

Music Cycle 2014-All Access Zapoleon Music Cycle Update: Exiting Doldrums and Entering Rebirth?

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It's November 2014, and time to revisit the 10-Year Music Cycle in 2014 as another change appears to be on the way. The Music Cycle is a phenomenon that has that a three-part phase pattern that has happened every 10 years for 60 years now. You always see the music cycle return to the same music patterns and phases every 10 years, but what's interesting is that this similarity has even stronger similarities every 20 years.

An understanding of the 10-Year Music Cycle phases and how to react to them is knowledge that the radio's top programmers, CEOs of music labels and radio company owners now understand, which has helped manage the effect of the Doldrums and the Extremes over the past 20 years but more on that later. However even with smart programmers, there is nothing anyone can do to change the patterns and phases of the music cycle because the pendulum swings from more Rock to more Rhythmic Hip-hop R&B to Center Pop as each new generation of teens and young adults want their own music, their own artists and quite often hits from different genres of music. They don't want to adopt what big sister or especially mom liked. Music labels will always need to produce hits that the 15-29 year old audience loves since they are the drivers of what become hits for Top 40, Urban and Alternative radio (as well as what drives Pop culture). So the Music Pendulum will always swing from one side to the other with each generation and that's one big reason why the music cycle repeats.

Here a recap of the three phases of the 10 year Zapoleon Music Cycle

Birth/Pop Phase -- The three core genres of music Rock + Pop + R&B are the most Pop in nature, while other formats like AC and Hot AC grow more Pop. The ratings are highest for Mainstream Top 40.

Extremes -- The majority of contemporary music moves toward the edges, away from being Pop and more Rock or R&B or both.

Doldrums -- Softer Music styles from AC, Country, and even Jazz have their shot at Mainstream Top 40 and Mainstream Top 40's R&B and Rock edges soften as well and much of that music is avoided entirely. Mainstream Top 40's ratings dip.

What brings back the Rebirth Phase and a new Cycle happens when a genre or an artist or a music platform brings about another change in music.

Music Cycle #1 1956 Artists: Elvis

Music Cycle #2 1964 Artists: The Beatles

Music Cycle #3 1974 Artists: Great album artists Led Zeppelin, Rolling Stones, Fleetwood Mac, Stevie Wonder

Music Cycle #4 1984 Platform + Artists MTV and its generation of artists

Music Cycle #5 1997 Platform: The Internet and Napster allowing for free music and trading files

Music Cycle #6 2005 Platform: American Idol

Music Cycle #7 2015 Platform: Mobile Technology & Music

So here's the scenario: There has been a long period of mostly Pop hits dominating the charts for the past five years. That was followed by a period of about two years where the charts were dominated by Softer Pop and Pop Rock artists. Then Pop music moved on to a more Rhythmic phase where the biggest hits were from Dance. Also, there was competition for the #1 format from Country radio, challenging Top 40 after a long run at #1, as you saw an explosion in popularity of Country music and Country artists.

Does this describe 2014? Yes, but it also describes the same period exactly 20 years ago. Back in 1994, Top 40 had come out of the music the format had played in years during the MTV era in the mid-'80s. Superstars like Michael Jackson, Madonna and Prince, and Pop Alternative and Pop Rock artists such as Duran Duran, Eurythmics and Bon Jovi led the way and made Top 40 the #1 format. Starting in the late '80s, Top 40 had gone thru the Extremes of the Music Cycle with less superstar Pop product, nameless Pop artists having "the hits" and Hip-Hop and R&B as well as Hard Rock (Guns N Roses, etc) gaining appeal. With that crop of music, Top 40 was losing ratings, and especially concerning for owners was the fact that Top 40 was losing 25+ numbers. Owners told their radio stations they needed to keep their 25+ numbers, so programmers mistakenly refused to play a lot of the biggest selling R&B and Hip-Hop songs and harder Rock music that was seen as not as popular with adults (but that the 15-24 audience was embracing.)

Radio flatly told the music labels they wanted lots of adult-appeal Pop Rock and Soft Rock hits instead. So there was an avalanche of soft hits by Whitney Houston, Mariah Carey, Brian Adams, Eric Clapton, Wilson Phillips and Steve Winwood, then Michael Bolton, Celine Dion and Amy Grant. This Soft Rock sound became the majority of music that many Top 40s played. The result was that instead of losing more of the 25+ numbers they were now targeting, the reverse effect happened, as there was a fall-out for the true base of the format, 15-24 listeners, and Top 40 ratings fell even more. At that point, consultants and group heads were quoted in the New York Times and the Wall Street Journal that the nearly 40 year old Top 40 format was finished. Owners panicked and took 500 Top 40 radio stations out the format and into Country, AC or the more 25-54 focused Hot AC format. This was the Doldrums of the music cycle

The format began to finally ease out of the Doldrums when what was left of the stations in the Top 40 format came to their senses beginning in 1994 and began to adopt more of the Pop Glue that helped hold the format together, including playing more of the Pop/Dance music that was coming from Europe with artists like Ace Of Base, Real McCoy and La Bouche, along with new R&B artists like TLC, En Vogue and Boyz II Men. When the first big 90s Teen Pop Acts like Hanson and Backstreet Boys began having national hits in 1997, followed by N'Sync, Britney Spears and Christine Aguilera, the 15-24 audience returned and Top 40 became a #1 format again under the leadership of programming teams like Z100's Tom Poleman, Sharon Dastur and Paul "Cubby" Bryant.

In 2005, as Cycle 6 began, there was a big wave of great Pop Music beginning with the popularity of American Idol in 2005 all the way to 2010. There were lots of Pop and Pop Dance hits by artists like Justin Timberlake, Rihanna, Katy Perry, Maroon 5, Miley Cyrus, Pink, One Republic, Lady GaGa, Flo-Rida, Coldplay, Taylor Swift, Black-Eyed Peas, Pitbull and Kelly Clarkson. There were great new artists that set a high standard of pop music from the likes of Katy Perry and Bruno Mars. This past music cycle that began in 2005 broke the barriers of appeal to more than Top 40's typical 15-29 female core listener. Even 35-44 and 45-54 women and men have adopted this music, which has led Hot AC and AC stations to play more contemporary Pop music than ever before. During this cycle, we've seen more teen pop acts like Justin Bieber making hits (and even the '90s Pop Teen acts like Backstreet Boys made a return with sellout reunion concerts).

In 2011, just like in the early '90s, a softer Doldrums period followed this Pop explosion. This Doldrums period began with Soft Pop Alternative hits by Lumineers, Mumford & Sons and softer Pop by Adele and continued with Passenger and continued this year with A Great Big World's hits, and fewer hits from big Pop artists. What's interesting is that during this Music Cycle's Doldrums period, it wasn't nearly as soft as any prior period of the Doldrums going back 60 years. Top 40 programmers know the way to ride out the music cycles is to stay focused on playing the "glue" for the format:uptempo Pop and Pop Rhythm with a majority of the format's music being Pop-centric. They are careful to maintain a safe percentage

of Rock as well as R&B and avoid much of the more extreme versions of either of those sounds. However, many Adult Pop acts have had a tougher time breaking through, even if they show they are popular in research, because Top 40 programmers want to manage that sound and don't want to make the same mistake that they did in 1990-94 by playing too many ballads or softening too much during that doldrums phase of the music cycle. Nevertheless, as we entered early 2014, I was asking a record industry Sr. VP about what he was finding with music from his label, and he told me year-over-year digital Pop music sales were DOWN 15%. A downturn in digital music sales is moving in tandem with the declining passion level for this cycle of pop music

So even though programmers are smarter about managing the Doldrums, just as in the early '90s there have been a lot of challenges for Top 40.

Just like in the early '90s, we have a huge explosion in popularity of Country music with Bro Country stars like Blake Shelton, Luke Bryan and Jason Aldean along with young Country female stars like Miranda Lambert (and even Garth Brooks is back with a hit!). This explosion of all these great Country artists has Country radio challenging Top 40 radio for #1 with a popularity in 18-34 Persons that this format hasn't seen in years.

Also, over the past three years, there have been more stations jumping into the Top 40 format, and at times you have three to four stations occupying the Top 40 landscape in a market, often along with a Rhythm Top 40 and a very contemporary Hot AC. Also, you have Urban, AC and Alternative stations playing more of their format's Pop songs that have crossed over to Top 40.

With the saturation of the Pop music across multiple stations/formats, with more stations occupying the Top 40 landscape, and with Country's immense popularity, ratings for the leading Top 40s, while still strong, aren't at the levels they were before. So is this the Doldrums continuing or an end to the Doldrums and signs of another phase beginning?

Over the last six months we're seeing R&B songs by artists like Jeremih, Tinashe and Chris Brown going top 10 in predictive music platforms and showing up on the Top 40 charts. We're also seeing successful new Urban stations pop up. And the Dance hits that were made popular at the beginning of Cycle 6 by Pop stars like Justin Timberlake, Lady Gaga, Britney Spears, Black Eyed Peas, and Katy Perry are being replaced by a new crop of artists. Many are the new EDM artists, with songs that first became hits over in Europe crossing over to the U.S. We're seeing hits now by artists like Avicii, Zedd and Mr. Probz. There are Deep House hits by Clean Bandit and Kiesza. Doesn't this resemble 20 years ago, when the same phenomenon of Pop Dance and Deep House hits came to the US from Europe? Also, there are Pop songs crossing from Alternative, like Lorde and Tove Lo.

So what do you get when you add Pop versions of Pop Rhythm/R&B, Rock/Alternative and Pop/Pop Dance? You get the Rebirth Phase coming again, and there are signs of that.

So at this point, as they say the "Jury is Out." There are signs of a new Rebirth phase, but still some signs of the Doldrums, so we'll have to watch the next few months to see if a milder Doldrums lingers, or if we're in the throes of Cycle #7, with an exciting new Rebirth Phase leading it off.