THE MULTICULTURAL MAJORITY RISES: LET’S LOOK AT MUSIC

By: Nancy Tellet

CULTURE MARKETING COUNCIL
5/1/2019
THE MULTICULTURAL MAJORITY RISES: LET’S LOOK AT MUSIC

by Nancy Tellet, co-chair CMC research committee and founder, brand & consumer navigator, PureClarity LLC

As longer days and budding trees are harbingers of spring, there are numerous signs that the U.S. multicultural majority is near. According to Census projections, 2020 is the year that the first demographic domino falls; the first full generation, ages 0-17, turns Multicultural majority. Shortly after that, **18-24s in 2026, 18-34s in 2028, 18-49s in 2033**. By 2044, this demographic process culminates with the overall U.S. population as Multicultural majority.

We see signs of this process and the growing power, influence and often dominance of Multiculturals in many arenas. Today, we look at Music.

Multicultural artists and their audiences dominate 3 of the 5 top trends identified in Nielsen’s 2018 Music Year-End Music Report; “Latin’s Top 40 Takeover, #1,” “The Year of Drake, #2” & “K-Pop Boom Reaches New Heights, #5”.

Plus, many Multicultural female artists contributed to “The Triumphant Return of Women, #3.

According to David Bakula, Nielsen SVP at Nielsen Music, the “2018 female growth trend was driven by such Multicultural artists as Cardi B, Nicki Minaj, Selena Gomez, Ella Mai, SZA, Demi Lovato, Rihanna and Beyonce.”

A custom music analytic by Nielsen for CMC indicates that young skewing music genres fueled primarily by Multicultural artists/sounds are increasing share (*R&B/Hip-Hop, Latin & World...fueled by K-Pop*) while genres rooted primarily in Non-Hispanic White artists/sounds are declining in share (*Country, Rock*).

Buzz Angle’s Music 2018 Year-End Report indicates that Latin music share now exceeds Country. According to Nielsen data, the Country genre still exceeds Latin in share, but the share trend of Latin growth and Country decline is also evident.
Nielsen and Buzz Angle use different math models to project genre share. Nielsen uses a lower album credit ratio for on-demand music video streaming vs. Buzz Angle. Latin and World music (fueled by K-Pop) are the genres most impacted by this formula difference; 38% of Latin & 21% of World Music total music consumption comes from music video streaming vs. industry average of 11%. Country and Rock generate only 6% of total music consumption from music video streaming. [Source: Nielsen, 2018]

**ALL STREAMING (AUDIO + VIDEO)**

CMC’s 2018 Digital Lives study found that only two music genres, Hip-Hop & Pop, make the Top 5 streamed genres across all measured 13-49 racial/ethnic segments (Non-Hispanic White, Non-Hispanic African-American and Hispanics). Other culture-based findings:

- Country a Top 5 genre with ONLY Non-Hispanic Whites, of all ages
- Rock #1 or #2 with all Non-Hispanic Whites, also popular (#2/#3) with Hispanics of all ages
- Hip-Hop, R&B and Rap, Top 3 with African-Americans of all ages
- Spanish music #1 or #2 with all Hispanics 13 - 49
- Dance a uniquely popular genre with segments of African-Americans and Hispanics
As per Nielsen data, total streaming (audio + video) as a form of music consumption dominates in younger skewing, often Multicultural dominant genres. It accounts for a whopping 91% of Latin genre music consumption. Older skewing, by default less diverse, genres such as Rock and Country lag the industry average as of 2018. Total industry streaming continues to grow rapidly; 71% share of total music consumption in 2018 v. 56% year-ago.

### Nielsen Total On-Demand Streaming (Audio + Video) % Share of Total Music Consumption... By Genre (2018)

<table>
<thead>
<tr>
<th>Genre</th>
<th>NHW 13-17s</th>
<th>NHAA 13-17s</th>
<th>HISP 13-17s</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country</td>
<td>30%</td>
<td>38%</td>
<td>26%</td>
</tr>
<tr>
<td>Dance</td>
<td>21%</td>
<td>13%</td>
<td>22%</td>
</tr>
<tr>
<td>POP</td>
<td>48%</td>
<td>43%</td>
<td>38%</td>
</tr>
<tr>
<td>Rock</td>
<td>45%</td>
<td>33%</td>
<td>34%</td>
</tr>
</tbody>
</table>

- **Latin** 91%
- **R&B/Hip-Hop** 84%
- **Dance/Electronic** 84%
- **Pop** 75%
- **INDUSTRY AVG.** 71%
- **World** 68%
- **Country** 63%
- **Rock** 56%

The signs of approaching Multicultural majority abound in music trends and in other places as well. Next month we will look at the world of social media influencers and their followers.

If you are like me and want to understand the math, below are the two music math formulas.

<table>
<thead>
<tr>
<th>TOTAL CONSUMPTION/UNITS EQUALS...</th>
<th>NIELSEN</th>
<th>BUZZ ANGLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical albums</td>
<td>1 to 1 ratio</td>
<td>1 to 1 ratio</td>
</tr>
<tr>
<td>Digital songs</td>
<td>10 to 1 ratio (10 songs = 1 album)</td>
<td>10 to 1 ratio (10 songs = 1 album)</td>
</tr>
<tr>
<td>Premium/subscription audio streaming (paid services)</td>
<td>1250 to 1 ratio (1250 song streams = 1 album)</td>
<td>Does not have this as a discrete category</td>
</tr>
<tr>
<td>Ad supported audio &amp; all music video streaming</td>
<td>3750 to 1 ratio (3750 ad supported audio/video streams = 1 album)</td>
<td></td>
</tr>
<tr>
<td>All audio &amp; video music streaming (paid + ad supported)</td>
<td>Does not have this as a category</td>
<td>1500 to 1 ratio for ALL (1500 streamed songs/videos = 1 album)</td>
</tr>
</tbody>
</table>

Copyright © Culture Marketing Council 2019