



Seeing and believing

Meeting Black audience demand for representation that matters



Foreword

From the foundation of our economy to today's pop culture lexicon, the U.S. Black population has a complex and powerful legacy that continues to shape our nation and cultures around the world. And yet when it comes to representation in media, the complexity that creates the richness of our experience is often lost, and when present, undervalued. Representation of the collective Black community remains critical. But in the era of personalization, so is the nuance. As we explore a few of the trends and identities among Black audiences today, it's an opportunity for content providers and brands to uncover ways to further enrich their representation.

For many African Americans, content is our common language. Black audiences spend more time with media than any other group, with content engagement that consistently drives breakout hits and trending topics alike. Like all viewers, how Black audiences discover and discuss content is changing. Traditional media habits are blending with new paths to engaging content, building trust with brands, and finding opportunities to put Black culture front and center. Curating content for a unique Black experience is easier than ever but when available options fall short, creators are stepping up to tell the stories that are missing.

As the media industry looks to be more inclusive of Black storytellers and grow their bottom lines or brand awareness with Black audiences, understanding who we are, where we're connected and how we're changing is as important as ever. All of this work translates to an important acknowledgment of the value the Black community delivers "for the culture" and beyond.



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Contents

Seen and heard	4
More than quantity, quality	5
Transmitting live and on demand	6
Social media consumers and creators	7
Getting it right: creative control, content and culture	8
Exploring Black identities and the personalized media experience	9
Dive deeper: diverse identity profiles	
The main streamer	10
The “phenomenal woman”	11
The HBCU fan	12
Methodology & contributors	13



Black buying power



Black viewing power



Total television & streaming minutes viewed in 2Q21

Sources: Selig Center for Economic Growth, Terry College of Business, The University of Georgia, June 2021; Nielsen Media Impact, Time Spent with Total TV and Streaming, Q2 2021

2/3

Two out of three Black viewers are more likely to:

- ▶ Watch representative content
- ▶ Buy from brands that advertise in representative content

Source: Nielsen Attitudes on Representation on TV Survey, May 2021

Seen and heard

Black America is taking control of both the economic and media influence they wield and using it to invest in Black experiences, Black communities and Black content.

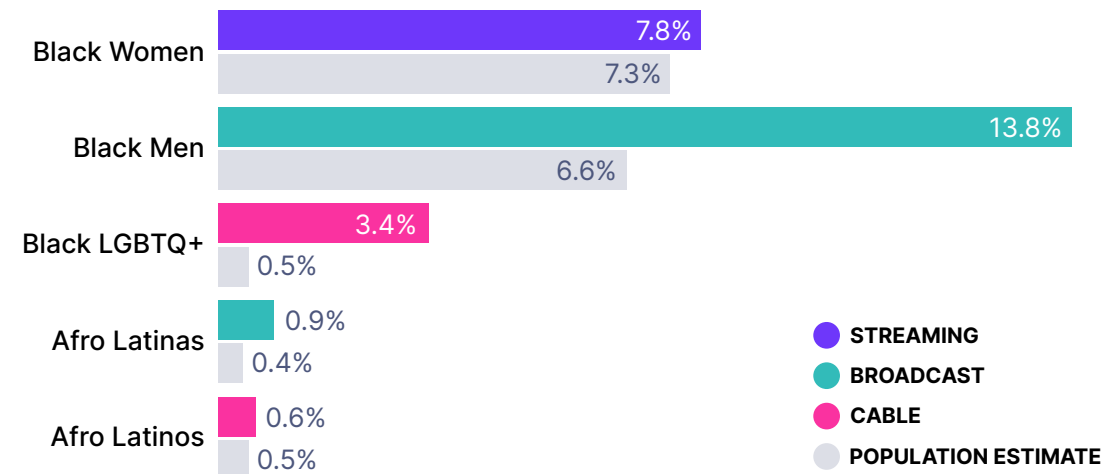
So the urgency to get representation right is real—it's a primary factor for the massive viewing levels Black audiences deliver and the shift in Black viewing power to platforms most representative of their community and identity group.

But getting representation right is increasingly nuanced: 9% of America's rural population is Black; 16% of Black people in the U.S. report speaking a language other than English at home; people identifying as "Black in combination with another race" increased 89% in the last decade; and Afro-Latinos are 8% of today's U.S. Black population (U.S. Census, 2020). The challenge to content creators now? Capturing this complexity within the population with authenticity and not erasure.

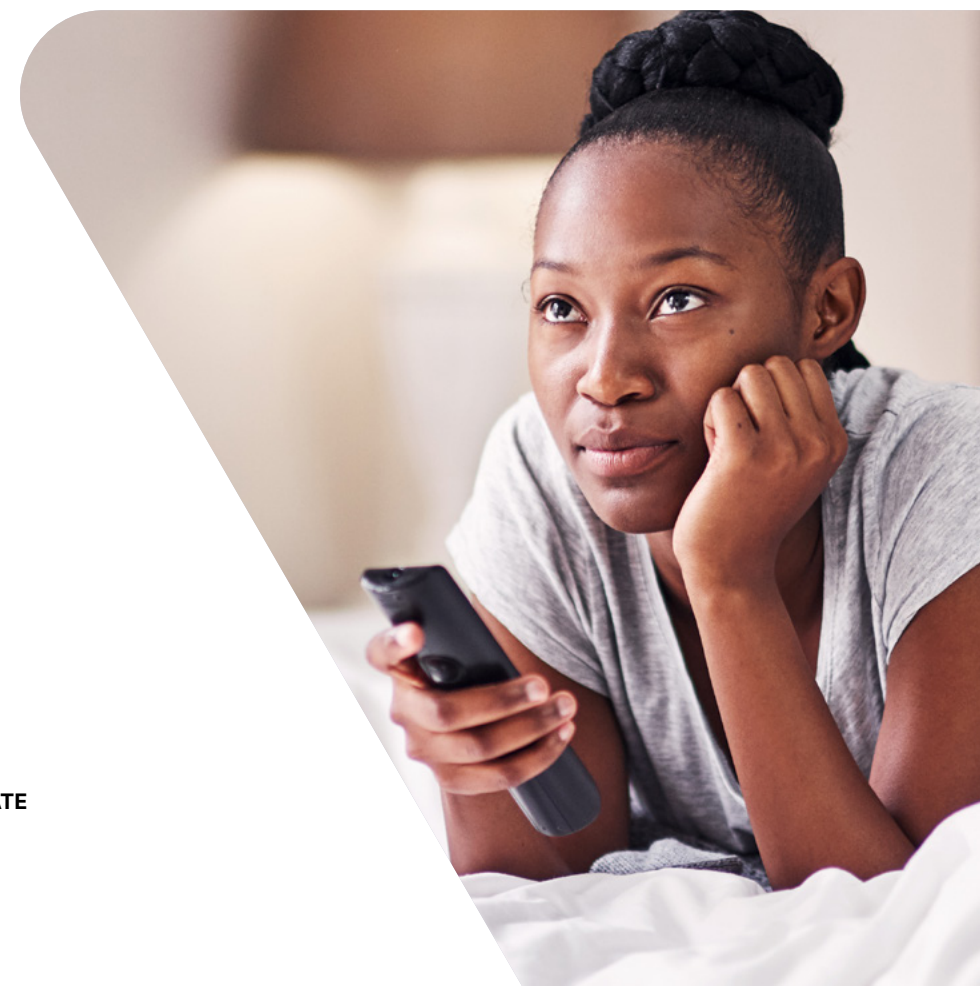
When it comes to feeling seen on screen, Black audiences are embracing new technology at higher rates to increase their content choices, and have similar expectations when they encounter advertising. Personalizing ads for a consumer segment without accounting for the diverse dimensions of that consumer can make promotions fall flat quickly. Combined, these trends are changing how and where Black audiences show up and how brands connect with them.

Access to content that reflects diverse Black experiences requires multiple platforms

Most representative platform by share of screen



Source: Gracenote Inclusion Analytics, Q1 2021

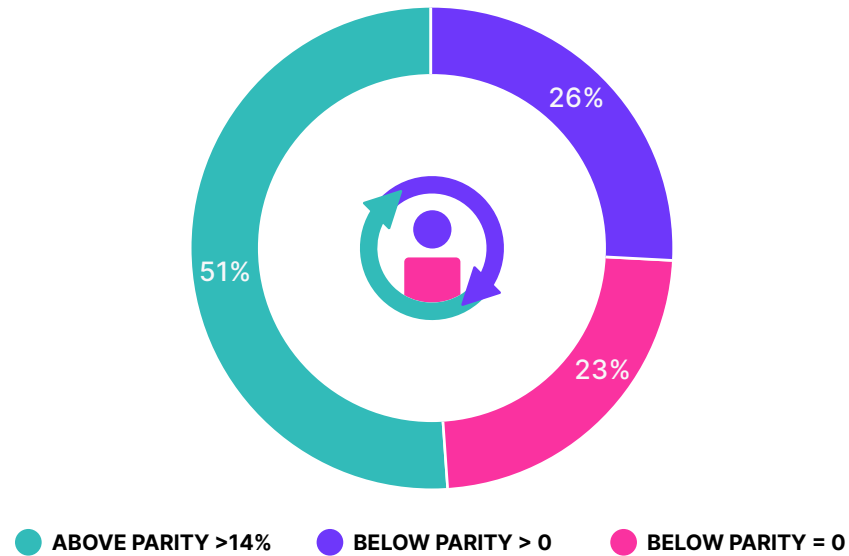


More than quantity, quality

If presence in content was enough to meet the demand, Black audiences would be satisfied with today's options. But just being present isn't enough—setting the bar for representation as the presence of Black people on screen, equal to their presence in the population, may not be the right goal. But representation is so much more than a numbers game. Black audiences are paying attention to the stories that are being told about their community, and where they are showing up in different genres.

Nearly a quarter of the reported genres in Gracenote Inclusion Analytics reported zero representation of Black talent in recurring lead roles. Looking closer, there are still gaps in genres like home improvement, history and educational content and Black audiences are driving the demand to change that.

Black representation in TV program genres (e.g. drama, comedy, news)

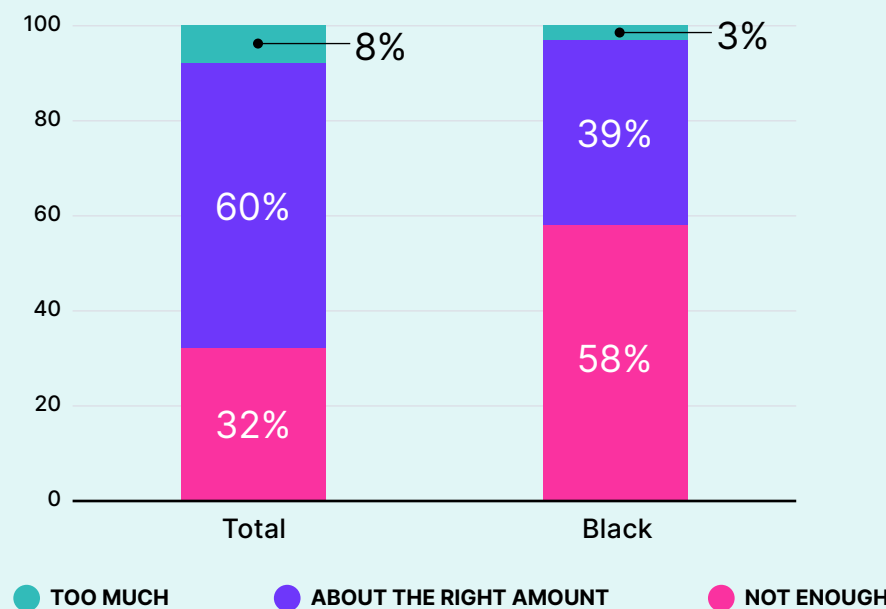


Source: Gracenote Inclusion Analytics, Q1 2021



How do you feel about the content on TV that features people from your identity group?

58% 
of Black audiences say there's still not enough representation of their identity group on screen

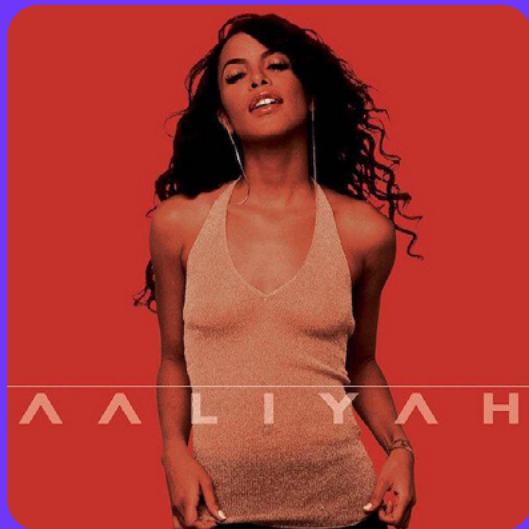


Source: Nielsen Attitudes on Representation on TV Survey, May 2021

After years of being excluded from narratives African Americans today are especially attuned to when—and how—they are represented on screen. On the leading edge of popular culture, the trends Black talent set on screen brings other audiences. Audiences are looking to television to see themselves as well as an opportunity to experience other cultures and follow great stories.

87% of respondents were interested in seeing more content featuring people from *outside* their identity group, and 35% of viewers felt the portrayal of people outside their own identity group was accurate*. Black audiences are leading the charge for more nuanced storytelling, but they won't be the only audiences to benefit from it.

*Source: Nielsen Attitudes on Representation on TV Study



Top of the Charts, Top of the Playlist

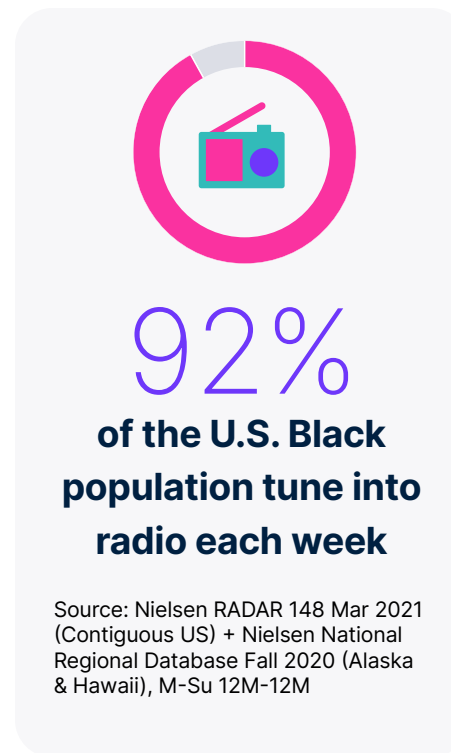
When iconic hip-hop trio De La Soul and soulful singer-songwriter Anita Baker gained control of their masters this summer, their announcements confirmed that owning and monetizing their full catalog through streaming platforms was the next goal on their list. The return of Aaliyah, a fellow 90s artist, to digital playlists shows why.

Years of anticipation for Aaliyah's streaming debut of "One in a Million" bumped the singer's Gracenote Music Popularity Score to its highest in two years, jumping 12% since the start of 2021.

The renewed interest in the artist in the weeks following her August 2021 streaming release also drove the 25 year-old album into the Top 10 on the Billboard 200 Chart.

SEEN AND HEARD

Transmitting live and on demand



The preference to connect with meaningful content extends to audio with traditional radio reaching 92% of the U.S. Black population each week, and this same group of listeners averaging over an hour and a half a week streaming audio.

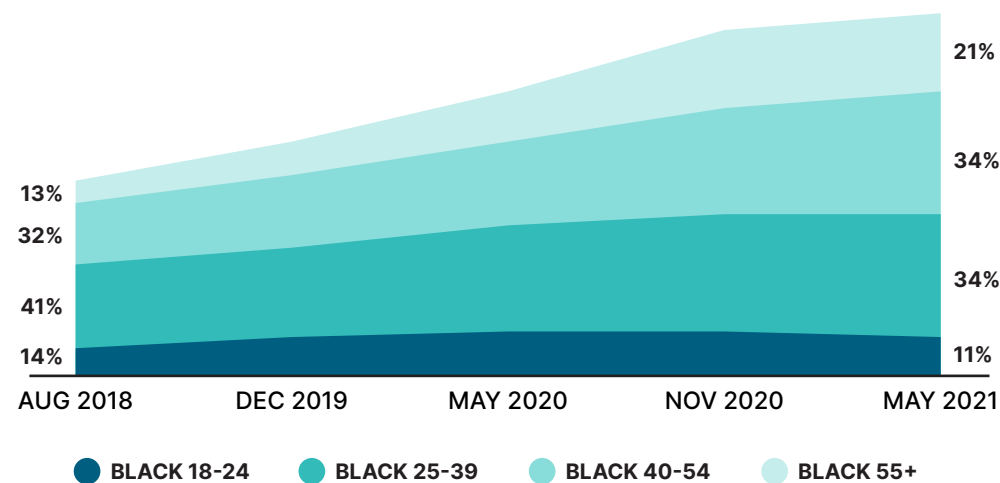
Traditional radio continues to prove the power of its reach providing the gossip, pandemic guidance and breaking news that's kept Black listeners connected this year, for over 21 million minutes a week. The trust and draw of radio were on full display as Americans waited months to see—and hear—if justice would prevail in the case of George Floyd's murder.

On the day of the Chauvin trial verdict, Black radio listenership spiked to the highest level in three months. In a single day, radio reached more than one-third of the Black population, an audience impact that usually takes the better part of a week to achieve.

Source: Nielsen RADAR 150, Black Listeners 12+, September 2021; Nielsen Audio Baltimore, Memphis & Minneapolis PPM data, Black Listeners P6+

Podcast popularity growing across Black listeners

Just as essential as Black hitmakers, is the community commentary that elevates them, a trend that points to why podcasts are surging in Black listenership and industry investment.



Source: Nielsen Podcasting Today, September 2021



Black listeners aren't just streaming audio more than other audiences, they're listening closely when brands reach out—averaging a 73% brand recall for podcast ads.

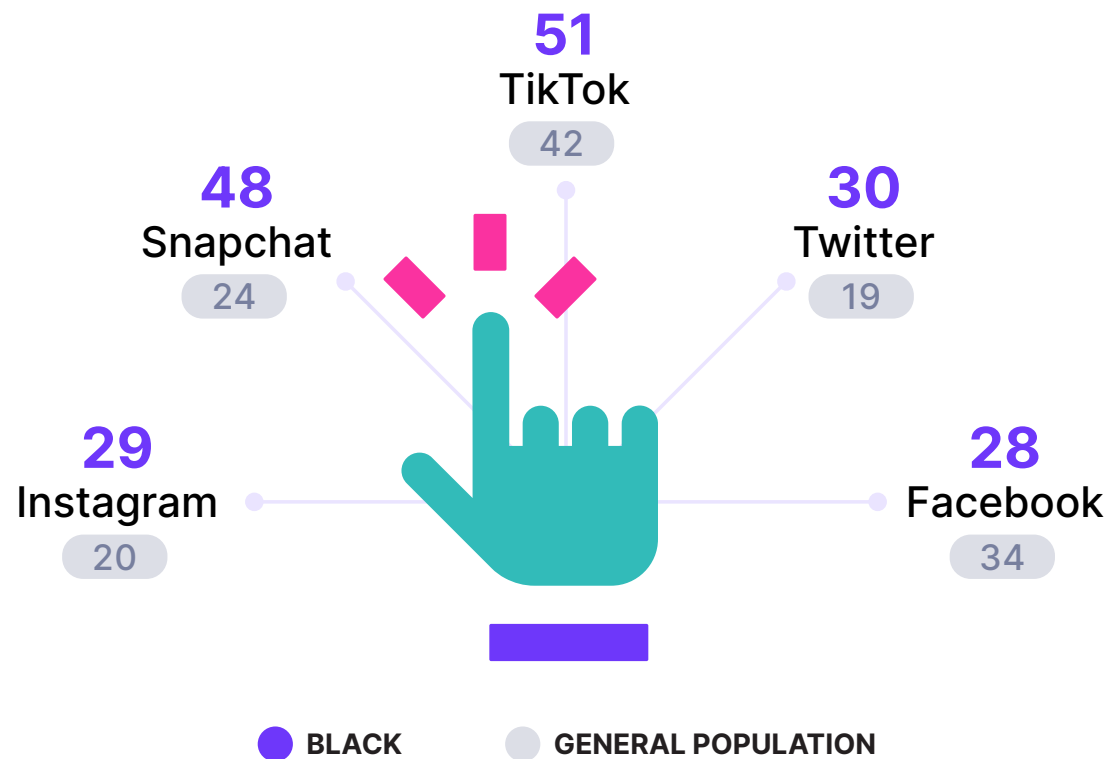
SEEN AND HEARD

Social media consumers and creators

When traditional content options don't deliver, social media doesn't just act as a key platform to celebrate or call out shortcomings. Social media's omnipresence within Black people's daily media routine continues as a source for nuanced content. Black stories and brand endorsements have spread to a new class of creators powered by feeds, timelines and the #ForYouPage. As Black people become and seek out influencers, the sources trusted with news, trends and entertainment exist at both the forefront and the fringes of digital media. In markets across the U.S. and around the world where Black representation in media can be limited, digital influencers are an even more important touchpoint.

Leading social media usage on 4 out of 5 social media apps

Black media users average daily time spent in minutes



Source: Nielsen Media Impact, May 2021

Not just for Gen Z

65%

Women 25-44 make up 65% of influencer and author Luvvie Ajayi Jones' following

Source: Nielsen InfluenceScope, Instagram Profiles

2x

Black people ages 35-44 spend almost twice as much time on TikTok daily than others in that age group

Source: Nielsen Media Impact, May 2021

38%

Heavy social media engagement among Black Baby Boomers up 38% since 2020

Source: Nielsen Scarborough R1 2021



And not just in the U.S.

87%

of Black people in Brazil reported social media apps as the ones used most often

Source: Nielsen Digital Consumer Survey - Brazil, 2021

10x

Prolific impersonator Grace Amaku, or @grace_africa to 1M TikTok followers, has a global reach from Houston, Texas to Lagos, Nigeria, and an average engagement rate that's 10 times higher than other influencers with a similar-sized Instagram following.

Source: Nielsen InfluenceScope, Instagram Profiles - Follower growth based on the last six months, September 2021

Getting it right: creative control, content and culture

As Black talent continue to make breakthroughs into a predominantly white media ecosystem, Black audiences continue to be vocal about cultural appropriation and injustice. Audience influence and advocacy are intertwined as Black creators and viewers across platforms unify to uproot exploitation within the media ecosystem and create a sense of urgency for social change.

Black-influenced

When it comes to scripted content, more Black voices in the writers' room are making must-see TV. Black talent at the table is critical to telling authentic Black stories, and Black writers should also be empowered to tell stories "outside the box."



Triller's reach with Black app users was five times the average reach for adults overall.

Black-owned

Who decides and who profits from how stories get told is impacted by ownership. Recent examples show just how much audiences are paying attention to who is in the boardroom.

Black News Channel's historic launch in 2020 made it the only cable network providing 24-hour news programming that is owned and operated "by people of color for people of color."

Networks like BET have catered to Black audiences since its founding but are taking the call for inclusion a step further not only to develop and air representative content, but also to create opportunities for ownership. The new venture BET Studios will provide equity ownership to the Black creators responsible for the content. (BET, September 2021)

When founders Swizz Beats and Timbaland sold Verzuz to Triller in March 2021, they shared a stake of their equity with over 40 performers that helped make the virtual concert series a success. By June, Triller's reach with Black app users was five times the average reach for adults overall.*

*Source: Nielsen Media Impact



Behind the scenes & on screen: the impact of representation on TV dramas

27%

of credited writers were Black on the most representative broadcast and cable dramas for Black talent in the first-quarter of 2021.

70%

Representation isn't just for endemic networks: seven out of the 10 top dramas by representation of Black talent aired on general audience networks.

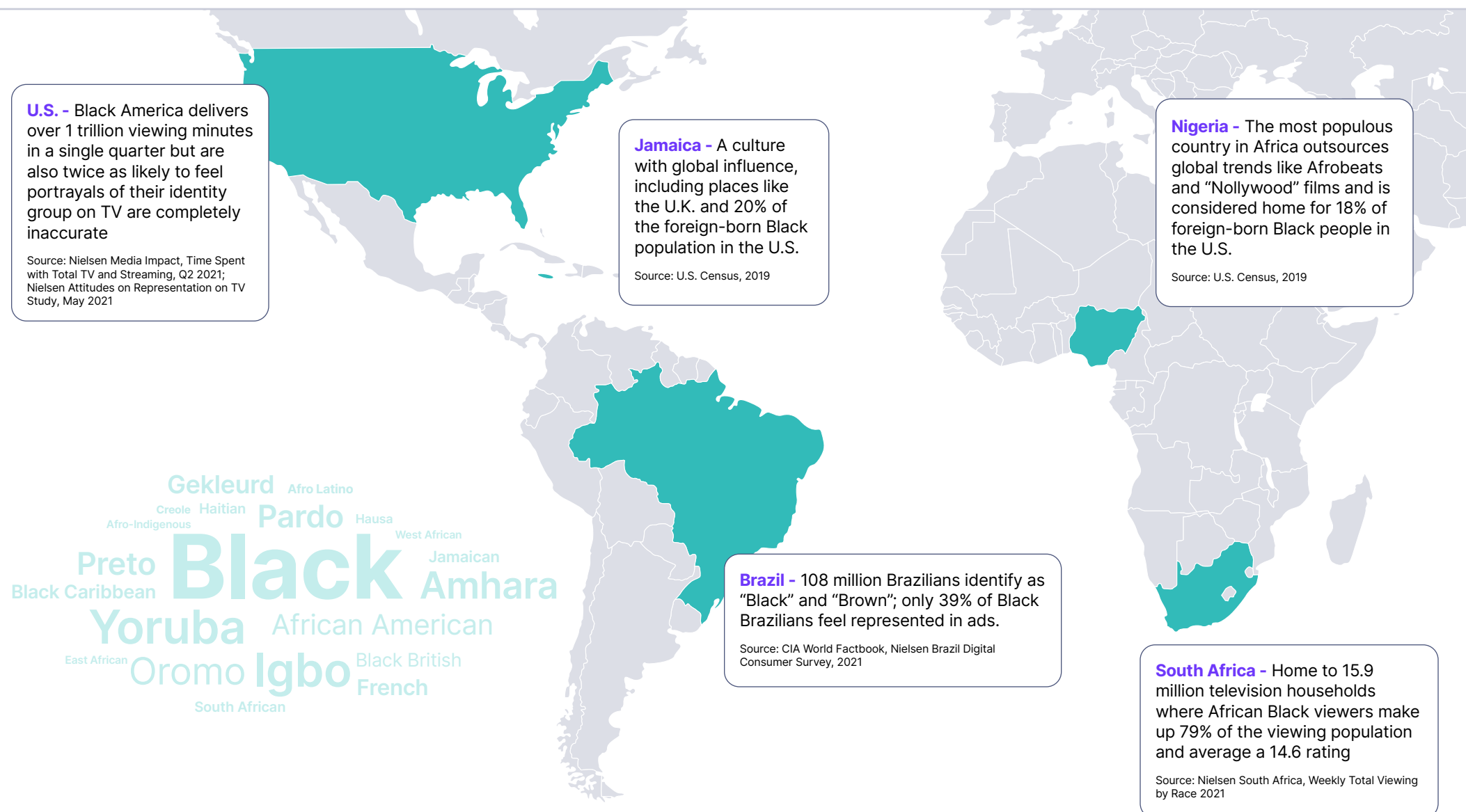
Source: Gracenote Inclusion Analytics, Q1 2021 Top 10 Dramas by Black Share of Cast; Gracenote Studio System, Writers by Known Race

Black identities and the personalized media experience

The diversity of the diaspora



In the era of personalization and inclusion in media, Black audiences around the world are looking to see both their collective and distinct experiences represented. From slang to skin tones, diving deeper within the monolith reveals diverse identities among Black people informed by experience and by region.



The advancements of curated content lists, on-demand scheduling and customized commercials mean more opportunities to enhance audience experiences thanks to today's technology. But outlets and advertisers that do not take into account how today's demographics influence identity may still end up missing the mark.

Black viewers are drawn to the personalized experience connected TV can offer with a rate of adoption up 82% since 2018—outpacing the overall growth at 56%

Source: Nielsen National TV Universe Estimates, June 2018 vs. June 2021

Is your brand message, content or creative as diverse as the Black population you hope to reach? In this new day, brands and content providers must begin to explore the experiences and identities of Black people within the U.S. and around the world.



The main streamer

How he feels

Black men have a high on-screen presence in TV content with a 15.5% share of screen, but 44% of Black men feel that the content that portrayed their identity group on screen was inaccurate. And while the number of advertisers spending in traditional media focused on reaching African Americans is up 16% since last summer, Black men are increasingly engaged outside of these platforms to find the forums that offer nuanced representation, connection and solace. This migration leaves untapped potential for brands to engage with “The Main Streamer” on his turf and with messaging that reflects what the broad strokes of representation often miss.

Source: Gracenote Inclusion Analytics, Q1 2021; Nielsen Attitudes on Representation on TV Survey, May 2021; Nielsen Ad Intel Q3 2020-Q2 2021

Where to find him

The variety among podcast options has made this a media staple for Black men in particular.

Twitch’s reach among Black men outpaces the platform’s reach with men overall. This level of engagement is a part of why creators, users and the platform itself are sounding the alarm to end “hate raids” and other forms of online harassment that disproportionately impact Black gamers.



Podcasts deliver choice and authenticity for Black men

More likely to listen to podcasts	6-7X per month Index = 171
Time spent listening to podcasts in typical week	8-10 hrs per wk Index = 135

Source: Nielsen Scarborough Podcast Buying Power (USA+), May 2021

Black men average double the amount of time on Twitch

Average daily time spent	77 minutes Total men = 34 minutes
Monthly reach	23% Total men = 21%

Source: Nielsen Media Impact, May 2021

Who he follows



- ▶ Kris Lamberson, better known as **@Swagg** to 2.4 million YouTube channel subscribers and 1.9 million on Twitch, has also seen his Instagram following increase 40% in the last six months, with significant reach among men aged 18-34.
- ▶ **@storymodebae**, aka Briana Williams’ has seen triple-digit growth, 133%, to her “Bae Brigade” in recent months, a following that is over 70% men.

Source: Nielsen InfluenceScope, Instagram Profiles, September 2021



The “phenomenal woman”

What she’s looking for

As described in Maya Angelou’s poem, Black women’s experiences range from triumphs to struggles, wins and losses, and they are seeking content that reflect that diversity.


When Oprah Winfrey Network (OWN) acquired rights to re-air the acclaimed “Underground” series in late 2020, fans were thrilled but left wanting more of the story than the show’s original two seasons. When another opportunity presented itself this year following the cancellation of “All Rise,” OWN didn’t just revise the show, they committed to producing a third season in 2022. Black women were 10% of the cast in the most recent season, but they were 14% of the audience and tuning in with a sense of urgency. While the latest episodes averaged a 9% overall uptick in DVR playback viewing in the weeks that followed an episode’s premiere, for Black viewers of the show that increase was just 3%. The investment of the Oprah Winfrey Network to produce their own lineup of diverse Black stories and breathe new life in others is an example that demonstrates the importance of Black women in the audience feeling connected through inclusive content.

Source: Gracenote Inclusion Analytics - Genres with 10+ programs, Q1 2021; Nielsen NPOWER: All Rise April-May 2021, P2+ (000), Live+7 vs Live+35

Where she’s connecting

2x Black women are twice as likely compared to viewers overall to seek out content where they’re seen on screen. But the need for community and connection doesn’t stop there.

Where she’s going

 Black women are 2.5 times more likely to be planning a spa vacation in the next year compared to women overall.

Source: Nielsen Scarborough USA+ 2020 Release 2

A community for self-care



- ▶ Tabitha Brown’s unique personal brand of positivity, faith and creative vegan recipes has amassed a following that is 88% women including 10% of her 3.8 million followers outside the U.S. in markets like the U.K. and Canada.
- ▶ CurlBOX creator Myleik Teele has been leading in the business of beauty for 10 years, with an engagement rate more than double influencers with similar size followings.

Source: Nielsen InfluenceScope - Instagram Profiles, September 2021





Photo by Kevin Coles

DIVE DEEPER: DIVERSE IDENTITY PROFILES

The HBCU fan

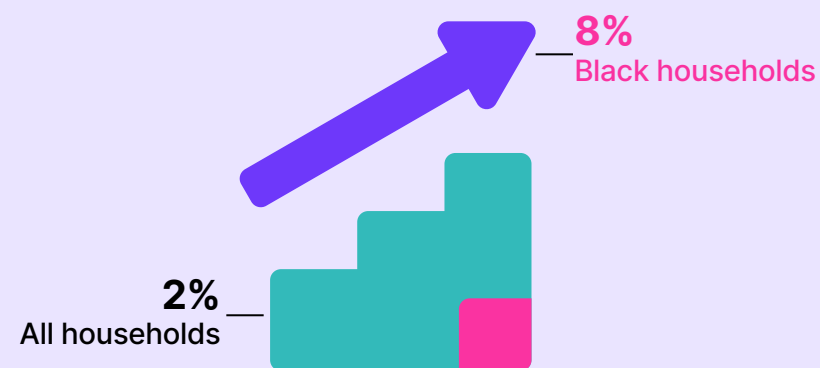


When brands show they understand the nuances of the Black experience, it is an opportunity to connect with diverse communities on personal, culturally relevant levels like never before. Embracing the impact of historically Black colleges and universities (HBCUs) is one example.

HBCUs aren't just about a college education. HBCUs continue to meet the demand for safe space by placing African American culture at the center of their collegiate experiences. But their impact goes far beyond their alumni base. Partnerships in the last year have also expanded collaborations with professional sports to celebrate the influence of HBCUs during audience favorites like NBA All-Star Weekend, the U.S. Open and NFL Kickoff. Sports brands and their advertisers who tap into the competitive spirit within the underserved HBCU community are also tapping the most coveted consumer segments.

Orange Blossom Classic wins with high-income Black viewers

Reach among households earning \$100K+



Source: Nielsen NPOWER: ESPN2 NCAA Football, 9/5/2021, Live+Same Day Household Reach



Trendsetters

Fashion and beauty editor, Kahlana Barfield Brown combined her passion for the HBCU experience and fashion-forward design in Target's "Black Beyond Measure" campaign. A powerful combination given the influencer's unique delivery of follower quality and topic relevance among her engaged Instagram community.

Source: Nielsen InfluenceScope



Black women

The day Nikole Hannah-Jones and Ta-Nehisi Coates announced they would be joining the Howard University faculty, Joy Reid's interview with the pair drew a 13% increase in Black viewers to MSNBC's The Reidout compared to the prior week—55% of them Black women.

Source: Nielsen NPOWER P2+ Average Audience Ratings, Live+Same Day, 7/6/2021 vs. 6/29/2021

Methodology & Contributors

Gracenote Inclusion Analytics

Designed to accelerate diversity and equity in media, Gracenote Inclusion Analytics illuminates representation of on-screen talent compared with audience diversity. The solution empowers content owners, distributors and brands to make better informed decisions around inclusive content investments. www.nielsen.com/inclusionanalytics

Gracenote Music Popularity Score

Gracenote Global Music Data Popularity Score is based on U.S. artist popularity averaged using a proprietary mix of inputs from the most comprehensive collection of standardized artist and recording IDs, editorial data and sonic descriptors.

Gracenote Studio System

Gracenote Studio System offers the most comprehensive, accurate and up-to-date information available on Hollywood's most important people and projects. Studio System is a web-based service and mobile app that enables subscribers to track TV, film and digital content in development, research box office numbers, browse TV premiere dates and see winners from every major award show and film festival.

Nielsen Attitudes on Representation on TV Survey

Survey of over 2,000 smartphone respondents via Nielsen's Computer and Mobile Panel, weighted for age, gender, race, ethnicity income and Android and iOS users conducted May 2021.

Nielsen Audio

Audience estimates for 48 large U.S. markets are based on a panel of respondents who carry a portable device called the Portable People Meter (PPM) which passively detects exposure to content containing inaudible codes embedded within. Audience estimates for 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. Nielsen RADAR reports national and network radio audience figures using both PPM and Diary measurement to create a national footprint based on a sample of 400,000 respondents.

Nielsen InfluenceScope

InfluenceScope is the Nielsen Media one-stop solution to support marketers throughout the entire Influencer Marketing Lifecycle. From selecting creators for social media campaigns, to measuring the return and effectiveness of the influencer marketing activities, InfluenceScope always provides the most granular data-driven answers. Through in-depth research, Nielsen has determined 4 key dimensions to provide the most reliable and consistent criteria for a comprehensive assessment of every personality (reach, relevance, resonance and return). InfluenceScope is based on 20+ social media metrics, digital audience data and a database including +100 million influencers.

Nielsen Media Impact

For national planning, Nielsen Media Impact uses respondent-level data from Nielsen's Total Media Fusion, which includes TV, VOD, SVOD, digital, digital-place based, print, radio and cinema. For local planning, Local Nielsen Media Impact uses respondent-level data from Nielsen's Local Media Fusion, which includes TV and radio.

Nielsen National TV Measurement

Television data is derived from Nielsen's National TV Panel that is based on a sample of over 40,000 homes that are selected based on area probability sampling. Data used in this report is inclusive of multicultural audiences.

Nielsen Scarborough

Nielsen Scarborough USA+ measures the unique shopping patterns, product usage, demographics, lifestyles and cross-media behaviors of the American consumer at a local, regional or national level, giving the ability to profile over 2,000 measured categories and brands.

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About Nielsen

Nielsen shapes the world's media and content as a global leader in audience measurement, data and analytics. Through our understanding of people and their behaviors across all channels and platforms, we empower our clients with independent and actionable intelligence so they can connect and engage with their audiences—now and into the future.

An S&P 500 company, Nielsen (NYSE: NLSN) operates around the world in more than 55 countries. Learn more at www.nielsen.com or www.nielsen.com/investors and connect with us on social media.

Audience Is Everything®

