

Tuesday, 16 June 2020

12.7 million Australians use streaming music services

Over 12.7 million Australians (61%) now use music streaming services in an average four weeks – an increase of over 3.7 million from only three years ago.

Spotify is the clear market leader used by 8 million Australians and has more than doubled its Australian user-base since 2017, up by 4.4 million (+122%). The growth for Spotify is faster than the overall market growth and it has been attracting existing music streamers from rival services.

The most prominent rival to Spotify is clearly YouTube Music (including Google Play Music) now used by 5.5 million Australians (26%). [Google announced in recent weeks](#) that Google Play Music will finally be shutting down later in 2020 after first flagging this intention three years ago.

In early 2020 Google Play Music had just over 1 million Australian users with around half already using YouTube Music. Google has now introduced a button for existing users of Google Play Music to switch their music libraries, playlists, and preferences over to YouTube Music.

Although behind the two market leaders, Apple Music and SoundCloud are each used by substantial numbers of Australians as the third and fourth most popular services in the music streaming market.

It's important to understand that these figures do not include all live radio streams and podcasts that Australians are able to listen to via these services. Early in 2019 over [1.6 million Australians downloaded podcasts in an average four weeks](#) and there are many others who livestream radio broadcasts of sporting events and talkback radio as well.

In contrast to these growing services a declining minority of 8.1 million Australians (39%) don't currently use any music streaming services, a drop of 2.7 million from three years ago.

Who is the quintessential streamer?

People who stream music online are more likely than the average Australian to be young, tech savvy and ready to spend

The quintessential Australian streamer is a young woman under 35 years of age and likely to be in full-time white collar employment. She's likely to be a 'big spender' and a ['Metrotech'](#) – i.e. in the [200 Metrotechs](#) Helix Personas Community.

Metrotechs are *'Socially aware, successful, career focused, culturally diverse as well as trend and tech focused. They are committed experience seekers, willing to spend big on the best of city life and thrive on being out and about in the world.'* Within the broader Metrotechs community the Personas that are most likely to stream music online are [204 High Life](#), [206 Fit & Fab](#) and [210 Academic Optimists](#).

People who stream music online are more likely than the average Australian to agree that *'I will buy a product because of the label', 'I was born to shop', 'I am always ready to try new and different products', 'I often buy takeaway food to eat at home', 'I prefer the bright lights and big cities when I travel', 'I play video games at home' and 'If we don't act now we'll never control our environmental problems.'*

In terms of media consumption she's far more likely than average Australians to watch Pay TV/ Subscription TV in an average week and far more likely to catch a movie at the cinema – when they're open. She's also far less likely to consume traditional media such as newspapers or magazines, and most likely to be only a light watcher of commercial TV. She does spend far more time online than the average Aussie.

The declining minority of people who don't stream music online tend to stick to traditional media for News and Reality TV

The typical Australian who doesn't listen to music online is a woman aged 50 and above who is likely retired, or otherwise not working and a light spender. She's most likely to be conventional family-oriented and a part of the [400 Hearth and Home](#) Helix Personas Community.

FOR IMMEDIATE RELEASE

Australians in the **Hearth and Home** Community are ‘Closest to the average Australian, life revolves around the home for these contented Australians who embrace conventional family life. Perennial home improvers, they see their homes as an expression of their status and achievements.’ Within the community the Personas least likely to stream music online are [408 Cautious Conservatives](#) & [404 Traditional Values](#).

People who don't listen to music online are more likely than the average Australian to agree that ‘A low fat diet is a way of life for me’, ‘I'm concerned about my cholesterol level’, ‘I spend more when my children come shopping with me’, ‘Expensive restaurants are not worth the money’, ‘I always watch the news on TV to keep me up-to-date’ and ‘I always read the business section of the newspaper’.

Her media consumption is heavily tilted towards traditional media outlets and she's more likely to read newspapers and magazines, listen to radio and watch commercial TV for more than three hours per day than the average Australian. Her favourite TV channels are Seven, Nine and the ABC and the TV shows you'll most likely find her watching include the News, Reality TV, Current Affairs and Dramas.

These are the latest findings from the Roy Morgan Single Source survey derived from in-depth interviews with over 1,000 Australians each week, and 50,000 annually.

Michele Levine, CEO, Roy Morgan, says the decision by Google to finally shutter its Google Play Music service later in 2020 has put the spotlight on the Australian music streaming market which is dominated by two major players:

“Over 12.7 million Australians (61%) now use a music streaming service, up from 9 million (45%) just three years ago. Importantly, the largest growth has been over the last year with an increase of 1.6 million users of music streaming services since early 2019.

“Those listening to music online tend to be younger and more open to new ideas than the average Australian, and ready to spend their money to seek out new experiences whether traveling, sampling different cuisines are trying the latest tech products. The socially aware and career focused [Metrotechs](#) exemplify these attitudes.

“At present the Australian music streaming market is dominated by Spotify with 8 million users and YouTube Music (including the soon to be closed Google Play Music) with 5.5 million users.

“However, competition in music streaming is set to increase with global tech giants Apple and Amazon both significant players. Apple Music launched in 2015 replacing the music service iTunes, while Amazon Prime Music launched in Australia less than two years ago in late 2018.

“The two trillion-dollar tech companies are also big players in [Australia's increasingly competitive Subscription TV/streaming video](#) market with Apple TV+ and Amazon Prime Video. The dynamics within both markets illustrate the power of the large global players to drive convergence and entice consumers to their platforms.

“In an increasingly interconnected world the ability of these companies to enter new markets and challenge existing players means existing market leaders like Spotify need to stay on top of exactly who and where their customers are.”

[Helix Personas](#) uses deep psychographic insights, far beyond simple demographics, to segment consumers into targetable groups. The tool incorporates values, beliefs and attitudes which are the best predictors of consumer behaviour, so you can reach your customers most effectively with messages that resonate. See below and visit www.helixpersonas.com.au to learn more.

Related research findings

Browse our Online Store for an extensive range of profiles on the music streaming services including [Spotify](#), [SoundCloud](#), [Apple Music](#), [YouTube Music](#) and more.

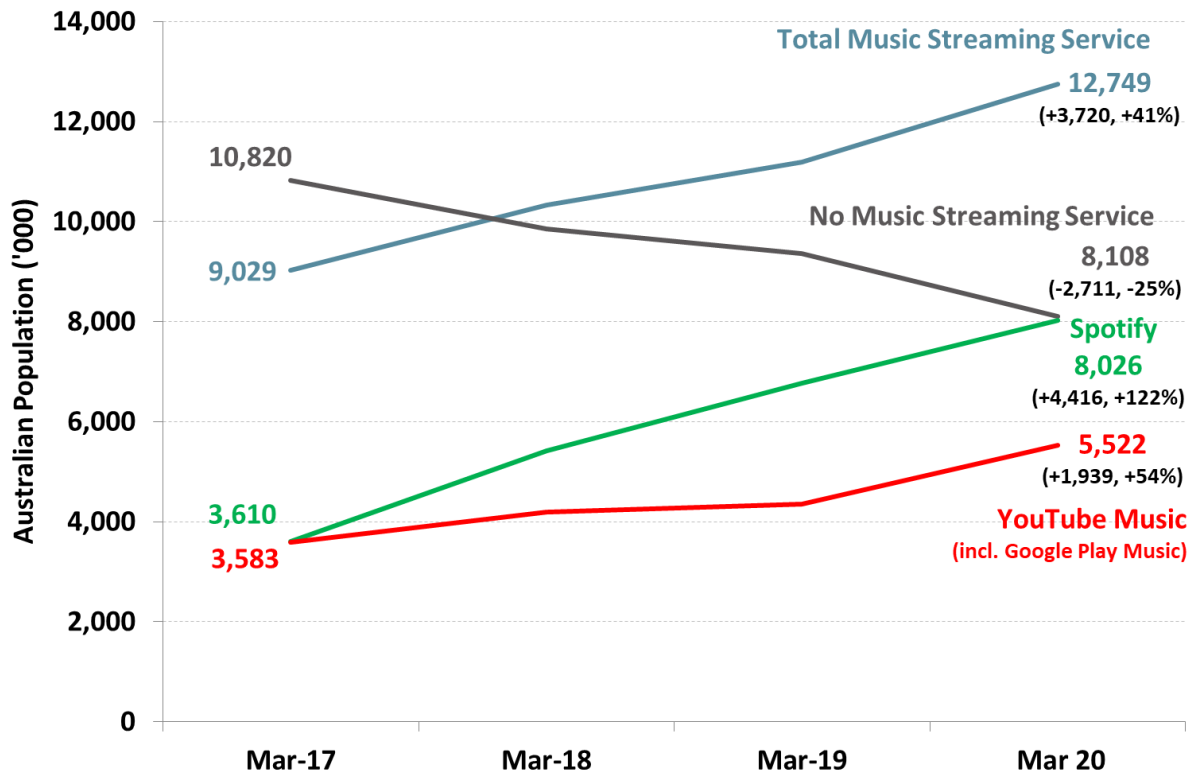
For comments and information about Roy Morgan's streaming music data, please contact:

Roy Morgan Enquiries

Office: +61 (3) 9224 5309

askroymorgan@roymorgan.com

Australian streaming music market: 2016 – 2020



Source: Roy Morgan Single Source: April 2016 – March 2020, n=average of 50,078 per year.

Base: Australians aged 14+. Note: These figures are not derived from cookies, device counts, impressions or clicks.

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%
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3
50,000	±0.4	±0.4	±0.3	±0.2

Roy Morgan Helix Personas



100 Leading Lifestyles

Focused on success and career and family, people in the Leading Lifestyles Community are proud of their prosperity and achievements. They are big spenders and enjoy cultured living to the max.

Explore



200 Metrotechs

Socially aware, successful, career focussed and culturally diverse, Metrotechs are trend and tech focused. They are committed experience seekers, willing to spend big on the best of city life and thrive on being out and about in the world.

Explore



300 Aspirationals

Driven by dreams of a big future, Aspirational are highly ambitious and culturally diverse up-and-comers. Careful spenders, they're working hard today to create a more successful tomorrow.

Explore



400 Hearth and Home

Closest to the average Australian, life revolves around the home for these contented Australians who embrace conventional family life. Perennial home improvers, they see their homes as an expression of their status and achievements.

Explore



500 Doing Fine

Modest but contented, people in the Doing Fine Community are happily making their way through life and value simple pleasures. Price sensitive and light spenders, they take a pragmatic approach to what they buy.

Explore



600 Fair Go

Struggling to make ends meet, looking for a better deal in life, making the best of things or simply pessimistic, cynical and likely to feel they get a raw deal out of life; the Fair Go community are lower income Australians.

Explore

Learn more by visiting www.helixpersonas.com.au.