



DIVERSE INTELLIGENCE SERIES | 2019

# IT'S IN THE BAG: BLACK CONSUMERS' PATH TO PURCHASE

# PREFACE

There is a saying, “Be careful what you ask for because you just might get it.” In 2011 when Nielsen launched the first comprehensive report on the buying habits and behaviors of African American consumers, we simply wanted to raise awareness of the economic clout Black consumers yielded as an opportunity for brands to be more inclusive. Eight years later the level of awareness has indeed been raised, but inclusion is still very much a work in progress.

Some industries and brands have grown markedly more diverse and inclusive while others have opted to change only when forced to do so following unfortunate missteps. Still others have not yet ventured into change at all. Those are the brands we still hope to inspire.

As we explore the African American path to purchase, we recognize that advertising is the indispensable first step of the journey. Yet the advertising industry has been slow to align Blacks’ consumption habits with brands’ advertising spend focused on Black audiences; or to diversify the industry itself to ensure it reflects this cohort’s \$1.3 trillion in spending power. We delve deeper into this topic in our special section on advertising.

At Nielsen, we are charged with helping our clients see ahead of the curve. What we know to be true—because we’ve crunched the numbers over and over—is this: diversity is not a moment. Or a trend. It will not pass. Or go away. But brands that continue to fail to recognize this reality just may. So we keep trying to spread the word. This year we have asked for a little help from some of the brightest minds in the industry, to help contextualize the opportunity of the Black consumer market for those brands we haven’t reached yet. We want to ignite a movement of positive, progressive change. And with industry leaders on our side—we think we might just get it.



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## EDITOR’S NOTE

African American population numbers throughout this report are reported as defined by the U.S. Census as “Black alone or in combination with other races.” This decision is a nod to the greater diversity of the African American population in the U.S.

# EXECUTIVE SUMMARY

African Americans' influence on mainstream culture is clear. Fifty-four percent of African Americans are 34 years old or younger, meaning the majority of Blacks have grown up in the digital age, and these powerful consumers have naturally incorporated their tech-affinity into their entire shopping journey. This pursuit of the latest things drives many steps on the African American consumer journey, from how they consume media to become aware of trends and products, to how they use e-commerce on multiple devices while still demanding a dynamic in-store experience.

Black Americans are 48 million strong with nearly 25 million being millennial age or younger as of 2018. With a median age of 32, Black Americans are just approaching their peak earning years, but are already dominating industries from music to fashion and many others and creating apps and digital spaces to serve their own unique needs when the opportunity demands it.

In a world bombarded by constant new media options and technologies, companies that want African American consumers' dollars must understand what most influences these consumers and how they influence others on their path to purchase. Developing authentic strategies that evolve from listening to Black consumers' needs and demands is not only the best way, but the only way for brands to realize the powerful growth opportunity ahead.

## TECH AFFINITY DRIVES THE CONSUMER JOURNEY

African Americans are adopting new and multiple devices at higher rates than the total U. S. and adapting those devices to their unique consumer journey. Ninety-six percent of African American households own a smartphone, and those aged 35+ surpass the total population in their age group by 2% for smartphone ownership.

## OMNICHANNEL MEDIA CONSUMERS WITH SHIFTS ON THE HORIZON

African Americans are voracious media consumers, across multiple channels, spending over 11 hours more each week using television (50:38 hrs per week) compared to the total population. "Internet on the go," usage is increasing with more time spent on video, audio and social networking than the total population on both smartphones and tablets.

## SOCIAL MEDIA SUPERSTARS

Facebook has the highest reach of social media apps with African Americans at 66%, but usage is 4% lower than the total population. Facebook-owned Instagram, however, reaches 45% of African Americans (surpassing the total population by 20%, the highest preference difference vs. the total population of all of these ranked social apps).

## AFFINITY FOR APPS AND CREATING WHERE THERE ARE GAPS

African Americans over-index the total population for most genres of apps, including search engines, entertainment, electronics, Government & Non-Profit apps. The rise of apps like the Official Black Wall Street and I Am Black Business create easy access to information about African American owned businesses, and their creation is impacting African Americans' ability to support black-owned businesses with their purchasing power.

## BLACK RADIO & MUSIC DOMINATE LISTENING

Radio has the highest weekly reach (92%) among adult African Americans and listening happens all day long with 35% happening in the home and 64% away from home. African American music genres dominate the music scene, with Urban AC (Adult Contemporary) the leading genre of choice for African Americans 18+ with a 29.3% market share among 18+ African Americans, then followed by Urban Contemporary at 20.3%, and Rhythmic CHR, Adult Contemporary and News/Talk rounding out the top 5.

## RECEPTIVE TO ADVERTISING

African Americans demand that product information and feedback opportunities be integrated across multiple media channels. African Americans are more likely than the total population to agree that advertising provides them with meaningful information about the product use of other consumers on most platforms including on mobile phones (42% higher), television (23% higher), radio (21% higher), and on the internet (18% higher).

## BUYING LOCAL AND CONCERNS ABOUT ENVIRONMENT AND FOOD SAFETY

African Americans are buying local more often with their definition of "local" varying across different food categories. The top 3 environmental/food safety concerns among Black consumers are: "Pesticide/herbicide use in food production" (76%), "Antibiotic use in animal production" (71%), and "Rising prices due to trade tariffs" (68%–21% higher than the total population).

## SHIFTING GEOGRAPHIES: TEXAS TAKES THE LEAD

Black buying power continues to grow, from \$320 billion in 1990 to \$1.3 trillion in 2018. Between 2000 and 2018, black buying power rose 114%, compared to an 89% increase in white buying power. Texas now has the largest population of African Americans and tops the nation in African American buying power.

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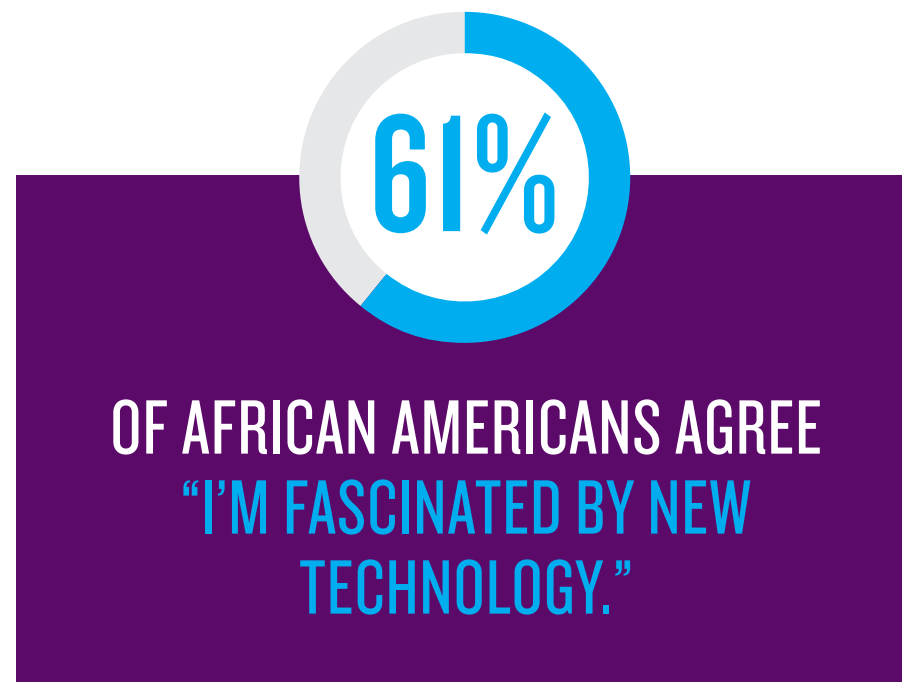
# INFLUENCES AND INFLUENCERS ALONG THE AFRICAN AMERICAN CONSUMER JOURNEY



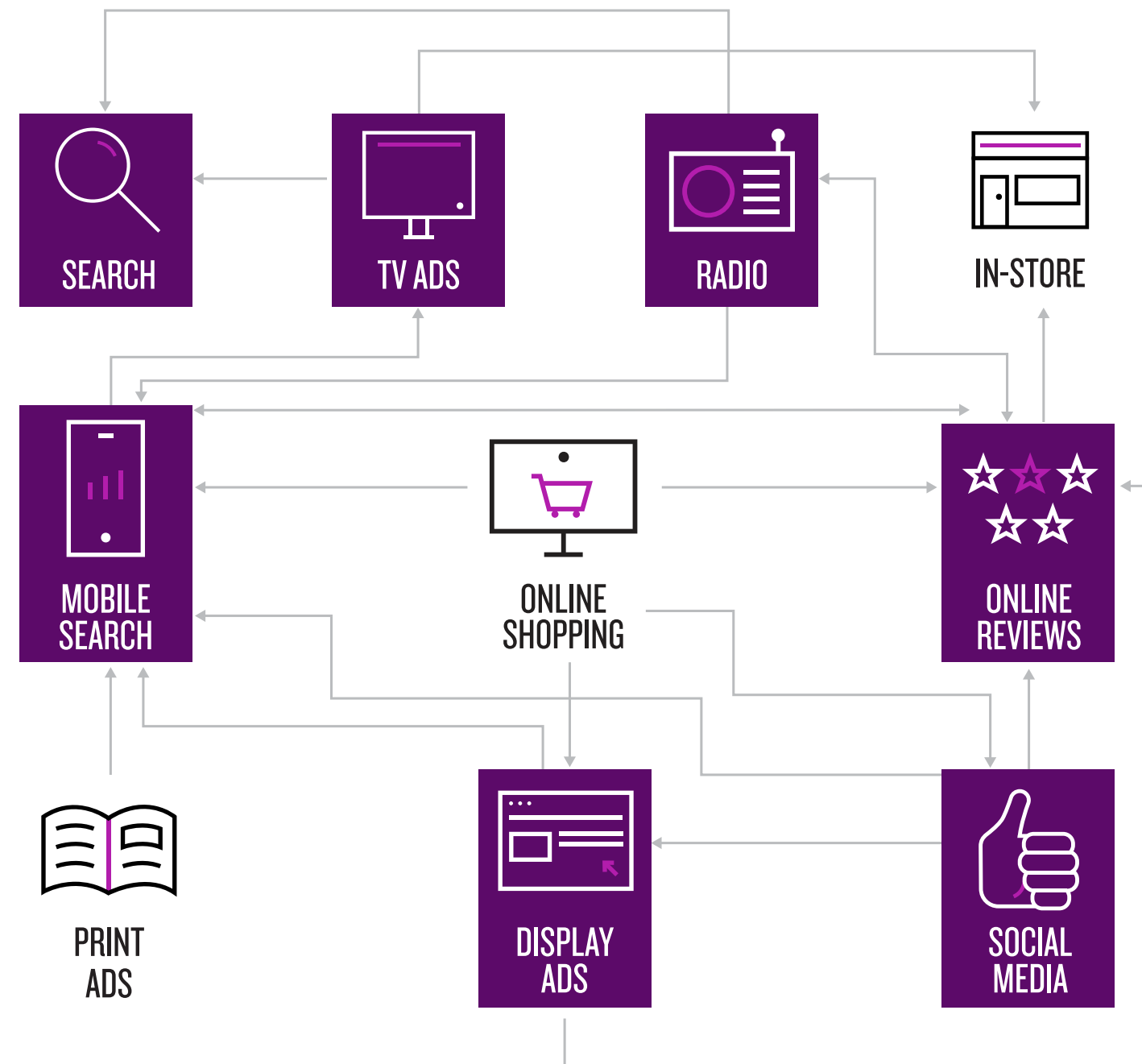
The path to purchase, or “consumer journey” is non-linear and circular, but finds a logical end at the purchase point. But, where does the consumer journey begin? It starts where consumers learn about products—through advertising, the recommendations of friends, family and online communities and the consumer’s own searching. So much of product discovery takes place on mobile devices, which is important because Black consumers are much more likely to own a variety of devices and spend more time on these devices than the total population. However, smart marketers will not overlook traditional media platforms when designing Black outreach plans. After all, Black consumers love all forms of media, and spend more time with media on traditional platforms like TV and radio. The key to earning Black consumer spend is reaching Black consumers as they research and discover the products they need.



Sixty-one percent of African Americans respond positively to the statement “I’m fascinated by new technology.” African Americans are also 37% more likely than the total population to be the first among their peers to try new technology products, and they are 43% more likely to agree with the statement “I like to have a lot of gadgets.” African Americans actively embrace technology, and its impact on their shopping behaviors, being 54% more likely than the total population to agree with the statement “I want others to say wow when they see my electronics.” This passion for the latest technology drives many steps on the African American consumer journey — not only how they consume media to become aware of products and services, but also how seamlessly they use e-commerce on these new and multiple devices, while still enjoying the in-store experience.



## THE NON-LINEAR PATH TO PURCHASE

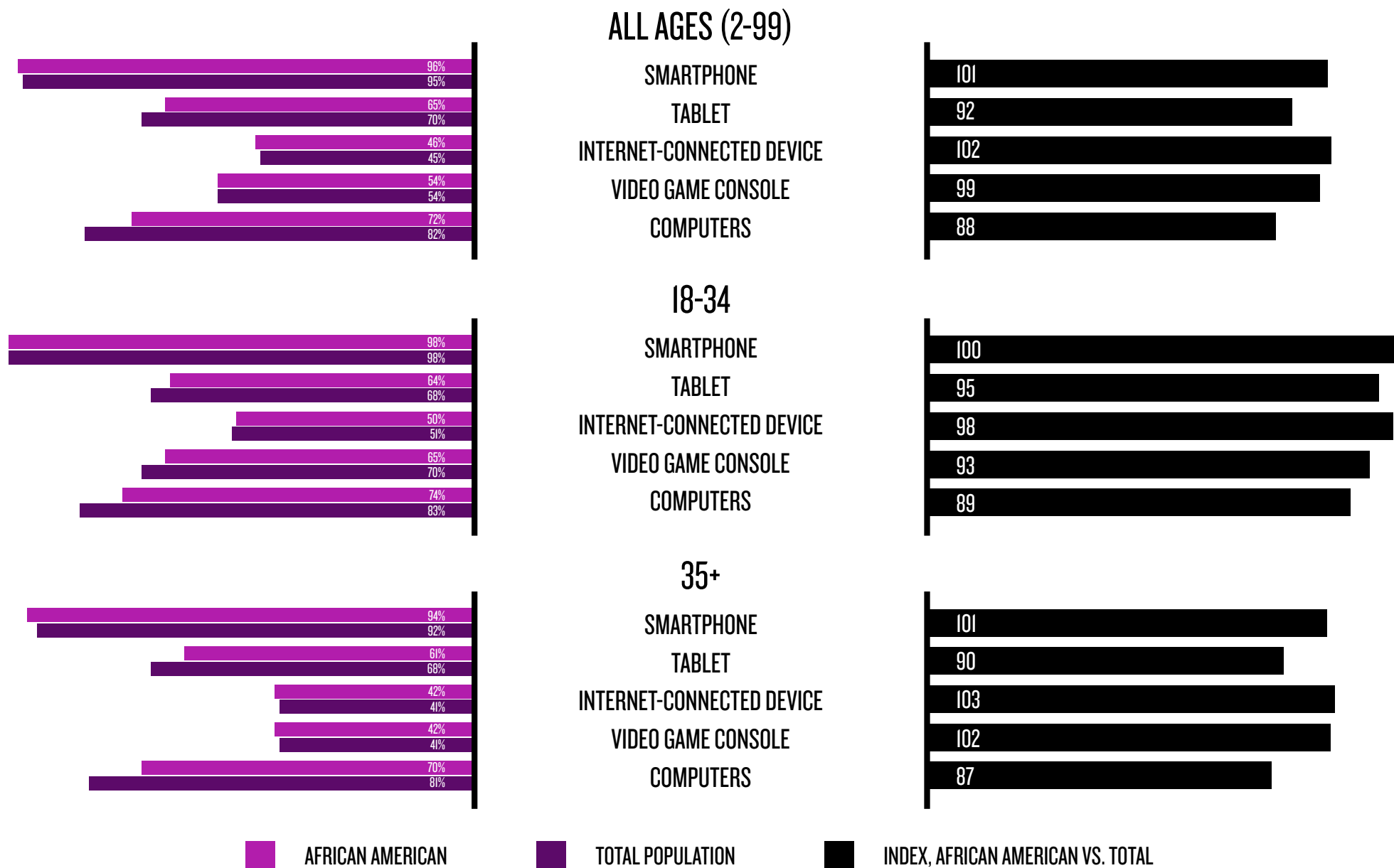


# AFRICAN AMERICANS OF ALL AGES LOVE THEIR TECH DEVICES

African Americans are adopting new devices and multiple devices at higher rates than the general U.S. population, and they're adapting those devices to their unique consumer journeys. Ninety-six percent of African Americans own a smartphone, and those aged 35+ surpass the total population in their age group by 2% for smartphone ownership. In fact, African Americans make up 23% of the total market for U.S. cellular sales, while only accounting for 14% of the overall population.



## AFRICAN AMERICAN DEVICE OWNERSHIP



Source: Nielsen NPOWER, April 2019, based on households/persons installed in the National TV panel

African Americans are avid media consumers—across multiple media channels—which gives advertisers ample opportunities to connect with them. African Americans spend more time on devices compared to the same quarter last year, as they embrace new technologies and the proliferation of new devices. African Americans spend considerably more time with television each week than the total population (50:38 vs. 39:06), the total time spent is down one hour and 20 minutes each week from 2018. To make up for the lost TV time, Black consumers in 2019 are active in using “Internet on the go,” spending more time on video, audio and social networking than the total population on both smartphones and tablets. Not only are African Americans spending more time on these devices, they are spending more time using them than the total population: They spend over three hours more on websites/apps on smartphones (29:46 vs. 26:31) and nearly an hour more on tablets (13:36 vs. 12:47).



**BLACK CONSUMERS ARE ACTIVE IN USING “INTERNET ON THE GO,” WITH MORE TIME SPENT ON VIDEO, AUDIO AND SOCIAL NETWORKING THAN THE TOTAL POPULATION ON BOTH SMARTPHONES AND TABLETS.**

## WEEKLY TIME SPENT ON DEVICE: ADULT USERS, AGES 18+

Q1 2019	AFRICAN AMERICAN	TOTAL POPULATION
<b>Total use of television</b>	50:38	39:06
<b>Live + time-shifted TV</b>	44:41	33:59
<b>Time-shifted TV</b>	6:41	7:15
<b>TV-connected devices</b>	12:34	10:42
DVD/Blue-ray device	5:14	4:11
Game console	11:14	9:47
Internet-connected device	10:40	9:01
<b>Radio</b>	13:41	13:06
<b>Internet on a computer</b>	6:16	7:12
Social networking	1:28	2:07
<b>Video on a computer</b>	2:40	2:28
<b>App/web on a smartphone</b>	29:46	26:31
Video-focused app/web on a tablet	3:10	2:19
Streaming audio	1:03	0:57
Social networking	7:20	6:33
<b>App/web on a tablet</b>	13:36	12:47
Video-focused app/web on a tablet	3:21	2:49
Streaming audio	0:44	0:33
Social networking	2:38	2:29

Source: Nielsen Total Audience Report, Q1 2019



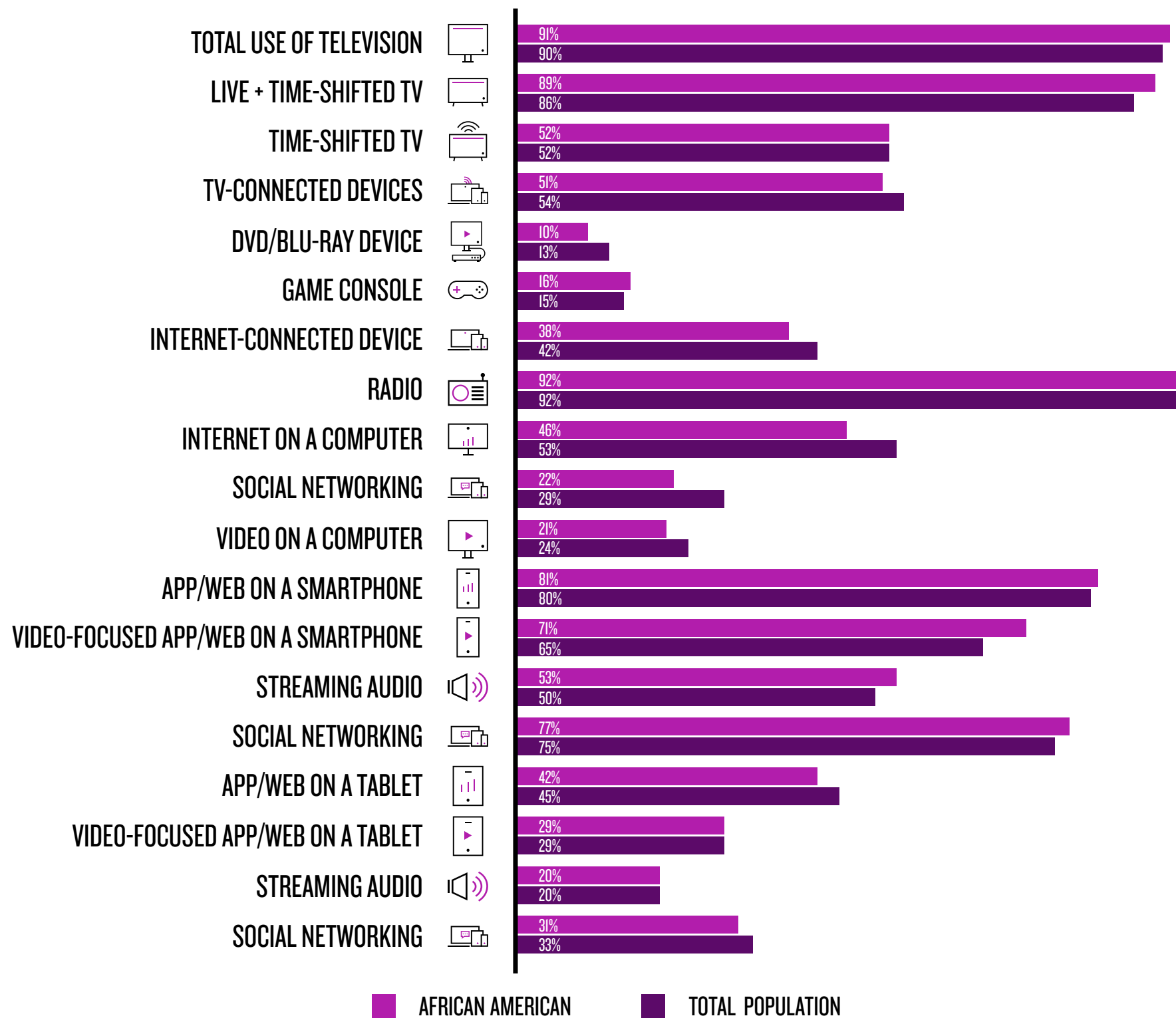
Radio has the highest weekly reach for African Americans at 92%. The reach of total TV for African American adults is 91%, and content is primarily consumed through live plus time-shifted TV. For any media channel—be it audio, video or digital—the use of smartphone devices outreaches the use of PCs and tablets by large margins.

The high weekly reach of media and the ample time that African American consumers spend with their devices present an array of opportunities for marketers looking to connect with Black consumers where they live their digital lives.



**WITH A 92% WEEKLY REACH, RADIO IS THE MOST RELIABLE MEDIA PLATFORM FOR ADVERTISERS TO REACH BLACK CONSUMERS.**

## WEEKLY REACH (%): ADULT USERS, AGES 18+



Source: Nielsen Total Audience Report, Q1 2019

# THERE'S AN APP FOR THAT: BLACK CONSUMERS CREATING APPS TO ANSWER THEIR UNIQUE NEEDS

Advertisers and content providers need to know what types of apps African American consumers frequent in order to reach them as their time spent on mobile devices increases. Both younger (aged 18–34) and older (35+) African American adults surpass the total population on using most types of apps, including search engines, entertainment, electronics (etc.) with a notable difference in the telecom internet services category.

About one-third of African American adults use corporate information apps over-indexing the total population by 14%. The rise of apps like the Official Black Wall Street and I Am Black Business create easy access to information about African American owned businesses, and the availability of that research is impacting their ability to support black-owned businesses with their purchasing power.

As African American consumers have searched to find products and services to fit their needs, Black-created apps are on the rise. For example, Squire Technologies—the fastest-growing small business management platform serving the men's grooming segment—announced it recently raised \$8 million in Series A funding, increasing the amount that Squire has raised to \$12.2 million. What started out as an app idea to help individuals struggling to find a good barbershop has grown into a platform that is changing the landscape of the barber experience. It now features barber shops in 28 cities. And the app has processed \$100 million in transactions since its inception.

The Scholly App is being called “the ultimate student success platform.” Scholly was created by Christopher Gray, who won \$1.3 million in scholarships through his own hard work, to make things much easier for others. Scholly received the nation's attention when it was featured on Shark Tank, landing a deal with Daymond John and Lori Greiner. Shortly thereafter, Scholly grew to be the No. 1 overall app in both the iOS App Store and the Google Play Store for over three weeks.



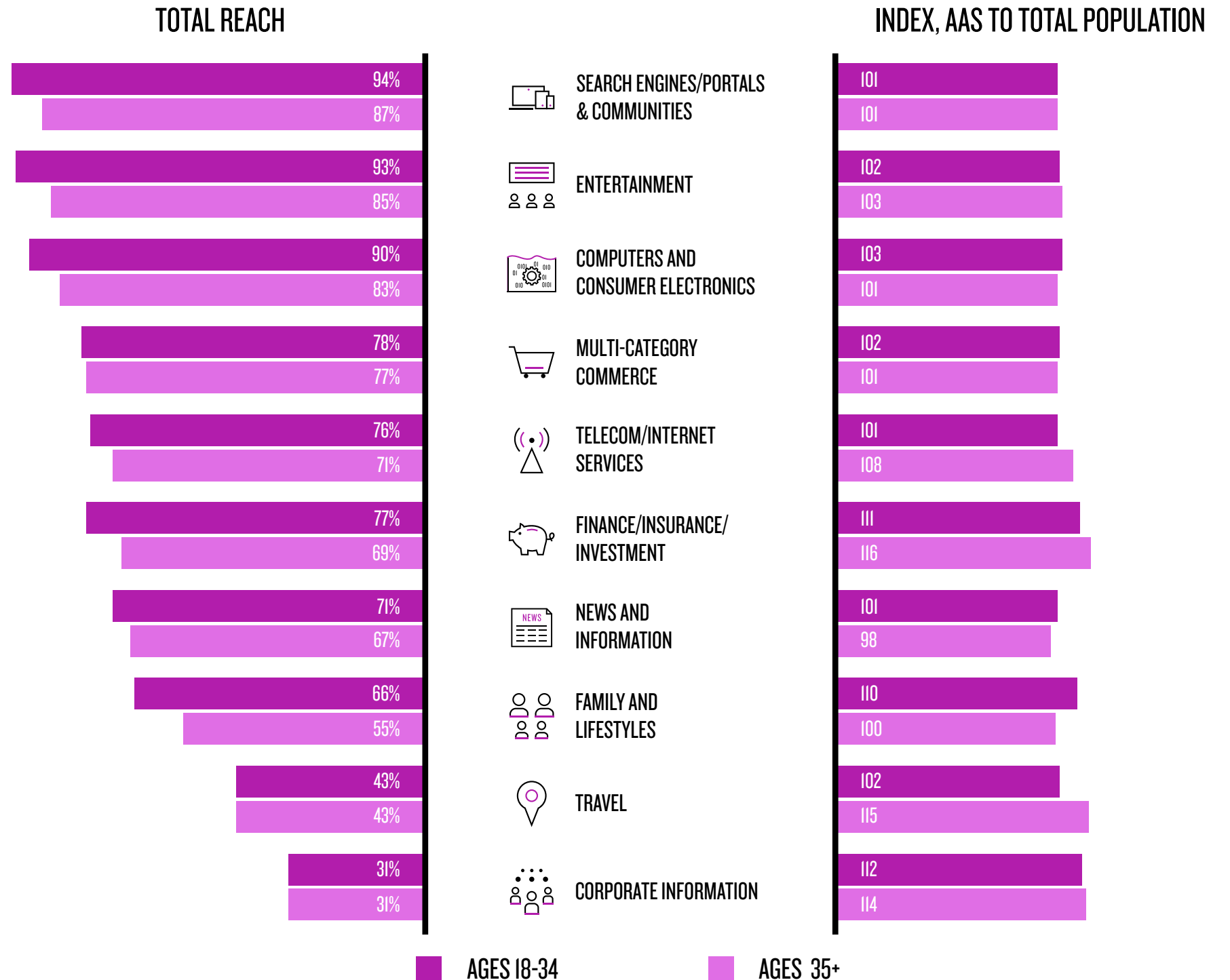
**BOTH YOUNGER (AGED 18–34) AND OLDER (35+) AFRICAN AMERICAN ADULTS SURPASS THE TOTAL POPULATION ON USING MOST TYPES OF APPS, INCLUDING SEARCH ENGINES, ENTERTAINMENT AND ELECTRONICS.**

The data shows that younger African American adults over-index the total population, same age group, by 60% on Government & Non-Profit apps. Corporate Information apps follow next and then Finance, Insurance and Investment. Older African Americans significantly over-index in Education & Careers, followed by Government & Non-Profit.



**AFRICAN AMERICANS AGED 18 TO 34 AND THOSE AGED 35+ ARE MORE LIKELY THAN THE TOTAL POPULATION TO USE FINANCE/INSURANCE/INVESTMENT APPS.**

## REACH OF DIGITAL APPS: AFRICAN AMERICANS, BY AGE GROUP



Source: Nielsen Media Impact, February 2019

# HIGHEST REACH APPS WITHIN CATEGORIES

Knowing where African Americans spend their time and leave their feedback and recommendations about products they like or dislike on social media communities is critical for companies striving to reach them in their path to purchase. Facebook has the highest reach with African Americans at 66%, although that's four percentage points lower reach than the total population. Facebook-owned Instagram, however, reaches 55% of African American consumers, surpassing the total population by 20%, the highest preference difference vs. the total population of all of these ranked social apps. Twitter is highly preferred by Blacks, as 37% of the population uses Twitter. That makes Black consumers 11% more likely to use Twitter than the total population.



## SELECT SOCIAL NETWORKING/COMMUNITY APPS

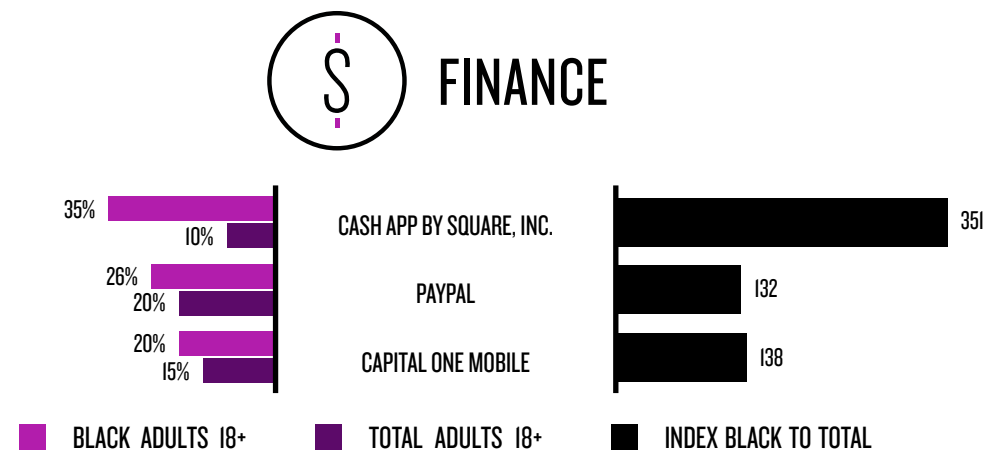
APP	BLACK ADULTS 18+	TOTAL ADULTS 18+	INDEX BLACK TO TOTAL
Facebook	66%	70%	94
Instagram	55%	46%	120
Pinterest	34%	33%	102
Twitter	37%	33%	111
Snapchat	33%	32%	103

Source: Nielsen Total Media Fusion/GfK MRI Survey of The American Consumer February 2019



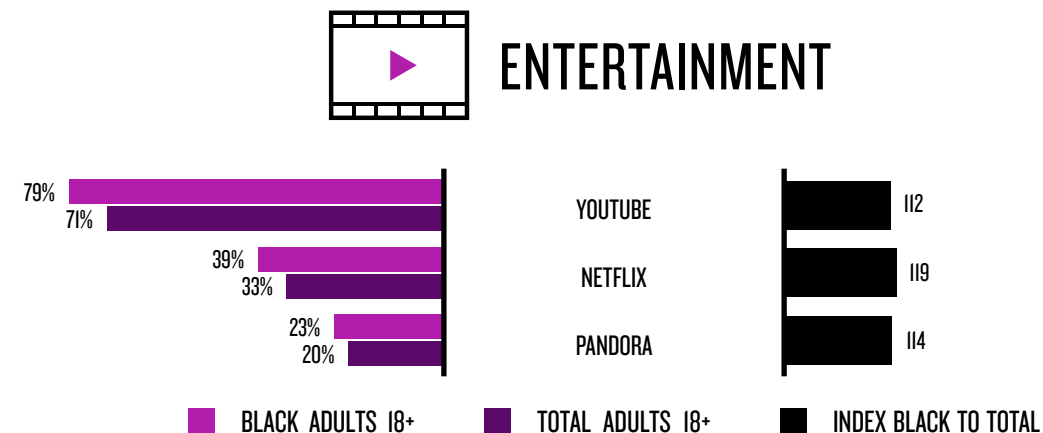
**INSTAGRAM REACHES 55% OF AFRICAN AMERICAN CONSUMERS, SURPASSING THE TOTAL POPULATION BY 20%.**

When looking deeper into the different types of apps that African American consumers use frequently, the highest preference differential for African Americans is in the Finance app category. Cash App by Square is the leader with a 35% market share, followed by PayPal: Mobile Cash (26%), then Capital One Mobile (20%). More importantly, the Cash App by Square is the app that African Americans use by the largest margin when compared with the general population (2.5x).



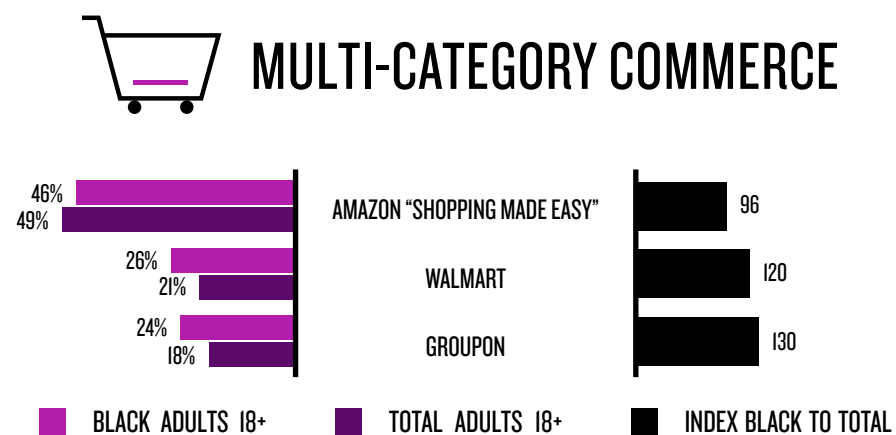
Source: Nielsen Total Media Fusion/GfK MRI Survey of The American Consumer February 2019

Among Entertainment Apps, YouTube is the leader, commanding a market share of 79% among African Americans, followed by Netflix (39%) then Pandora (23%).



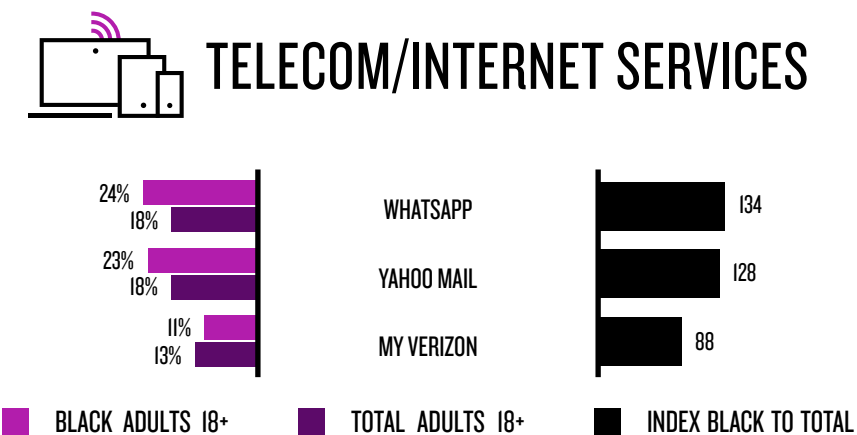
Source: Nielsen Total Media Fusion/GfK MRI Survey of The American Consumer February 2019

Among e-commerce apps, which allow consumers to shop for multiple categories, Amazon is most used by African Americans, with 48% market share, followed by Walmart (26%), then Groupon (24%). African Americans use Amazon at about the same level as the total population; however, they use Walmart and Groupon at a higher rate than the total population.



Source: Nielsen Total Media Fusion/GfK MRI Survey of The American Consumer February 2019

In Telecom/Internet Services Apps, African American consumers use Facebook-owned WhatsApp most frequently at a 24% reach, surpassing the general market by 34%.



Source: Nielsen Total Media Fusion/GfK MRI Survey of The American Consumer February 2019

# ASPIRATION AND THE AFRICAN AMERICAN CONSUMER JOURNEY

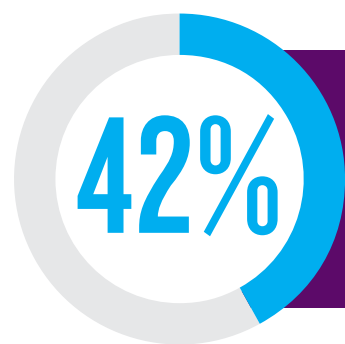
The availability of Black-owned brands and products that serve the African American community is profoundly impacting the African American path to purchase. Melissa Butler took her line of custom-made, vegan lipsticks, in bright colors, onto ABC's Shark Tank in 2015, and she was laughed out of the room. However, her persistence has since paid off, and The Lip Bar launched on Target's website in 2016, in stores in February of 2018, and is now expanding into products for the entire face...and all faces. The Lip Bar is now a multimillion-dollar company with products in 450 Target stores. A success story for sure.

Fenty Beauty by Rihanna is an African American owned brand that successfully markets and sells a global lineup of shades designed for all types of consumers, inclusive of all skin tones. In fact, the line is poised to launch in Asia in September 2019. Fenty Beauty, which is part of the LVMH Moët Hennessy Louis Vuitton empire's Kendo division, pursued the diverse consumer market using social media as a primary means of promotion. The brand generated half a billion dollars in sales last year.

Bevel, a shaving system geared toward men of color, and a Black-owned business success story, was launched in 2013 and in 2019 was purchased by Procter and Gamble.

As information and availability of Black-owned brands and Black-focused products increases, 42% of African American adults expect brands they purchase to support social causes, 16% more than the total population. This social consciousness should demand that marketers of goods and services understand not only the benefit of supporting African American social causes, but also the risk of not supporting them.

With the number of highly visible African American business success stories increasing, marketers should note that these proud images and role models, and the ambition to achieve success, are being reflected in purchasing decisions. In the women's business clothing categories, African Americans over-index the total population in items bought in last 12 months at all price points. Fifty-eight percent of African Americans respond positively to the statement "my goal is to make it to the top of my profession," which surpasses the total population by 31%. Black consumers are 40% more likely to agree with the statement "I strive to achieve high social status" than is the total population. And they are willing to work for it, since the data shows that they are 14% more likely to agree with the statement "I don't mind giving up my personal time for work" than is the total population.



**OF AFRICAN AMERICAN ADULTS EXPECT BRANDS THEY PURCHASE TO SUPPORT SOCIAL CAUSES, 16% MORE THAN THE TOTAL POPULATION.**

# THE RISE OF TV CONTENT PORTRAYING NUANCED AND LAYERED AFRICAN AMERICAN STORIES

African Americans are avid TV viewers, spending over 50 hours per week watching TV, and content providers are recognizing the importance of providing relevant content to them. Cable and streaming services provide the ability for content distributors to create nuanced and layered stories that appeal to Black consumers, and a platform for those stories to be broadcast. With programs like Ava DuVernay's *When They See Us*, a jarring look into the infamous 1980 Central Park Five Case, now known as the Exonerated Five case, entertainment is beginning to reflect the true issues faced by the African American community. Netflix reports that the four-part series was watched by more than 23 million accounts worldwide, becoming one of its most watched series.

## TOP 20 RECURRING BROADCAST & CABLE SHOWS

(African Americans by Age vs. Total Population)

ADULTS 18-34			
AFRICAN AMERICANS		TOTAL POPULATION	
Love & Hip Hop Atlanta 7	VH1	Roseanne	ABC
Empire	FOX	This Is Us	NBC
Love & Hip Hop Hollywood 5	VH1	Walking Dead	AMC
Love & Hip Hop Miami	VH1	Grey's Anatomy	ABC
Love & Hip Hop 8	VH1	Jersey Shore: Fam Vacation	MTV
Star	FOX	Big Bang Theory, The	CBS
Teyana & Iman	VH1	American Horror Story	FX
Black Ink Crew 6	VH1	Bachelor, The	ABC
Love & Hip Hop 9	VH1	Manifest	NBC
Basketball Wives 7	VH1	911	FOX
Black Ink Crew 7	VH1	Good Doctor, The	ABC
Black Ink Crew Chicago	VH1	Bachelorette, The	ABC
Leave It to Stevie 2	VH1	America's Got Talent - Tue	NBC
Real Housewives Atlanta	BRAVO	Empire	FOX
T.I. & Tiny: Family Hustle	VH1	Young Sheldon	CBS
911	FOX	Ellen's Game of Games	NBC
Scandal	ABC	Jersey Shore: Fam Vacay S2	MTV
Atlanta	FX	Modern Family	ABC
Power 5	Starz Primary	Big Brother - Thu	CBS
How to Get Away w/ Murder	ABC	Teen Mom II ss N8B	MTV

ADULTS 35+			
AFRICAN AMERICANS		TOTAL POPULATION	
Empire	FOX	Roseanne	ABC
Star	FOX	Big Bang Theory, The	CBS
Haves and the Have Nots	OWN	NCIS	CBS
Scandal	ABC	Young Sheldon	CBS
Greenleaf	OWN	This Is Us	NBC
911	FOX	Bull	CBS
If Loving You Is Wrong	OWN	Blue Bloods	CBS
Queen Sugar	OWN	Good Doctor, The	ABC
This Is Us	NBC	Manifest	NBC
How to Get Away w/ Murder	ABC	FBI	CBS
Love & Hip Hop Atlanta 7	VH1	America's Got Talent - Tue	NBC
Real Housewives Atlanta	BRAVO	NCIS: New Orleans	CBS
Neighborhood, The	CBS	America's Got Talent - Wed	NBC
Manifest	NBC	New Amsterdam	NBC
Black-ish	ABC	60 Minutes	CBS
Love & Hip Hop Hollywood 5	VH1	Voice	NBC
Chicago PD	NBC	Hawaii Five-0	CBS
S.W.A.T.	CBS	Mom	CBS
Power 5	Starz Primary	NCIS: Los Angeles	CBS
FBI	CBS	Chicago PD	NBC

Source: Nielsen NPOWER, Broadcast and Cable programming: 01/01/2018 - 12/31/2018  
 Live+7 Days (+168 Hours) | TV with Digital | Linear with VOD  
 Excludes Repeats and Sports programming and programs with less than 5 Telecasts

African Americans are unique in their TV viewing choices, with few overlaps with the total market. They're also unique in that cable networks are a primary provider of their most watched shows. In their TV viewing habits, all African American consumers enjoy the American Hip-Hop drama series Empire on FOX. Among recurring shows, Empire is popular regardless of age group. In spring 2019, FOX announced that the successful show would be renewed for its sixth and final season.

African American adults ages 18-34 are fans of the Love & Hip-Hop franchise on VH1, with its spin-offs occupying four of the top five most-watched spots for that age group. Love & Hip-Hop Atlanta was awarded Reality Royalty for the best reality TV show at the 2019 MTV Movie & TV Awards over other, more established reality TV franchises, including Jersey Shore.



**CABLE NETWORKS ARE A PRIMARY PROVIDER OF AFRICAN AMERICANS' MOST WATCHED SHOWS.**





# POPULAR RADIO FORMATS WITH YOUNGER AND OLDER AFRICAN AMERICANS

Radio, at 92%, has the highest reach among African Americans ages 18+ and listening happens all day long with 35% of radio listening happening in the home and 64% away from home (Source: Nielsen National Regional Database (NRD), Fall 2018, Black DST Metros, Black Persons 18+, Mon-Sun 12m-12m, AQH Persons). A deeper look shows that Urban AC (Adult Contemporary) is by far the leading genre of choice with a 29.3% market share among 18+ African Americans, then followed by Urban Contemporary at 20.3%, and the remaining genres of Rhythmic CHR, Adult Contemporary and News/Talk.

When looking at the same ranking for African Americans ages 12+, the percentages show minor variance between the genres, except for News/Talk, which is popular with older listeners but is replaced by Pop CHR at a stronger market share of 5%. This indicates a potential marketing opportunity in the future for these younger Pop listeners, who will soon be aging into their spending years.

## BLACK PERSONS 18+ Fall 2018

RANK	FORMAT	SHARE
1	Urban AC	29.3
2	Urban Contemporary	20.3
3	Rhythmic CHR	6.3
4	Adult Contemporary**	5.7
5	News/Talk Combined	4.9

## BLACK PERSONS 12+ Fall 2018

RANK	FORMAT	SHARE
1	Urban AC	28.6
2	Urban Contemporary	21.0
3	Rhythmic CHR	6.4
4	Adult Contemporary**	5.6
5	Pop CHR	5.0

Source: Nielsen National Regional Database (NRD), Fall 2018, Black DST Metros, Black Persons 18+, Mon-Sun 12m-12m, AQH Persons.



# THE POWER AND INFLUENCE OF HIP-HOP – AND BEYOND

Hip-hop continues to dominate the music scene. The Recording Industry of America reports that streaming accounted for 75% of music industry revenues in 2018, and the Billboard year-end Streaming Songs Artists chart for 2018 featured 17 rappers in the top 25, exceeding the 15-rapper mark set in 2017. Additionally, 50 songs on the 75-position year-end Streaming Songs chart came from the hip-hop genre, up from 40 in 2017. Drake topped the list with 35 chart entries. The only non-hip-hop artist to be featured on Billboard's list of artists who charted the most songs this year is R&B crooner Khalid, who had 15 entries.

Hip-hop tracks accounted for 24.7% of music consumption in 2018. Since streaming and purchases of rock music fell in 2018, hip-hop now has an impressive lead over the runner-up genre, pop, which accounted for only 19% of all music consumption.

The rap-meets-country single Lil Nas X's "Old Town Road" owns the record for most time spent atop the Billboard Hot 100. The song originally charted on both the hip-hop and country charts, highlighting the influence of hip-hop across genres.

In early 2019, Missy Elliott made history by becoming the first female hip-hop artist to be inducted into the Songwriters Hall of Fame. Elliott is the third rapper to be inducted.

As marketers recognize the power and influence of hip-hop, marketing strategies increasingly highlight the music, and its culture. The 2019 Super Bowl highlighted this power and influence with ads including Chance The Rapper for Doritos and 2Chainz for Google's new smartphone Pixel 3A, among others. The Wrangler Lil Nas X Collection illustrates the influence of hip-hop on fashion and culture. Oreo, the cookie brand, created cultural connectivity by creating a 2019 Grammy spot that featured a full song by Wiz Khalifa and a spot featuring him with his son Sebastian, and of course, Oreos.

Black musical influence is not limited to rap and hip-hop. The fifth studio album by rapper Tyler, the Creator, debuted at No. 1 on the U.S. Billboard 200. The album *Igor* received widespread critical acclaim from critics, along with its retail success, in spite of not falling within the traditional hip-hop or rap genre. Artist Gary Clarke, Jr. as a songwriter fuses blues, rock and soul. He is best known as a guitarist, though he also plays the drums, trumpet, keyboard and harmonica. Country singer and song-writer Kane Brown, in October 2017, became the first artist to have simultaneous number ones on all five main Billboard country charts.



## PROFILES OF AFRICAN AMERICAN HOUSEHOLDS



### THE JEFFERSON HOUSEHOLD

Victor, Age 41

Dana, Age 37

Ava, Age 9

Ian, Age 6

Responses submitted by Victor.

Q: How do you research new products and/or brands?

A: **Yahoo Search.**

Q: How do you prefer to receive shopping deals? Why?

A: **Email. Easier to view, sort, and delete.**

Q: When making a purchase, whose opinion(s) do you consider?

A: **Mine and my families.**

Q: How do you decide whether to shop for a product in-store or online?

A: **Pricing and convenience.**

Q: What makes for a positive in-store shopping experience?

A: **Good customer service, clean store, and easy to locate products.**

Q: Do you use social media? If so, for what reasons?

A: **No, but my wife does.**

Q: How do you prefer to watch video content?

A: **Handheld electronic via Youtube.**

Q: On what device(s) do you listen to music?

A: **Mobile phone, Bluetooth speaker, Alexa.**

Q: How do you stay up to date with current events?

A: **Watch the local and national news, Yahoo and TMZ.**

Q: Who goes with you on your shopping trips?

A: **My family.**

Q: What do you find most important about the food products you buy?

A: **Price, ingredients and freshness.**

These profiles were compiled via an independent online survey, and provide contextual background to the Nielsen data in the report. The responses reflect the opinions of the individual households and should not be interpreted as a scientific insight.

# OMNICHANNEL ADVERTISING – THE PHYSICAL AND DIGITAL

For African American consumers, advertising of all types is an important touchpoint in their shopping journey. African American shoppers are exposed to products through a variety of channels and messages. The African American community embraces multiple media channels. African Americans are more likely than the total population to agree that advertising provides them with meaningful information about the product use of other consumers on most platforms including on mobile phones (42% higher), television (23% higher), radio (21% higher), and on the internet (18% higher).

It's good news for marketers that advertising is an important medium for the African American consumer to discover and conduct product research. Black Americans are 41% more likely to agree with the statement "advertising on mobile phones provides me with useful information about bargains," than is the total population. African Americans are receptive to smartphone advertising, since they disagree 20% more than the total population with the statement "advertising on mobile phones has no credibility," while also disagreeing 28% more than the total population with the statement "advertisements on cell phones are annoying." They're also 16% more likely than the total population to rely on magazines to stay up to date on fashion. Their positive response to advertising crosses all media and surpasses the total population in agreeing with finding advertising on TV, radio and in magazines useful in locating bargains.



**AFRICAN AMERICAN CONSUMERS ARE 41% MORE LIKELY TO AGREE  
"ADVERTISING ON SMARTPHONES PROVIDES ME WITH USEFUL  
INFORMATION ABOUT BARGAINS."**



# THE STATE OF ADVERTISING TO AFRICAN AMERICAN CONSUMERS

Advertising spend designed to reach Black consumers declined by 5% between 2017 and 2018. The decrease on a variety of media is at odds with the demonstrated economic power of Black consumers, particularly on digital platforms, where Black consumers have been leading consumption for years. Perhaps marketers believe they can reliably reach Black audiences with the same dollars they spend to reach the total population. After all, there's no language barrier to overcome, and Black consumers use all the same platforms to consume content as everyone else. These approaches simultaneously ignore the lived experiences of Black consumers that define Black culture, and the growth proposition these consumers represent for all consumer industries. With an annual buying power (\$1.3 trillion) on par with the gross domestic product of The Netherlands, Indonesia and Switzerland, this consumer segment is not one to ignore.

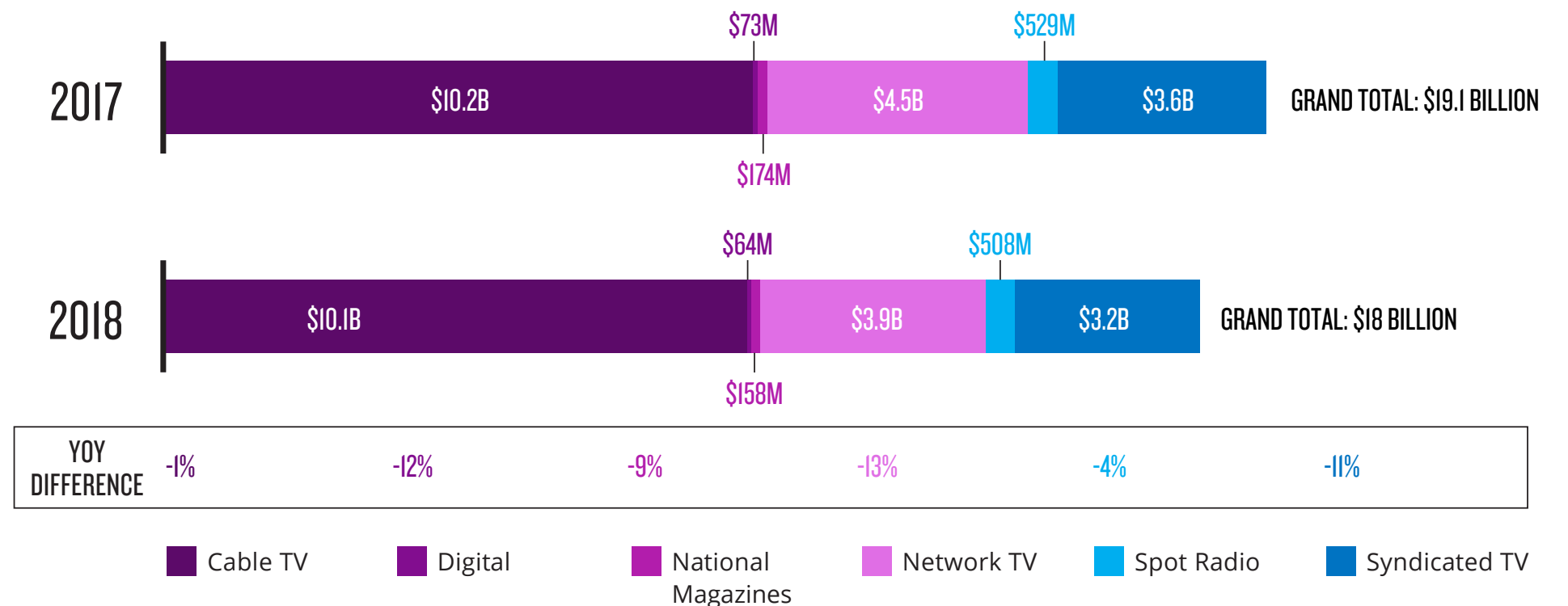
According to Nielsen Ad Intel, advertisers invested \$18 billion on African American-focused media in 2018, which represents 21% of the total \$83 billion spent on advertising on the platforms below. Between 2014, when this data was last analyzed, and 2018, the average threshold of Black viewership required to qualify as an "African American-focused program" was lowered. This change in methodology impacted the overall African American-focused media investment.

Leveraging African American talent within advertising is a logical step for marketers since for African American consumers, advertising of all types is an important touchpoint in their shopping journey and African Americans enjoy seeing people in media and content that share their ethnic background. It's impossible to create ad campaigns that are culturally relevant to Black audiences, without having Black creatives, media planners and strategists at the table. The case for reaching these consumers is clear: with annual buying power higher than the economic output of most countries, and an outsized influence on culture, Black consumers represent one of the only reliable engines for future growth. Yet, many companies feel they can reach Black consumers with a general market approach. However, this strategy leaves dollars on the table, and brand reputations at risk.



**AFRICAN AMERICANS ARE MORE LIKELY TO SAY THEY ENJOY SEEING PEOPLE IN MEDIA AND CONTENT THAT SHARE THEIR ETHNIC BACKGROUND.**

## AFRICAN AMERICAN-FOCUSED MEDIA SPEND



Source: Nielsen Ad Intel

## MISSING THE MARK: NON-DIVERSE AD AGENCIES

There is an ongoing conversation in the advertising, marketing and communications industry regarding the lack of diversity, inclusion and equity. African-Americans represent approximately 5% of the workforce and less than 100 black women are in leadership, the C-suite or in positions of influence in the industry. Hispanics/Latino have slightly increased over time making up 10% and Asian Americans are at 8.5%, yet white professionals are at 85% in the 629,000 person industry. Inequality is nothing new; Diversity and inclusion has been a hot topic in the advertising industry for over 30 years and yet, many opportunities remain on the table, still yet to be tapped.

The advertising industry is supposed to be where the most creative of creatives, the most thinking-est thought leaders and the most strategic of dot-connectors are to tell brand stories. But how can you tell stories when the industry on both agency and brand side do not reflect the consumer marketplace? The spending power of communities of color, the cultural influence that drives pop culture and the changing demographics vs. the number of ad agencies helmed by people of color don't align. We've got work to do to ensure that multicultural agencies aren't just a supplier diversity check-box. In fact, diverse-owned agencies are the ones best equipped to help brands unlock diverse consumer spend--one of the only real sources of growth as the U.S. population becomes more diverse.

Multicultural agencies are struggling to keep their doors open and compete at the same level as general market agencies. When multicultural agencies suffer, the entire ecosystem is crippled. They can't hire talent at competitive salaries, production houses, directors or independent suppliers. Yet, multicultural budgets are minimal while the Millennial and Gen Z populations are the most diverse ever at approximately 40% or more. Retainer fees and scopes of work have greatly declined, production and media budgets are a mere 5.2% of total budget allocations.

So why aren't we following the money?

If people of color are not being hired at general market agencies and multicultural agencies are diminishing or strategically prevented from participating then who's at the table? Who's selecting talent for content, championing diverse media partners, providing direction on hair and makeup? Who's writing the copy? Who's telling our stories and representing the voice and full range of the black and brown diaspora? Culture is not a spectator sport. Brands cannot participate through social media, listen to rap music and claim to be a specialist. Marketers must hire those who reflect the new consumer, who have a share of voice, different perspectives and create work that resonates among a spectrum of audiences.

Then there was "Total Market," which has its own inherent obstacles. After all, what resonates for one consumer can come across as irrelevant or insensitive to another, even when there's no language barrier between the two. We are seeing, in real-time, major mistakes brands are making and issuing public apologies to consumers for "missing the mark" on their tone-deaf content. Much of that is because of the Total Market approach and it has contributed to an already depleting Multicultural agency ecosystem. Marry that with people of color leaving the industry due to lack of opportunity, representation, unconscious and sometimes blatant bias and we have an industry that is creatively deficient and unprepared to market to the new consumer.

Multicultural talent and agencies should be the most poised to lead the industry, yet we are not seeing long-term growth or opportunity. Audiences are multicultural and agencies must represent that. The industry won't move forward if inclusivity and equity are not recognized as a business imperative. There has to be more than progress measured and benchmarks set to make any change in this industry.

So, how do we go about fixing it? First, brands, marketers, advertisers and agencies have to step up and acknowledge that there is a representation problem. Then, promote and hire black and brown talent in leadership and decision-making roles. This will help retain diverse talent at entry- and mid-level roles. Nielsen has shown that the growth rate for Black high school graduates enrolling in college is higher than for non-Hispanic White graduates (11% to 1%). Further, 60% of all African Americans and 73% of Black millennials say it is their goal to make it to the top of their profession. The tendency is to place blame on the perceived lack of a diverse pipeline, but we've been here.

Where is the accountability? Diversity is not just a D&I issue—it affects the bottom line. So why aren't we attaching compensation to diverse representation? The evidence is clear—when are we going to stop talking about it and reflect it?



**Deadra Rahaman**  
Founder and Principal,  
Society Redefined Consulting



Sources for this section: U.S. Bureau of Labor Statistics and 2019 ANA Annual Report.

On the bright side, some brands understand this opportunity and are investing accordingly. For instance, McDonald’s launched the “Black & Positively Golden” campaign, developed in collaboration with Burrell Communications, a Black-owned full-service marketing and communications agency. This campaign was intended to be less of an advertising campaign and more of a movement, including a Gospel tour, a commitment to the YWCA, a new Instagram channel celebrating Black excellence and ads with new music from hip-hop artists and other Black musicians. As more brands highlight diversity, we see the dollars spent on African American advertising increase. Procter & Gamble (P&G) has stated that as the world’s largest advertiser both in total dollars and in African American dollar spend, it hopes to use its voice to ensure accurate and positive representation of its consumers.

Two years ago, P&G launched its ad “The Talk,” which was a two-minute film that put racial bias on center stage, developed in collaboration with BBDO Worldwide and EGAMI Group, a Black woman-owned multicultural marketing and communications agency. The ad was one of the Cannes Lions-winning campaigns with the highest amount of buzz at the conference and was awarded a Grand Prix in the Film category. Now in 2019, P&G has introduced their commercial video called “The Look,” which openly encourages dialogue around the subject of unconscious bias. It zeroes in on the unconscious biases that black men confront on a daily basis in a powerful and moving way.

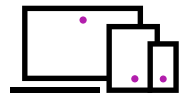
African American media spend in 2018 was focused on TV (cable, network and syndicated). This is possibly due to the availability of preferred recurring shows and the sheer amount of time spent by African American consumers on total TV. However, TV is not the only place Black consumers spend their time. In fact, Black consumers spend more weekly time using apps and the web on smartphones than the total population. Marketers who lack a digital strategy to reach Black consumers risk losing out on their consumer spending.

## AFRICAN AMERICAN-FOCUSED MEDIA SPEND

COMPANY	SPEND
PROCTER & GAMBLE CO TOTAL	\$544,297,665
BERKSHIRE HATHAWAY INC TOTAL	\$358,227,018
PFIZER INC TOTAL	\$350,591,203
AT&T INC TOTAL	\$295,952,172
GLAXOSMITHKLINE PLC TOTAL	\$215,801,864
YUM! BRANDS INC TOTAL	\$205,407,814
PEPSICO INC TOTAL	\$203,717,087
PROGRSSIVE CORP TOTAL	\$198,622,952
WALT DISNEY CO TOTAL	\$184,861,243
COMCAST CORP TOTAL	\$178,215,530
DEUTSCHE TELEKOM AG TOTAL	\$173,478,584
GENERAL MOTORS CO TOTAL	\$168,257,506
ABBVIE INC TOTAL	\$164,134,941
UNILEVER TOTAL	\$163,604,602
SOFTBANK CORP TOTAL	\$162,342,266
JOHNSON & JOHNSON TOTAL	\$158,307,695
AMAZON.COM INC TOTAL	\$156,107,377
VERIZON COMMUNICATIONS INC TOTAL	\$148,849,929
BAYER AG TOTAL	\$147,728,158
LOREAL SA TOTAL	\$138,035,381

Source: Nielsen Ad Intel

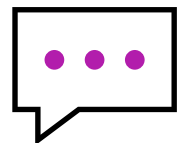
# SECTION I TAKEAWAYS



African Americans are adopting new devices and multiple devices at higher rates than the general U.S. population and adapting those devices to their unique consumer journey. Savvy advertisers will adopt an omnichannel marketing mix that reaches African American consumers where they spend their time.



Radio has the highest weekly reach of any media platform among adult African Americans, at 92% and listening happens all day long with 35% of radio listening happening in the home and 64% away from home. Marketers that overlook traditional media risk missing Black consumers with their messaging.



Facebook has the highest reach of social media apps with African Americans at 66% (5% lower than the total population). Facebook-owned Instagram, however, reaches 45% of African Americans (surpassing the total population by 20%, the highest preference difference vs. the total population of all of these ranked social apps).



African Americans are more likely than the total population to agree that advertising provides them with meaningful information about the product use of other consumers on most platforms including on mobile phones (42% higher), television (23% higher), radio (21% higher), and on the internet (18% higher).





# AFRICAN AMERICAN POWER AT THE POINT OF PURCHASE



The transaction is the point in the path to purchase where consumers vote with their dollars. Black consumers are spending those dollars in unique ways and in unique channels that fit their diverse lifestyles. Understanding hot categories where African Americans are overspending and getting a window into their shopping attitudes at the point of purchase is the best path for marketers looking for growth and opportunity. As companies understand what influences African American consumers in their path to purchase, better products and services that better fit Black consumers' needs will be the benefit for all.

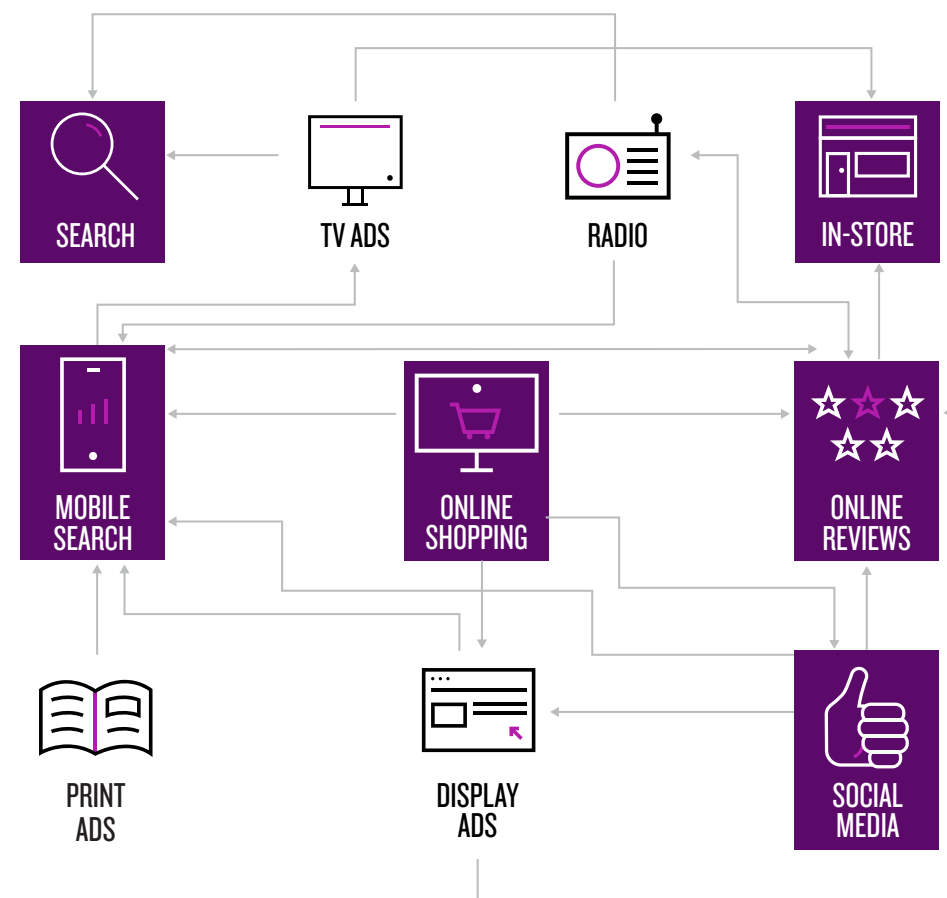


# THE PRE-STORE INFLUENCERS OF AFRICAN AMERICAN CONSUMERS

Positive African American images, celebrity endorsements and recommendations are important influences on the African American path to purchase. In their path to purchase, African American consumers are 51% more likely to agree with the statement “A celebrity endorsement may influence me to consider or buy a product” than is the total population. They are also 33% more likely to agree with the statement: “I am influenced by what’s hot and what’s not.” Fifty-five percent of African Americans align with the statement “I feel really good about seeing celebrities in the media that share my ethnic background,” which surpasses the total population by 79%. African American consumers are also 44% more likely to agree with the statement “I love keeping up with celebrity news and gossip” than is the total population. Marketers can gain valuable insight by noting the consistency of African American responses, since African American shoppers are also thirty-five percent more likely to agree that “When a celebrity designs a product, I am more likely to buy it.”

Both the physical and digital worlds, and the interaction between the two, play important roles in influencing purchase pathways. African Americans rely on advertisements, both physical and digital, as pre-store influencers in their path to purchase. Data shows that not only advertisements but also recommendations, which can include personal, reviews and endorsements, over-index in many shopping categories for African Americans.

## THE NON-LINEAR PATH TO PURCHASE



## PRE-STORE INFLUENCERS

	TOTAL	FOOD	NON-FOOD	BEVERAGES	FRESH	FROZEN	GROCERY	HEALTH	PERSONAL CARE
<b>Recommendation</b>	137	161	108	161	155	157	187	117	145
<b>Digital</b>	129	131	117	126	143	139	123	128	105
<b>Ad</b>	131	139	116	97	144	163	156	128	123
<b>Coupon/Promo Code</b>	107	98	105	99	106	101	103	101	93
<b>Request</b>	92	93	100	85	93	79	81	124	82

Source: Nielsen U.S. Category Shopping Fundamentals, 2017

# ATTITUDES & BEHAVIORS AT THE POINT OF PURCHASE

African Americans love the latest trends and are more likely to try new products for the sake of variety and novelty by about 30% vs. the total market. Nearly 40% of Black consumers say that they are the first among their friends to try new products and services, surpassing the total population by 29%. As e-commerce grows, African Americans are increasingly turning to online shopping, but they continue to enjoy the physical act of shopping, outpacing the total market by 26% in their belief that shopping is a great way to relax.

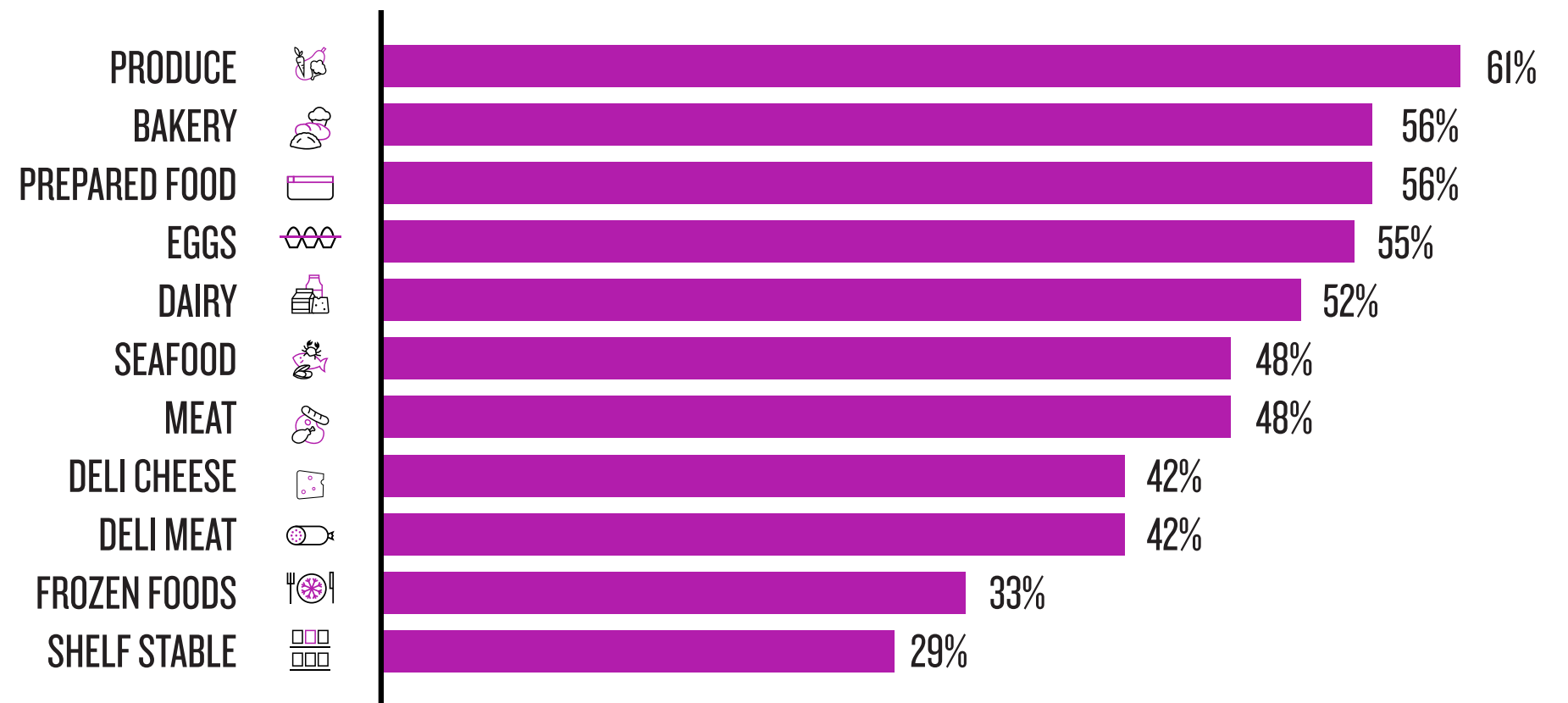
## LOCAL SOURCING AND FOOD SAFETY ARE TOP OF MIND

African American shoppers are increasingly passionate about their environment including buying local. When asked “how important is it to buy local” in multiple food categories, African American consumers named produce as the most important category for local sourcing with 61% saying it was extremely or very important, followed by bakery and prepared foods at 56%, eggs at 55%, and dairy at 52%.

## ATTITUDES TOWARDS LOCALLY SOURCED FOOD CATEGORIES

Q. Thinking of how you define local, how important is it to you to buy local for each of the following categories you shop?

### A. Extremely or Very Important



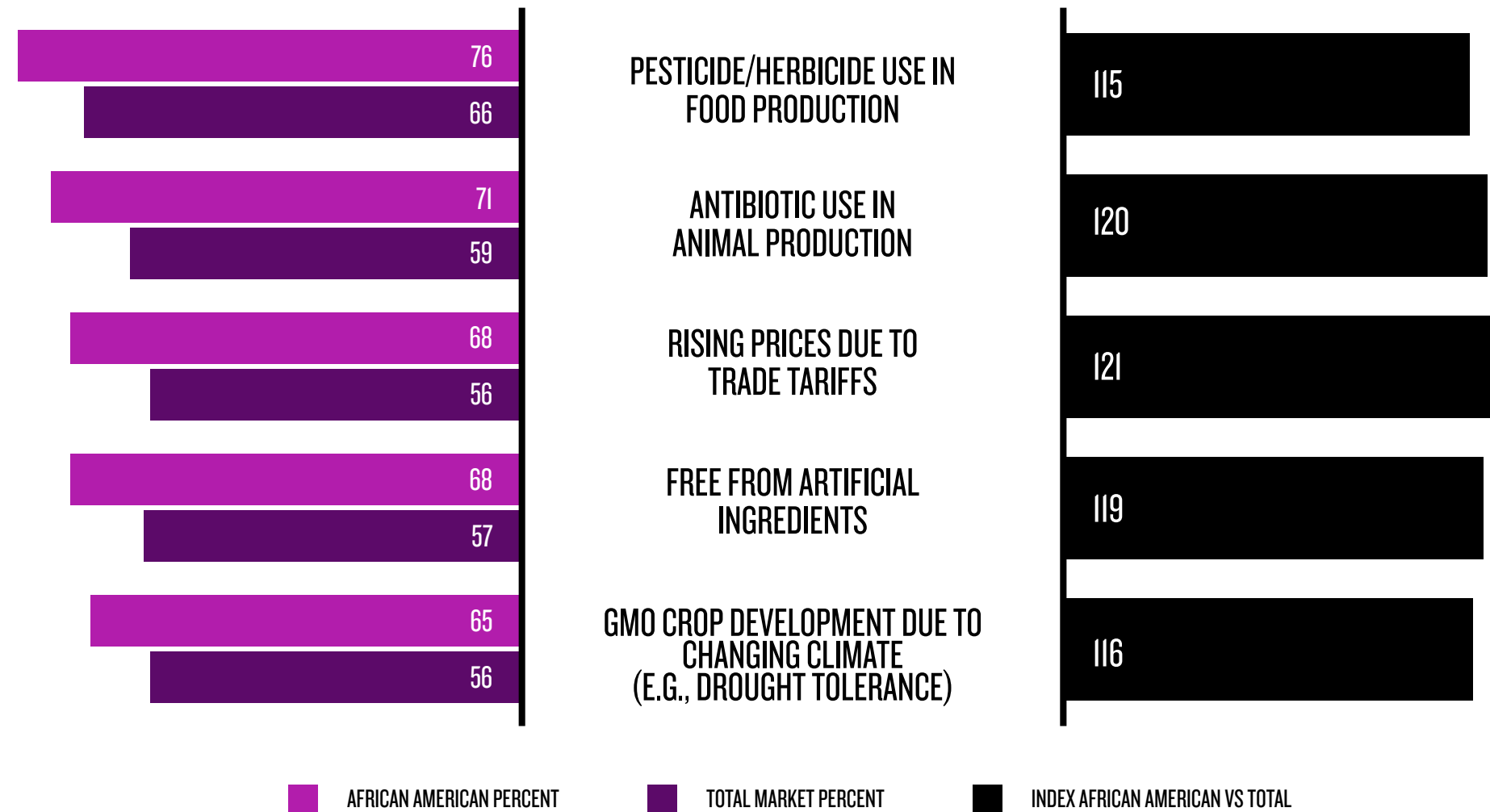
Source: December Online Views, Nielsen National Consumer Panel

When asked “what defines local” in the same food categories, African American consumers gave varied answers by category, however, being grown or raised in the same state or city/town as their store was their primary definition for produce, bakery, and eggs. More so, grown, raised or made in the U.S. is the most common perception of “local” in regard to seafood, meats, deli cheese, deli meat, frozen foods, and shelf stable.

African American consumers are influenced by a wide array of hot topics in the food industry. Top concerns for African American consumers are: “Pesticide/herbicide use in food production” (76%) and “Antibiotic use in animal production” (71%). Additionally, African American consumers are significantly more concerned with “GMO crop development due to changing climate” (16% higher than the total population). Sixty-eight percent of African Americans also indicate they are concerned about “Rising prices due to trade tariffs” (21% higher than the total population).

Understanding the environmental and safety concerns of Black consumers can help marketers understand what really matters most to African Americans consumers in making decisions along their shopper journey.

## CONCERNS ABOUT FOOD HOT TOPICS



Source: December Online Views, Nielsen National Consumer Panel

# ATTITUDES & BEHAVIORS AT THE POINT OF PURCHASE

Positive African American images, celebrity endorsements and recommendations are important influences on the African American path to purchase. In their path to purchase, African American consumers are 51% more likely to agree with the statement “A celebrity endorsement may influence me to consider or buy a product” than is the total population. They are also 33% more likely to agree with the statement: “I am influenced by what’s hot and what’s not.” Fifty-five percent of African Americans align with the statement “I feel really good about seeing celebrities in the media that share my ethnic background,” which surpasses the total population by 79%. African American consumers are also 44% more likely to agree with the statement “I love keeping up with celebrity news and gossip” than is the total population. Marketers can gain valuable insight by noting the consistency of African American responses, since African American shoppers are also thirty-five percent more likely to agree that “When a celebrity designs a product, I am more likely to buy it.”

## PRE-STORE INFLUENCERS

	TOTAL	FOOD	NON-FOOD	BEVERAGES	FRESH	FROZEN	GROCERY	HEALTH	PERSONAL CARE
<b>Price Checking</b>	97	99	89	91	105	114	111	84	74
<b>Mobile</b>	119	125	103	92	157	149	143	136	53
<b>Product Attention</b>	126	135	107	141	167	104	123	106	106
<b>Store Associate</b>	134	143	115	142	163	113	192	83	189
<b>Coupon/Sale</b>	101	101	105	130	92	105	100	114	99
<b>Merchandising</b>	127	126	137	144	135	155	104	86	120
<b>Ad</b>	128	122	145	146	135	108	125	177	127

Source: Nielsen U.S. Category Shopping Fundamentals, 2017

## IN-STORE INFLUENCERS AT THE POINT OF PURCHASE

Mobile in-store influences are a part of the total influence mix and African Americans over-index on mobile in-store influence for fresh, frozen and grocery items (57%, 49% and 43%, respectively). In-store coupons influence African Americans’ purchases at about the same rate as the total population except in the beverage category where African Americans over-index by 30%. African American shoppers are 26% more likely to be influenced by product attention (in-store informational messages) and 34% more likely by store associates than the general market. The influence of in-store ads on health purchases is particularly strong to African Americans, and surpasses the general market by 77%.



## PROFILES OF AFRICAN AMERICAN HOUSEHOLDS



### THE WATLINGTON HOUSEHOLD

Amber, Age 31

Cedric, Jr., Age 34

Cedric III, Age 3 months

Responses submitted by Amber.

Q: How do you research new products and/or brands?

**A: Searching on Google or Amazon.**

Q: How do you prefer to receive shopping deals? Why?

**A: Via mobile apps or emails.**

Q: When making a purchase, whose opinion(s) do you consider?

**A: Mine own and my spouse.**

Q: How do you decide whether to shop for a product in-store or online?

**A: Typically we seek out the best price, but sometimes we need a product quickly or conveniently and that typically means online shopping.**

Q: What makes for a positive in-store shopping experience?

**A: Ease of shopping experience, limited crowds, quick transaction, being able to find and purchase everything needed.**

Q: Do you use social media? If so, for what reasons?

**A: Yes, for social/personal reasons and also business marketing.**

Q: How do you prefer to watch video content?

**A: Mobile phone device, laptop, or on the TV.**

Q: On what device(s) do you listen to music?

**A: Mobile phone.**

Q: How do you stay up to date with current events?

**A: Social media apps (Twitter, Facebook, IG), news media apps, news podcasts.**

Q: Who goes with you on your shopping trips?

**A: Husband and son.**

Q: What do you find most important about the food products you buy?

**A: Good quality and reasonable price.**

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These profiles were compiled via an independent online survey, and provide contextual background to the Nielsen data in the report. The responses reflect the opinions of the individual households and should not be interpreted as a scientific insight.

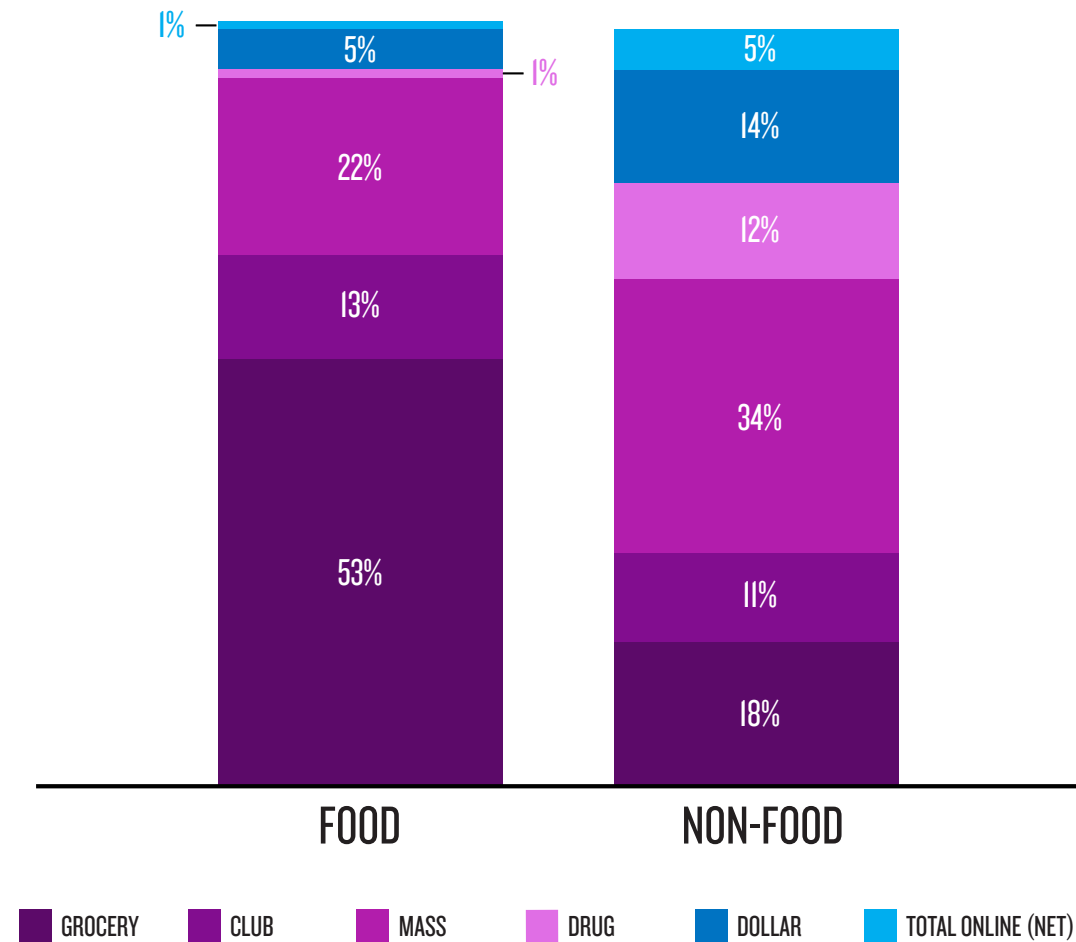
## SHOPPING CHANNEL PREFERENCES

African American shoppers frequent a wide variety of shopping channels to make their purchases. Grocery stores account for the bulk of their food purchases where they fill 53% of their needs. Mass merchandisers such as Walmart and Target account for the highest share of their non-food purchases at 34%.

Online purchases are growing rapidly, particularly among non-food items. Online purchases in categories such as Baby Bath, Baby Wipes and Diapers, Nutritional Shakes, Vitamins and Minerals, Cosmetics and Suncare are now outpacing purchases in grocery stores. Cosmetics are a unique category, as Black consumers are more likely to shop for these products at drug stores than any other channel.

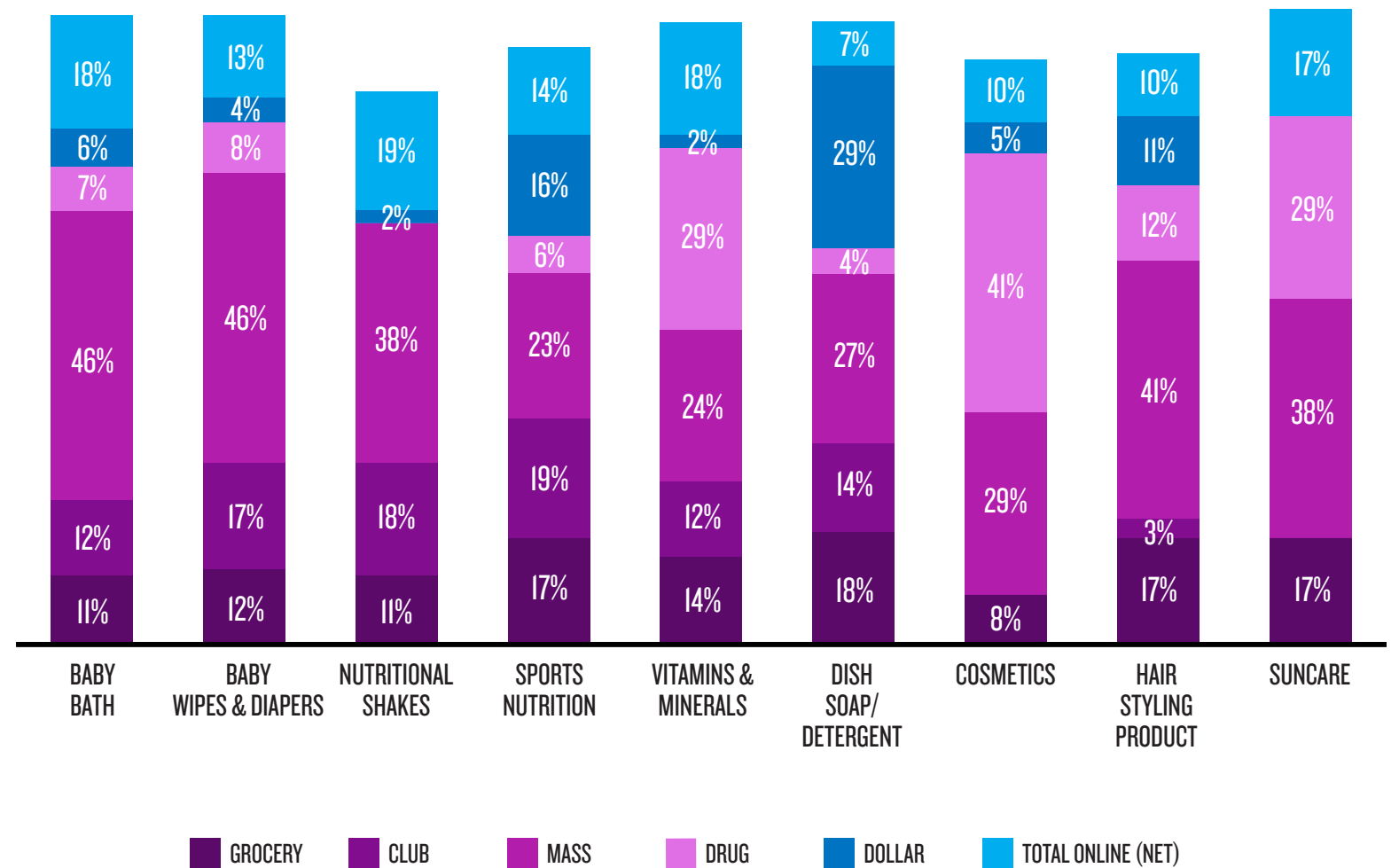
### AFRICAN AMERICAN CHANNEL PREFERENCES

Food vs. Non-Food Shopping by Channel



Source: Nielsen U.S. Category Shopping Fundamentals, 2017

### SELECT NON-FOOD CHANNEL PREFERENCES



Source: Nielsen U.S. Category Shopping Fundamentals, 2017

## THE POWER OF AFRICAN AMERICAN DOLLARS

For nearly a decade, Nielsen's Diverse Intelligence Series has provided leading research on the consumer habits, lifestyle trends and media preferences of African Americans.

In previous years, Nielsen has sought to engage community stakeholders to lend a voice to the changes that are impacting African American consumers; and to help brands hear from independent third parties the importance of having a 360-degree perspective of the Black consumer. This year, we invited influencer, media commentator and self-proclaimed #TruthBringer-in-Chief Angela Rye, Principal and CEO of Impact Strategies, to lend her perspective on why Black dollars should matter to brands, and to inspire Black consumers to validate their representation through their voices, advocacy and purchasing decisions.

## ANGELA RYE GUEST COMMENTARY



### CONNECTING BRANDS AND THE CONSCIOUS BLACK CONSUMER

*I've been a fan of Nielsen's reports since they first came out in 2011. I find them incredibly relevant to ensuring a more level-playing field when it comes to America's ecosystem. Smart companies are making multicultural segments a priority now. Smart companies recognize that multicultural consumers have almost \$4 trillion in collective buying power annually. And, smart companies are seeking out opportunities to claim these consumers to help drive sales, growth and profits in a variety of consumer product categories. Are you a smart company?*

The multicultural market is expected to continue growing. Companies can't afford to "sleep on" (as Black Twitter would say) this opportunity. It's low-hanging fruit and available to brands that aren't afraid to embrace it. The first step is understanding how Black consumers shop and make purchases, because not only are African Americans enthusiastic consumers, they are conscious consumers. Being conscious (or awakened) means being attuned to the issues that impact you. We are people who fight against injustices, both physically and financially. Corporations should embrace our passion and desire to ensure that we are shopping with brands who are making an impact in our daily lives.



**Tip #1 for marketers: Black consumers are *choosing* to spend their money with brands that recognize and address social issues and the proof is in the data.**

## SPRAY & SLAY: BEAUTY, GROOMING & PERSONAL CARE ARE TOP SPENDING PRIORITIES



**Tip #2 for marketers: Understand that where there are gaps, enterprising African Americans will fill the void.**

Physical appearance is a point of cultural pride in the African American community. It is a reflection of one's identity and a form of self expression, including the physical aesthetic as well as fragrance and overall swag. But there have been gaps in meeting the specific health and beauty needs of Black consumers that major manufacturers weren't aware of, or could not figure out how to fill. But Black entrepreneurs could and did. Femly and Honey Pot, two companies created by Black women, have not only tapped into the feminine hygiene industry but they are fulfilling the demand for chemical-free products.

Black men are making an impact too. Tristan Walker, an African American man frustrated with the choices of shaving products available to him, created "Bevel," a grooming line designed to address the unique needs of Black men such as ingrown hairs and razor bumps. Bevel's razors and hair trimmers were such a hit that five years later, a major manufacturer purchased the company.

So it's not just about style—Black consumers have influence and aren't afraid to use it for good.

## FOOD CHOICES WITH FLAVOR ARE AN OPPORTUNITY FOR GROCERY CHAINS



**Tip #3 for marketers: Our culture and traditions aren't for sale, but we'll spend with brands who help bring them to life.**

Soul food is at the heart of African American culture and tradition. It is the center of every social gathering. African Americans have a selective sense of taste often reflective of their heritage, be it born in American or the Caribbean. They enjoy food that is flavorful, spicy, sweet and/or conjures up a taste of home. So it's no surprise when Nielsen's data shows this reflected in African Americans' shopping carts. The fact that Black consumers spend 520 times more on Albers Grits; and 456 times more on Zatarain's Cajun-seasoned coating mix than the total population, speaks to our affinity for food and family.

However, access to healthy produce continues to be an issue in African American communities. A large percentage of the population live in food deserts. According to the Associated Press, "major grocers overwhelmingly avoid America's food deserts instead of trying to turn a profit in high-poverty areas." As a result, most residents still have to travel a relative distance to shop at major grocery retailers for fresh produce or locally sourced food items. Grocers that do not invest in Black communities are leaving dollars on the table; after all, Black consumers are projected to wield \$1.5 trillion in annual buying power by 2023, and express a desire for healthy foods. The opportunity is massive, and smart retailers will serve African Americans the healthy options we want.

## TAKEAWAYS FOR COMPANIES AND CONSUMERS

Black consumers represent a reliable source of growth for brands able to forge an authentic connection. I know from personal experience the influence these consumers wield over public discourse on social media and other platforms. So, African Americans hold quite a bit of leverage over companies from all industries. I've shared tips on how brands can tap into this power to ensure they get Black consumer outreach right. But I'd be remiss if I didn't also share how consumers can exert their influence effectively and positively.

To my fellow consumers: #TruthbeTold, you are a viable and valuable consumer. Every dollar you earn is precious. What you buy, where you buy and why you buy -- it all matters. Your dollar is your influence. So, before making purchases, consider these five questions, which Nielsen has encouraged Black consumers to ask themselves since the dawn of the Diverse Intelligence Series in 2011:

- Was I able to find this product in my neighborhood?
- Does the brand make an effort to connect with me and reflect me and my community?
- Does the brand invest in my community and support causes I care about?
- Does the brand show a demonstrated commitment to representing my community in their ranks?
- And, if any of the answers to these questions is no, do I still want to do business with this company?

Visit [nielsen.com/africanamericans](https://nielsen.com/africanamericans). Support the brands that support you, your community and what you believe in. That is when change can begin.

For marketers—beyond the tips that I've shared, remember, companies that respond favorably and authentically through consistent action will ultimately earn Black consumers' purchases. The return on investment will be repeat visits, prolonged stays, more purchases and increased sales. In turn, we feel valued and remain loyal to brands who are putting our needs first.



## BLACK BEAUTY

From the \$800 million+ Black consumers spend on detergent, to the nearly 86% of the spend they make up on ethnic hair and beauty aids, Black consumers' economic impact is felt in a variety of industries. African Americans continue to dominate the ethnic hair and beauty aids category, currently spending nearly 86% of the total \$63.5M spend. Following ethnic hair and beauty aids, leading product categories are Women's Fragrances, Feminine Hygiene, Men's Toiletries and Personal Soap & Bath Needs, respectively.



## THE POWER OF BLACK DOLLARS

Categories where the percentage of Black spending is greater in proportion to their population (14%)

CATEGORY	BLACK SPEND	TOTAL SPEND	% OF TOTAL SPEND ATTRIBUTABLE TO BLACK CONSUMERS
Shelf-Stable Juices & Drinks	\$1.04B	\$6.2B	16.6%
Detergents	\$829.8M	\$5.6B	14.83%
Bottled Water	\$810.3M	\$5.15B	15.75%
Frozen Unprepared Meat & Seafood	\$761.7M	\$4.3B	17.75%
Refrigerated Juices & Drinks	\$578.2M	\$3.3B	17.51%
Personal Soap & Bath Needs	\$573.6M	\$3.04B	18.89%
Spices, Seasonings & Extracts	\$430.2M	\$2.7B	16.13%
Household Cleaners	\$407.8M	\$2.7B	14.89%
Shortening Oil	\$352M	\$2.3B	15.05%
Insecticides & Repellants	\$176.6M	\$1.14B	15.49%
Women's Fragrances	\$152M	\$679.4M	22.37%
Cookware	\$136.8M	\$934.5M	14.64%
Gum	\$122.8M	\$807.7M	15.2%
Men's Toiletries	\$62M	\$308.3M	20.1%
Ethnic Hair & Beauty Aids	\$54.4M	\$63.5M	85.65%
Feminine Hygiene	\$54.1M	\$257.3M	21.04%
Charcoal, Logs & Accessories	\$43.5M	\$300.5M	14.48%

Source: Nielsen Homescan, Total U.S. 52 Weeks ending 12/30/17.

## YOUNGER HOUSEHOLDS = INCREASE IN BABY PRODUCTS SPEND

While African American consumers are open to store brands, when it comes to babies as seen with their No. 1 spend on baby wipes in this category, they gravitate to Kimberly-Clark (KC) products for training pants and diapers. KC brands dominate the top 10 categories of preferred baby care products, including Pull-Ups, Huggies, and Goodnites brands, in Black households. Also, the data speaks to moms' desires to purchase trusted and traditional brands such as Pampers, Johnson's Baby Oil and Similac for baby.

## TOP BABY CARE PRODUCTS FOR AFRICAN AMERICAN HOUSEHOLDS



Source: Homescan

## TOP 20 HIGH INDEXING AFRICAN AMERICAN GROCERY PRODUCTS VS. GENERAL MARKET

African Americans over-index in spending in a number of categories as the table below demonstrates. It does not reflect the totality of these consumers' tastes.

Black consumers have an affinity for fresh foods, fruits and veggies. In fact, 61% identify produce as the most important category to buy local, followed by bakery and prepared foods at 56%, eggs at 55% and dairy at 52%.

PRODUCT	CATEGORY	AFRICAN AMERICAN TOTAL \$	TOTAL \$ PER 100 HHs INDEX
Quaker	Grits	19,086,256	466
Louisiana Fish Fry Products	Coating Mixes	11,147,492	454
Glory Foods	Cooking Greens	7,124,361	457
Jays	Potato Chip	2,666,411	462
Quaker	Grits	2,606,917	469
Glory Foods	Cooking Greens	2,461,192	492
Tahitian Treat	Soft Drinks	2,319,589	536
Albers	Grits	1,465,572	626
Alka 65	Value Add Water	1,285,503	455
Turkey Creek Snacks	Pork Rind	914,568	480
Goya	Dried	845,301	532
Spice Supreme	Seasonings	837,008	534
Glory Foods	Cooking Greens	783,417	516
Vintage	Tonic Water	687,956	471
Goya	Dried	684,452	527
Chef's Select	Seasonings	657,153	463
Zatarain's New Orleans	Coating Mixes	631,032	556
Minute Maid	Fruit Drink	595,727	467
Trappey's Red Devil	Hot Sauce/Chili	552,934	492
B & G	Relish	533,866	476

Source: Homescan

## WHY IN-STORE SHOPPING STILL MATTERS

More than half (52%) of African American consumers find the physical shopping experience to be relaxing, outpacing the total population by a very significant 26%. They are more impacted than others by engagement with in-store personnel, advertisements and merchandising. Fifty-five percent say they enjoy wandering the store looking for new interesting products. Creating in-store opportunities for Black customers to touch, feel and try new products while shopping could be essential to building long term loyalty.

Some luxury retailers have an African American fan base who say they are more likely to shop at high end stores, including Saks Fifth Avenue (63% more likely), Neiman Marcus (45% more likely) and Bloomingdale's (24% more likely). Black consumers are more likely than the total population to agree "I am willing to pay extra for a product that is consistent with the image I want to convey" (by 20%) and say clothes made by fashion designers are more appealing (by 22%). Luxury spending doesn't stop at clothes. Black consumers are spending upwards of \$500 on handbags and costume jewelry at a higher rate than the total population.

## BLACK CONSUMERS SPEND ON LUXURY ITEMS

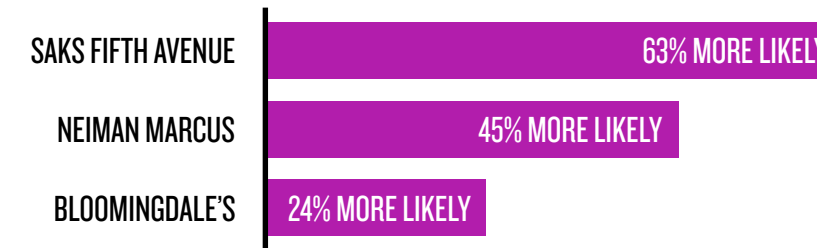
(Index: Black Consumers vs. Total Population Say They've Spent \$500 or More in the Past 12 Months)



Read as: Black consumers are 31% more likely to say they've spent \$500 or more on handbags/purses in the past year than the total population.

Source: Nielsen Scarborough USA+ 2019 Release 1 Total (Jan 2018 - May 2019)

## AFRICAN AMERICANS ARE MORE LIKELY THAN THE TOTAL POPULATION TO SAY THEY SHOP AT HIGH END STORES



**BLACK CONSUMERS ARE 20% LIKELY THAN THE TOTAL POPULATION TO AGREE "I AM WILLING TO PAY EXTRA FOR A PRODUCT THAT IS CONSISTENT WITH THE IMAGE I WANT TO CONVEY."**

# THE FEEDBACK LOOP: PASSION AND POWER IN RECOMMENDATIONS

The actual transaction is just one step in the path to purchase. African American consumers share their passion and satisfaction (or dissatisfaction) with a transaction or product with their circles of influence, providing the fuel for others' decisions to buy or not buy. Today, the consumer journey begins with discovery/awareness, moves through consideration/research, into conversion/purchase and then into evaluation/reporting...repeat. African Americans are leaders in creating this post-purchase influence.

African Americans are active in posting their opinions online, which is why their post-purchase influence is so strong. Black Americans, in fact, surpass the total population by 26% in agreeing with the sentiment "I like to share my opinions about products and services by posting reviews and ratings online." Black consumers also agree 20% more than the total population with the statement "people often come to me for advice before making a purchase," giving them yet another opportunity to share their purchasing and ownership experiences, both positive and negative.

When negative impressions are created, such as director Spike Lee's boycott of Prada and Gucci following their offerings of products with racist connotations, the path to purchase is impacted. The impact of negativity can in fact be felt more strongly by brands, and their marketers, than can positive reviews and ratings, meaning marketers must be vigilant about satisfaction after the transaction as well as prior to it in completing the feedback loop in the consumer journey.

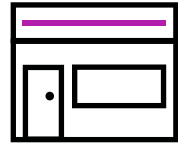
The path to purchase loop is continually evolving, with consumer evaluations, input and opinions becoming more and more important. As African Americans continue to lead in sharing their purchasing experiences, brand owners must be aware that African American influence on the buying decisions of all consumers can mean success or failure in the evolving American mainstream.



# SECTION 2 TAKEAWAYS



African Americans love the latest trends and are more likely to try new products for the sake of variety and novelty by about 30% vs. the total market. Nearly 40% of Black consumers say that they are the first among their friends to try new products and services, surpassing the total population by 29%.



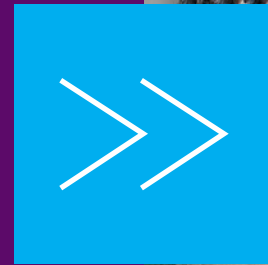
52% of African American consumers find the physical shopping experience to be relaxing, outpacing the total population by 26%. African American consumers are more impacted in-store than the total population by things like store personnel, in-store advertisements and merchandising. Creating in-store opportunities for African American customers to touch, feel and try new products while shopping could be essential to building long term loyalty.



African Americans are increasingly relying on the convenience of online shopping and are most likely to shop online if a coupon or promotional code for the site is available, surpassing the total population by 17% in agreeing with this statement.



# AFRICAN AMERICAN DEMOGRAPHIC TRENDS AND ECONOMICS



In order to grasp the full Black consumer journey, companies must understand how household makeup and demographic trends influence consumer needs. For instance, did you know that nearly one-third of African Americans are under the age of 18? That's important, because Black consumers are more likely than the total population to agree that their children influence the brands they buy. Nearly all of what we know about Black household makeup and demographics (and all households for that matter), comes from the decennial U.S. Census.



# THE U.S. CENSUS BUREAU - NIELSEN 2020 PARTNERSHIP

The decennial census is essential to many civic functions U.S. residents count on every day. For instance, local government use the census to ensure public safety and plan new schools and hospitals; residents use the census to support community initiatives involving legislation, quality-of-life and consumer advocacy; real estate developers and city planners use the census to plan new homes and improve neighborhoods; every 10 years, the results of the census are used to reapportion the U.S. House of Representatives, determining how many seats each state gets; and, after each census, state officials use the results to redraw the boundaries of state and legislative districts, adapting to population shifts.

Beyond this though, business decisions across the country also depend on accurate census data. Companies use this data to plan for growth and adapt to demographic change. For example, through Nielsen, census measurement underpins \$90 billion in advertising transactions and powers decision-making by the country's biggest retailers and manufacturers that influence more than \$1 trillion in consumer spending.

We use census data to determine universe estimates (population estimates) in our U.S. panels and as a key benchmark for understanding consumers. Accurate census data has never been more important, due to the rapid diversification of the U.S. population. Multicultural consumers are projected to become the numerical majority in the U.S. by 2044.<sup>1</sup> That's why Nielsen is proud to be a 2020 Census Official Partner and an active participant in ensuring that the 2020 Census is as accurate as possible.

The results described in this section are primarily sourced from and based on data collected by the U.S. Census Bureau.



**THROUGH NIELSEN,  
CENSUS MEASUREMENT  
UNDERPINS \$90 BILLION IN  
ADVERTISING TRANSACTIONS  
AND POWERS DECISION-  
MAKING BY THE COUNTRY'S  
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INFLUENCE MORE THAN  
\$1 TRILLION.**

<sup>1</sup> U.S. Census Bureau, 2017 National Population Projections, Table 4. Projected race and Hispanic origin; Accessed via <https://www.census.gov/data/tables/2017/demo/popproj/2017-summary-tables.html>: (22 August 2019)



# CENSUS AND YOU - DID YOU KNOW?

# 95%

of homes in the country will receive letters with instructions by mid-March 2020. You will have the option to respond digitally (for the first time in 2020), by telephone call or on the paper form.

Returning a partially filled-out questionnaire may result in a follow-up phone call or visit from a census worker to complete the form.

**DO IT RIGHT  
THE FIRST TIME!**



**It's confidential.** It is against the law for the U.S. Census bureau to share or publish any private information that identifies an individual, including with other government agencies.

**PERSONAL INFORMATION CANNOT BE USED AGAINST YOU  
BY ANY GOVERNMENT AGENCY OR COURT.**



**Representation matters.** The census only happens once every 10 years. Make sure you are counted to help ensure your family, and your community, receive the funding and resources they need.

## GROWING CONSUMER BASE

Black Americans are a significant and rapidly growing population group in the U.S, estimated to be 47.8 million people in 2018 (U.S. Census estimates of black race alone or in combination with other race).<sup>2</sup> By 2060, that population is estimated to grow 27% to over 60 million.<sup>3</sup>

- **Black Americans are also among the youngest: 28% of Blacks are under 18, compared to 23% of all Americans.**
- **An additional 26% are under 35, meaning that 24.6 million African Americans are Millennials or younger.**
- **The median age for Blacks is 32, significantly younger than the median age of the total population (38). The median age for Black males is 30 and for Black females is 34.**

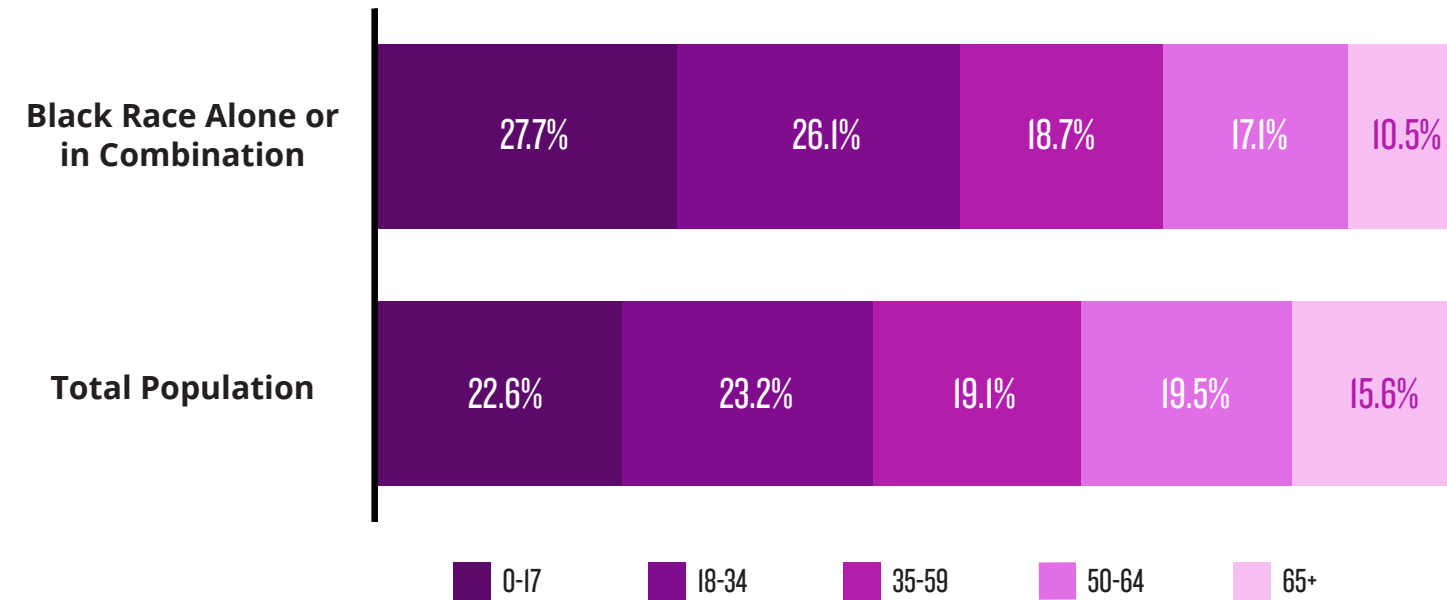
Source: Annual Estimates of the Resident Population by Sex, Age, Race Alone or in Combination, and Hispanic Origin for the United States and States: April 1, 2010 to July 1, 2018 Source: U.S. Census Bureau, Population Division Release Date: June 2019 <http://factfinder.census.gov/bkmk/table/1.0/en/PEP/2018/PEPASR5H?#>

The relative youth of the African American population shows up in their comfortable use of technology, and how that intertwines with their spending decisions and habits. The relative youth of the population also indicates more years of buying power in the future.

<sup>2</sup> U.S. Census Bureau; Table PEPALL5N: Annual Estimates of the Resident Population by Sex, Single Year of Age, Race Alone or in Combination, and Hispanic Origin for the U.S.: April 1, 2010 to July 1, 2018, 2018 Population Estimates; Accessed via American Factfinder: (8 August 2019).

<sup>3</sup> U.S. Census Bureau; 2017 National Population Projections Tables; Table 4. Projected race and Hispanic origin; Accessed via <https://census.gov/data/tables/2017/demo/popproj/2017-summary-tables.html>: (Aug. 8, 2019).

## AGE DISTRIBUTION OF BLACK AMERICANS VS. TOTAL POPULATION



Source: U.S. Census Bureau; American Community Survey (ACS), One-Year Public Use Microdata Sample (PUMS), 2017; generated by Ethnifacts; accessed via ftp; ; (8 August 2019).

Fifty-six percent of African Americans live in the South as of 2018, increasing from 55% in 2010 and 54% in the 2000 decennial Census. Seven of the top 10 states for African American population are located in the South and Texas now has the largest population of African Americans.

Large populations of African Americans can also be found in major metropolitan areas, with the largest populations in New York City, Atlanta, Washington, D.C., and Chicago. Texas is the only state to have two of the top 10 metro areas for Black population.

## TOP STATES FOR AFRICAN AMERICAN POPULATION

RANK	STATE	TOTAL AFRICAN AMERICAN POPULATION	PERCENT OF STATE POPULATION
1	Texas	3,713,556	13%
2	Florida	3,690,640	18%
3	Georgia	3,458,600	33%
4	New York	3,452,551	17%
5	California	2,780,243	7%
6	North Carolina	2,361,565	23%
7	Illinois	1,953,628	15%
8	Maryland	1,924,311	32%
9	Virginia	1,792,223	21%
10	Louisiana	1,544,541	33%

Source: U.S. Census Bureau; American Community Survey (ACS), One-Year Public Use Microdata Sample (PUMS), 2017; generated by Ethnifacts; accessed via ftp; (8 August 2019).

## LARGEST METRO CONCENTRATIONS OF AFRICAN AMERICANS

METRO AREA	TOTAL AFRICAN AMERICAN POPULATION
New York-Newark-Jersey City, NY-NJ-PA Metro Area	3,768,726
Atlanta-Sandy Springs-Roswell, GA Metro Area	2,101,171
Washington-Arlington-Alexandria, DC-VA-MD-WV Metro Area	1,693,297
Chicago-Naperville-Elgin, IL-IN-WI Metro Area	1,671,532
Miami-Fort Lauderdale-West Palm Beach, FL Metro Area	1,389,782
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD Metro Area	1,375,452
Houston-The Woodlands-Sugar Land, TX Metro Area	1,259,000
Dallas-Fort Worth-Arlington, TX Metro Area	1,249,417
Los Angeles-Long Beach-Anaheim, CA Metro Area	1,015,376
Detroit-Warren-Dearborn, MI Metro Area	1,014,865

Source: U.S. Census Bureau; Table B02009: BLACK OR AFRICAN AMERICAN ALONE OR IN COMBINATION WITH ONE OR MORE OTHER RACES; 2017 American Community Survey 1-Year Estimates; Accessed via American Factfinder; (8 August 2019).

## THE IMPACT OF GROWING COLLEGE ENROLLMENT

The percentage of African American high school graduates immediately enrolling in higher education continues to rise, reaching 63.1% in 2016-2018, up from 62.7% in 2013-2015. In particular, Black female high school grads have increased immediate enrollment in college from 63.6% to 68.9% over the same time period<sup>4</sup>. In 2007, 45.2% of adult (18+) Blacks had completed at least some college. In 2017, that number grew to 54.3% of all Black adults. Not only is enrollment increasing, but the population with a Bachelor's Degree or higher is also increasing. This increase in education should continue to positively impact employment and income numbers for the African American community.

<sup>4</sup> Source: U.S. Census Bureau; Current Population Survey (CPS), October Supplement, Microdata from 2013 to 2018; generated by Ethnifacts; accessed via ftp; ; (26 July 2019).



**86% OF BLACK STUDENTS RECEIVING BACHELOR'S DEGREE BORROW MONEY, COMPARED TO 69% OF ALL STUDENTS.**

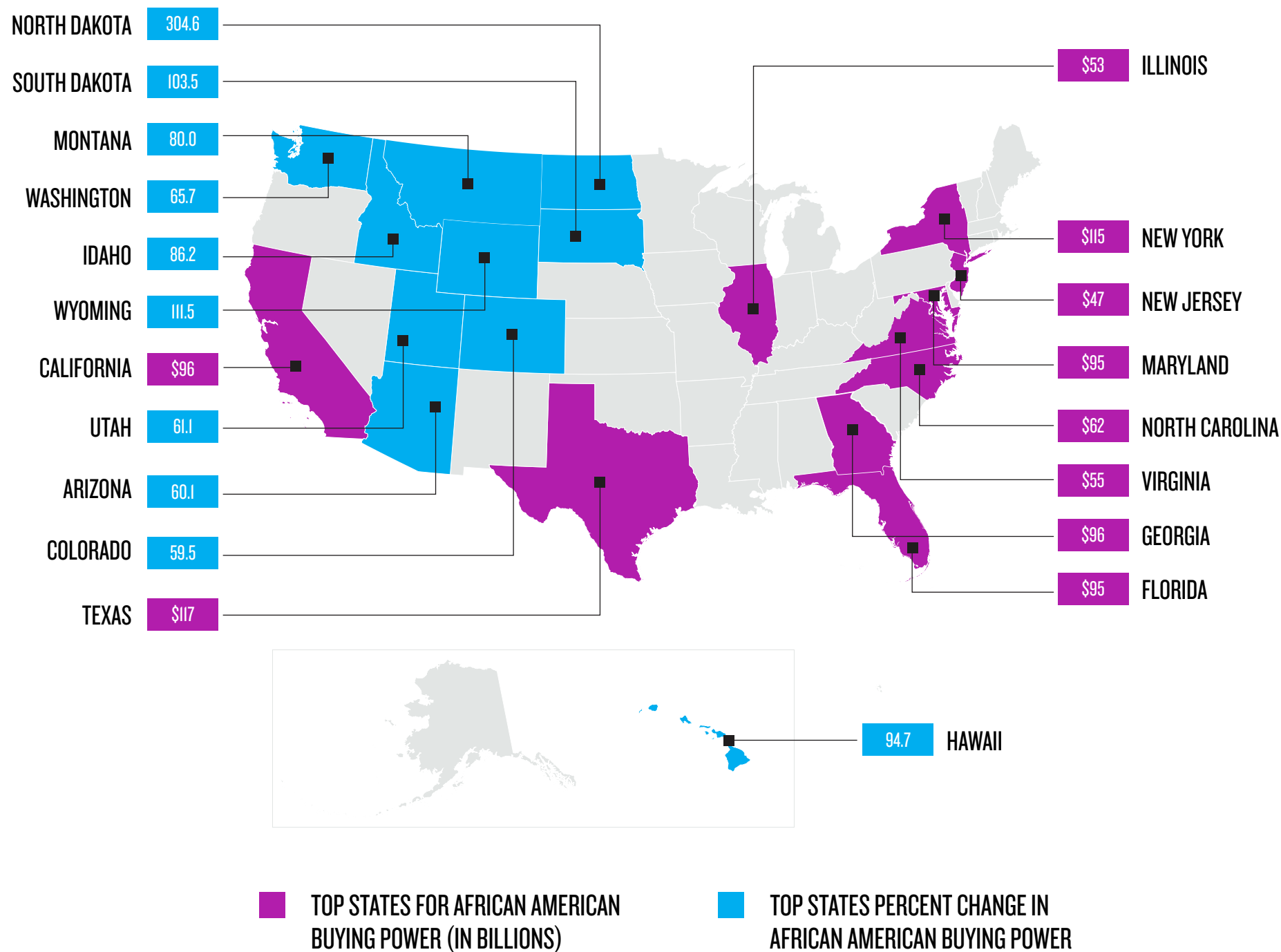
## GEOGRAPHIC DISTRIBUTION OF BLACK AMERICAN BUYING POWER

Black buying power continues to grow, rising from \$320 billion in 1990 to \$1.3 trillion in 2018. Between 2000 and 2018, Black buying power rose 114%, compared with an 89% increase in White buying power. Texas now tops the nation in buying power for African Americans, along with population.<sup>5</sup> Texas led the nation in jobs gained in 2018, and African Americans appear to have followed those opportunities into the state. Nationally, the number of Black Americans in the labor force is projected to increase from 19.6 million in 2016 to 21.6 million in 2026,<sup>6</sup> at approximately the same rate of growth as the total Black population.

While more than half of African Americans live in the South, the buying power of African Americans is distributed across the U.S. Texas has now surpassed New York as having the strongest African American buying power in the U.S.. A geographically diverse group of states is seeing the fastest growth in African American buying power, with the state of North Dakota seeing the sharpest increase.

The average annual household expenditure for Black households is \$43,117. They overspend the general market on housing, apparel, transportation, personal care products, and TV, radio, and sound equipment as a percentage of their total household expenditures. Total expenditures trail the general market, but that gap is narrowing as unemployment decreases and education rates rise.

Population growth, increasing education attainment rates and a larger percentage of Blacks in the workforce are all contributing factors to the increase in buying power in the African American community.

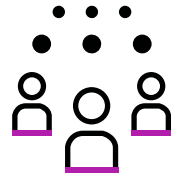


Source: Selig Center for Economic Growth, Terry College of Business, The University of Georgia, June 2018.

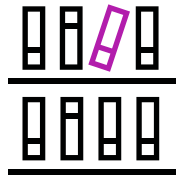
<sup>5</sup> Selig Center for Economic Growth, Terry College of Business, The University of Georgia, June 2018

<sup>6</sup> Emily Rolan and Mitra Toossi, "Blacks in the labor force," *Career Outlook*, U.S. Bureau of Labor Statistics, February 2018.

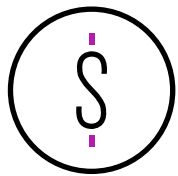
# SECTION 3 TAKEAWAYS



Black Americans are a significant and rapidly growing population in the U.S, estimated at 47.8 million people in 2018 and expected to grow 32% to over 60 million by 2060. Black Americans are also among the youngest: 28% of Blacks are under 18, compared to 23% of all Americans.



The percentage of African American high school graduates immediately enrolling in higher education continues to rise to 63.1% in 2016-2018, up from 62.7% in 2013-2015. In particular, black female high school grads have increased immediate enrollment in college from 63.6% to 68.9% over the same time period.



Black buying power continues to grow, from \$320 billion in 1990 to \$1.3 trillion in 2018. Between 2000 and 2018, black buying power rose 114%, compared to an 89% increase in white buying power. Texas now tops the nation in buying power for African Americans, along with population.



# CONCLUSION

The influence of African American consumers is extensive - driven by their tech affinity, passion for sharing experiences, and powered by their omnichannel thirst for information and recommendations, the 48 million Black Americans, now just approaching their peak earning years, are adopting and adapting media and technology in their shopping journey to fit their unique needs and culture.

Marketers should be aware that African Americans demand that product information and feedback opportunities be integrated across multiple media channels and they are more likely than the total population to agree that advertising provides them with meaningful information about the product use of others. Further, African Americans love the latest trends with nearly 40% of Black consumers saying that they are the first among their friends to try new products and services, surpassing the total population by 29%.

As voracious media consumers across multiple channels, Black consumers are the largest consumers of TV with over 11 hours more each week using television compared to the total population. Despite this, TV usage decreased in the last year while “internet on the go,” is increasing with more time spent on video, audio and social networking than the total population on both smartphones and tablets. Black consumers are creating their own video, audio, and digital app platforms that allow them to express their aspirations and their support of thriving Black-owned businesses of all types.

The African American path to purchase is social and circular, with the transaction being a critical step in the process before consumers express their passionate feedback about their experience, be it positive or negative. Brick and mortar and online retailers and service providers should all strive to provide an experience that not only satisfies Black consumers, but creates buzzworthy raves that will quickly be passed on to friends, family and virtual networks in their discovery, awareness and decision-making processes.

Developing strategies to connect with African American consumers and assuring that their culture is understood and respected, as well as assuring that their expectations are exceeded will provide far-reaching influence and growth throughout all consumers for many years to come in the evolving American mainstream.



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# METHODOLOGIES

## NIELSEN HOMESCAN PANEL DATA

The Homescan national panel consists of a randomly dispersed sample of households that is intended to be representative of, and projectable to, the total U.S. market. Panel members use handheld scanners and/ or a mobile app to record items with a UPC code purchased from any outlet. Data for this report is based on Homescan panel data from the following periods: 52 weeks ending December 30, 2017 and 52 weeks ending December 29, 2018.

## TELEVISION METHODOLOGY

Television data are derived from Nielsen's National TV Panel that is based on a sample of over 45,000 homes that are selected based on area probability sampling. Live+Time-shifted TV (PUT) includes Live usage plus any playback viewing within the measurement period. Time-shifted TV is playback primarily on a DVR but includes playback of encoded content from video on demand, DVD recorders, server-based DVRs and services like Start Over. Total Use of Television (TUT) includes Live TV + Time-shifted TV as well as TV-connected devices (DVD, Game Console, Internet Connected Device). TV-connected devices include content being viewed on the TV screen through these devices. This includes when these devices are in use for any purpose, not just for accessing media content. For example, Game Console also includes when it is being used to play video games. Internet Connected Device usage includes Smart TV app usage. Reach for television and TV-connected devices includes those viewing at least one minute within the measurement period. Data used in this report is inclusive of multicultural audiences.

## DIGITAL METHODOLOGY (COMPUTER, SMARTPHONE, TABLET)

Digital data is based on Nielsen's Total Media Fusion, which is reflective of both panel and census measurement. It leverages the most granular and comprehensive cross-platform respondent-level data from our panels, along with census data from Nielsen's Total Audience Measurement solutions, to provide the highest-quality, representative sample of digital media consumption. Data for this was sourced from Nielsen Media Impact (Nielsen's cross platform planning solution). Data used in this report is inclusive of multicultural audiences.

## TIME SPENT AMONG U.S. POPULATION, TIME SPENT AMONG USERS, REACH OF USERS, REACH %

Total Use of Television, Live+Time-shifted TV, Live TV, Time-shifted TV, TV-Connected Devices (DVD, Game Console, Internet Connected Device) 12/31/2018–03/31/2019 via Nielsen NPOWER/National Panel; Radio 03/29/2018–03/27/2019 via RADAR 141; Computer, Smartphone, Tablet via Total Media Fusion sourced from Nielsen Media Impact. For digital data, weeks that cross calendar months are not included. Weeks included for digital: 01/07/19, 01/14/19, 01/21/19, 02/04/19, 02/11/19, 02/18/19, 03/04/19, 03/11/19, 03/18/19, 03/25/19.

Note: Time spent among U.S. population includes whether or not they have the technology, and data sources can be added or subtracted as appropriate. Time spent among users of each medium would include different bases by source, and data sources should not be added or subtracted. Time spent among U.S. population includes visitor viewing, and time spent among users excludes visitor viewing, resulting in occurrences of reported time spent for U.S. population to be higher than users. Some amount of simultaneous usage may occur across devices. Sum of individual sources may vary slightly from total, due to rounding.

## TELEVISION DISTRIBUTION STATUS, DEVICE OWNERSHIP

Based on scaled installed counts for March 2018 and March 2019 via Nielsen NPOWER/National Panel.

## RADIO METHODOLOGY

Audience estimates for 48 large markets are based on a panel who carried a portable device called a Portable People Meter (PPM) that passively detects exposure to content containing inaudible codes embedded within. Audience estimates from the balance of markets in the U.S. are based on surveys of people who record their listening in a written diary for a week. Estimates in this report are based on the Fall 2018 National Regional Database in the 127 different measured markets with Black differential survey treatment.

Radio as defined in this report includes listening to AM/FM radio stations, digital streams of AM/FM stations (where captured in diary markets or encoded in PPM markets), HD radio stations and satellite radio as captured in diary markets only. No other forms of radio or audio are included at this time. Data used in this report is inclusive of multicultural audiences.

## NIELSEN SCARBOROUGH

Nielsen Scarborough USA+ 2018 Release 1 GfK MRI Attitudinal Insights Module: By integrating 400+ attitudinal statements and segmentations with Nielsen Scarborough's syndicated data set, this analysis reflects consumer psychographics in the studied categories.

## NIELSEN U.S. CATEGORY SHOPPING FUNDAMENTALS

Category Shopping Fundamentals is one of Nielsen's complementary solutions that makes up Nielsen's Shopper Essentials suite. Together, Nielsen's Shopper Essentials paint a picture of a brand's shopper across the entire path to purchase. The Category Shopping Fundamentals survey is fielded online in the U.S.

## AFRICAN AMERICAN HOUSEHOLD PROFILES

The profiles of African American households featured in this report were gathered using an independent online survey, which was voluntarily completed by households. The responses are the personal opinions of respondents and should not be interpreted as a scientific analysis of African American consumer sentiment as a whole. Rather, the responses contained in household profiles can be read as a contextual background to the Nielsen data in the report. Selected respondents were compensated.



## ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global measurement and data analytics company that provides the most complete and trusted view available of consumers and markets worldwide. Our approach marries proprietary Nielsen data with other data sources to help clients around the world understand what's happening now, what's happening next, and how to best act on this knowledge. For more than 90 years Nielsen has provided data and analytics based on scientific rigor and innovation, continually developing new ways to answer the most important questions facing the media, advertising, retail and fast-moving consumer goods industries. An S&P 500 company, Nielsen has operations in over 100 countries, covering more than 90% of the world's population. For more information, visit [www.nielsen.com](http://www.nielsen.com).

