

August 2018 Audience Spotlight Report: Music Lovers



Executive Summary

Verto Analytics' Audience Spotlight reports provide a cross-device, consumer-centric view on a selected audience segment. Each month, we'll explore user demographics and rich behavioral metrics on an unduplicated audience segment, including media assets across all the key digital devices, as well as across both app and web properties.



Key Definitions and Terminology Used in This Report

- ▶ **U.S. adult online population:** all adults in the U.S. ages 18 and above, who use at least one device (smartphone, tablet, or PC) to access the internet at least once per month.
- ▶ **Category:** Verto Analytics classifies apps and websites into 24 categories, based broadly on categorizations found in the Apple App Store and Google Play Store. These categories include social media & communication, games, productivity, and others.
- ▶ **Stickiness:** how Verto measures user engagement, calculated as total daily users over total monthly users, and conveys how frequently a consumer is using a service. A high level of stickiness indicates loyal, engaged users.
- ▶ **Music Lovers:** For the purposes of this Audience Spotlight, we define Music Lovers as those U.S. adults who comprise the top 20% of all adults who accessed a streaming music service during June 2018, based on the amount of time they spent per month online with streaming music services.

User Types

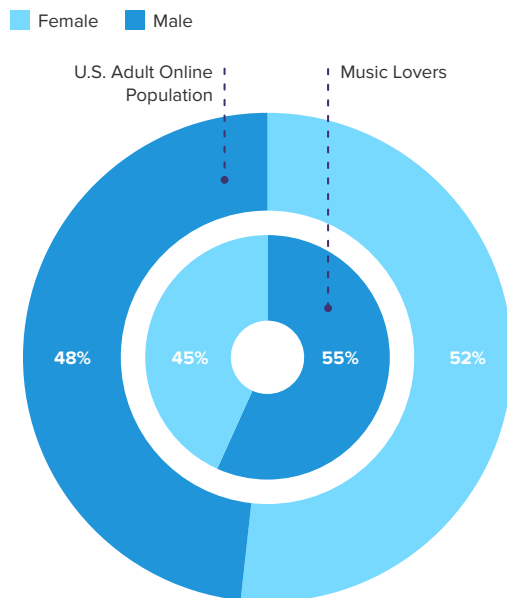
Based on Verto Analytics data about consumer behavior, we have divided Music Lovers subject into three distinct categories based on how they spend their time online:

- ▶ **Heavy users** comprise the top 20% of all streaming music listeners, based on the amount of time they spend per month with streaming music services. The Music Lovers audience segment falls into this group.
- ▶ **Medium users** are those who fall between the 40th and 80th percentile of all streaming music listeners, based on the amount of time they spend per month with streaming music services.
- ▶ **Light users** are those who comprise the bottom 40% of all streaming music listeners, based on the amount of time they spend per month with streaming music services.

Music Lovers Audience Spotlight: A Demographic Analysis

According to Verto data, Music Lovers are 55% male and 45% female, compared to the makeup of the U.S. adult online population, which is 48% male and 52% female.

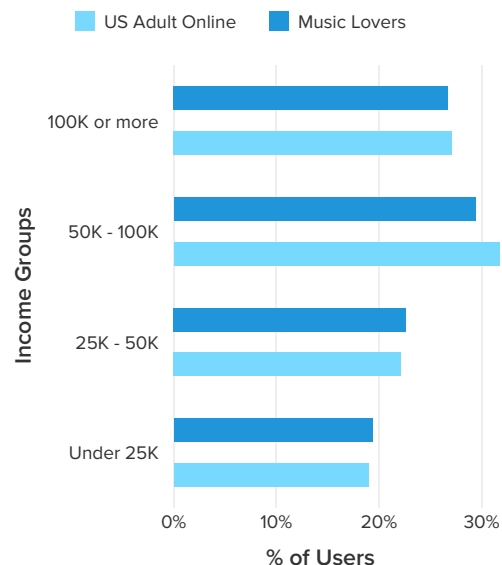
Gender Distribution of Music Lovers vs. U.S. Adult Online Population



Music Lovers by Household Income

Compared to the U.S. adult online population, the household income distribution of Music Lovers shows a higher representation among households earning under \$25K, those earning between \$25K - \$50K, and those earning \$100K or more per year, while showing lower representation among households earning between \$50K - \$100K per year.

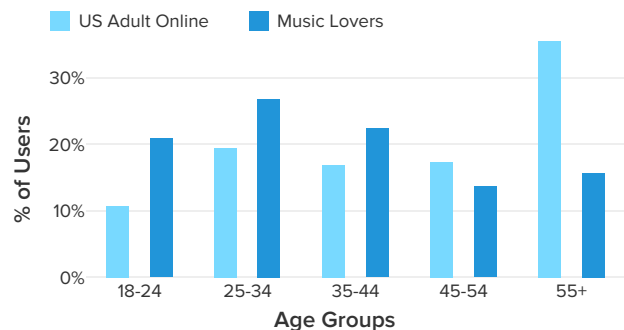
Household Income of Music Lovers Compared to U.S. Adult Online Population



Music Lovers by Age

Compared to the U.S. adult online population, the age distribution of Music Lovers shows a higher representation among audiences in age groups 18-24, 25-34 and 35-44, while showing lower representation among audiences in age groups 45-54 and those over the age of 55.

Population of Music Lovers Compared to U.S. Adult Online Population



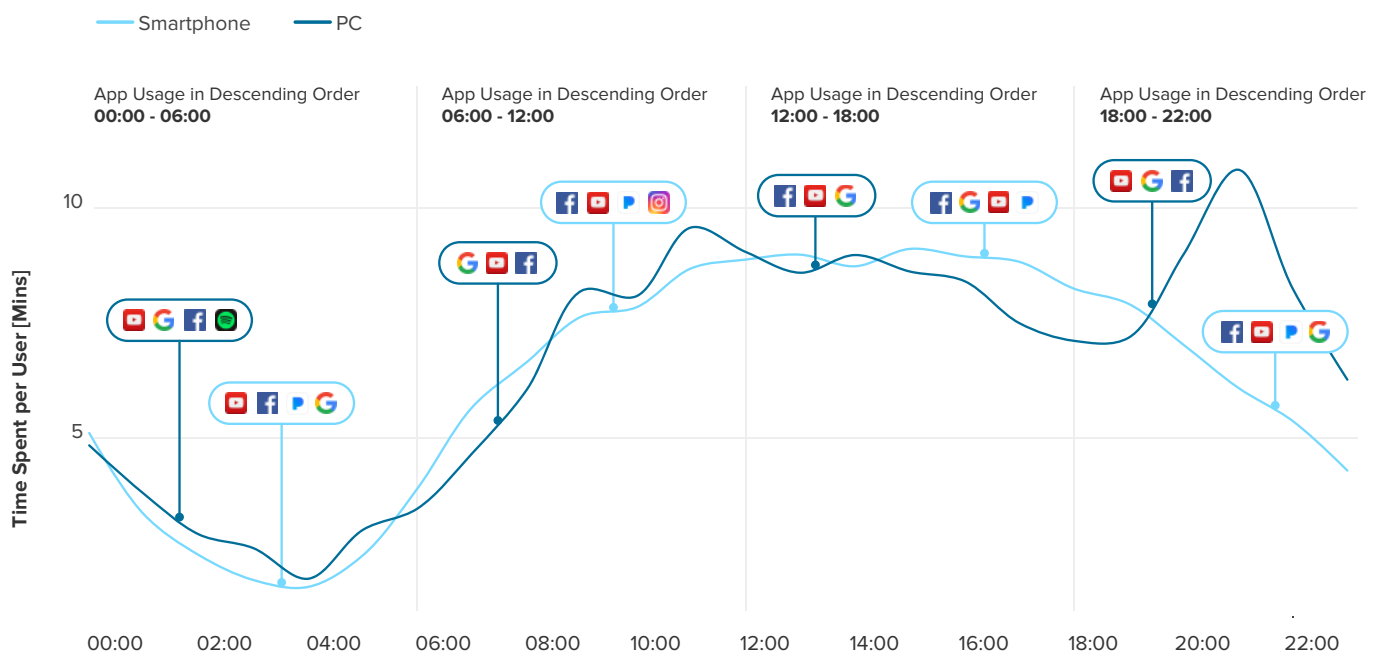
A Day in the Life of a Music Lover

Beyond demographic data, understanding what a day or week in the life of a Music Lover looks like provides a much deeper, nuanced understanding of the Music Lovers audience segment as a whole. Which screens and apps do they prefer to use at which times of the day or week, and when it comes to Music Lovers, which apps and websites do they use and when?

Verto's analysis of a day in the life of a Music Lover reveals distinct peaks and dips over the course of the day and even across a given week, based on time of day, devices used, and which sites and apps are accessed.

As seen in the chart below, Music Lovers spend the most time on PCs. Peak activity on PC happens at 9:00, 11:00, 14:00, and 21:00 and time is spent mostly on YouTube, Facebook, and Google Search. Peak activity on smartphones happens at 13:00 and 15:00, with time spent mostly on YouTube, Facebook, and Pandora Radio.

A Day in the Life of a Music Lover

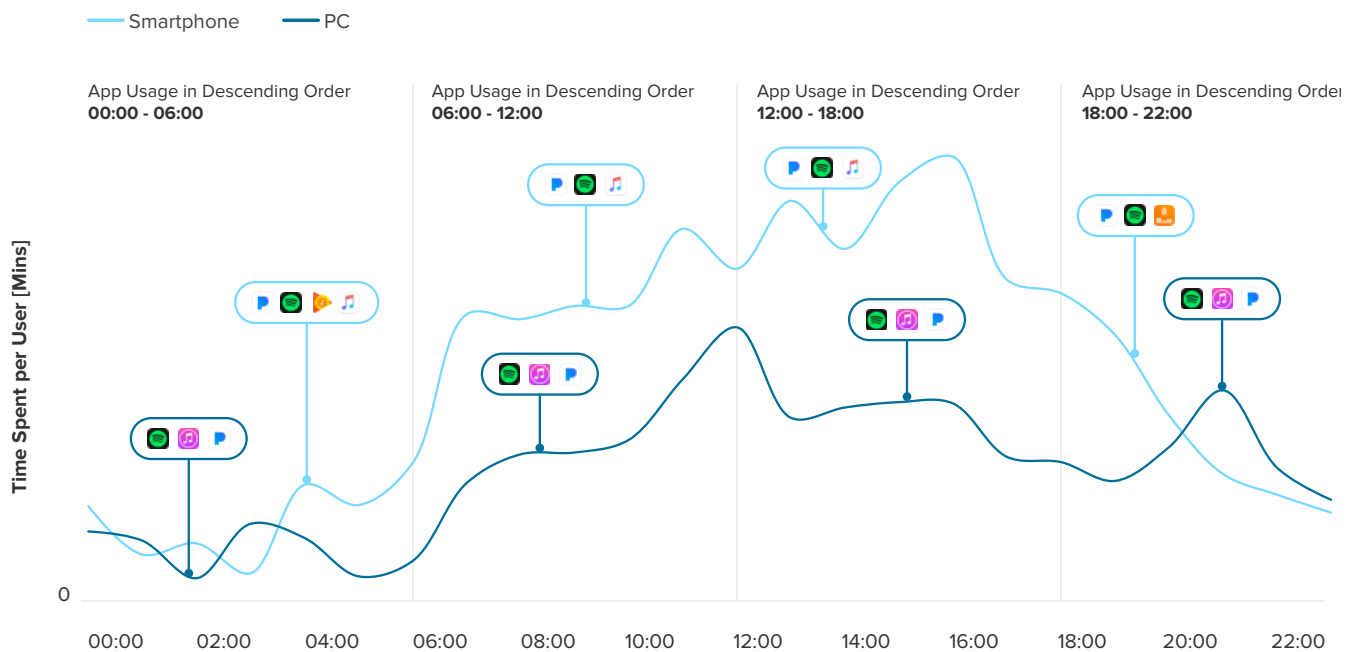


Taking a Closer Look - Music in the Day in the Life of a Music Lover

When it comes to music-specific activity, a Music Lover's activity is defined by how much time is they spend specifically on streaming music content over the course of the day. As seen in the chart below, the typical Music Lover spends the most time with streaming music while using a smartphone. A further breakdown of Music Lovers activity based on streaming music service and screen reveals:

- ▶ On **smartphones**, Google Play Music, Apple Music, Pandora Radio, and Spotify are the most popular streaming music services among Music Lovers, with peak hours: 4:00, 7:00, 9:00, 11:00, 13:00, and 16:00.
- ▶ On **PCs**, Spotify, Zune, iTunes, and Pandora Radio are the most popular streaming music services among Music Lovers, with peak hours: 3:00, 12:00, 15:00, and 21:00.

Streaming Music Services in the Day in the Life of Music Lovers

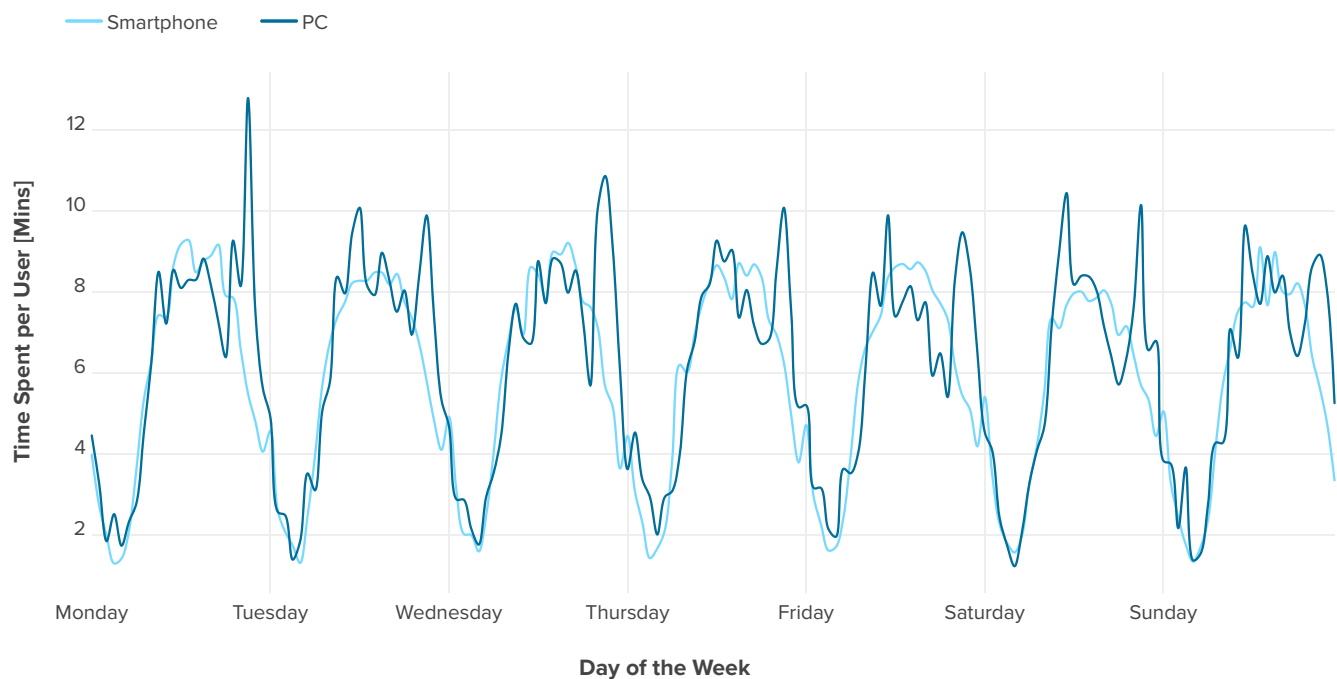


A Week in the Life of Music Lovers by Device Type:

Expanding to a weekly view of the online activity of Music Lovers reveals additional patterns in audience behavior. In order to identify which devices are most popular among Music Lovers over the course of the week, we charted device usage across the whole week and calculated what share of each device's weekly engagement happens on each day.

We see that on PCs, the heaviest day of use is on Tuesdays and lowest usage day occurs on Sundays. On smartphones, the heaviest day of use is on Wednesdays and lowest usage day is on Saturday.

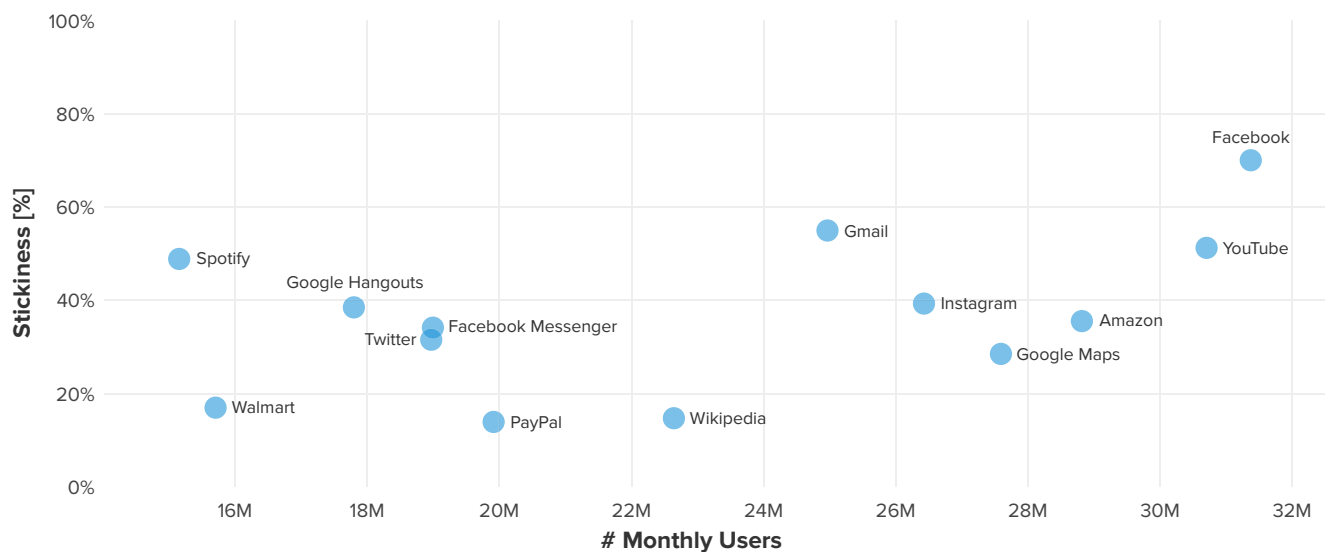
A Week in the Life of Music Lovers by Device Type



Which Apps and Services are Stickiest Among Music Lovers?

As noted above, stickiness is how Verto measures a given app or website's audience engagement; the higher the stickiness rating (as a percentage), the more engaging (or stickier) an app or website is. The stickiest apps and sites among Music Lovers are, unsurprisingly, also some of the most popular digital properties on a global scale: Google Search (71% stickiness), Facebook (70% stickiness), and Gmail (55% stickiness). But there are also some interesting smaller properties on the list, such as Walmart (17% stickiness), Wikipedia (15% stickiness), and PayPal (14% stickiness).

Stickiest Apps & Services Among Music Lovers

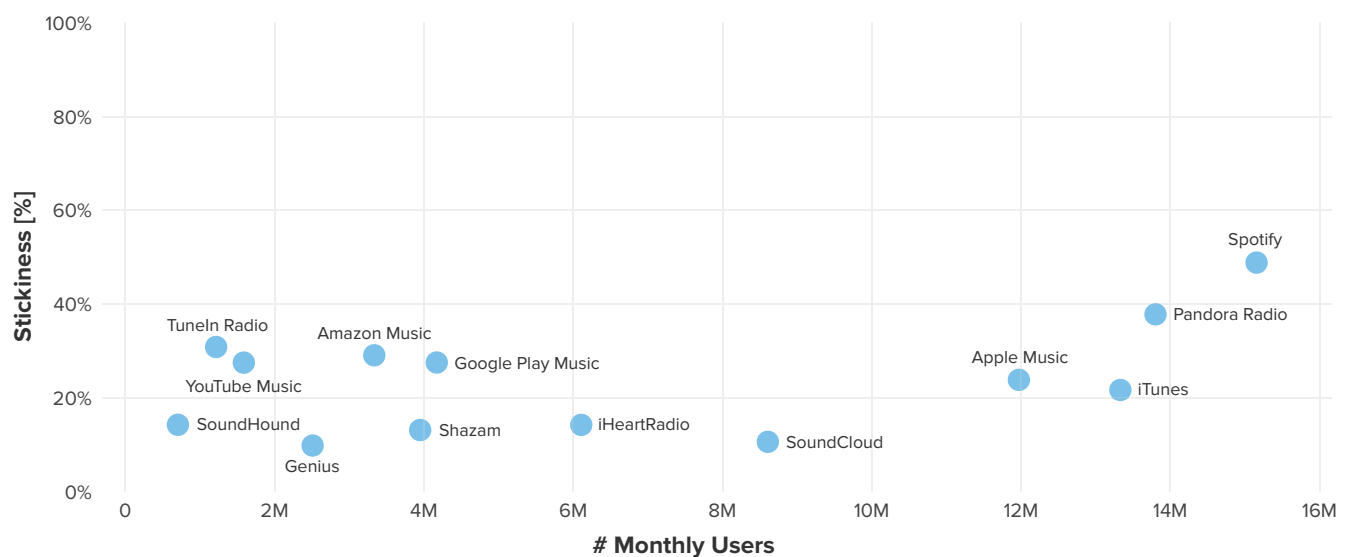


Which Music Streaming Services are Stickiest Among Music Lovers?

The stickiest streaming music services among Music Lovers tells a much different story: notably, which streaming music services Music Lovers listen to on a regular (even daily) basis. Among Music Lovers, the stickiest streaming music services are:

- ▶ Spotify [49% stickiness rating]
- ▶ Pandora Radio [38% stickiness rating]
- ▶ TuneIn Radio [31% stickiness rating]

Stickiest Streaming Music Services Among Music Lovers



Top-Ranking Online Brands Among Music Lovers

Our list below shows the ten top-ranking digital brands with highest reach among Music Lovers. Many of the top-ranking brands among Music Lovers are also some of the biggest digital brands on a global scale. However, we see the emergence of other brands that are especially popular among Music Lovers, such as Wikipedia and Paypal.

Top-Ranking Online Brands Among Music Lovers

Subject	MAU [M]	Reach [%]	Reach Index	Stickiness [%]	Stickiness Index	Sessions Per Month Per User [#]	Average Session Duration [mm:ss]	PC Users [M]	Smart-phone Users [M]	Tablet Users [M]
Facebook	31.4M	99%	104	70%	103	162	05:33	21.0M	27.9M	6.7M
Google Search	31.1M	98%	102	71%	119	77	08:26	23.5M	27.4M	7.9M
YouTube	30.7M	97%	105	51%	126	62	15:17	20.6M	27.0M	7.4M
Amazon	28.8M	91%	106	36%	102	27	08:58	18.9M	22.0M	4.6M
Google Maps	27.6M	87%	115	28.5%	116	35	04:32	12.0M	24.3M	1.5M
Instagram	26.4M	83%	116	39%	125	80	03:33	11.3M	21.7M	2.3M
Gmail	25.0M	79%	120	55%	107	87	02:31	17.4M	17.3M	2.9M
Wikipedia	22.6M	71%	124	15%	101	6	03:54	10.9M	15.7M	1.5M
PayPal	19.9M	63%	106	14%	101	6	04:03	11.7M	13.0M	1.9M
FB Messenger	19.0M	60%	113	34%	100	77	01:34	1.0M	18.0M	1.8M

Top-Ranking Music Brands Among Music Lovers

Our list of top-ranking music brands among Music Lovers reveals the ten specific streaming music services that are most popular among Music Lovers. The most popular title is Spotify, which has a 48% reach among Music Lovers, who engage in an average of 124 sessions per month with the brand. Pandora Radio comes in second among Music Lovers, with a 43.5% reach. Music Lovers rack up an

average of 81 sessions per month engaging with Pandora Radio, while iTunes comes in third with a 42% reach, and an average of 35 sessions per month.

Top-Ranking Streaming Music Services Among Music Lovers

Subject	MAU [M]	Reach [%]	Reach Index	Stickiness [%]	Stickiness Index	Sessions Per Month Per User [#]	Average Session Duration [mm:ss]	PC Users [M]	Smart-phone Users [M]	Tablet Users [M]
Spotify	15.2M	48%	192	49%	174	124	03:58	9.8M	11.7M	0.9M
Pandora Radio	13.8M	43.5%	230	38%	165	81	07:22	2.1M	12.2M	1.3M
iTunes	13.3M	42%	200	22%	156	35	05:23	13.1M	0.4M	0.0M
Apple Music	12.0M	38%	180	24%	143	18	05:16	0.3M	10.9M	1.6M
SoundCloud	8.6M	27%	184	11%	137	11	03:14	4.7M	4.8M	0.6M
iHeartRadio	6.1M	19%	145	14%	133	18	03:48	2.1M	4.0M	0.3M
Google Play Music	4.2M	13%	120	28%	174	61	02:14	0.4M	3.8M	0.2M
Shazam	3.9M	12%	185	13%	115	9	02:25	0.0M	3.9M	0.0M
Amazon Music	3.3M	10.5%	172	29%	163	56	04:33	0.9M	2.7M	0.2M
Genius	2.5M	8%	192	10%	145	4	03:48	1.4M	1.1M	0.3M

Ranking of Verto Categories Among Music Lovers

As previously mentioned, Verto Analytics classifies apps and websites into 24 universal content categories, based broadly on categorizations found in major OS app stores. These categories include social media & communication, games, productivity, and others.

avid users of Social Media & Communications apps and services (which virtually have a 100% reach among Music Lovers), as well as News & Weather content and Shopping sites and apps (both have a 98% reach)

Besides the expected Entertainment category (which includes streaming music services), Music Lovers are

Ranking of Verto Categories Among Music Lovers

Subject	MAU [M]	Reach [%]	Reach Index	Stickiness [%]	Stickiness Index	Sessions Per Month Per User [#]	Average Session Duration [mm:ss]	PC Users [M]	Smart-phone Users [M]	Tablet Users [M]
Entertainment	31.7M	100%	102	85%	131	274	07:51	24.1M	29.6M	9.4M
Communication & Social	31.7M	100%	101	91%	107	896	03:01	24.6M	29.6M	9.8M
Search & Reference	31.6M	100%	102	77%	110	104	07:44	24.6M	28.5M	8.7M
News & Weather	31.2M	98%	103	49%	92	66	05:41	20.3M	26.9M	4.9M
Shopping	31.1M	98%	102	63%	107	86	05:51	22.0M	28.0M	5.7M
Travel	30.9M	97%	108	43%	119	61	04:32	17.5M	27.7M	3.2M
Productivity	29.9M	94%	102	54%	109	182	02:12	24.0M	23.9M	4.4M
Finance	29.5M	93%	103	42%	106	43	03:37	19.3M	24.6M	3.8M
Business	27.5M	87%	105	24%	107	16	03:03	17.2M	20.5M	2.9M
Photo & Video	26.8M	84%	108	43%	108	77	02:19	18.9M	17.6M	2.6M
Health & Fitness	25.5M	80%	110	27%	103	24	03:28	12.1M	20.3M	1.8M
Games	22.5M	71%	100	50%	93	109	08:08	10.1M	17.6M	5.2M
Sports	16.0M	50%	112	27%	101	24	07:12	8.5M	12.1M	2.6M
Books	15.3M	48%	111	18%	86	16	08:18	6.6M	10.7M	2.7M
Real Estate	13.6M	43%	120	12%	92	7	05:34	6.5M	9.0M	1.0M
Automotive	10.1M	32%	107	10%	96	5	04:37	5.6M	6.0M	0.6M
Gambling & Lottery	4.6M	14.5%	77	19%	103	10	09:15	3.3M	1.6M	0.3M

About Verto

Verto Analytics provides a consumer-centric measurement solution for monitoring the complex behavior of cross-device consumers on every device, app, and platform they use throughout the day. We provide data and insights that inform marketing, competitive intelligence, media buying, and product strategy and development.

Verto Methodology

Verto Analytics' single-source, passive measurement methodology is based on behavioral data gathered from a panel of consumers that owns and uses multiple devices. We measure from the point of consumer interaction across all platforms, media, content, and devices. Our panelists, who are compensated for their participation depending on their demographics, opt-in to install a measurement app on their digital devices.

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