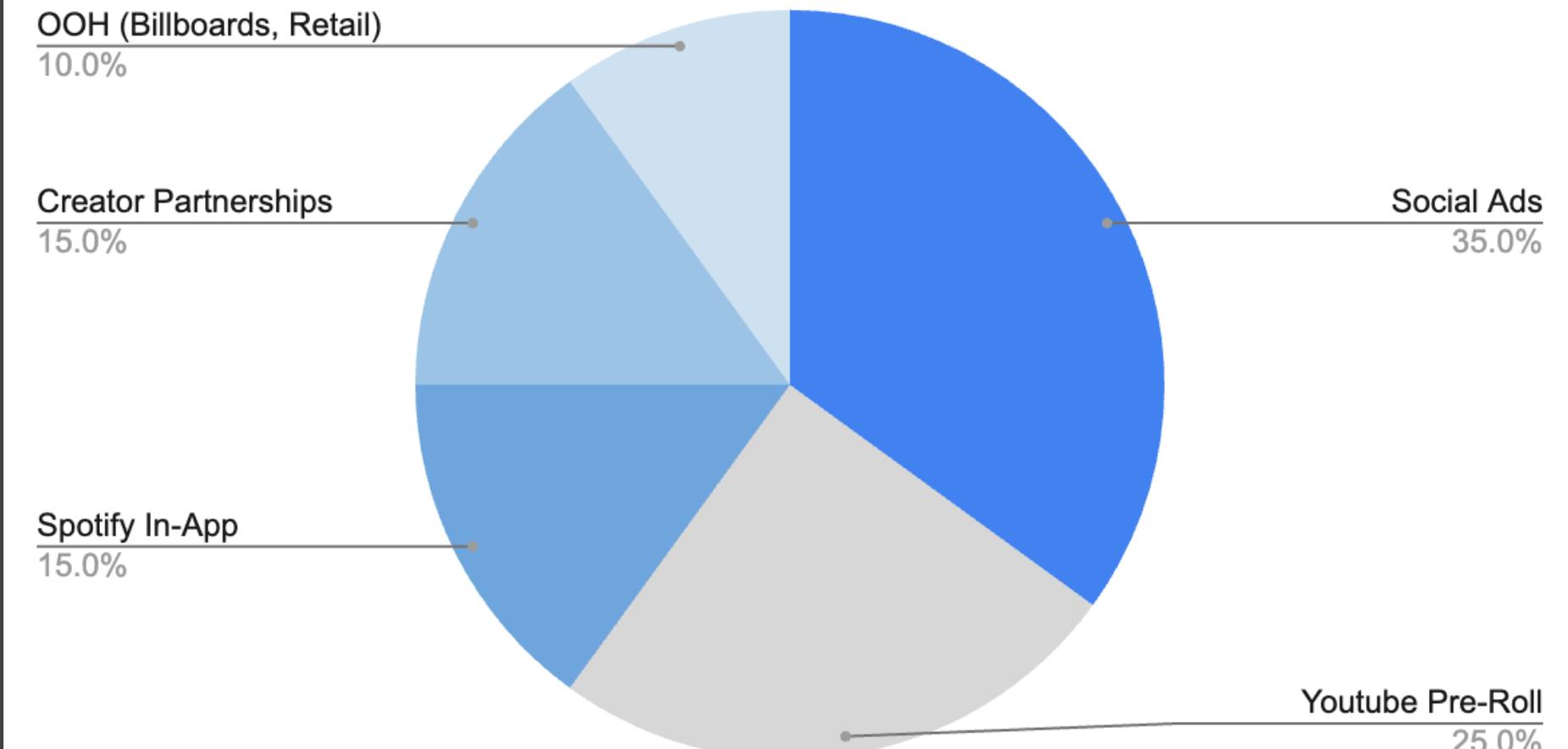
- Daylist users get “Start Your Day with Sonya Mode” banner
- On Repeat / Discover Weekly interstitials

## Phase 5: Sony Retail + OOH

- Sony retail store demos
- Sonya listening booths
- Billboards a + retail

## Marketing Budget Allocation

Based on ~\$32M Marketing Budget



# Campaign Mock-up



Start your day  
with Sonya Mode



Spotify

Start your day  
with Sonya Mode



LEARN MORE

# Success Metrics

## Early Sales Performance

- Track number of Sonya units sold within the first year after launch.
- Compare these sales figures to the first year performance of other smart speakers on the market to gauge success.

## New Customer Acquisition into the Sony Ecosystem

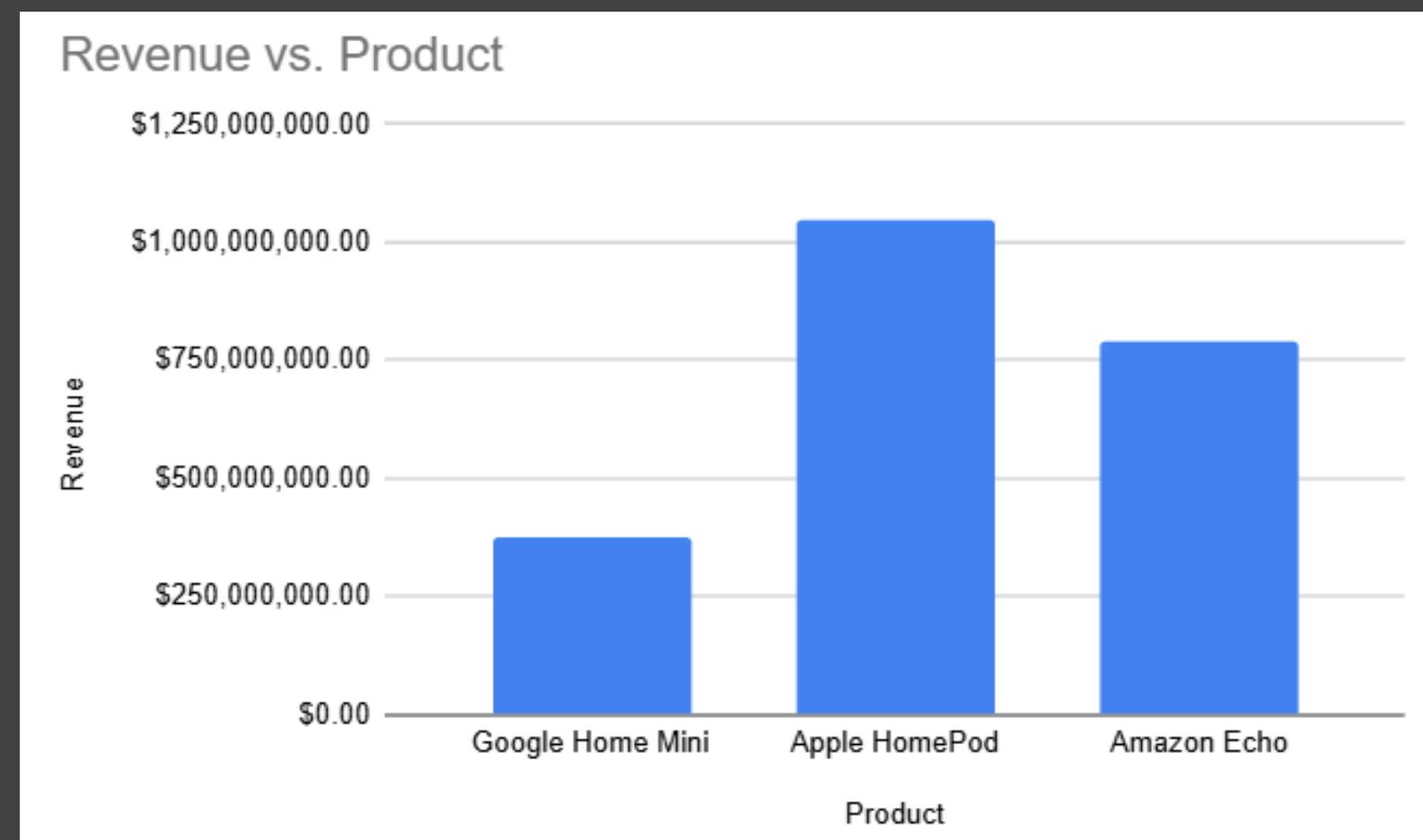
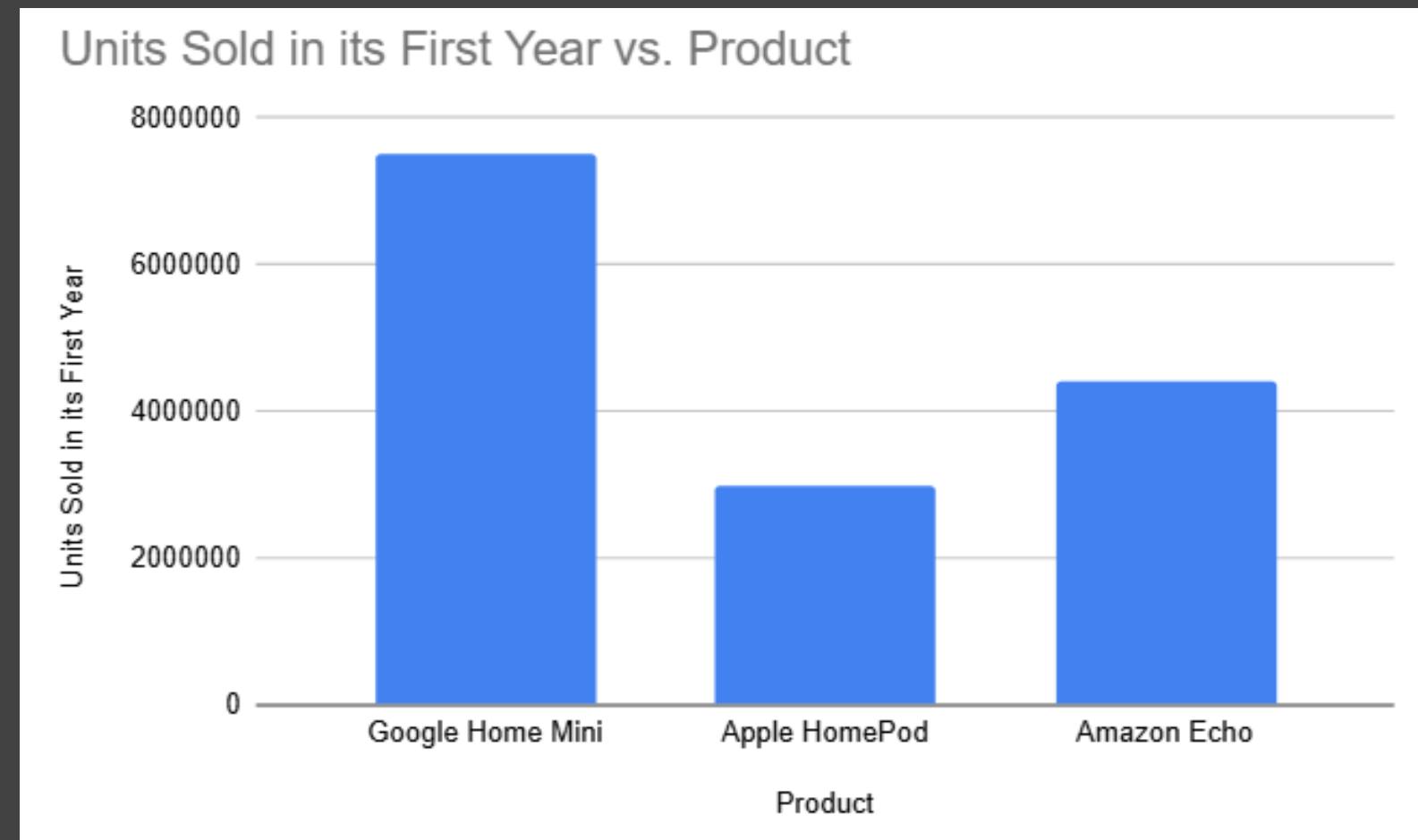
- Add a brief post-purchase survey asking whether customers previously owned Sony audio products (speakers, headphones, soundbars, etc.).
- Measure the proportion of first-time Sony hardware buyers.
- A combination of strong early sales + high first-time Sony customers signals a strong investment.

## Sonya-Driven Recommendations

- Track average listening time per day for songs or playlists recommended exclusively by Sonya.
- Measure playlist adds / save rates of Sonya-recommended songs.
- Measure skip rates of Sonya-recommended songs.
- Compare Sonya metrics to Spotify benchmarks:
  - Listening time vs. Spotify Daylist.
  - Save/skip rates vs. Daylist rates.

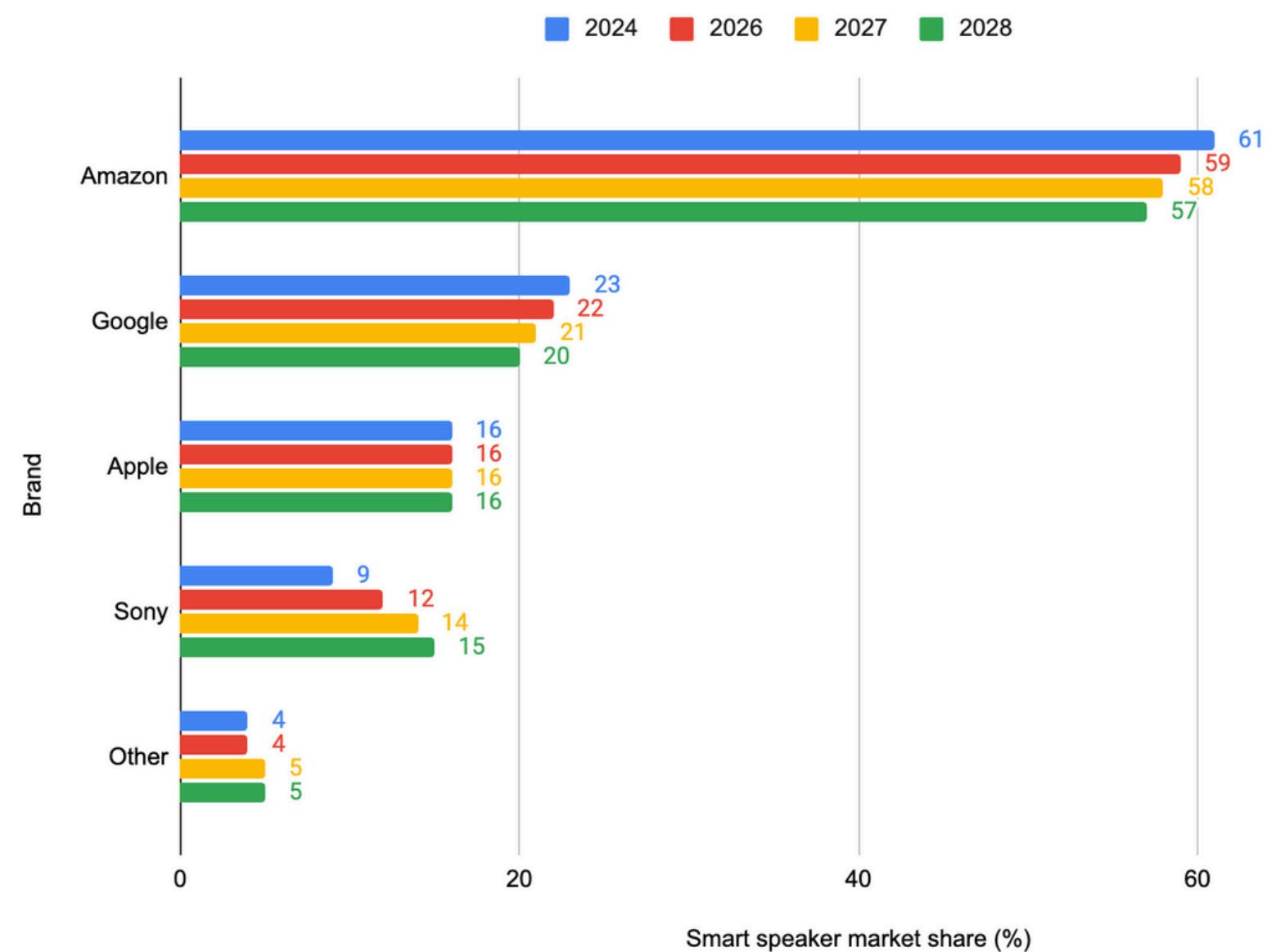
## Big Tech Smart Speaker Charts

- Benchmarking against first-year sales of Echo, HomePod, and Google Home (~4.7M units)
- Sony's 18.1 M headphones sold from their 2024 sales, and along with Spotify's premium user base of 281M users in 2025.
- First-year sales forecast of 800,000 - 1,800,000 units,
- Sonya can reach **1.2M** sold units, generating at least over \$178M just from hardware sales (not including the Spotify Premium+ Package).
- Sonya can be a new superpower in being both a general voice and a premium smart-speaker for music and other audio enthusiasts.



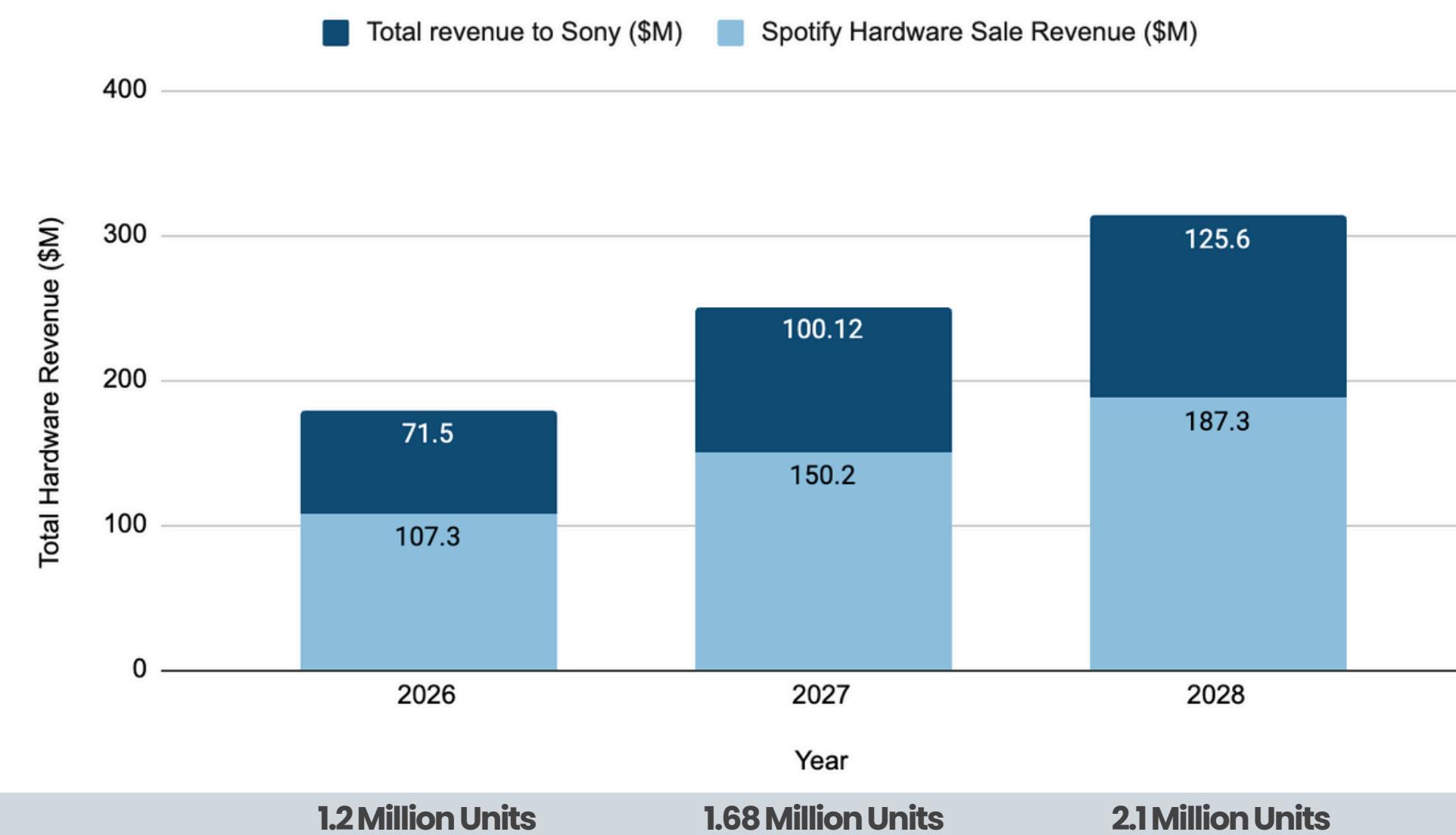
# Sony's ROI

Projected Smart Speaker Market Share % 2026-2028 using 2024 baseline



~6% Increase in Smart Speaker market

Total Projected Hardware Revenue (\$M) Sony/Spotify Split 2026-2028



40% of Sonya Hardware Revenue

Exclusive Rights to Sonya Software

# Thank You!

[Link to Spreadsheet Analysis](#)

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