

Sunday, 24 June 2018

YouTube Music set to challenge fast growing Spotify and SoundCloud

Over 5 million Australians aged 14+ now visit radio or music sites in an average four weeks, nearly a quarter of Australians. These are the latest results from Roy Morgan Single Source derived from in-depth face-to-face interviews with 1,000 Australians each week, 50,000 each year.

Research conducted directly with real people is qualitatively and quantitatively more valuable than information drawn only through automated processes from web browsers and complicated algorithms. It's the only way to learn how many real people – not bots, devices, clicks, or impressions – visit a site.

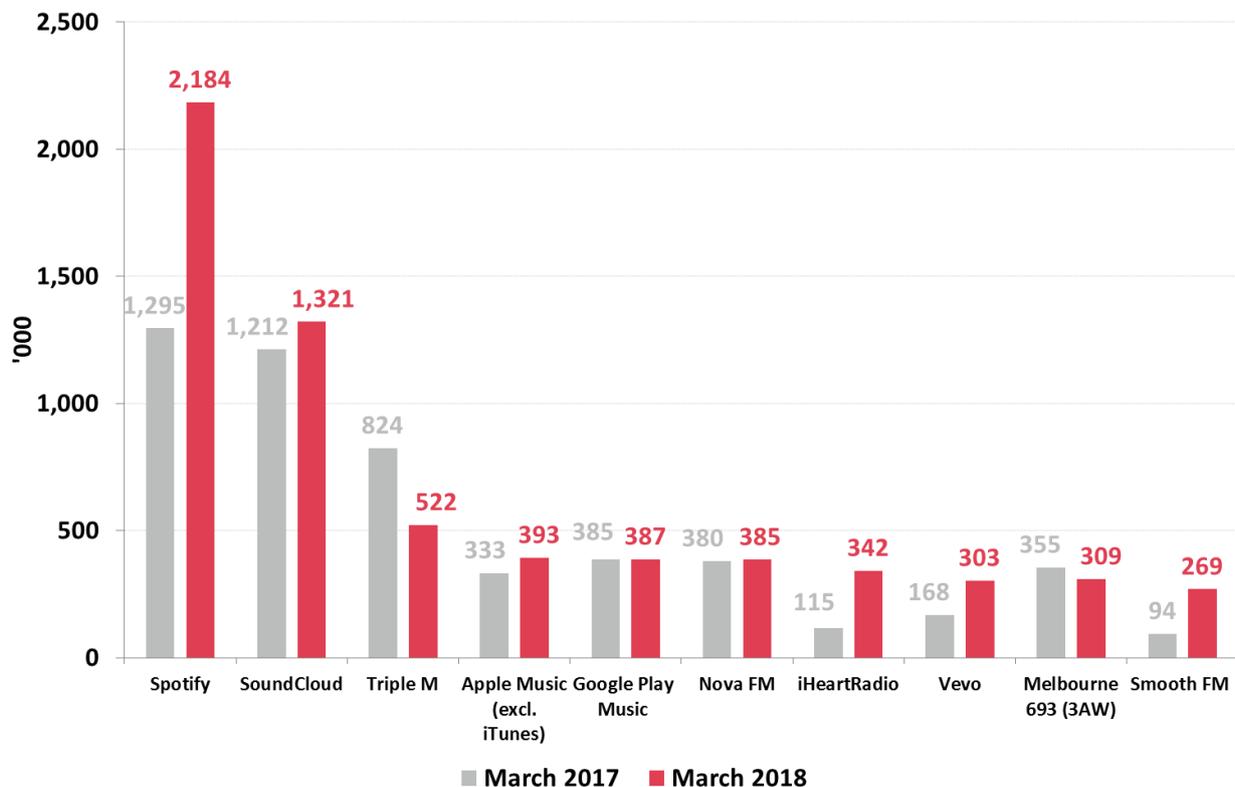
Spotify is easily Australia's most popular radio or music site visited by nearly 2.2 million Australians in an average four weeks, a 69% increase, or 889,000 more Australians than a year ago.

There is a significant gap to SoundCloud in second place with over 1.3 million visitors in an average four weeks while nationally syndicated radio station Triple M is a clear third with over 520,000 visitors to its site.

Apple Music and Google Play Music both have just under 400,000 visitors to their sites in an average four weeks and represent two of the tech giants competing against each other in an increasing number of areas.

Compared to the current leading music and radio websites YouTube captures a much greater share of the Australian marketplace already. Over 15.2 million Australians access YouTube in an average four weeks representing around 75% of Australia's adult population. YouTube Music's entry into the streaming music industry is expected to see Google Play Music rolled into the new service.

Australia's Top 10 Music and Radio websites visitation in an average four weeks – March 2017 cf. March 2018



Source: Roy Morgan Single Source: March 2017, n=4,000, March 2018, n = 4,008 Australians aged 14+. Note: These visitation figures are not derived from cookies, device counts, impressions or clicks.

Vevo, Spotify, Apple Music and SoundCloud most at threat from YouTube Music

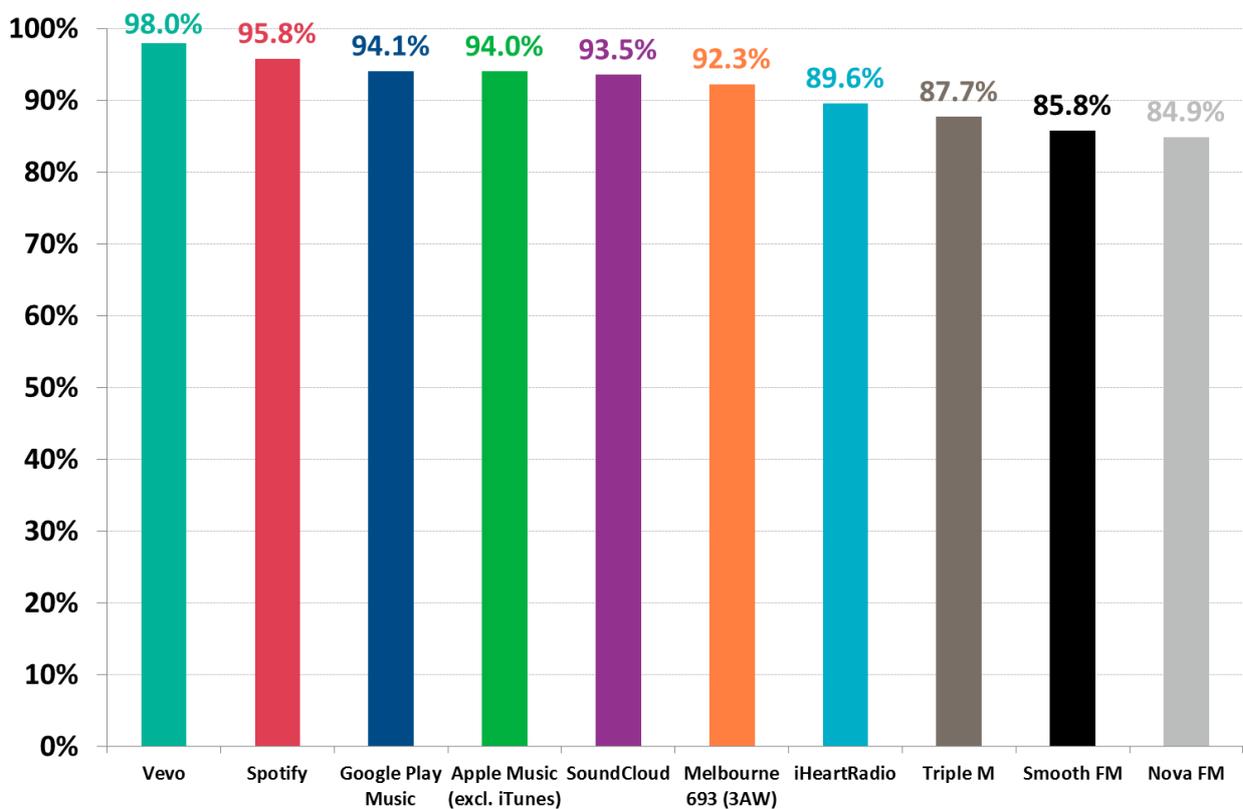
YouTube's huge reach amongst the Australian population means it's inevitable a substantial proportion of those who visit existing radio and music sites will also visit the YouTube site in an average four weeks.

Analysing data on the leading radio and music websites in the 12 months to March 2018 shows that 98% of those who visit the Vevo music website also visit YouTube and 95.8% of market leader Spotify's website visitors also visit YouTube.

As pointed out Google Play Music is expected to be combined with the new YouTube Music but it's worth pointing out over 90% of visitors to the Apple Music, SoundCloud and 3AW Melbourne 693 sites also visit YouTube.

Less than 90% of visitors to the Nova FM, Smooth FM, Triple M and iHeartRadio sites also visit YouTube.

% of visitors of Australia's Top 10 radio and music sites who visit YouTube – 12 months to March 2018



Source: Roy Morgan Single Source: April 2017 – March 2018, n = 50,014 Australians aged 14+.

Michele Levine, CEO, Roy Morgan, says the announcement by YouTube that it is launching YouTube Music to compete head on with the likes of music streaming services such as Spotify and SoundCloud presents a clear threat to the audiences these sites currently have:

“Over 5 million Australians now visit radio and music sites in an average four weeks led by streaming music service Spotify with nearly 2.2 million visitors and rival SoundCloud with over 1.3 million visitors.

“However, although Spotify and SoundCloud have stolen a march on competitors which include many of Australia's leading radio stations, the biggest threat to their business model could well be YouTube Music which is set to challenge their leadership in the market head on in the future.

“Over 15.2 million Australians visit YouTube in an average four weeks – over three times the size of the combined radio and music site market at present. Unsurprisingly given the size of YouTube's

audience there is a huge cross-over between those who visit YouTube and visitors to leading music and radio sites such as Spotify, SoundCloud, Triple M, Apple Music and Nova FM.

“Over 95% of visitors to Spotify also visit YouTube in an average four weeks and the figure is well over 90% for SoundCloud, Apple Music and Vevo as well. The figures are slightly lesser for leading radio sites such as Triple M, Nova FM and Smooth FM but still well over 80%.

“In an increasingly interconnected and online world the ability of giant technology companies such as Google/YouTube, Amazon, Apple, Facebook and the like to enter new markets and challenge existing players means those already in the market need to stay on top of exactly who and where their customers are.

“Roy Morgan Single Source combined with the psychographic segmentation provider by [Helix Personas](#) provides radio and music website owners with unique information about the visitors to their websites not available anywhere else.

“The power of Roy Morgan Single Source is derived from in-depth face-to-face interviews conducted with over 1,000 Australians each week, and over 50,000 per year. Research conducted directly with real people is qualitatively and quantitatively more valuable than information drawn only through automated processes from web browsers and complicated algorithms. It’s the only way to learn how many real people – not bots, devices, clicks, or impressions – visit a site.”

For comments and information about Roy Morgan’s website visitation data, please contact:

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Related research findings

Browse our Online Store for an extensive range of profiles on the [different websites Australians visit](#) for radio and music including [Spotify](#), [SoundCloud](#), [Triple M](#), [Google](#), [Apple](#), [YouTube](#), [Nova FM](#), [Vevo](#), [3AW](#), [Smooth FM](#) and more.

Compiled with data from Roy Morgan’s Single Source survey (the largest of its kind in the world, with 50,000 respondents p.a), these ready-made profiles provide a broad understanding of the target.

About Roy Morgan

Roy Morgan is the largest independent Australian research company, with offices in each state of Australia, as well as in the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan has over 75 years’ experience in collecting objective, independent information on consumers.

Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
50,000	±0.4	±0.4	±0.3	±0.2

