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The online music consumers: their habits beyond music

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1. Introduction: What's popular online? And what, beyond music websites do music consumers do?

We know, as per our previous analysis on (references) prepared for midem, how pervasive music is becoming, online. But what do we know about the rest of online activities from the music users? Equally important to brands and agencies on the one hand, and to artists and their management on the other hand, Nielsen take a look at the main online activity of different demographic groups across Europe (UK, France, Germany, Spain, Italy), US, Australia and Brazil. Both categories and specific sites provide great insights into potential hot spots and successful partnerships for the industry. We also dig deeper in the UK and identify, for users of music related websites, what else they are most likely to do online.

In summary, according to Nielsen panels, online activity gravitates around four functions: purchasing, entertainment, information and communication.

Within these four categories there are a number of brands that dominate across all age groups and countries. Not surprisingly, these are Google, MSN, Yahoo!, YouTube, Facebook, Wikipedia, Microsoft and Apple.

Important points about Nielsen methodology

The information below is taken from our online panel in November 2011 unless otherwise detailed. Our data source is proprietary metered panels of computer internet users, both at home and at work, across five countries.

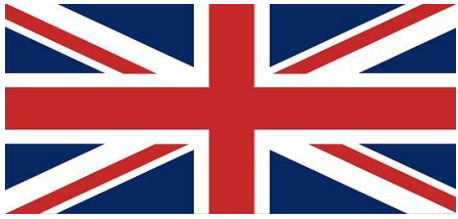
Nielsen grouped websites together according to their main purpose: for a music oriented audience, we chose eight groups – social media, music sales, music audio streaming, music video streaming, lyrics and music notation websites, music news websites, live music, and illegal download.

- The social media group includes websites such as Facebook and Twitter.
- Music sales refers to websites on which users can purchase digital music tracks. This group however also includes applications which can be used for listening to music.
- Music audio streaming refers to websites and applications that allow users to listen to personalized radio stations or music on demand, e.g. Last.fm, Spotify, Deezer.
- The music video streaming group is composed of websites that host official music videos; it does not take into account fan-uploaded music videos.
- The lyrics and music notation group refers to websites that post song lyrics, lyrics translations, guitar tabs and sheet music.
- The music news group is made up of websites that provide daily music artist news and information on new album/single/video releases.
- The live music group consists of websites that sell tickets or provide information about upcoming music concerts or festivals.
- The illegal download group is made up of torrent websites and applications, free illegal mp3 download websites and peer-to-peer websites and applications.

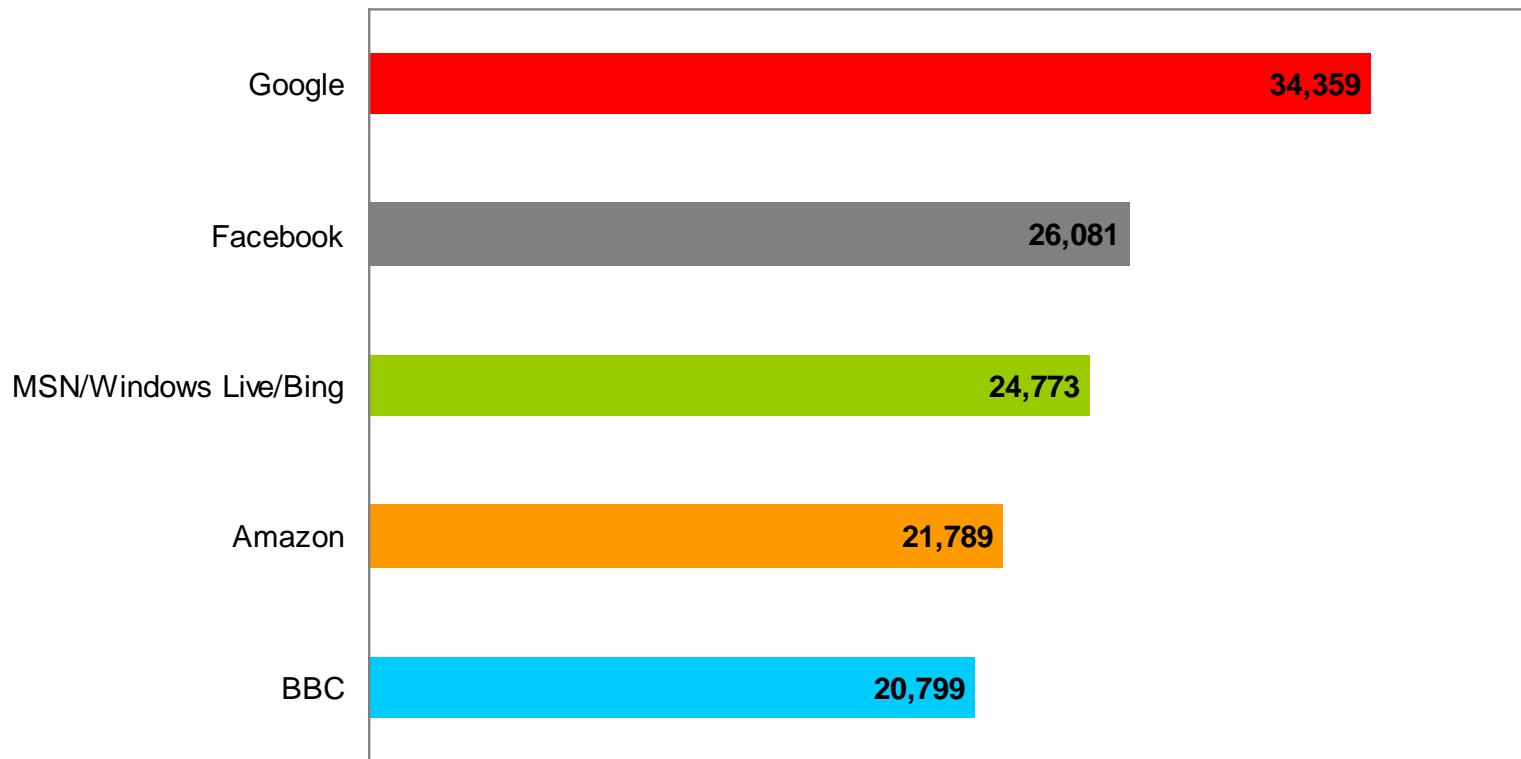
A list of the websites included in each category is provided in the appendix.

Nielsen Capabilities

Nielsen provides online metrics and analytics to clients across the globe. Data available includes individual site, service and application breakdown data. Nielsen provides website metrics including active reach, coverage, time spent, sessions and page views. By further combining this data with demographic breakdown including age, gender, household income, education and occupation, Nielsen provide our clients with comprehensive and trusted insights into online behaviours.

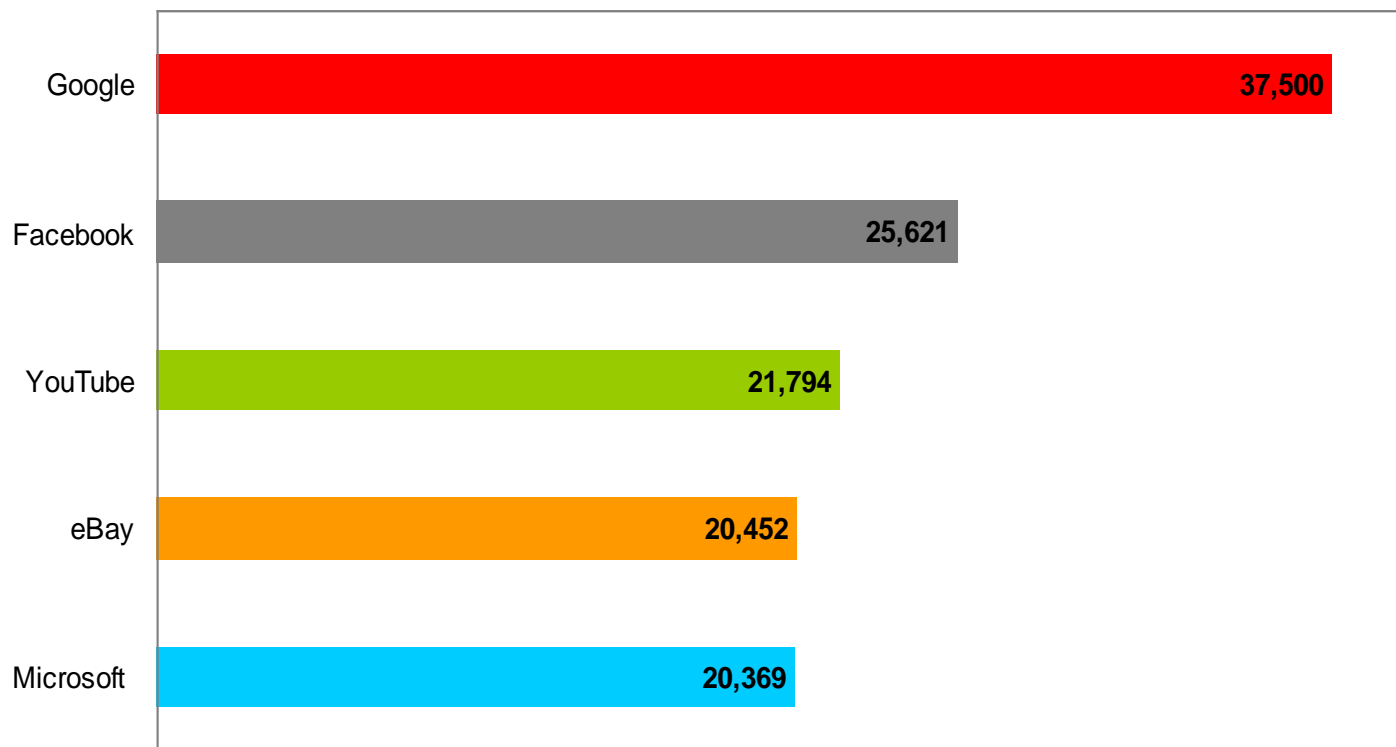


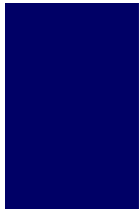
Top 5 Sites by Unique UK Visitors (000) - November 2011



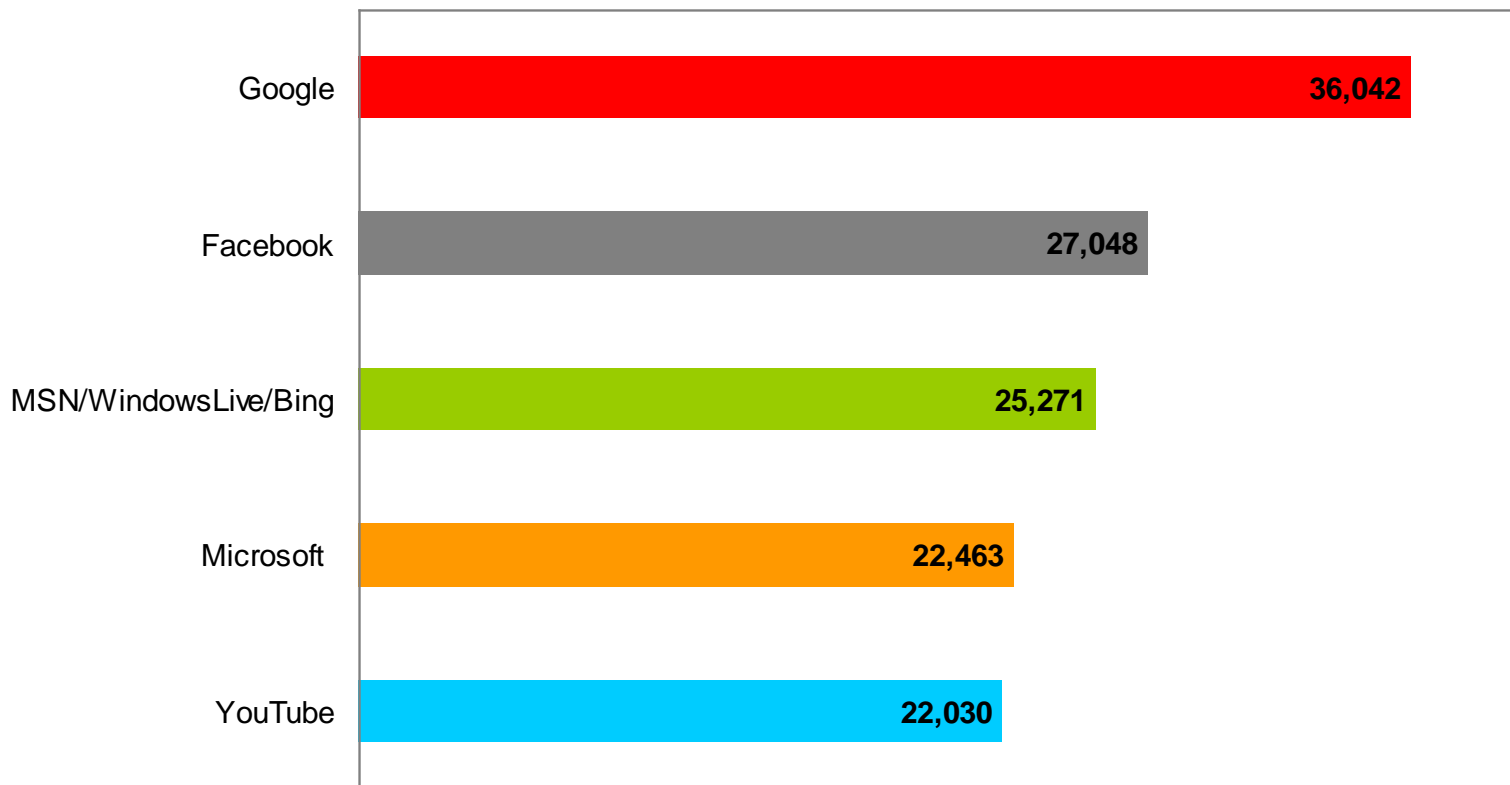


Top 5 Sites by Unique German Visitors (000) - November 2011



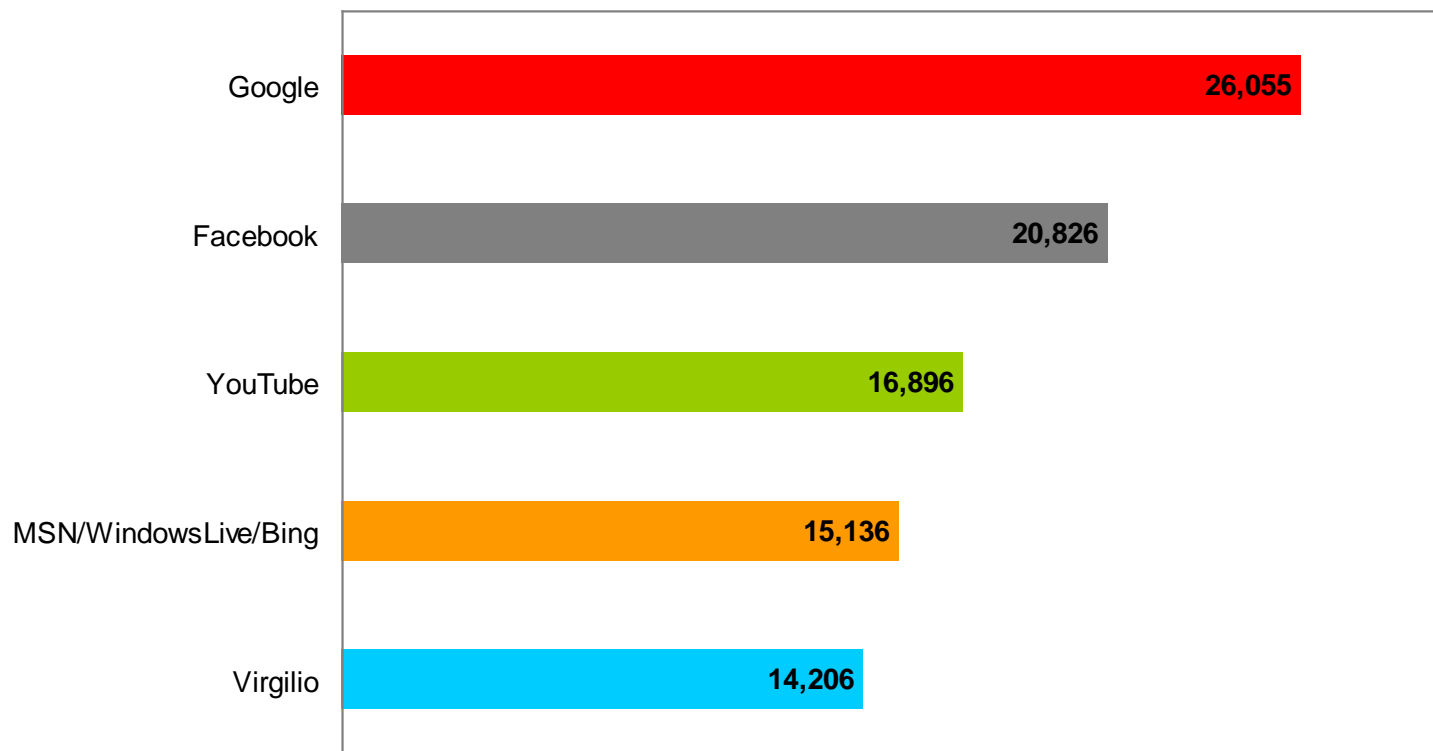


Top 5 Sites by Unique French Visitors (000) - November 2011



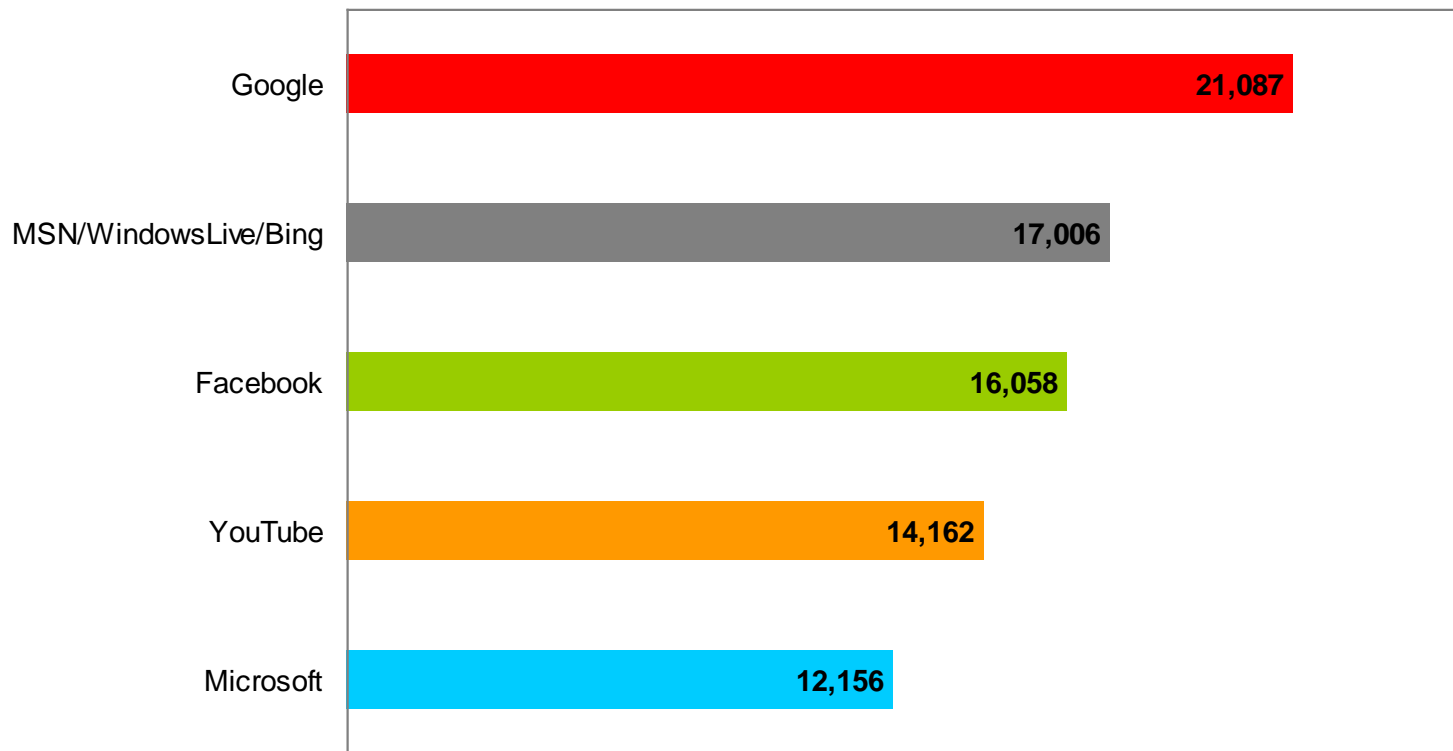


Top 5 Sites by Unique Italian Visitors (000) - November 2011





Top 5 Sites by Unique Spanish Visitors (000) - November 2011



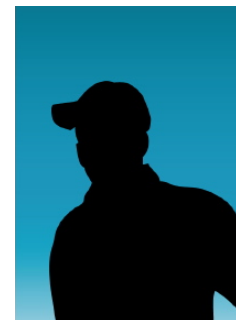
2. Youngsters: Gaming and communicating or shopping.

For the youngest age group, those aged under 17, communication and games are key. Websites that children and teenagers like to visit are Blogger, instant messenger websites (for example Windows Live Messenger has 30% coverage boys in this age group), game websites (Zynga, SPIL Hames, MiniJuegos, Jeuxvideo.fr), websites of mobile operators and domestic web portals (Virgilio, Libero, Marca.com, UOL, Free). The online website for Twitter is popular with the 2-17 year old age group in the UK, US and Brazil.

Website usage is stable amongst this age group, their top websites are set.

The kids like music, with iTunes and VEVO among the top brands. The audio streaming website Deezer is popular among the youngest users in France, and Spotify is a top brand for girls in Spain. The VEVO brand is in the top 30 most popular brands for Nov 2011 in all countries, with the exception of Germany, where it is not available. It remains more popular with 2-17 year old girls than with boys of the same age in all countries.

Online shopping – potentially for bargains on online auction sites – is a prominent trend amongst the youngest surfers on online shopping websites. e-Bay is in the top 50 brands in the UK, US, Italy and Australia (with a high of 30% coverage in UK and Australia), while in France leboncoin.fr (which is based on a similar model) is among the top 50 brands. Amazon is also a top brand in the UK, US, Australia, France and Germany.



3. Young adults: Entertainment! But also shopping, socializing and education.

The young adults (18-24), most first-time wage earners or students focus on music and movies, shopping, socialising and education online.

They place more emphasis on news content than kids; they visit both news portals and the web pages of the biggest newspapers in their respective countries. They show an interest in movie website (IMdB, Kino.to, alloCine) and websites that stream TV services (Megavideo).

Forums, blogs (Blogger, Overblog) and Twitter allow them to communicate and remain informed. Males aged between 18-24 veer toward sport news websites and gaming websites whilst females prefer shopping websites (ASOS, Tesco, Wal-Mart) and general female portals (auFemin, enfemenino.com).

We again find VEVO in the top 30 brands of this demographic group, for both males and females, and across countries. A key exception is in Germany, where VEVO is not amongst the Top 30 sites and with French young women, where Deezer is more popular is more popular than VEVO.



Online music users – a UK example: what behaviour prompts which action?

A further in depth piece of analysis allowed us to analyse specifically music consumers in the UK and understand how they differ from those that do not access their music online. The results below cover men and women aged **18-24**.

As a matter of fact, all online music consumers are not the same – tastes vary. For example, the consumers using music audio streaming services and those using lyrics sites favour different things: there are clear affiliates and affinities. Whilst online gambling sites and fashion sites may be popular for all females in this age category, there are clear affinities between specific online music sites and brands.

- For example, visitors to music lyrics sites have a greater affinity with shopping site Boohoo than with Topshop; other example, online gaming PartyPoker links more with users of audio streaming sites than FoxyBingo.
- Our research also shows that if you visit a music news websites, you're more likely going to buy tickets (Ticketmaster) or music (HMV).
- If you're a man buying gig tickets then you're also likely to watch the video on VEVO and visit twitter to check out the buzz or add to it.
- Young men continue the love of gaming websites incubated in their youth: rockstargames.com is popular with those who use music video streaming sites.
- Those that visit music audio streaming sites show the most affinity with ultimate-guitar.com.
- Shopping features heavily in young women's lives, but the websites which are most important to them vary; if they use music audio streaming sites then they have a greater affinity with Topshop, H&M, New Look and ASOS. But for those young women who visit music video websites, Urban Outfitters scores more highly as does studentbeans.com (the website for university students) and piknik.com, the photo editing site.
- Bagging a bargain is key to this often cash-strapped age group, alongside the prevalence of peer-to-peer, file-hosting and torrent sites is an affinity with shopping-king.com, a comparison site, and sites where prizes and money can be won (grazzup.com, partypoker.com) and savings bagged (livingsocial.com).

4. More grown-up adults: News and social media. All about the household names and big brands.

By the time that adults reach 25-34, their online preferences have altered. News websites take precedence over entertainment sites, but social media remains popular.

Big global brands are prevalent in the top sites list of this demographic – the BBC website has almost 50% coverage of this age group in the UK. And Amazon is a rapidly growing site with its % coverage of women in the 25-34 age group up from 48% to 55% of women in the last 5 months. Sky, Microsoft and Tesco are good examples of the household names that are present in Nielsen's most popular websites list.

And current news websites are gaining in popularity amongst online readers – not only the BBC, but Associated Newspapers (who publish Daily Mail, Mail on Sunday and the Metro) in the UK. 25% of UK males read the Associated Newspaper's websites, up on previous months. Bild.de has 16% of German men covered, whilst the Brazilian news websites have a massive coverage of over 60% each with Globo and Terra. But the Italians win on sheer variety with the news websites Libero, Virgilio, Leonardo, La Repubblica, Corriere Della Sella, Quotidiano and Nanopress all appearing in the Top 50 websites within this category.



5. Established in life: Keeping in touch. And household management and shopping.

Between the ages of 35-49 different social networks are popular, the perennially popular Facebook leads the charge, and where LinkedIn and Twitter appear in the top US sites, Habbo, Bebo or MySpace do not.

Also popular are government websites (Directgov in the UK with 19% coverage of women, impots.gouv.fr in France and paginebianche.it). Shopping websites abound (Argos, Tesco and Marks & Spencer in the UK, Cdiscount and LaRedoute in France which has 25% coverage of women and has risen in the last couple of months) as do banking sites (Caixa in Spain, Commonwealth Bank in Australia, Itau in Brazil, Bank of America in the US).

The global favourite Amazon is popular with this age group, with an over 50% coverage of men in the US and UK. Otto.de, the German based mail-order service, is popular with German women and is growing in coverage, although Amazon has a larger coverage and is also growing, now with over 50% coverage of German women. In Italy, eBay and Groupon (25% coverage of women) appear in the top sites as Italian consumers search for good deals online and the Brazilians are fans of mercadolibre.com which is eBay's Latin American partner (35% of men).

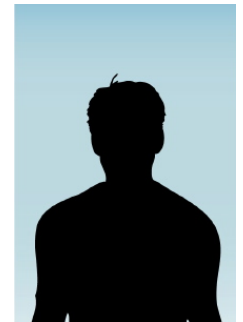


6. Mature adults: Getting a good deal! And planning their day.

And the 50+ online users are savvy shoppers with online comparison and purchase websites a common destination. Their online life greatly mimics their offline activity, with newspapers and supermarkets (Tesco – 30% UK coverage) high on their list of top sites.

Route planner websites (AA, ViaMichelin – 20% of French coverage) and weather websites are popular in obtaining information for this category.

Staying in touch is more diverse in this age group, Facebook leads in all countries surveyed by Nielsen. But in Germany Stayfriends and Classmates Online also make an appearance in the top websites lists with 13% coverage each and in Brazil, Orkut, an alternate social networking site owned by Google is significant in this age group in Brazil with around 40% of coverage. However, Orkut's coverage in Brazil in this age group has fallen over the last couple of months as Facebook increases in popularity.



Conclusion: Online music consumers, from band to brand, from activities to affinities.

With an increased focus year after year on brands and music, within the industry and during the midem event, there is obviously appeal outside of this document to dig deeper into the top line data. Music is important for customer engagement and positive brand recognition, and therefore success lies in the best designed partnerships.

As we have noticed, different age groups will behave differently online, and somewhat consistently within the same demography. Online is more about gaming, communicating or shopping amongst the youngsters (less than 17), whilst young adults (18-24) favour entertainment, shopping, socializing and education. Grown-up adults (25-34) like news and social media, and are keen on household names and big brands. The more established adults (35-49) go straight to what's essential to them, keeping in touch with friends and families, and of course household management and shopping. And finally the more mature adults are savvy buyers and are into day to day planning.

However, the reality is more complex and worth investigating. For example, Nielsen can analyse consumers' journeys across different sites, whether they are music- or brands- oriented, and also get a qualitative approach on consumers' attitudes towards companies and artists' collaborations. Depending on your core music activities, what affinities do you show amongst an infinite choice of online sites? Where do you start and finish your journey? As a consumer, how do you perceive the alliance between a band and a product or a brand?

Appendix

Category	UK
Social Media	Facebook, Twitter, Myspace
Music Video Streaming	VEVO, Dailymotion Music, Orange Music, SFR Music, Free Music, Paroles de Clip, MTV Networks Music, Ournia, Stars Music
Music Audio Streaming	Spotify, Deezer, Last.fm, Radionomy, Goom Radiom, Jukebo, MusicMe, Jiwa, Fun Radio, AlloMusic, Musique Radio
Music News	Websites such as Great Song, Premiere Musique, Lesinrocks, Pure Charts
Music Sales	iTunes, 7 Digital, eMusic, CD Universe, Beezik, Starzik, Fnac Download, Qobuz
Lyrics & Notation	Websites such as AZLyrics, LyricsMode, Lyrics007.com, Sing365.com, Ultimate-Guitar.com
Illegal Download	Websites such as The Pirate Bay, BitTorrent, Torrentz, BeeMp3, TorrentReactor, Mp3Skull
Live Music & Gigs	Live Nation Network, Songkick, Stereoboard.com, GigWise.com, Virtual Festivals, Music Glue, BandsInTown
	France
Social Media	Facebook, Twitter, Myspace
Music Video Streaming	VEVO, Muzu TV, Dailymotion Music, MSN Music, MTV Networks Music
Music Audio Streaming	Spotify, we7, Last.fm, Napster, Jango.com, Mixcloud, ReverbNation
Music News	Websites such as BBC Music, RollingStone, Billboard, Drowned in Sound, allmusic
Music Sales	iTunes, 7 Digital, eMusic, CD Universe, CD WOW !, Amazon Mp3 Downloader, Beatport
Lyrics & Notation	Websites such as AZLyrics, LyricsMode, Lyrics007.com, Sing365.com, Ultimate-Guitar.com
Illegal Download	Websites such as The Pirate Bay, BitTorrent, Torrentz, BeeMp3, TorrentReactor, Mp3Skull
Live Music & Gigs	Concerts.fr, infoconcert.fr, ConcertAndCo, Concertlive.fr
	Germany
Social Media	Facebook, Twitter, Myspace, meinVZ, studiVZ, schülerVZ
Music Video Streaming	Yavido, Dailymotion Music, tape.tv, MTV.com

Music Audio Streaming	Simfy, Last.fm, Napster, Jango.com, musicstar
Music News	e.g. Web.de Musik, GMX Musik, Laut.de, Hiphop.de
Music Sales	iTunes, 7 Digital, eMusic, CD Universe, Amazon Mp3 Downloader, tonspion, T-Online Musicload
Lyrics & Notation	Websites such as AZLyrics, LyricsMode, Lyrics007.com, Sing365.com, Ultimate-Guitar.com
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	<i>Spain</i>
Social Media	Facebook, Twitter, Myspace
Music Video Streaming	VEVO, Muzu TV, Dailymotion Music
Music Audio Streaming	Spotify, Last.fm, Rockola.fm, Los40.com, Vagos.fm, Yes.fm
Music News	e.g GoEar, Cadenadial.com, HHGroups, Jenesaispop
Music Sales	iTunes, 7 Digital, eMusic, CD Universe,
Lyrics & Notation	Websites such as AZLyrics, LyricsMode, Lyrics007.com, Sing365.com, Ultimate-Guitar.com
Illegal Download	Websites such as The Pirate Bay, BitTorrent, Torrentz, BeeMp3, TorrentReactor, Mp3Skull
Live Music & Gigs	Nvivo.es, Conciertos 10, Ticketsfera
	<i>Italy</i>
Social Media	Facebook, Twitter, Myspace
Music Video Streaming	VEVO, Muzu TV, Dailymotion Music, Virgilio Musica, Musictory
Music Audio Streaming	Last.fm, Jango.com, DADA, Radionomy, Cubomusica, ReverbNation
Music News	Websites such as rockol.it, musicsite.it, italianissima.net, Sonorika.com, ondarock.it
Music Sales	iTunes, 7 Digital, eMusic, CD Universe
Lyrics & Notation	Websites such as AZLyrics, LyricsMode, Lyrics007.com, Sing365.com, Ultimate-Guitar.com
Illegal Download	Websites such as The Pirate Bay, BitTorrent, Torrentz, BeeMp3, TorrentReactor, Mp3Skull
Live Music & Gigs	Live Nation Network, Concertionline, 5gig.it

	<i>Brazil</i>
Social Media	Facebook, Twitter, Myspace, Orkut
Music Video Streaming	VEVO, Muzu TV, Dailymotion Music, UOL Musica, iG Musica, MTV Networks Music
Music Audio Streaming	Last.fm, ReverbNation
Music News	Websites such as Billboard, PAPOLOG, Blitz, Hip Hop Blog
Music Sales	iTunes, Som Livre, CD Universe
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	<i>Australia</i>
Social Media	Facebook, Twitter, Myspace
Music Video Streaming	VEVO, MTV Networks Music, Take40, The Hot Hits Live from LA
Music Audio Streaming	Last.fm, ReverbNation, Jango.com
Music Sales	iTunes, Som Livre, CD Universe, CD WOW !, BigPond Music, Sanity
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	<i>USA</i>
Social Media	Facebook, Twitter, Myspace
Music Video Streaming	Websites such as VEVO, MTV Networks Music, Dailymotion Music, Muzu TV
Music Audio Streaming	Websites such as Pandora, Last.fm, Jango, Project Playlist, Spotify, Rhapsody, Soundcloud, Napster
Music News	Websites such as Yahoo!Music, MSN, Billboard, NME.com, allmusic
Music Sales	Websites such as iTunes, CD Universe, Mp3.com, eMusic, CDbaby.com
Lyrics & Notation	Websites such as AZLyrics, LyricsMode, Lyrics007.com, Sing365.com, Ultimate-Guitar.com
Illegal Download	Websites such as The Pirate Bay, BitTorrent, Torrentz, BeeMp3, TorrentReactor, Mp3Skull

About the author

Nielsen Music is the measurement reference of the music industry, and the market data and research partner of choice for the music sector. Our local and international teams of research and music experts bring the best set of comprehensive, robust and quality insights to our music clients. With Nielsen Music, access, understand and interrogate:

- What music is played on radio and music television (airplay monitoring); we are the only respected and official brand for charts and provide detailed analysis with both local and international coverage.
- What is sold (sales tracking); tracking of digital sales globally and physical sales in selected countries.
- What is said and by whom; measurement of internet behaviour and consumer generated media (buzz).
- What is advertised and where; complete advertising information.
- Who your customers are: significant global consumer and ad-hoc research capabilities.

Nielsen Music is successfully working with more than 500 clients representing all elements of the music chain: record companies/music labels (majors and independents), radio and TV stations, music publishers, performing rights organisations, artists and their management, digital media and services, mobile phone companies, retailers, the video game/gaming industry, consultancy firms, and the media. Nielsen Music (www.nielsen-music.com) is a division of Nielsen (www.nielsen.com), the leading global market research company.

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