

nielsen

POWER OF THE BLACK COMMUNITY—FROM MOMENT TO MOVEMENT

The African American Diverse
Intelligence Series 2020



FOREWORD

2020 has been a year of life-changing moments. The pandemic, politics and racial injustice created moments that have impacted every single American. For African Americans, the racial reckoning has gone beyond any one moment, becoming a matter of life and death.

Indeed, the Black Lives Matter movement is one that's impacted every facet of American life. What started as a social media campaign eight years ago by Alicia Garza, a civil rights activist, has awakened a global community of activists and allies amid rising instances of racial injustice. It has encouraged corporations, governments and individuals to ask how we can break through systemic racism.

With Black Lives Matter, we are witnessing the recognition of nuanced Black identity, and a collective vision where Black consumers continue to be recognized for their leadership and passion in economics, politics and culture – despite barriers of institutional racism. The power of the Black community has never been more evident to the wider American population. The New Black Renaissance shows us how Black creativity, through content innovation across digital platforms, has uplifted the community in times of celebration and protest – joy and tribulation.

In our 10th year exploration of Black consumers, Nielsen pays tribute to the moments that make the movement. In our commitment to fight racism with action, we challenge ourselves and our stakeholders to understand through education, to amplify through inclusive content and to push the movement forward by sharing resources. For big and small brands alike, we assume a great responsibility to help our clients respect Black audiences by making informed decisions that not only present a full mosaic of the community – but also reach beyond the surface to create opportunities for authentic connections with this diverse consumer segment.



Cheryl Grace

SVP, Consumer Insights and
Engagement, Nielsen

“FOR US, #BLACKLIVESMATTER IS REALLY A RE-HUMANIZATION PROJECT. IT’S A WAY FOR US TO LOVE EACH OTHER AGAIN, TO LOVE OURSELVES AND TO PROJECT THAT LOVE INTO THE WORLD SO THAT WE CAN TRANSFORM IT.”

Alicia Garza

American civil rights activist and co-founder of the Black Lives Matter movement

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INTRODUCTION

The increasing influence of African Americans in the marketplace is another reason why the movement toward racial equality will keep gaining traction. In 2019, African American buying power stood at \$1.4 trillion, a 48% increase since 2010. This increase in buying power surpasses that of both whites (40% increase) and the total U.S. population (43% increase). For marketers, it's a compelling reason to try to connect with this group at a younger age. The earlier you engage them as a consumer, the longer you can keep them.

AFRICAN AMERICAN U.S. BUYING POWER



Source: Selig Center for Economic Growth, Terry College of Business, University of Georgia, June 2019



VOTING WITH THEIR WALLETS

While there has been an overall increase in buying power across the community, there has also been an evolution in where and what African Americans are buying. The impact of COVID-19 and the economic recessionary environment cannot be overlooked. With more deaths from COVID-19 and higher unemployment than any other population in the U.S., Blacks are looking to make their dollars work harder, and they are shifting where they're shopping.

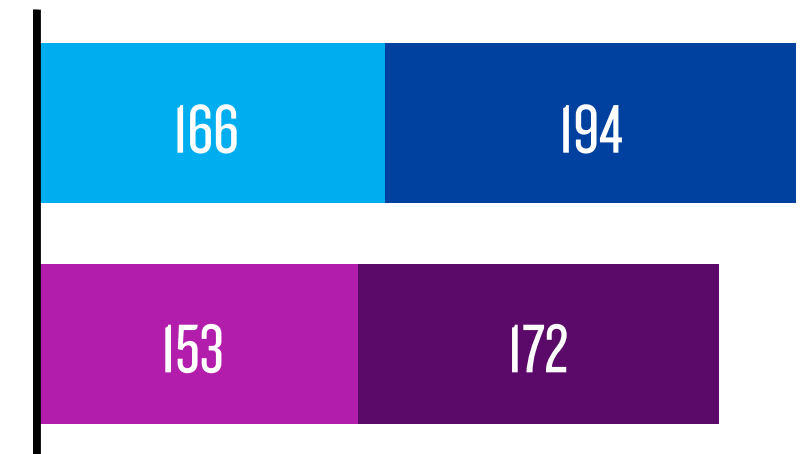
African Americans are limiting the amount of time they are spending out in public, and shopping where they can get more value. Blacks make more frequent trips to the store, spending less per trip than the total population. It is crucial to stay connected to what matters to Black consumers and connect with them at the point of purchase.

TOTAL RETAIL CHANNELS

Basket ring dollars per trip / Purchase size



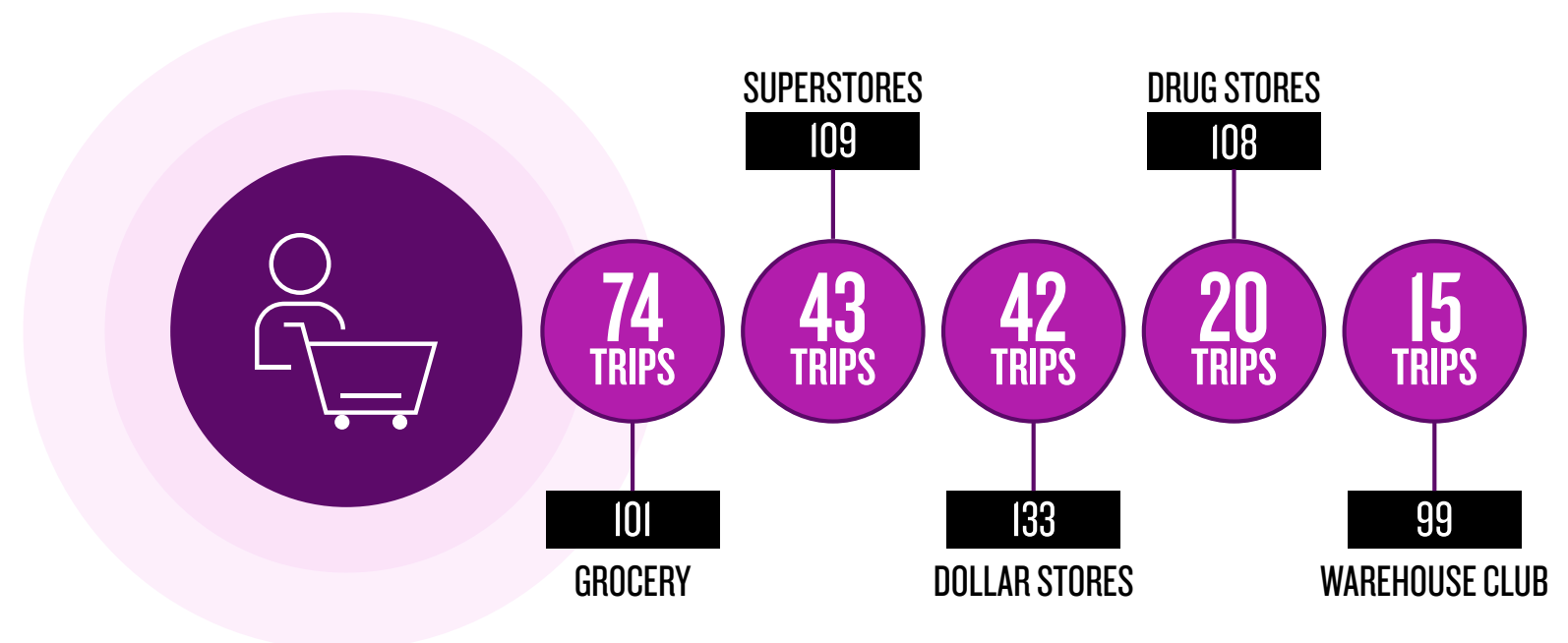
Shopping trips per household / Purchase frequency



■ AFRICAN AMERICAN 2010 ■ AFRICAN AMERICAN 2020 ■ TOTAL POPULATION 2010 ■ TOTAL POPULATION 2020

Source: Nielsen Homescan, Total U.S., 52 weeks ending Dec 25, 2010 and 52 weeks ending Aug 15, 2020 vs year-ago

WHERE BLACKS ARE SHOPPING

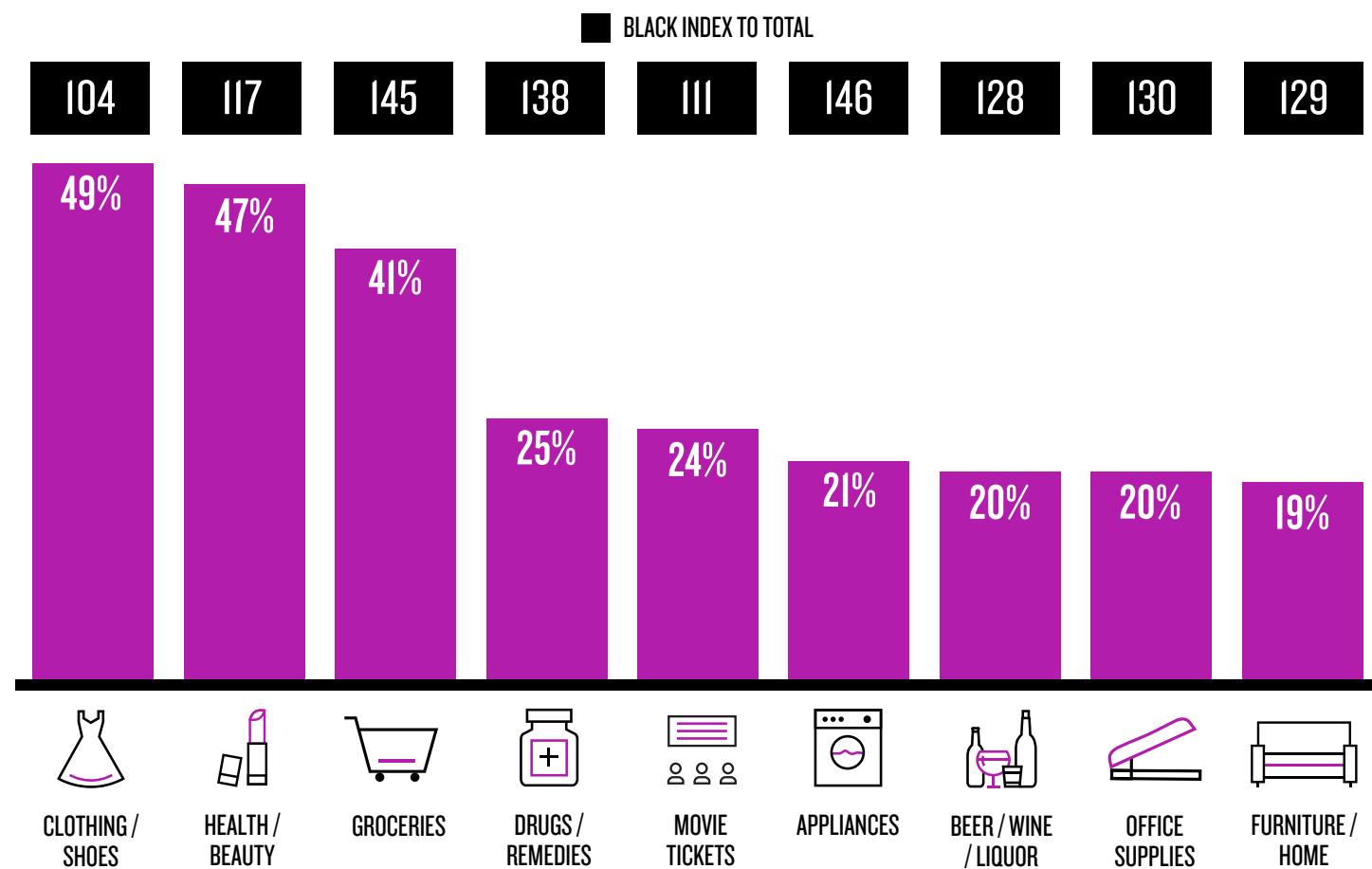


Read as: Blacks are 8% more likely to shop at drug stores than the general population.

Nielsen Homescan, Total U.S., 52 weeks ending Aug 15, 2020 vs year-ago

Online shopping is a convenient and safe alternative to brick-and-mortar shopping, and Black shoppers of all ages are embracing it at increasing rates. This year, 48% of African American households shopped online, 11% more than the average household. And they are most frequently buying the essentials—health and beauty items, groceries, clothing and shoes top the online list.

ITEMS BLACK ADULTS BOUGHT ONLINE IN PAST 6 MONTHS



Source: Scarborough Retail Internet Lifestyles 2020



THIS YEAR, 48% OF AFRICAN AMERICAN HOUSEHOLDS SHOPPED ONLINE



Retailers, brands and manufacturers can help Black consumers stretch their dollars by making their purchases last longer and by offering deals and lower prices. Some strategies to consider include discounts and price-matching on non-perishable and frozen foods, shelf-stable items, and essentials like hand sanitizers and wipes. Smaller pack sizes at lower prices will also work well. Online retailers can win Black consumers' loyalty by making it easier to compare products and prices, and by making deals easy to find on their websites.

“BLACK CONSUMERS ARE STRESSED AND STRETCHED RIGHT NOW. BRANDS THAT CAN SATISFY THEIR NEED FOR VALUE, EASE PANDEMIC CONCERNS AND SHOW THAT THEY CARE FOR THE BLACK COMMUNITY WILL WIN LONG-TERM LOYALTY.”

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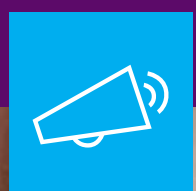


BUYING BLACK

For the Black Lives Matter movement to make a lasting impact, Black economics must also matter. The good news is that in the last decade, there have been more successful Black brands, Black-owned businesses, and investment in expanded economic opportunities for Blacks. African Americans as consumers and taste makers use their buying power to demand niche products, and not only seek them out online but are nearly three times as likely to take to social media to show support of their favorite companies and brands. The success of this cycle of support online, is further amplified by the commitment of retailers to diversify their offerings. Black owned brands like Mented, The Lip Bar, Honey Pot Co., and Scotch Porter are now available at major retailers and Amazon.

Many consumers during this time of racial reckoning are also asking the question “How can I change my consumption habits to support causes that matter?” Specifically among Black consumers, the expectation that the brands they purchase should support social causes has increased significantly in 2020 compared to last year. African Americans are now 58% more likely to expect the brands they buy to take a stance on these issues and 37% more likely to buy a brand when they do, up from just 4% more likely and 1% more likely respectively last year. But the Black Lives Matter movement has influenced allies to take action as well. For example, Hispanic consumers outpaced African Americans in their expectation that the brands they buy support social causes as well.

**AFRICAN AMERICANS ARE NOW
58% MORE LIKELY TO EXPECT THE
BRANDS THEY BUY TO TAKE A SOCIAL
STANCE AND 37% MORE LIKELY TO BUY
A BRAND WHEN THEY DO**



Q&A WITH MICHELE HOSKINS, FOUNDER & CEO, MICHELE FOODS

The impact of these shifts in spend are far reaching, going beyond the beauty aisle to the grocery aisle as well. One example is syrups. 46% of Black households buy pancake, waffle and French toast toppings in a year, over-indexing total households by 16%. For one brand, Michele Foods, the Black Lives Matter movement has made a big difference. After news that the makers of Mrs. Butterworth's and Aunt Jemima were reviewing their brands to eliminate racial bias, sales of Michele syrups [jumped 78%](#) in July 2020 relative to the previous year.



How long have you been in business and why did you start your company?

This is my 36th year. I started the company in 1984. In the 80s, I read that it was the decade that women were going to emerge as CEOs and executives of companies, and I really wanted to be part of that community. And then I thought, why don't I start my own company and be my own CEO?

There was a syrup recipe in my family that my great-great-grandmother came up with, and passed it down to the third daughter in each generation. When I had my third daughter, it was handed to me. And I thought instead of handing my daughter the recipe, maybe I would hand down a business along with being CEO of my own company. We have not as African Americans, understood yet how to build wealth and pass it on generationally. Build a strong foundation so your children can enjoy the benefits of your hard work in the next generation. That's why I'm still here 36 years later owning my company, knowing I have built a brand and a legacy that I can pass on to my family.

Why do you think you've grown so much this year? Has the Black Lives Matter movement made a difference? Impact of social media?

I lived in Aunt Jemima's and Mrs. Butterworth's shadows because I did not have the dollars or the brand recognition that they had. The average American thought that they were supporting an Afro-American company because of their branding. This year, Aunt Jemima's and Mrs. Butterworth's syrups were getting a lot of heat for not being authentic. We're smarter consumers now. Consumers want to know what's in that product. They want to know who's behind it. My daughter, who was my media person, posted a picture comparing Aunt Jemima and Michele Syrups on Instagram, and it coincided with the owners of Aunt Jemima and Mrs. Butterworth's syrups making the decision to rebrand. They made the decision because of the Black Lives Matter movement. It was time for the light to shine on me. The Instagram post went viral and my website got so much traffic it crashed!

What can any American do to fight racism/support Black businesses?

I think that consumers can support us by, first of all, inquiring about Black businesses and products. If you walk into a retail store, you should be curious. Now with social media, it's easier to buy Black. It wasn't like that 30 years ago. For the larger companies, if you're going to embrace us and our products in your retail stores, you should let people know that you do carry us and that we're part of your community.

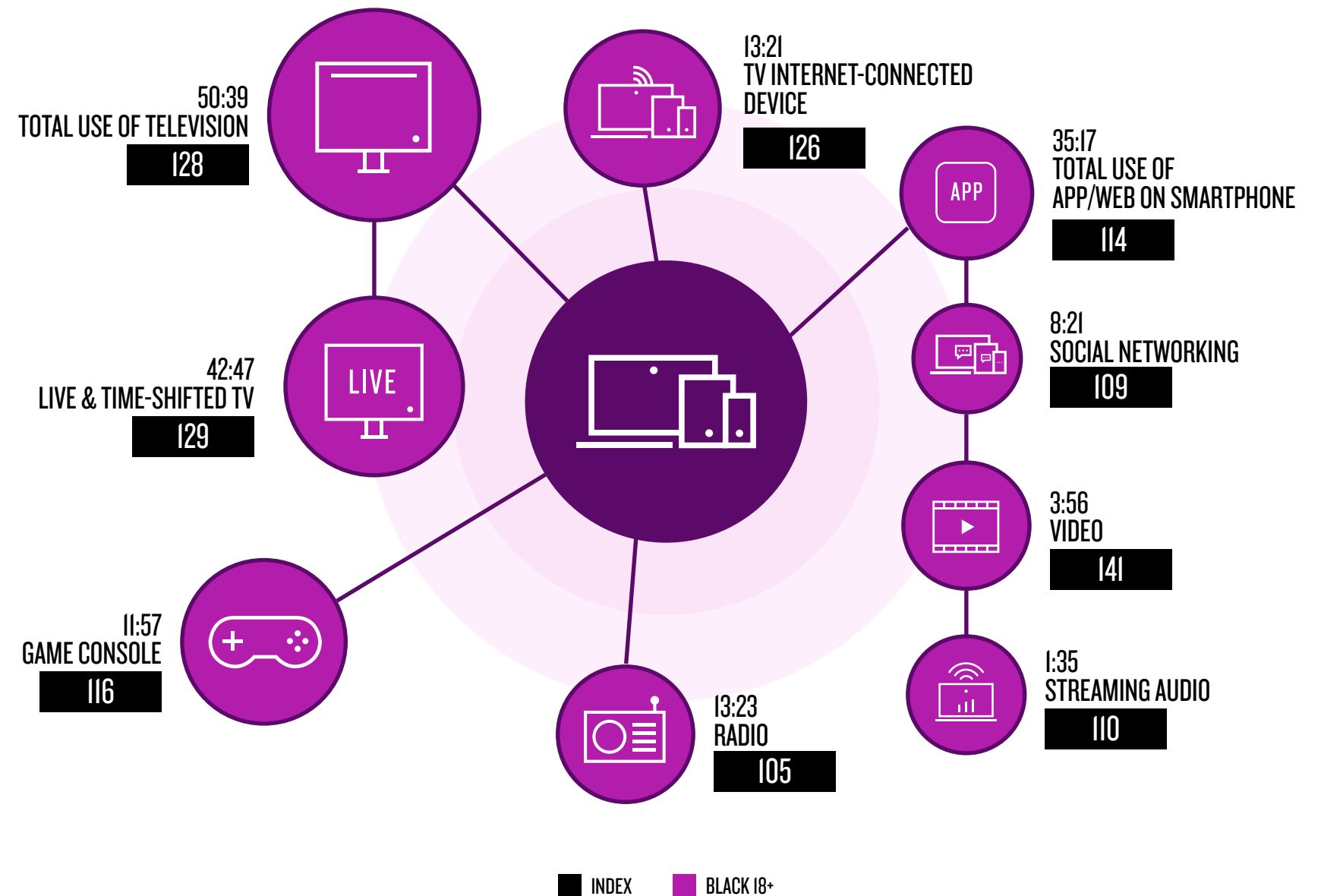
STAYING CONNECTED FROM THE FRONTLINES

African Americans have been at the forefront of the COVID-19 crisis, as they're more likely to be employed as essential workers, spending more time at work outside the home.

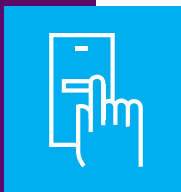
Needing to strike the balance between work outside the home while also staying in touch with children and other family members who may be staying in due to lockdowns, African Americans are spending the most time on their smartphones compared to the total population. In one week, they spend over eight hours social networking, about three hours watching videos and over one hour streaming audio on their smartphones. Overall, smartphone ownership for African Americans has grown from 44% in 2011 to 98% in 2020—faster than the total population.

WEEKLY TIME SPENT ON A DEVICE

(Hours:Minutes)



98%
SMARTPHONE OWNERSHIP

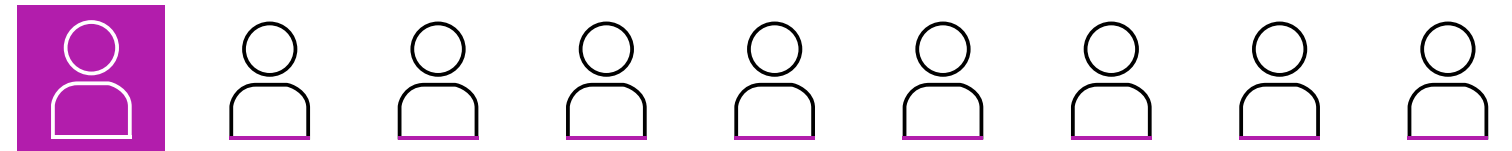


35 HOURS
PER WEEK ON SMARTPHONES

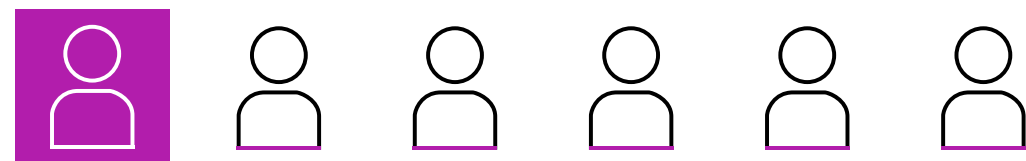
Source: Nielsen Total Audience Report, August 2020



CONTRIBUTE TO OUR COUNTRY



**BLACK WORKERS MAKE UP ABOUT
ONE IN NINE WORKERS OVERALL**



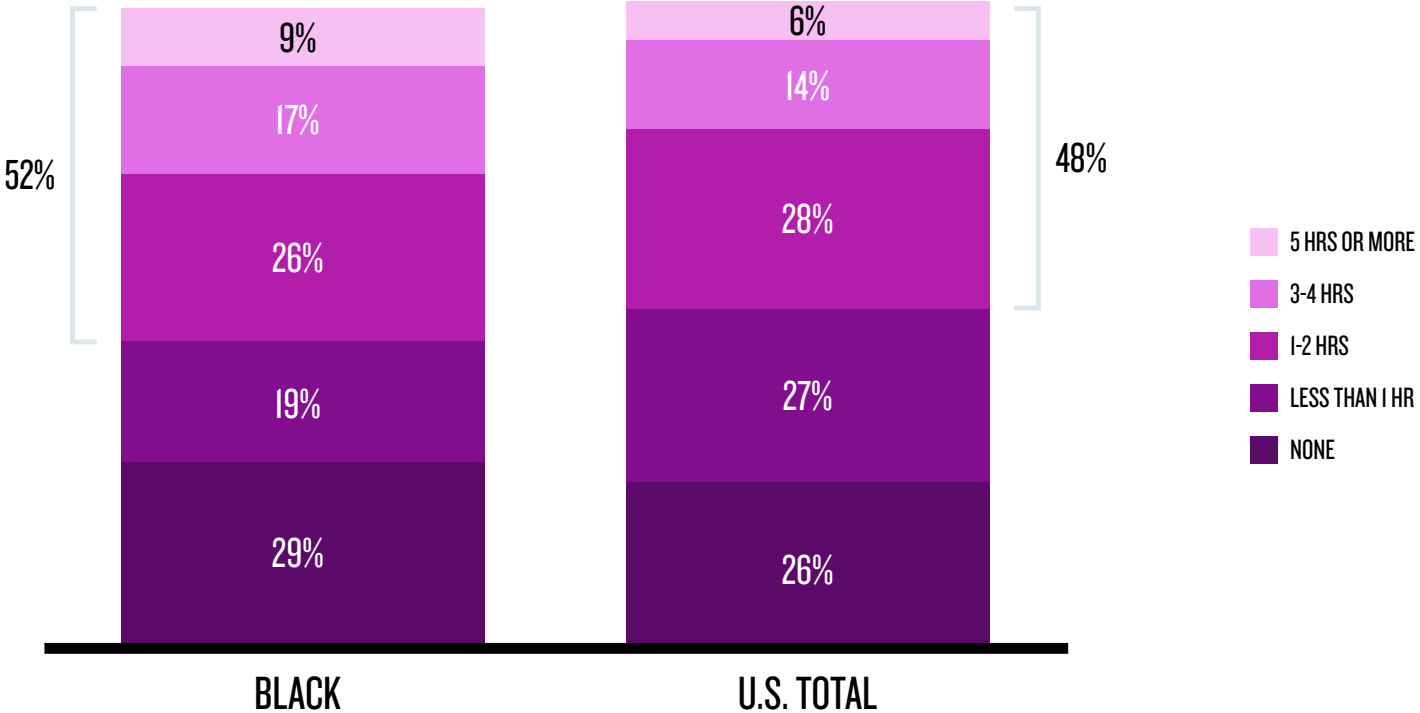
**ABOUT ONE IN SIX ARE
FRONT-LINE-INDUSTRY WORKERS**

Source: [Study](#) from the Center for Economic and Policy Research

SPEAKING UP THROUGH SOCIAL MEDIA

A decade ago, African Americans were already embracing new digital technologies to educate and activate. Ten years ago, they were more likely to use Twitter than any other ethnic group. Today, they're more likely to spend at least one hour per day on their social networks than the total population.

HOURS SPENT SOCIAL NETWORKING IN AN AVERAGE DAY



Source: Scarborough Retail Internet Lifestyle 2019

After George Floyd's death, Blacks protested in person and through social media using the #BLM. What began as a Facebook post is now a unifying hashtag that symbolizes the fight against systemic racism. More strikingly, the renewed energy on social media isn't just coming from African Americans; it is also coming from others who wanted to be allies, evident from the increase in YouTube video [uploads related to allyships](#).

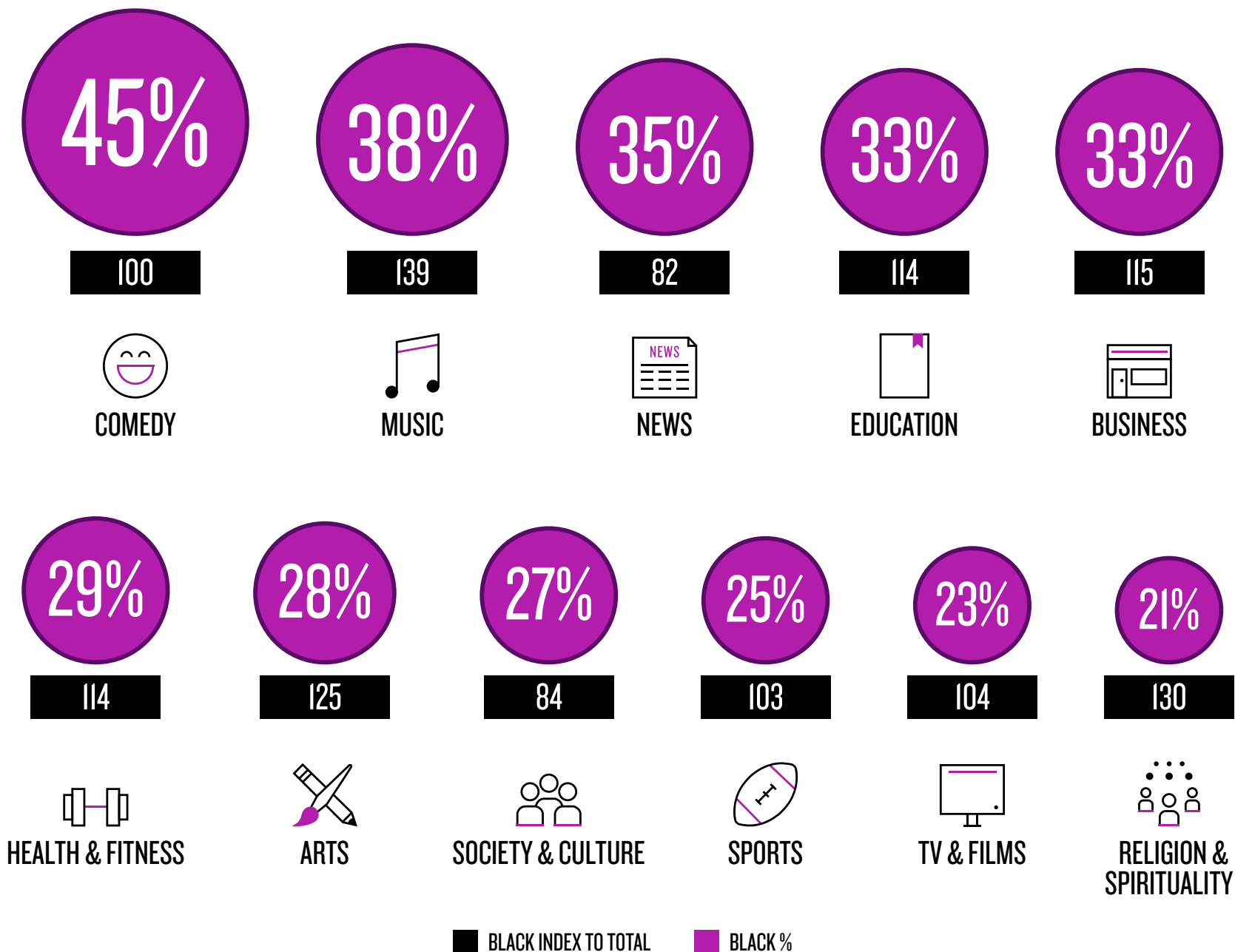


PODCASTS AND RADIO

Podcasts have become a central stage for Black voices. Over the last few years, Black podcast listeners have also grown in numbers. Some highly regarded podcasts include 1619, which relates Black Americans' lived experience, and stories of survival, Tonya Mosley's Truth Be Told, which gives advice for surviving the challenges of being a person of color and Snap Judgment by Glynn Washington which uses the best of oral storytelling tradition to weave stories of her guests around a specific topic.

African Americans spend more time per week streaming audio, including podcast listening, than the total U.S. population. In a typical week, almost half (49%) of African American podcast listeners spend about 1 to 4 hours listening to podcasts. The top genres are music, arts and religion areas that connect the Black community. Radio too has remained a trusted channel for news and information for African Americans, reaching 98% of them every month.

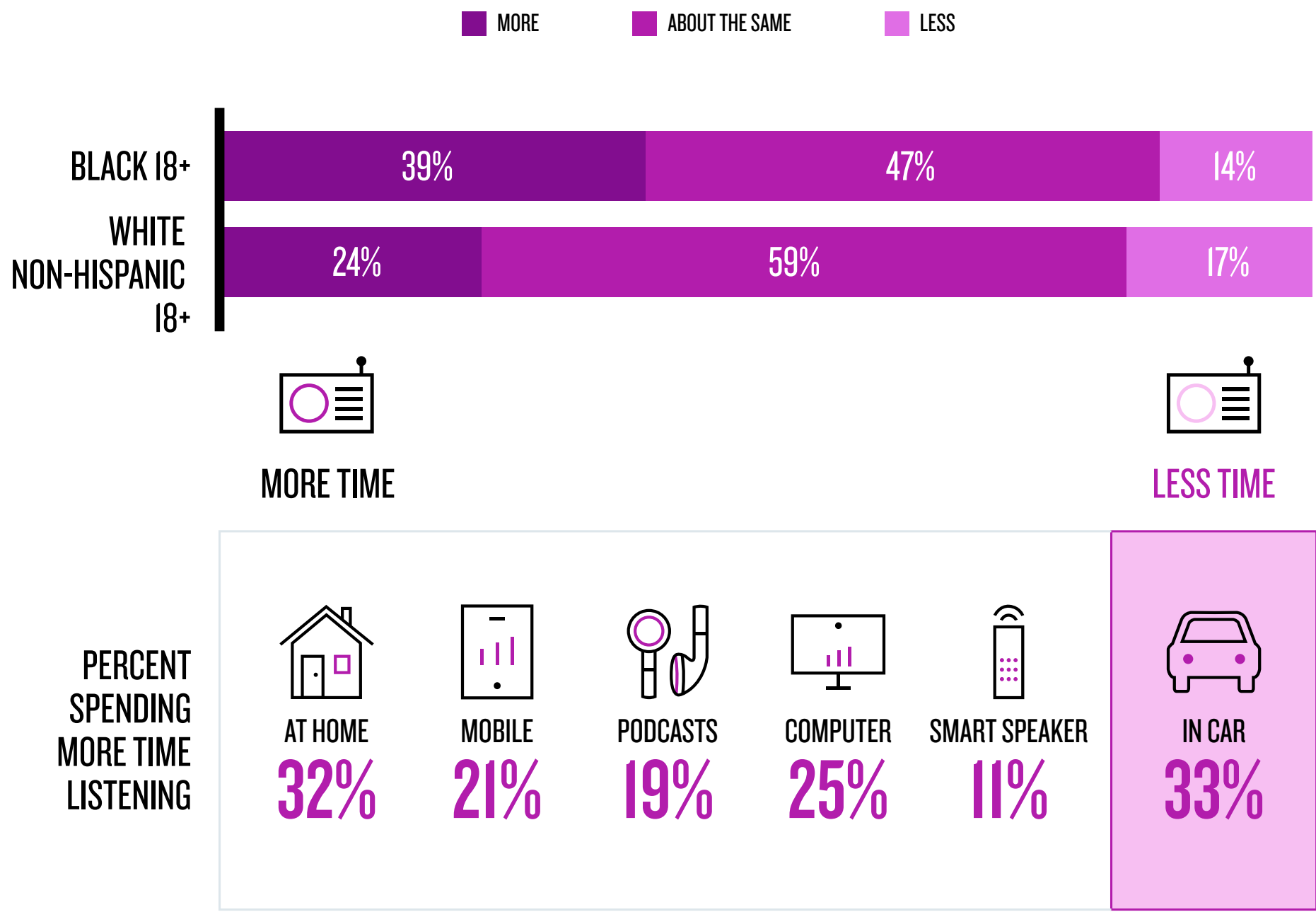
TOP PODCAST GENRES AMONG BLACK PODCAST LISTENERS



Source: Scarborough Podcast Recontact Study (Listeners Only), 2019



MORE THAN 1/3 OF AFRICAN AMERICANS REPORT MORE TIME WITH RADIO AS A RESULT OF COVID-19



Source: Custom Nielsen study conducted March 2020 via an online survey, based on a weighted sample of 1000 adults 18+

ENGAGING MEDIA-SAVVY AFRICAN AMERICANS

Black consumers are the largest ethnic group in watching live TV, playing game consoles, consuming smartphone media, and streaming audio. No matter what kind of media company you are, Black viewers are valuable.

The Top 20 advertisers' spend on media focused on African Americans has increased from \$3.34 billion in 2011 to \$3.86 billion in 2019—almost a 16% increase. But this is still less than 2% of the total U.S. advertising market of over \$200 billion. Now, more than ever, is the time for advertisers to invest in the Black consumer segment and forge more meaningful connections. Brands can use media to reach Black consumers where they are—either as content sponsors, or advertising on programs to show their commitment to racial justice.

TOP 10 ADVERTISERS' SPEND ON MEDIA FOCUSED ON AFRICAN AMERICANS

2011 (in Millions)		2019 (in Millions)	
Procter & Gamble	419	Procter & Gamble	476
AT&T	359	Berkshire Hathaway	308
GlaxoSmithKline	205	Amazon.com	248
L'Oréal	179	AT&T	239
Berkshire Hathaway	177	Pfizer	228
Johnson & Johnson	164	AbbVie	226
Hershey Co.	159	PepsiCo	197
Walt Disney Co.	156	Progressive Group	193
General Mills	152	Yum! Brands	173
Verizon Communications	145	Walt Disney Co.	169



TOP 20 ADVERTISERS' ANNUAL SPEND WITH AFRICAN AMERICAN MEDIA HAS INCREASED ALMOST 16% BETWEEN 2011 TO 2019.



Source: Nielsen Ad Intel 2011 and 2019 Cable TV, Network TV, Syndication TV, Spot Radio, and National Magazine data

MEDIA MAKES THE MOVEMENT

This time of racial reckoning has placed great responsibility on Hollywood and other media publishers to be more inclusive in the stories and characters who tell them—beginning with #oscarsowhite to the continuing scrutiny in the Emmys. The call for inclusive programming that breaks traditional stereotypes and gives a voice to African Americans is finally being heard.

African Americans’ increased appetite for news and stories that reflect their life and experiences, is evident from what they are watching. When it comes to TV shows, Black Americans gravitate toward content with Black protagonists and leads.

BLACK AMERICANS GRAVITATE TOWARD CONTENT WITH BLACK PROTAGONISTS AND LEADS.



TOP 10 SHOWS FOR AFRICAN AMERICANS JAN - SEP 2020

Broadcast		Cable	
18-49	50+	18-49	50+
Empire	Empire	Last Dance	ReidOut
Masked Singer, The	ABC World News Tonight	Sistas Series	Remembering George Floyd
For Life	Chicago PD	Love & Hip Hop Atlanta 9	Rachel Maddow Show
911	All Rise	House of Payne (2020)	AM Joy
How to Get Away w/ Murder	Masked Singer, The	Love & Hip Hop Miami 3	MSNBC Special Coverage
Chicago PD	Chicago Fire	Black Ink Crew 8B	MSNBC Live: Decision 2020
Grey's Anatomy	911	Oval, The	Oval, The
Neighborhood, The	FBI	Remembering George Floyd	Beat w/ Ari Melber
Chicago Fire	World News Tonite	WWE Entertainment	Deadline: White House
This Is Us	Bob Hearts Abishola	Assisted Living	House of Payne (2020)

Source: Nielsen NPOWER National TV Sample, 12/30/2019 - 09/27/2020

With streaming offerings, Black audiences now have a lot more choice in programs that depict their real-life experiences, feature Black actors and are created by African Americans.

Black households have steadily increased subscriptions to streaming services—from 65% in 2019 to 70% in 2020. African Americans are more likely to download a video podcast, watch live TV, or keep up with news through a streaming service, compared to the total population.

TOP 20 STREAMING VIDEO ON DEMAND PROGRAMS

Black Adults 18+	
1. Ozark	11. You
2. All American	12. Black Lightning
3. Family Guy	13. A Fall From Grace
4. Criminal Minds	14. Love is Blind
5. The Office (U.S.)	15. Self Made (CJ Walker)
6. Tiger King	16. The Blacklist
7. Supernatural	17. Good Girls
8. Greys Anatomy	18. On My Block
9. NCIS	19. Spenser Confidential
10. American Dad!	20. Shameless

Source: African American SVOD Viewership Jan - May 2020



**STREAMING SERVICE SUBSCRIPTIONS BY
BLACK HOUSEHOLDS INCREASED FROM
65% IN 2019 TO 70% IN 2020**

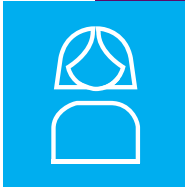
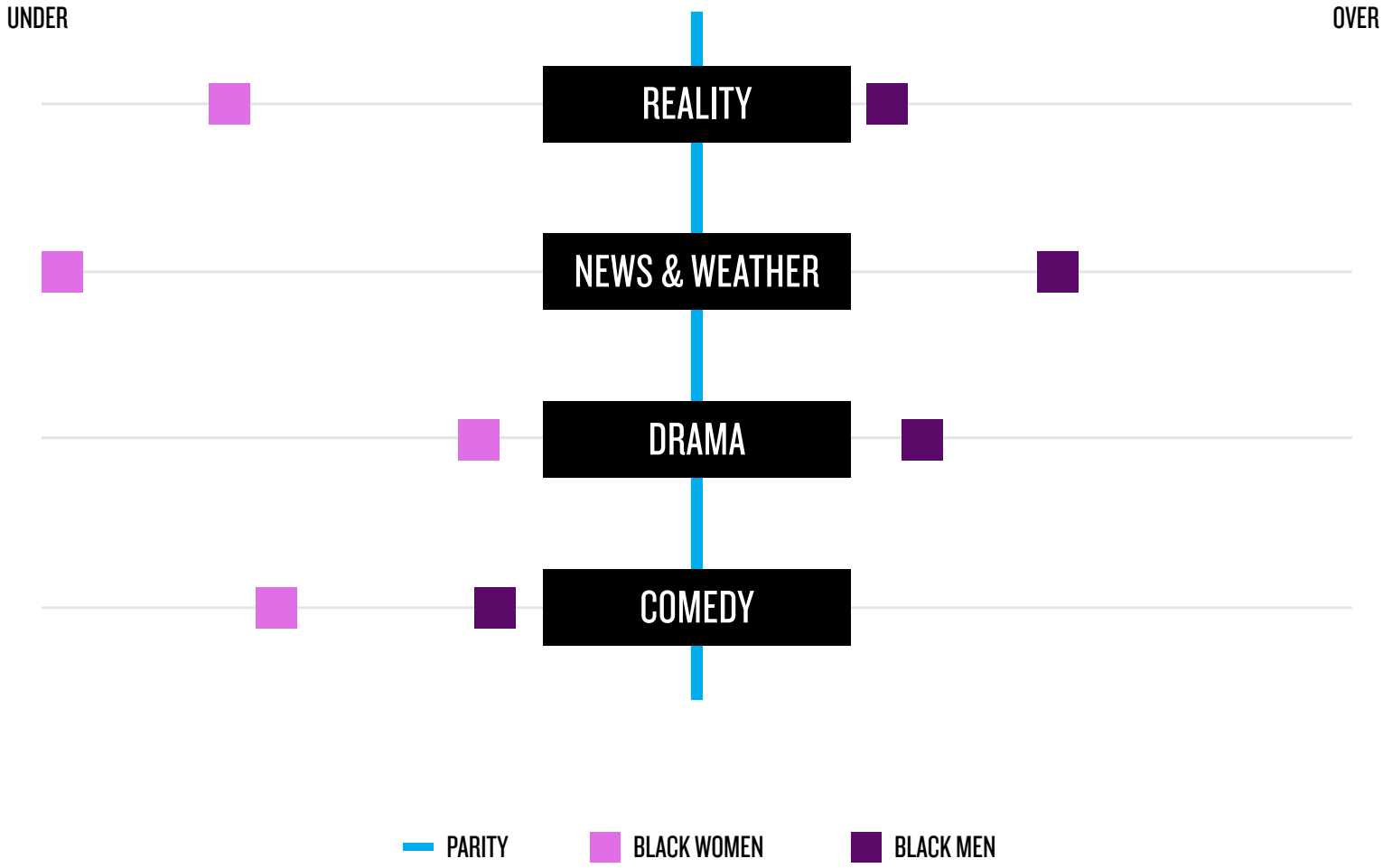


AFRICAN AMERICAN INCLUSION ON TV

For the first time, Nielsen this year created an Inclusion Opportunity index, which we use to study the most popular programs on broadcast, cable and SVOD to determine how representative they are of different demographics. This chart reviews representation of Black men and women across four genres of programming: Reality, News/Weather, Drama and Comedy.

The good news is that Reality, News/Weather and Drama do deliver representation for Black men relative to their representation in the U.S. population. But Black women are far from parity across the board, coming close to it in only one genre: Drama.

Fifty-six percent of the top broadcast shows we analyzed have a Black female cast member. However, the share of screen for Black women in top Broadcast shows in our metrics is just 2.2% because of the overwhelming number of minutes that non-Black females are seen on screen. By taking episode counts and viewing minutes into account and comparing that to representation in the general population, we are measuring how often Black women appear on screen and how much they are being watched—painting a clearer picture of representation across content. Given the lack of parity for Black women in drama, publishers can shift their investments to stories that reflect the real lives of Black women and hire more Black female cast members. Storytelling helps to educate, and education helps change stereotypes.



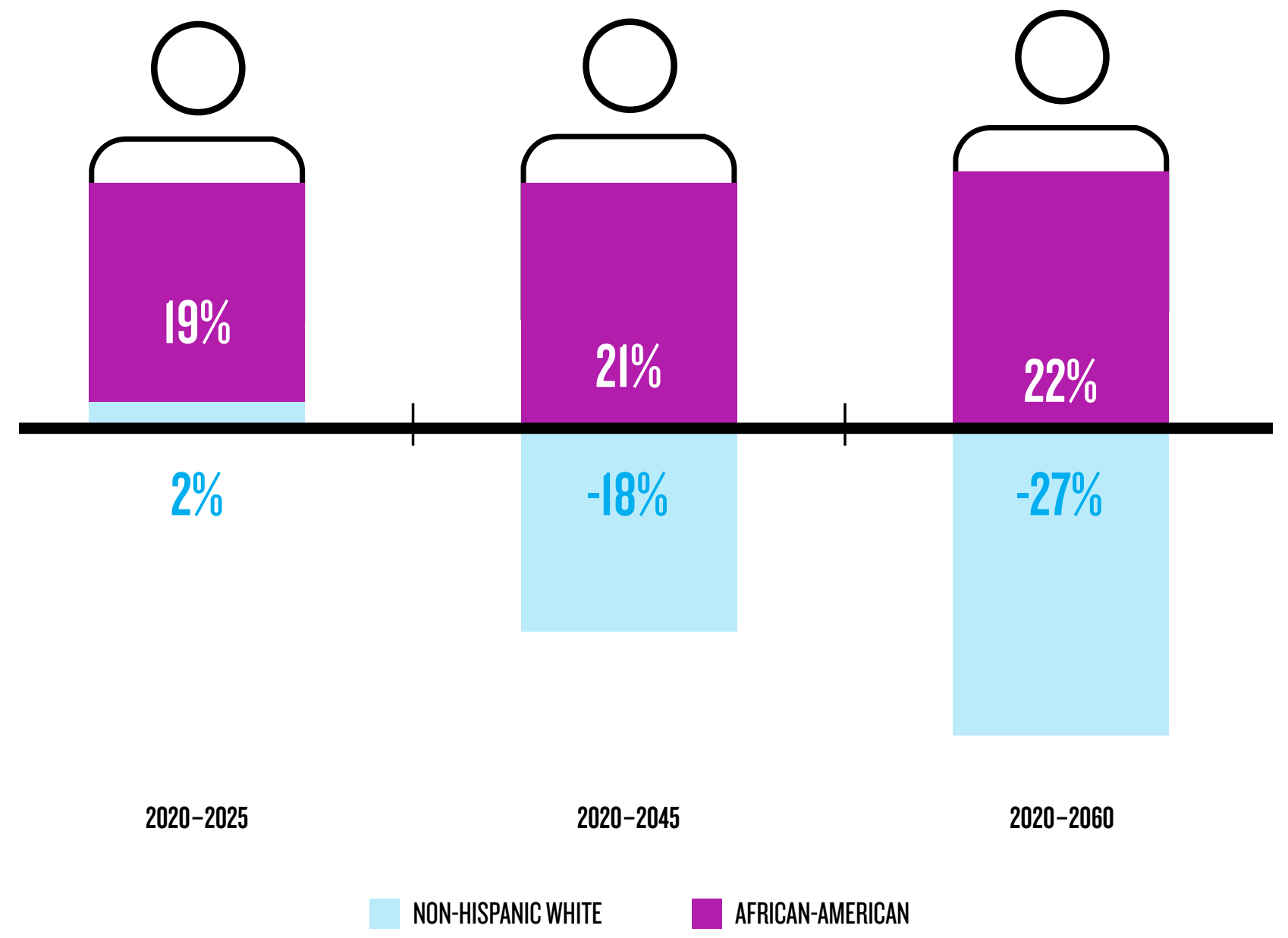
REALITY, NEWS/WEATHER AND DRAMA PROGRAMS ARE INCLUSIVE OF BLACK MEN, BUT NOT BLACK WOMEN

ABOUT AFRICAN AMERICANS

In the past decade, there's been considerable growth in African Americans' population, buying power, education and income. There are 48.2 million African Americans in the U.S.. From 2020 to 2060, Blacks will contribute to more than 20% of the total U.S. population growth.

What's more significant is that African Americans are much younger with a median age of 32—six years younger than the national average and 11 years younger than non-Hispanic whites. In 2018, 54% of the African American population was under age 35, with about half of those under age 18. When compared with the total population, only 46% of Americans are under age 35 and 40% of non-Hispanic whites fall in this age group. The size and youth of African Americans speak to their growth in economic and political influence, as well as consumer power.

POPULATION GROWTH OF AFRICAN AMERICANS



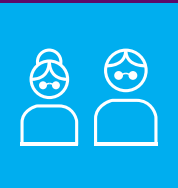
Source: 2018 American Community Survey

CARING ACROSS GENERATIONS

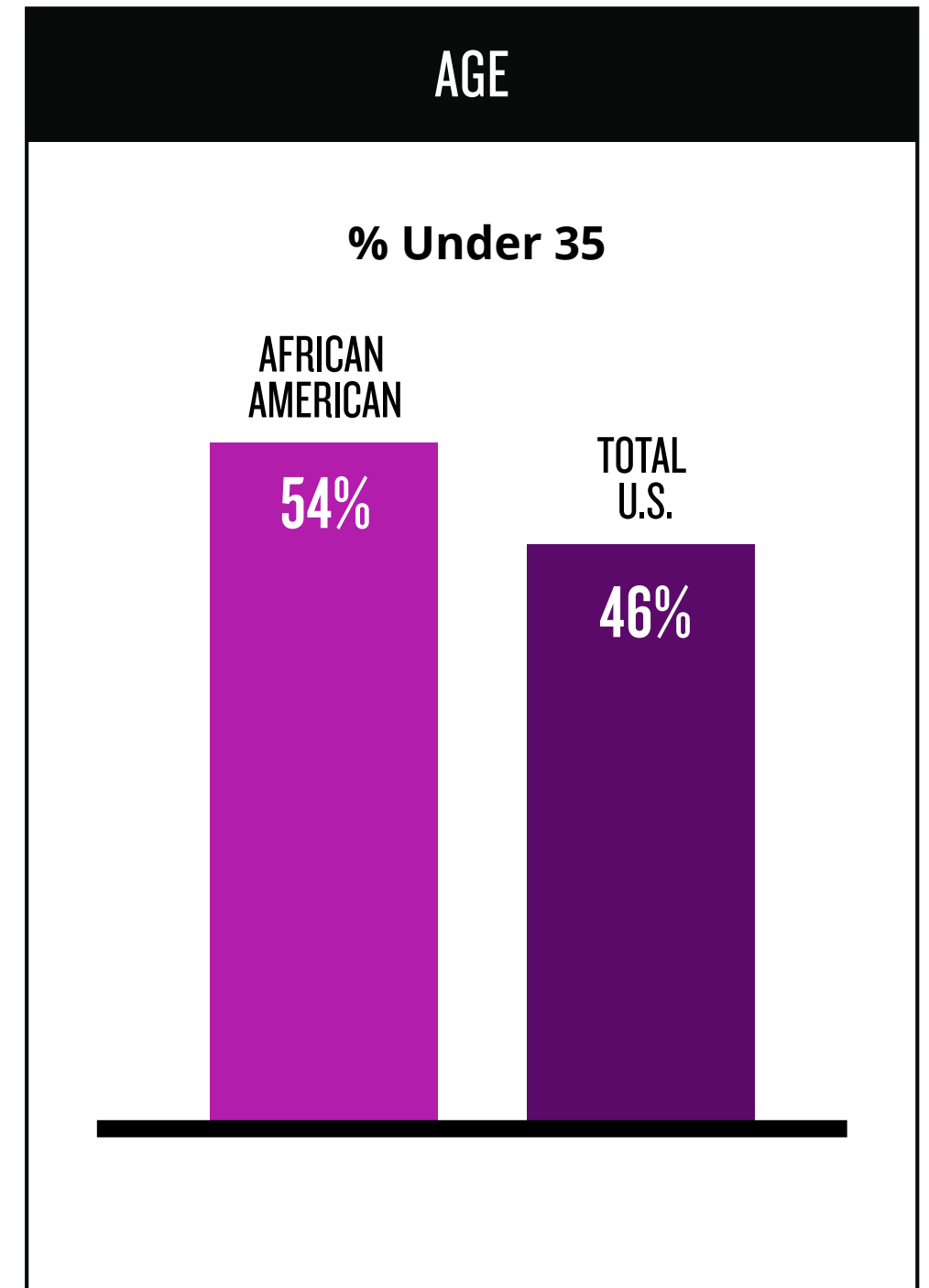
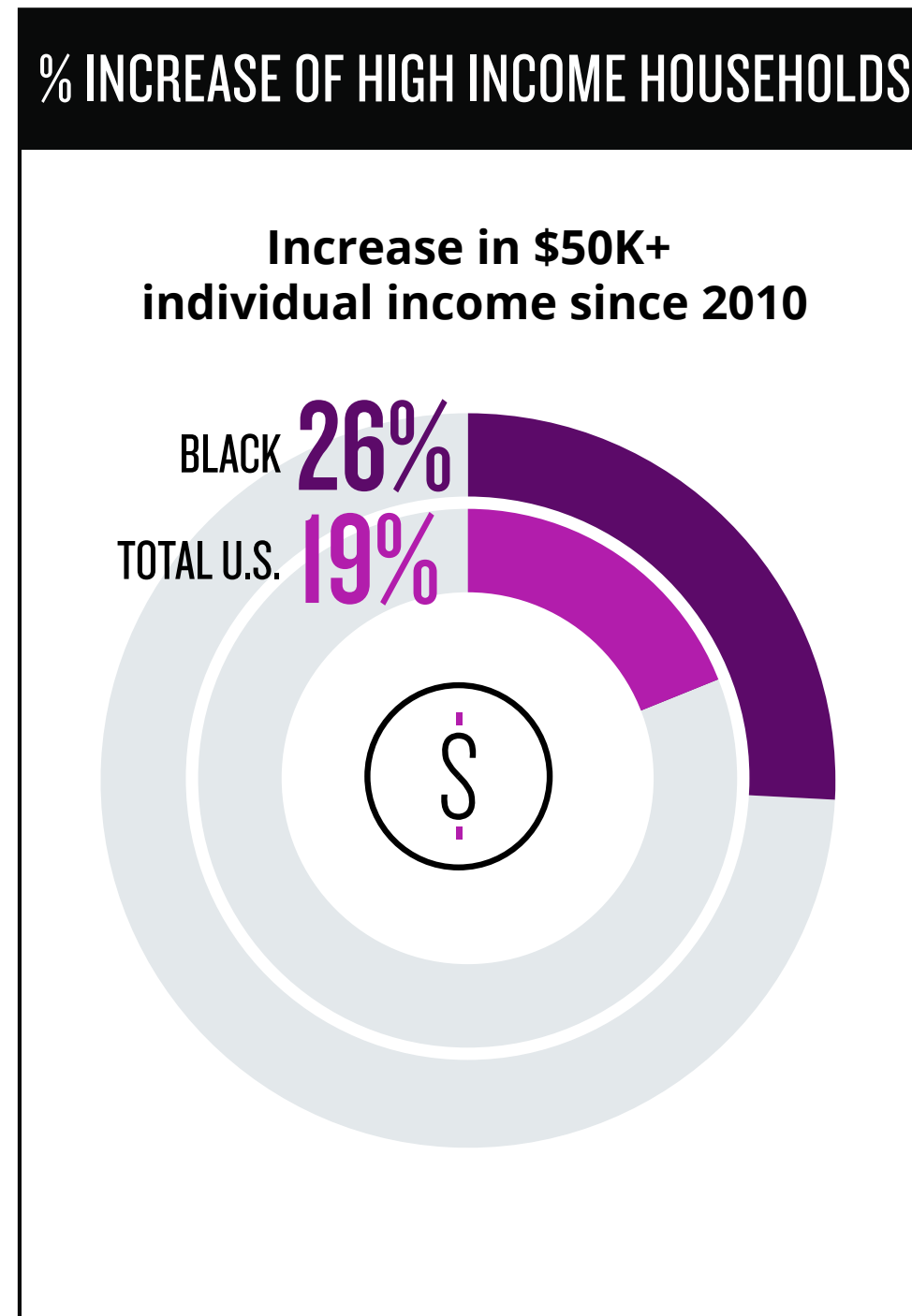
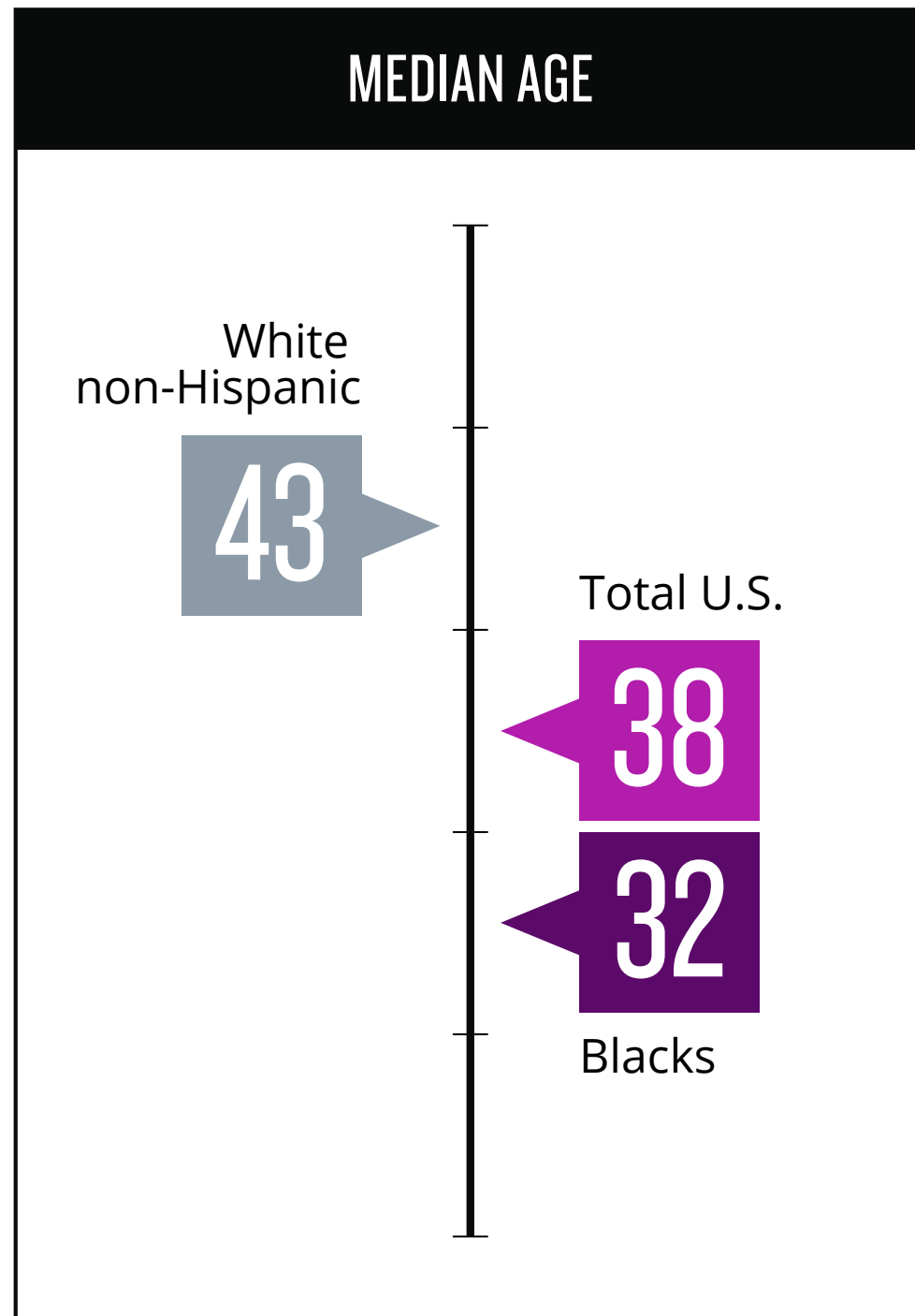
African American households are smaller than the national average at 2.48 vs. the national average of 2.52. Twenty-nine percent of these households are more likely to have children under 18 compared to 27% of all U.S. households.

With smaller households and younger children, Black grandparents are filling the role of caregivers. Five percent of African American grandparents live with their grandchildren, and 40% of those grandparents are the main caregivers for their grandchildren. They become the conduit for family traditions, religion and strengthening cultural roots—the foundation of a thriving Black community.

5% OF AFRICAN AMERICAN GRANDPARENTS LIVE WITH THEIR GRANDCHILDREN, AND 40% OF THOSE GRANDPARENTS ARE THE MAIN CAREGIVERS FOR THEIR GRANDCHILDREN.



AFRICAN AMERICANS AT A GLANCE



Source: US Census Bureau, American Community Survey (ACS) 2010, 2018

METHODOLOGIES

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.

NIELSEN SCARBOROUGH

Nielsen Scarborough USA+ 2020 Release 1: Scarborough 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.

NPOWER METHODOLOGY

NPOWER is the Nielsen Company's national custom analysis system, is a powerful tool that offers an unparalleled ability to focus on very specific audience characteristics and opens opportunities for detailed analysis of national television media. NPOWER employs a respondent-level data warehouse that subscribers access through a browser-based interface. Audience estimates can be generated, not only for all standard demographics and market breaks, but also for expanded audience characteristics that cannot be accessed anywhere else.

TELEVISION METHODOLOGY

Television data are 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. Live+Time-shifted TV (PUT) includes Live usage plus any playback viewing within the measurement period. Timeshifted 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 + Timeshifted 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.

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) 12/30/2019 – 03/29/2020 via Nielsen NPOWER/National Panel; Radio 03/28/2019 –03/25/2020 via RADAR 145; 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 – 01/06/20, 01/13/20, 01/20/20, 02/03/20, 02/10/20, 02/17/20, 03/02/20, 03/09/20, 03/16/20, 03/23/20. Digital data was produced on 06/18/20 and slight variations in data processed after this point reflect ongoing updates. 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 July 1, 2020 via Nielsen NPOWER/National Panel.

ADVERTISING SPEND ON MEDIA FOCUSED ON AFRICAN AMERICANS

Television - The networks are either reported in their entirety or individual programs are selected. When programs are selected they are based on a percentage of greater than 50% (Black/Composite P2-99) coverage. National Magazine – review media kit for individual magazines to determine target audience. Spot Radio – review format of new stations or when stations change their formats. Formats that are classified as African American are: Gospel, R&B, Urban, Urban Oldies.

INCLUSION ANALYTICS

Inclusion Analytics measures the share of screen for the top 10 recurring cast members from the most popular programs on Broadcast, Cable, and SVOD in 2019 (about 300 programs, ~100 per platform). Programs are ranked by African American % for P18+, Live+7. Talent identity data is sourced from Gracenote StudioSystem and is supplemented using deep internet research of self-identity. Share of Screen is weighted using episode occurrence at the program level. It is additionally weighted by minutes viewed at the genre and platform level. Inclusion Analytics incorporates celebrity data from Gracenote Studio System, program metadata from Gracenote Global Video data and Audience data from Nielsen National People Meter data.

CONTRIBUTORS

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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.

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