

BALANCING 'ME' WITH 'WE'

Music's Power To Reflect Diversity & Unite Culture



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THE ME-CONOMY

SEE ME.
UNDERSTAND ME.
REFLECT ME.
OR RISK LOSING ME.

When consumers perceive ads as culturally relevant they are:

2.7x
more likely to buy from a brand for the first time

50%
more likely to repurchase from a brand

2.8x
more likely to recommend a brand

— **Additionally** —

46%
use ad blockers to avoid irrelevant ads

\$12B
lost in 2020 due to ad blocking



THE ME-CONOMY

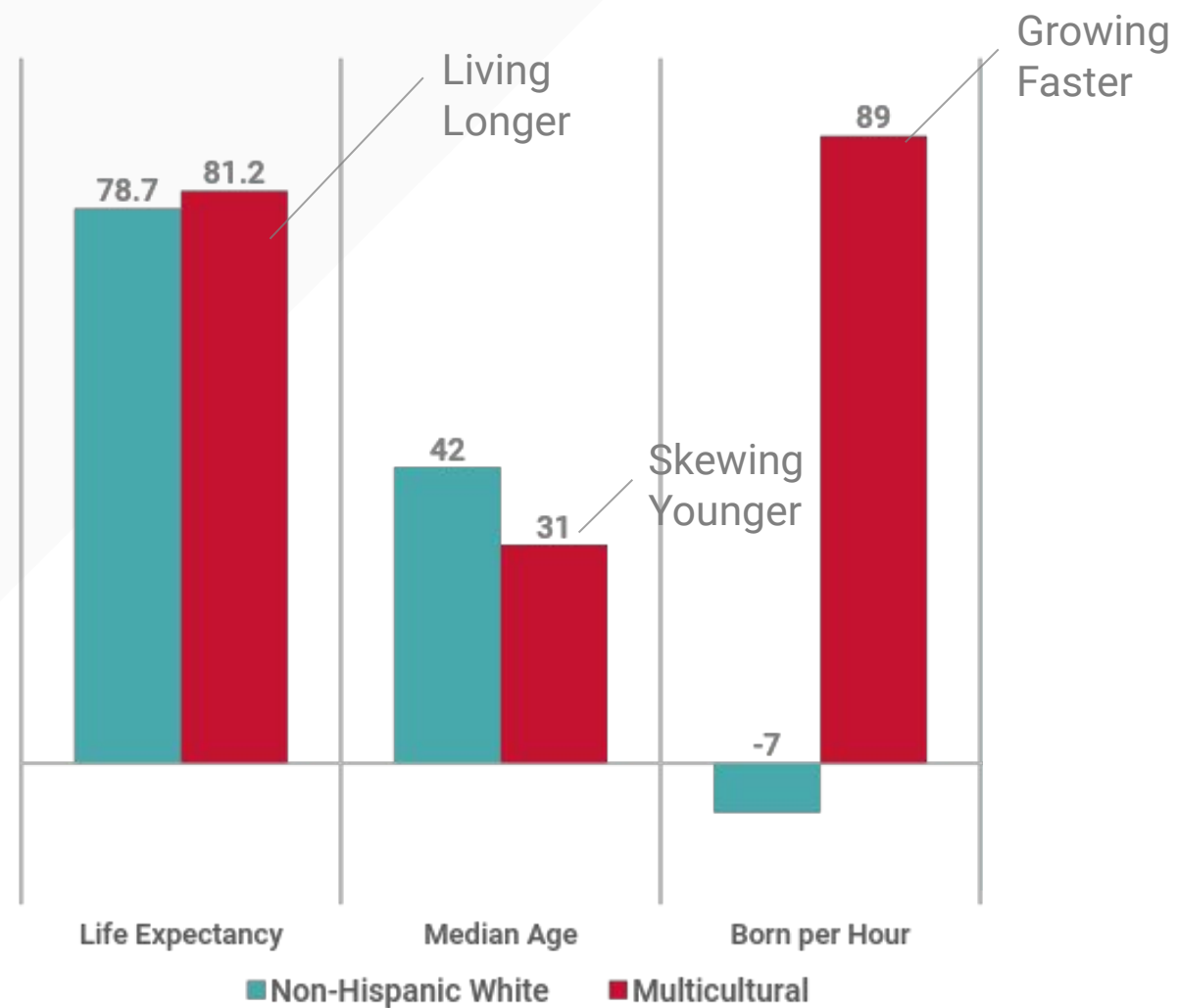
What does it take to ~~survive~~ **thrive**?

At the center of the ME-conomy are multicultural audiences. They represent the greatest opportunity for growth over the coming decades. Brands that invest their time, attention, and resources in multicultural audiences will not only survive, but **they will thrive**.

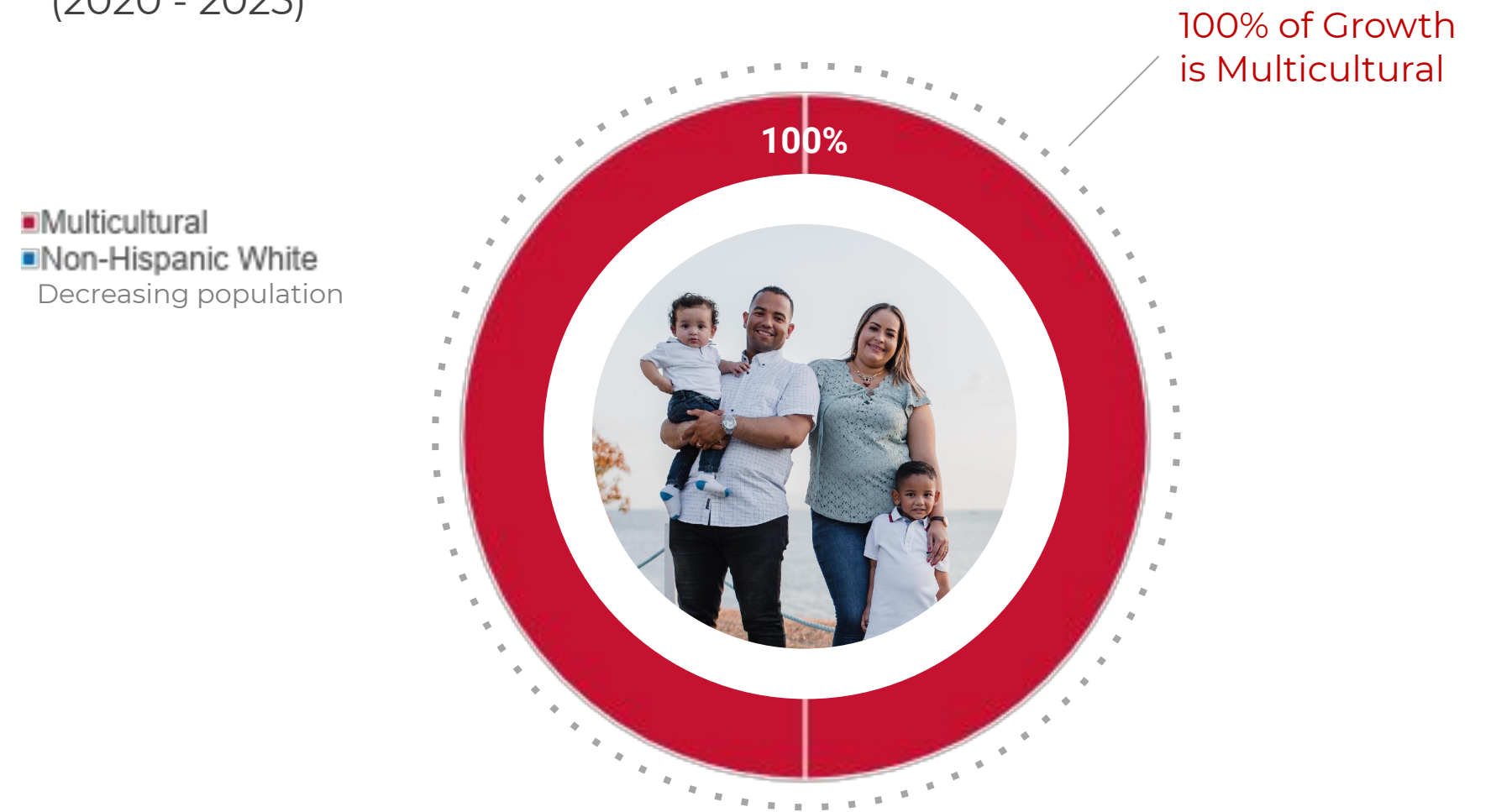
Why?

A POWERFUL POPULATION

131M Multicultural Americans - 40% of the population.
Growing by more than 2M each year.



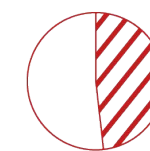
U.S. Population Growth (2020 - 2025)



Over The Next 5 Years



Top 10 largest U.S. markets will be majority multicultural

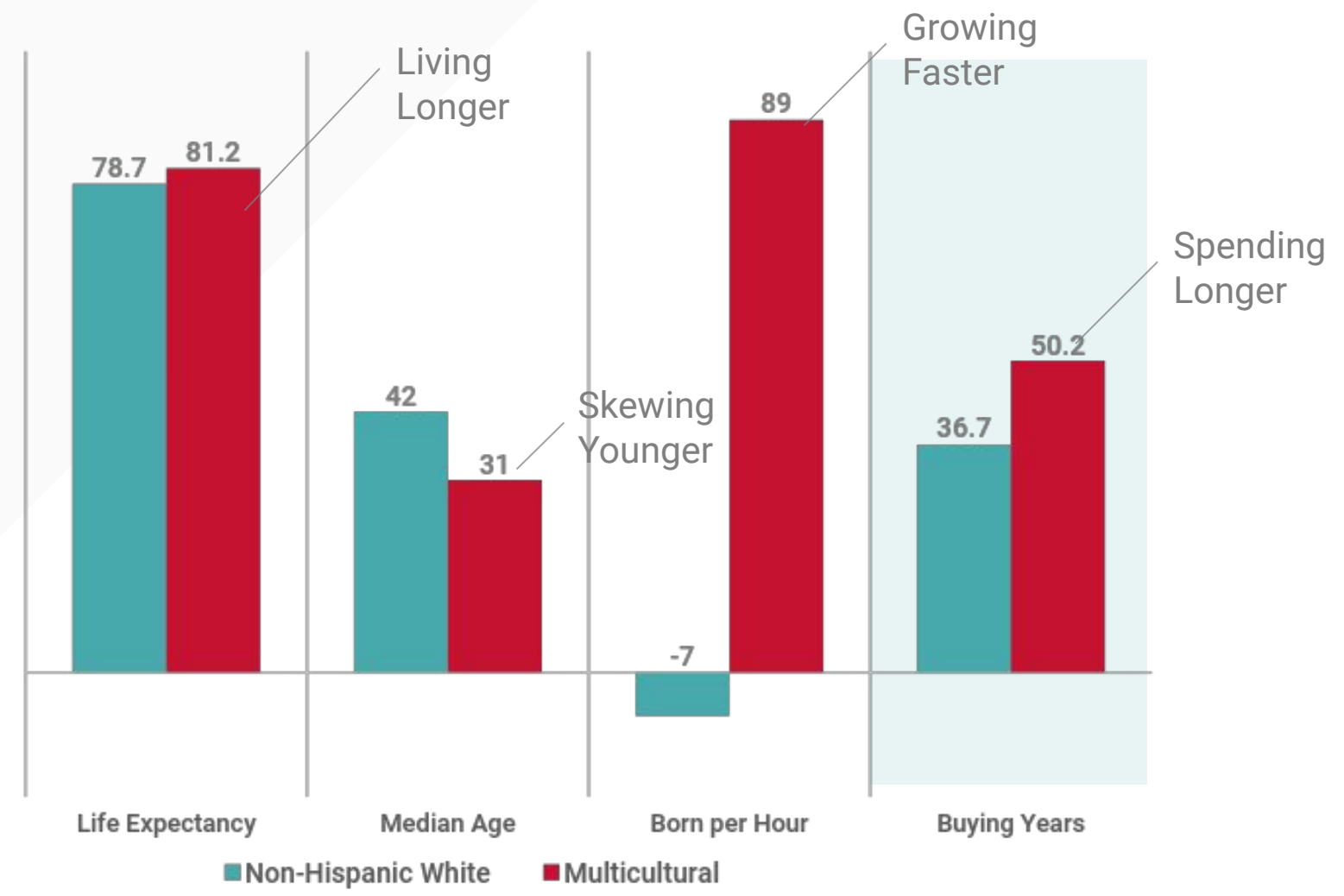


49.5% of Millennials will be multicultural (42% today)



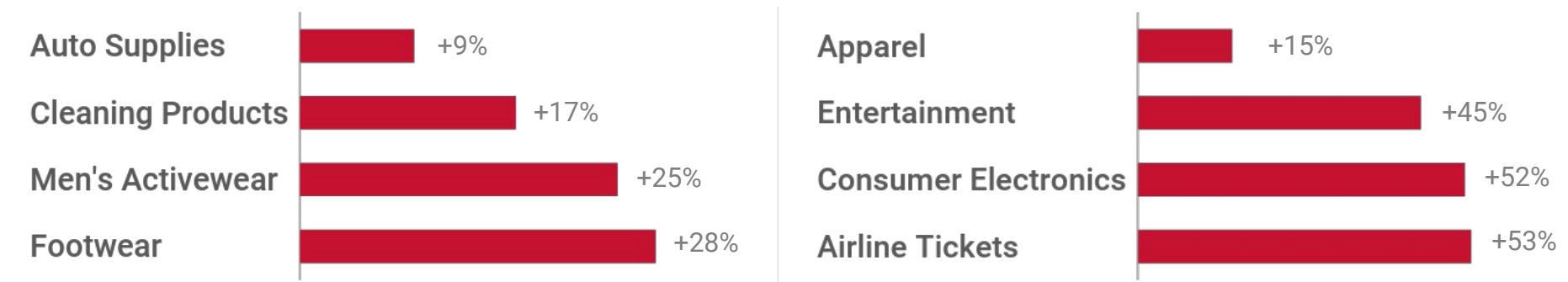
STRONG ECONOMIC IMPACT

The multicultural population is on the rise, and so is their buying power.

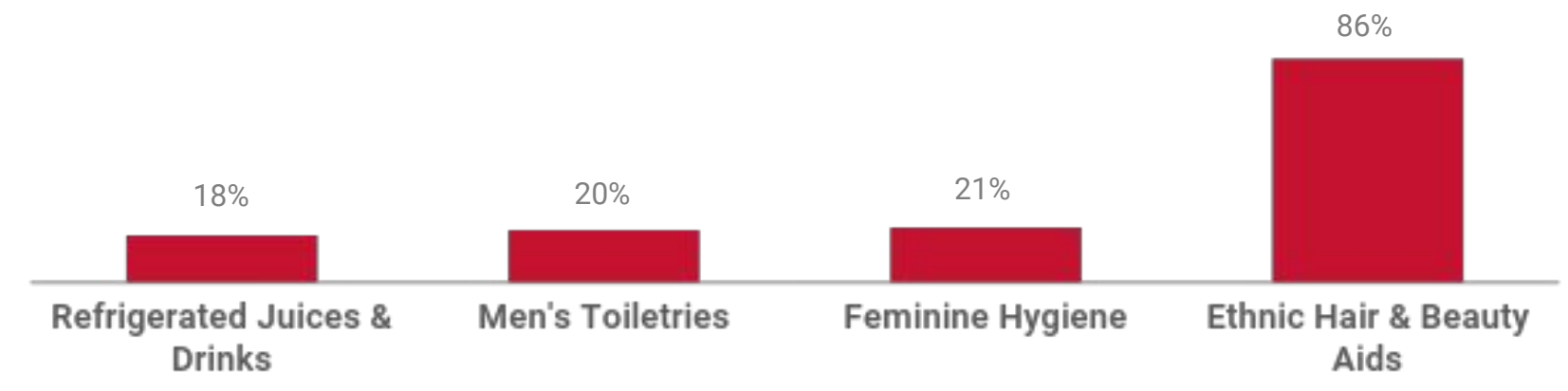


Multicultural Americans:

Outspend Average U.S. Households in Key CPG Categories



Have an Outsized Influence on Spending



Multicultural Americans

3rd largest economy in the world

\$4TN equals economic power of Germany

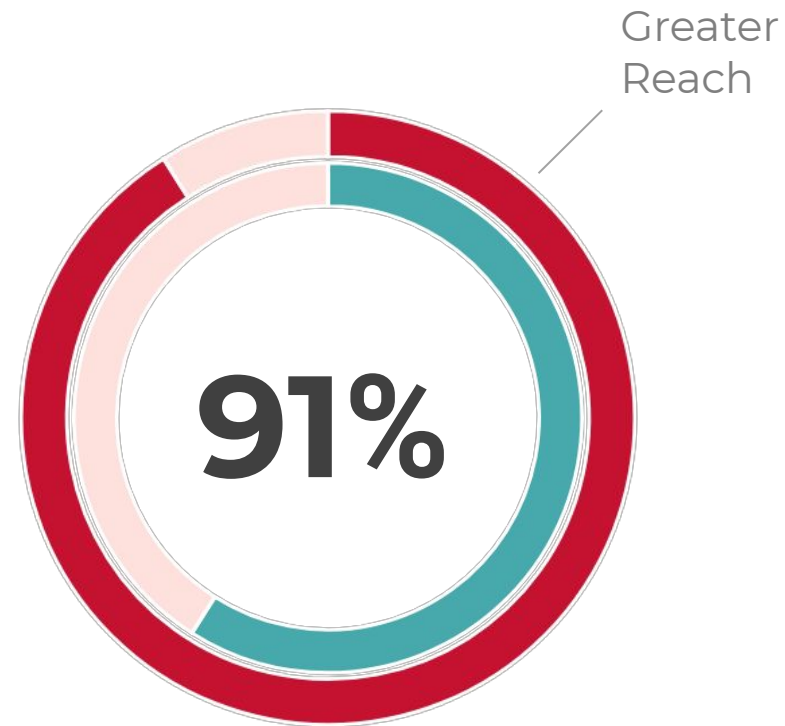




NOTHING SAYS **'ME'** LIKE MUSIC

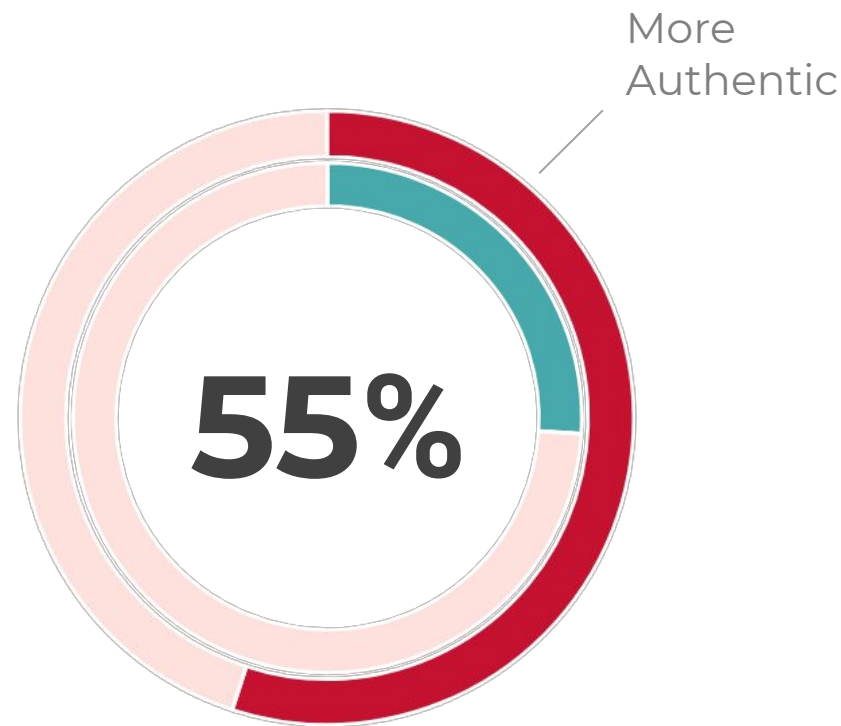
WHY MUSIC OVER OTHER PASSION POINTS?

U.S. FANBASE



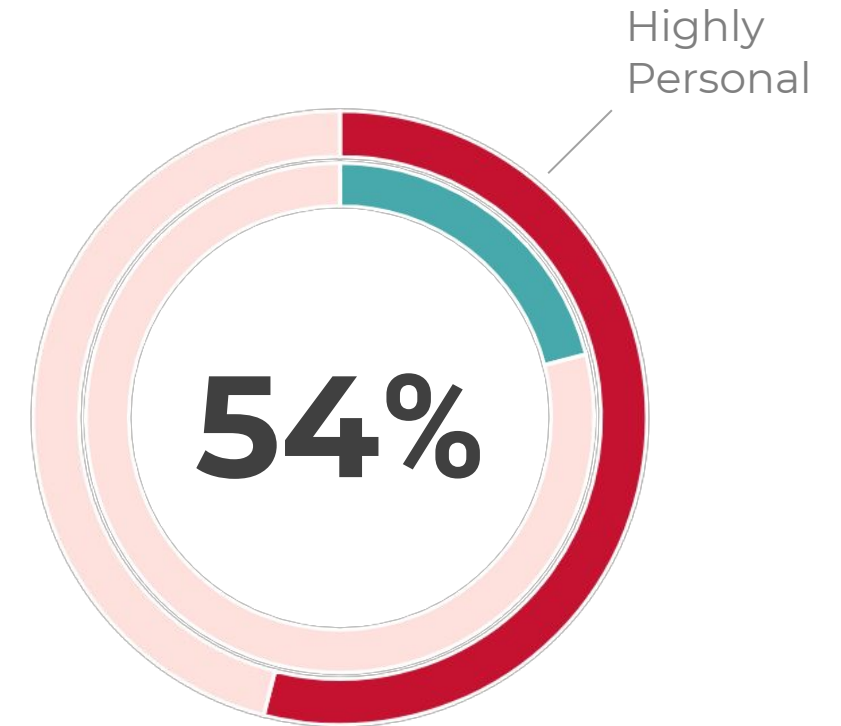
59% are sports fans
91% music 24+ hrs

CULTURAL ASSOCIATION



26% sports with culture
55% music with culture

SHARED IDENTITY



21% sports is identity
54% music is identity

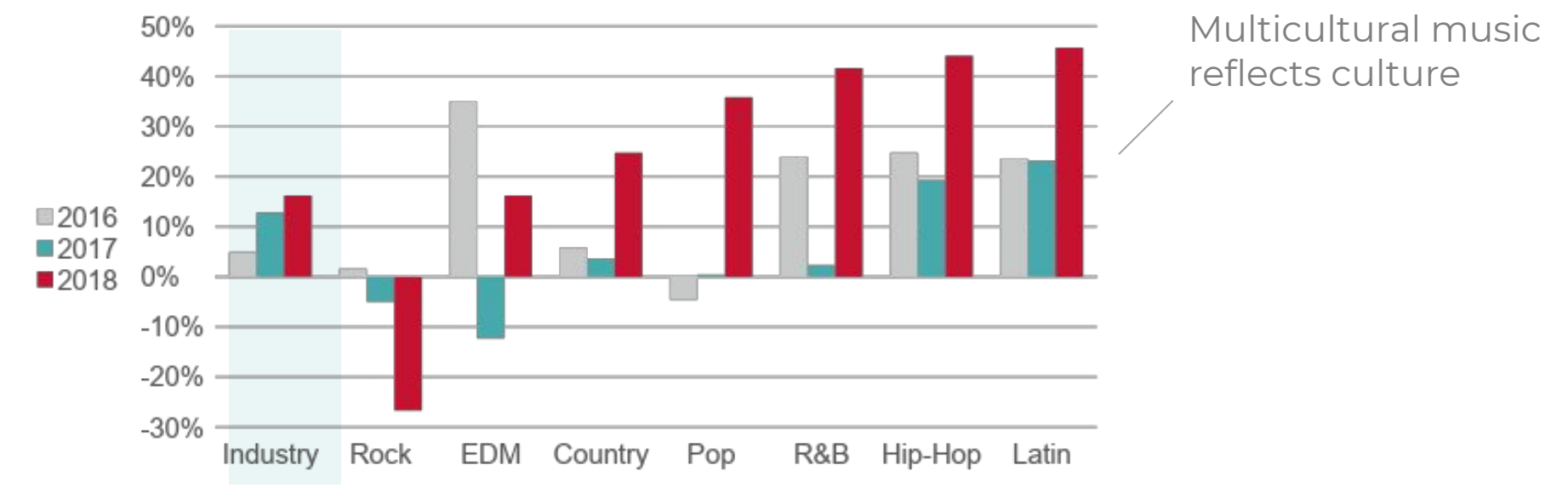
■ Sports ■ Music



MUSIC REFLECTS THE CULTURAL SHIFT

Hip-Hop has dethroned Rock as the No. 1 genre.
Latin music has surpassed Country.

Total Album Consumption Growth

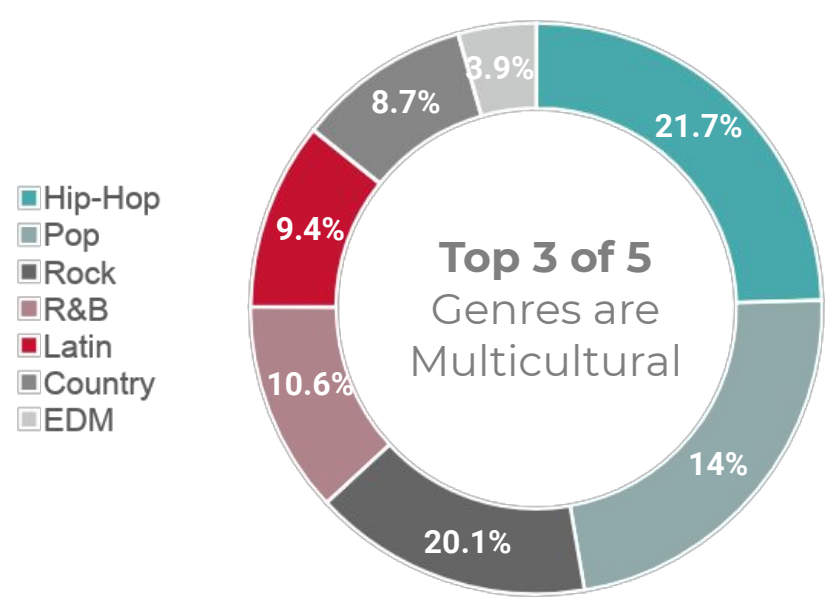


Multicultural Music Fans

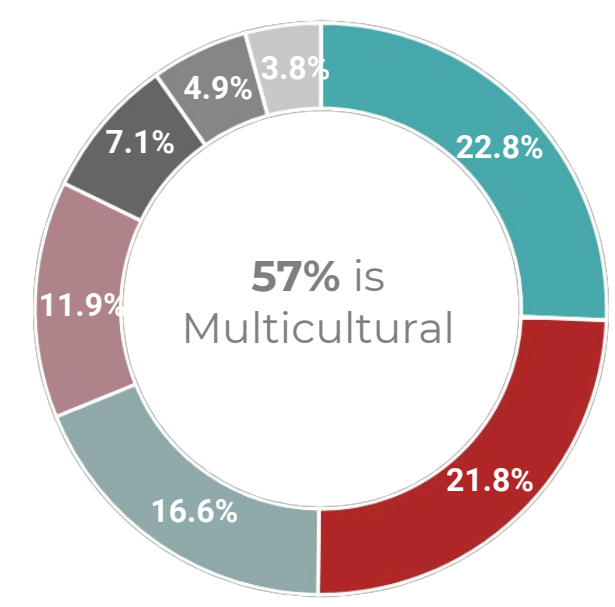
32+ Hours listening to music per week	63% Listen through online music service	13+ Hours listening to radio each week	88% YouTube viewers watch music videos
78% Favor brands that sponsor music	70% Follow artists on social media	32% More likely to attend live music events	16% Higher annual spend on music



Total Music Consumption

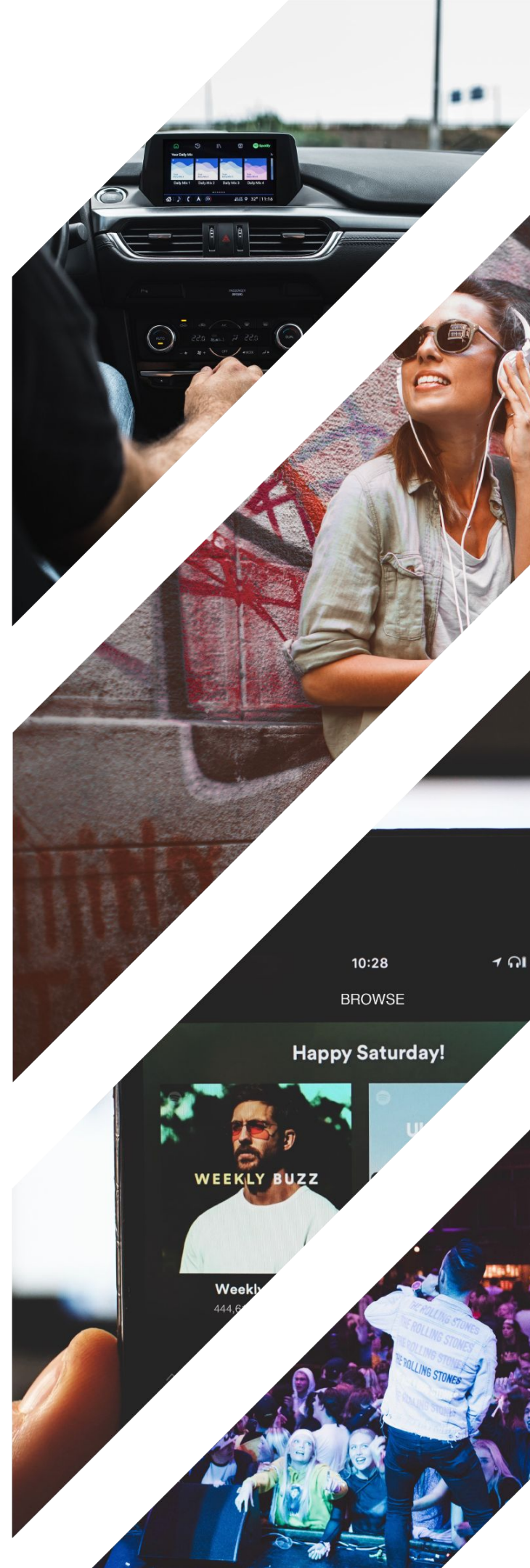
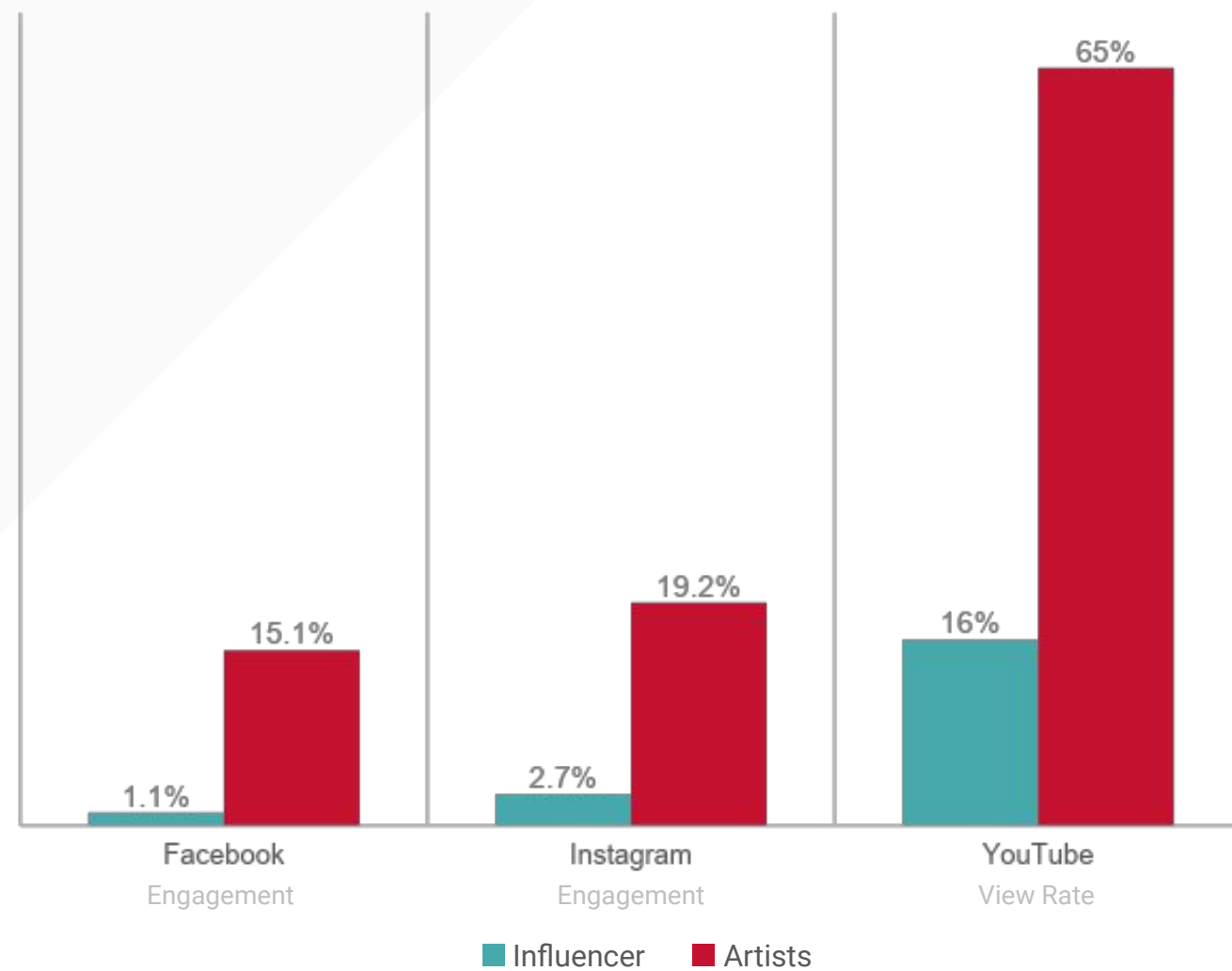


Music Video Consumption



ARTISTS ARE THE CONNECTION POINT WITH FANS

Music is the #1 passion point for Multicultural Americans.
Artists are influencers who bring this passion to life for a brand.



Artists Are Everywhere Brands Want To Be

Storytelling Opportunities:

- On the radio
- On Streaming
- On TV
- Online
- On video
- On social
- On Livestreams
- At shows
- At retailers

Artists Represent Endless Content Opportunities

1.8M+	865+	1.5M+	100K+
Artists	Genres	Annual Releases	Live Shows



CHANGES IN CONSUMER BEHAVIOR CREATE OPPORTUNITIES

As traditional advertising avenues continue to show uncertainty, music listenership continues to increase, and as advancements in the livestream experience improve, there are new opportunities for brand involvement.

35.7
avg hours listening to music per week

74%
will watch livestream concerts in 2020 & 2021

44%
likely to livestream a concert in the next 2 weeks

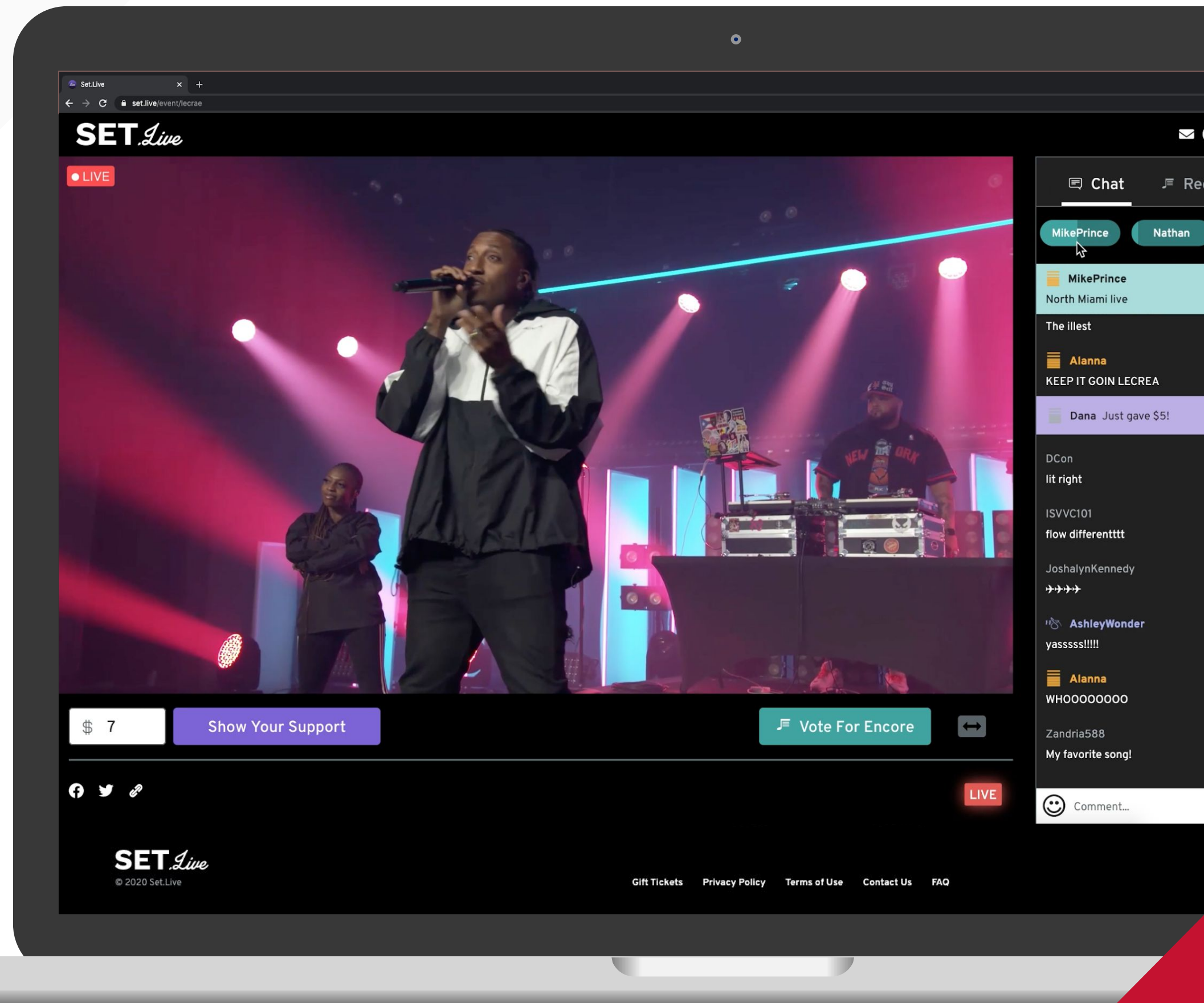
21%
have watched a livestream (26% for Hispanic fans)

Additionally

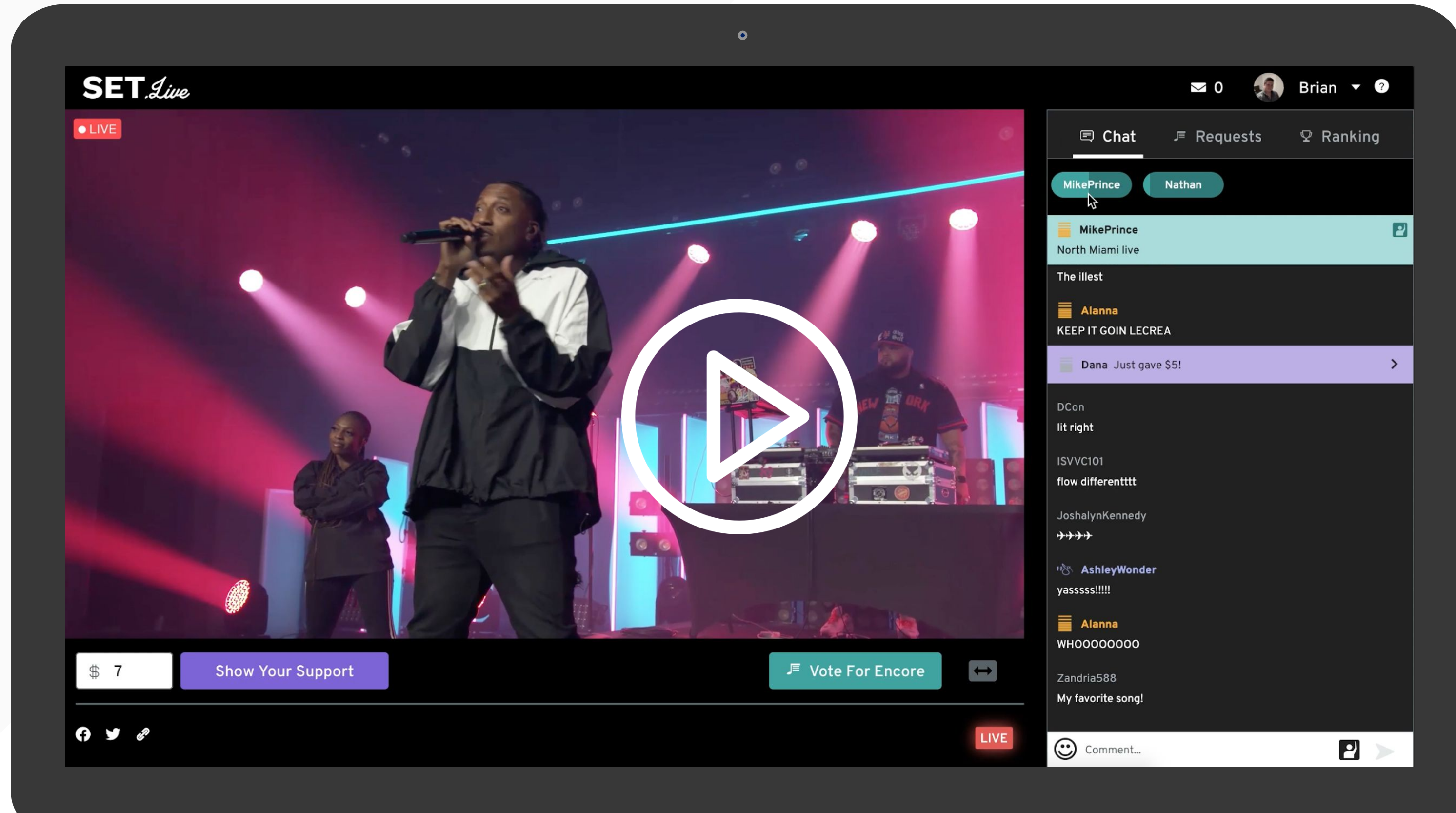
Consumers view brands more favorably when they...

Support Artists
66%

Sponsor Livestreams
57%



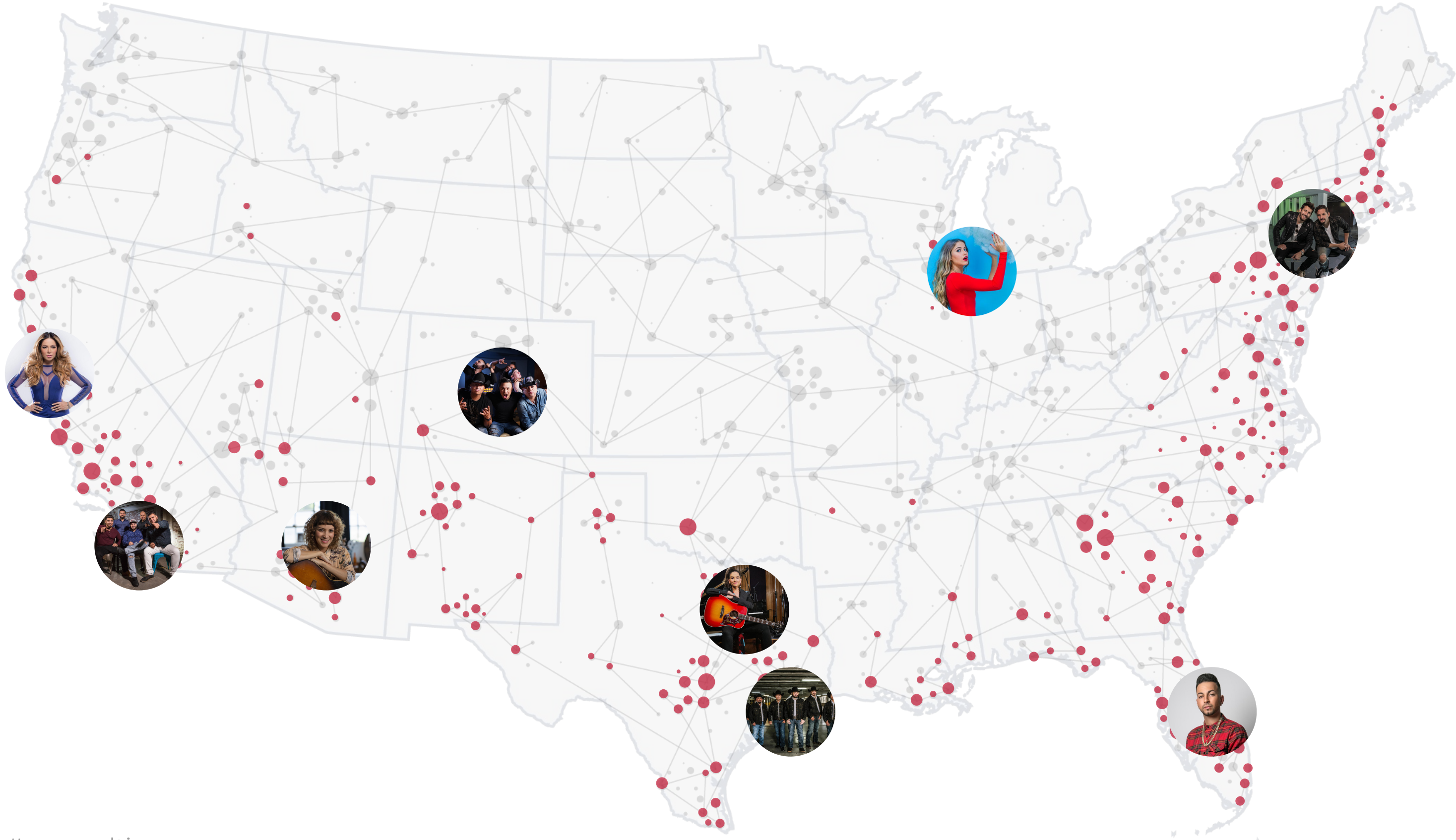
LIVESTREAMING FOR THE 'ME'-CONOMY





BALANCING 'ME' WITH 'WE'

SPEAKING WITH CULTURALLY RELEVANT VOICES



SPEAKING WITH CULTURALLY RELEVANT VOICES

Hyper-target audiences with very specific cultural attributes, and then align with artists who authentically appeal to them.

Heritage	Acculturation	Age	Market
Bolivia	Spanish-only	Gen Z	West Coast
Puerto Rico	HA5	18-24	Los Angeles
El Salvador	Bi-cultural	25-34	Houston
Columbia	HA4	Millennial	Dallas/Ft. Worth
Nicaragua	Bi-lingual	35-44	South
Costa Rica	HA3	45-54	Chicago
Mexico	Ambicultural	Gen X	Midwest
Guatemala	HA2	55-64	Miami
Cuba	Acculturated	65-74	Southeast
Honduras	HA1	Baby Boomer	New York
Dom. Republic	Non-Spanish	75+	Northeast
Ecuador			

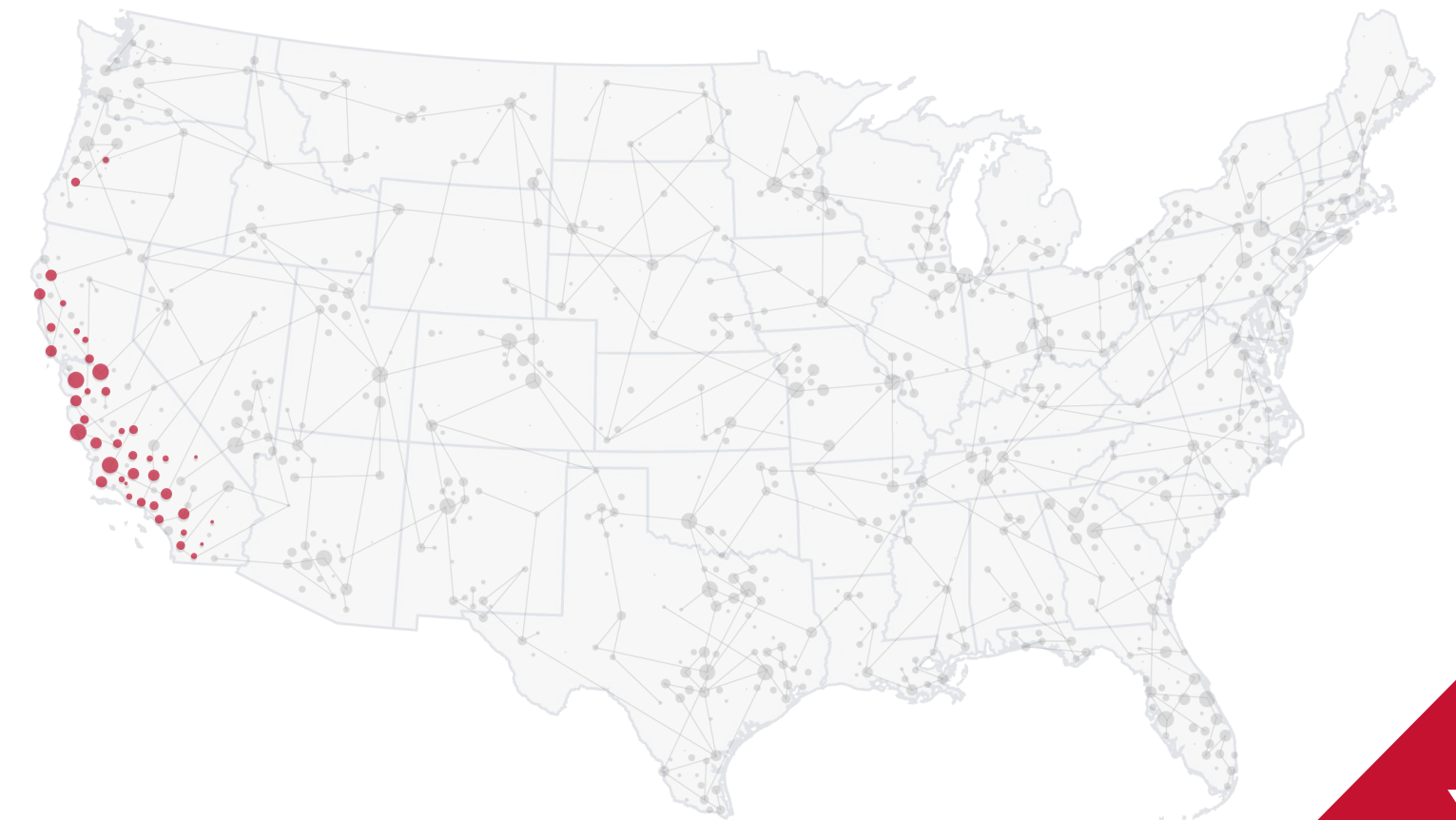
West Coast Acculturated Hispanic Millennials

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3.98M IN WEST

4,831 ARTISTS

- Energy Drinkers
- Early Adopters
- Ridesharing Users
- Gamers
- Creatives
- Hip Hop / Rap
- EDM
- Indie Pop
- Latin Pop



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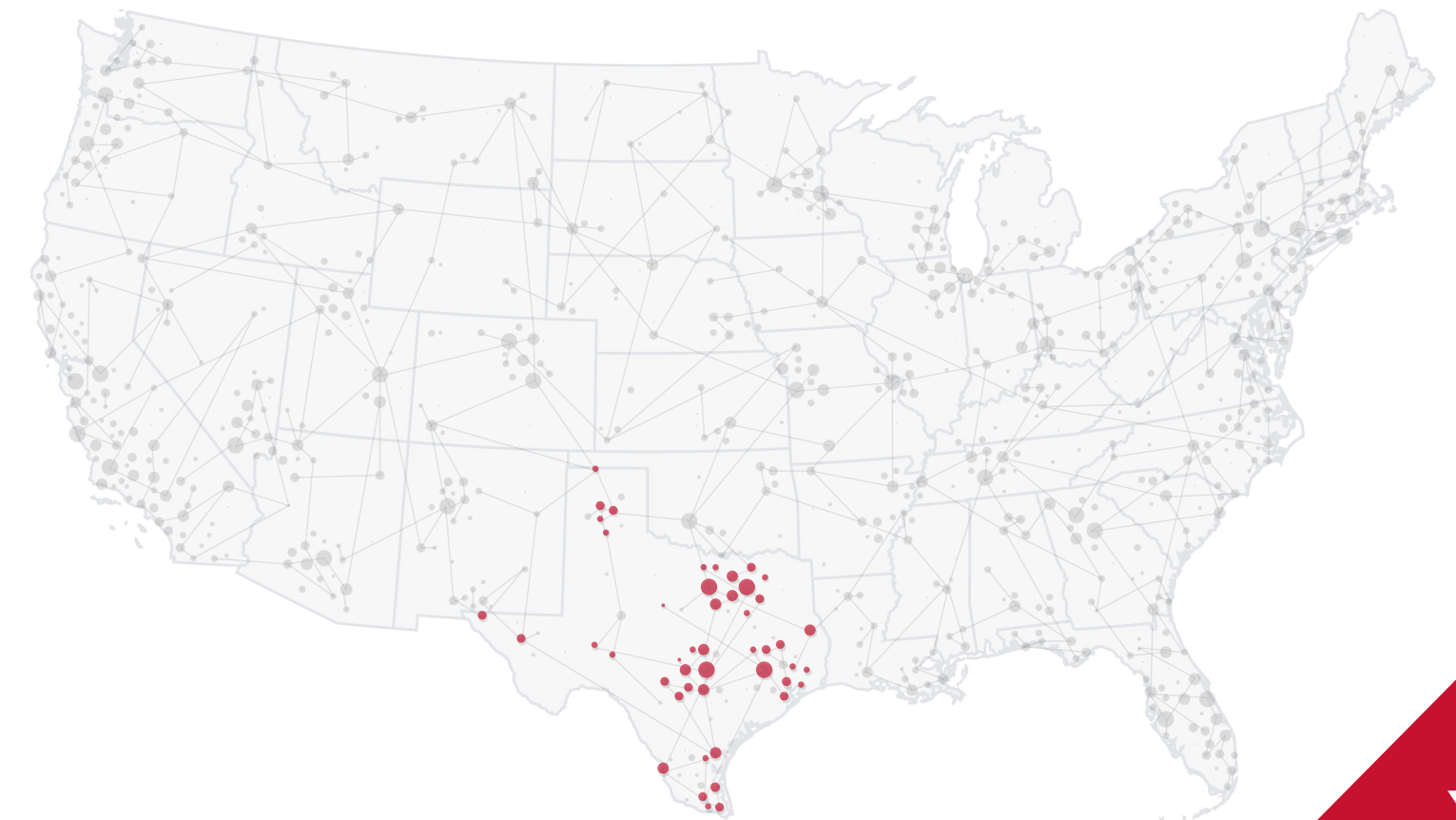
Bicultural Women with Mexican Heritage in Texas

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2.57M IN TX

473 ARTISTS

- Shopping Enthusiast
- Style Conscious
- Crafters
- Social Media Hubs
- Romance Fans
- Regional Mexican
- Cumbia
- Tejano
- Latin



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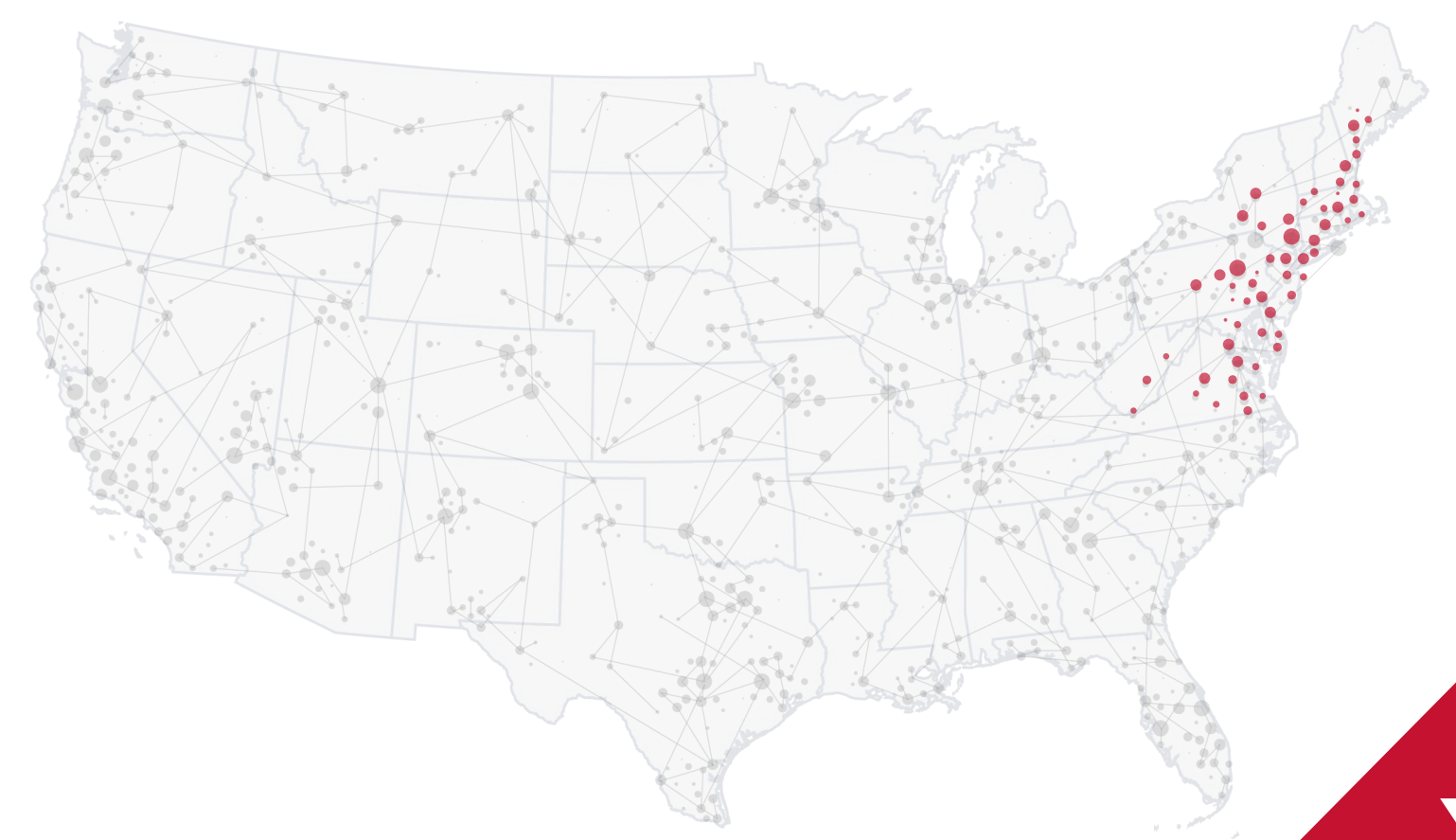
Millennials with Caribbean Heritage in the Northeast

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5.38M IN U.S.

846 ARTISTS

- Early Adopters
- Online Shoppers
- Style Conscious
- Gym Enthusiasts
- Night Club Goers
- Latin
- Reggaetón
- Bachata
- Salsa





WHAT IT LOOKS LIKE IN PRACTICE

ENGAGING **BLENDED** CULTURAL SEGMENTS

Cricket Wireless targets younger, more ambicultural segments by leveraging artists with crossover appeal. By focusing on psychographic attributes of the target, Cricket aligns with artists who deeply resonate with blended demographic profiles.





featured artist: **Helen Ochoa**

HIGHLIGHTING **UNIQUE** ARTISTS TO MIRROR **BRAND** POSITIONING

Dr Pepper's ongoing music program brings the brand story to life through artists who appeal to the brand's key audiences and emulate the brand's attitude—both in their music and their lifestyles.



**OUR LOSS
IS THEIR
PROFIT.**

WeAreNotProfit.org

featured artist: Goapele

SHARING AUTHENTIC STORIES THROUGH RELEVANT VOICES

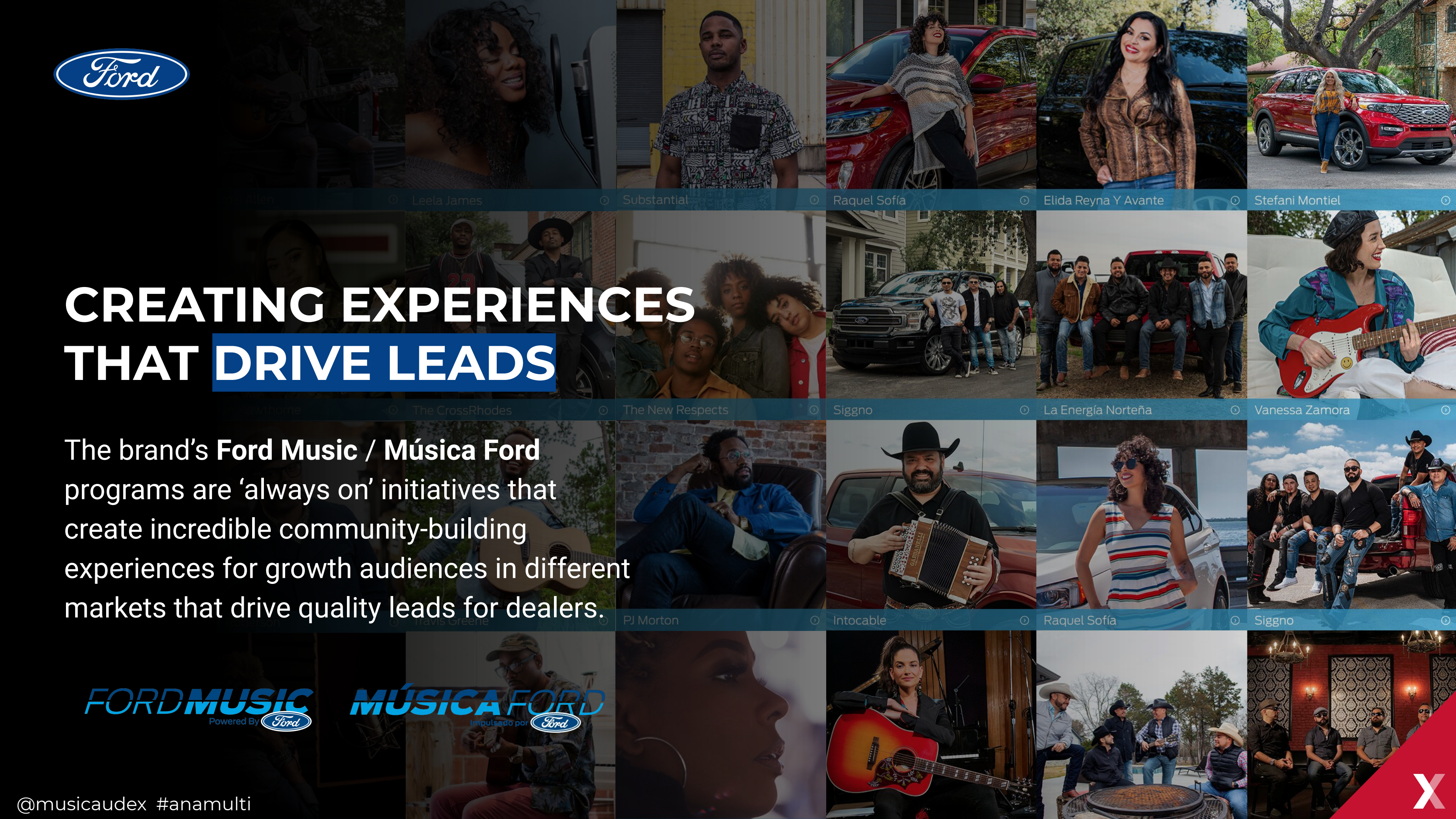
TobaccoFreeCA found a strong voice in R&B artist & community activist, Goapele, whose passionate fanbase and personal connection to the organization's cause helped to raise awareness and drive critical social conversations.





CREATING EXPERIENCES THAT DRIVE LEADS

The brand's Ford Music / Música Ford programs are 'always on' initiatives that create incredible community-building experiences for growth audiences in different markets that drive quality leads for dealers.



WRAP UP

- **Thriving in the 'ME'-conomy means:**
 - *See Me. Understand Me. Reflect Me...* or risk losing me.
 - Growth Opportunity: Multicultural segments
- **Nothing says 'ME' like Music**
 - Music is personal, captivating, abundant, and growing
 - Artists are the connection point
 - New behavior & technologies present new opportunities for brands to thrive
- **Balancing 'ME' with 'WE'**
 - It's not about 'one big name' to appeal to everyone
 - It's about leveraging data to understand cultural nuances & leveraging technology to scale

THANK YOU!



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SOURCES

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- [2016 Year-end Music Report \[Nielsen\]](#)
- [2017 Year-end Music Report \[Nielsen\]](#)
- [2018 US Music 360 Snapshot \[Nielsen\]](#)
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- [2017 Music Report \[BuzzAngle\]](#)
- [2018 Music Report \[BuzzAngle\]](#)
- [A Statistical Review of Influencer Engagement Rates in 2018 \[PMYB\]](#)
- [As Industry Grows, Percentage of U.S. Sports Fans Steady \[Gallup\]](#)
- [Building a Movement to See All Consumer Segments Prioritized and Reflected In Today's Marketing Efforts \[AIMM/ANA\]](#)
- [Hispanic Insights for Food Marketers \[MSLGROUP\]](#)
- [Influencer Marketing Benchmarks \[gen.video\]](#)
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- [Personal Identity Study \[MAX\]](#)
- [Sponsorship Spending Forecast: Continued Growth Around The World](#)
- [Sponsorship Spending On Music To Total \\$1.54 Billion In 2017](#)
- [The Growth Majority: Understanding The New American Mainstream \[Claritas\]](#)
- [The Hispanic American Market Report \[Claritas\]](#)
- [The Asian-American Market Report \[Claritas\]](#)
- [The Impact of Culture \[Magna\]](#)
- [The Online Lives of LatinX Consumers \[Nielsen\]](#)
- [2018 Asian-American Report \[Nielsen\]](#)
- [Music Is Still The Soundtrack To Our Lives \[Nielsen\]](#)
- [Black Impact: Consumer Categories Where African Americans Move Markets \[Nielsen\]](#)