



DIVERSE INTELLIGENCE SERIES | 2017

AFRICAN-AMERICAN WOMEN:

OUR SCIENCE, HER MAGIC



Cheryl Grace
Senior Vice President,
U.S. Strategic Community
Alliances and Consumer
Engagement



Andrew McCaskill
Senior Vice President,
Global Communications
and Multicultural
Marketing



Rebecca K. Roussel
Senior Director,
Diverse Intelligence
Series

FOREWORD

WHAT IS #BLACKGIRLMAGIC? AND WHY SHOULD YOU CARE?

While the term #BlackGirlMagic is universally understood amongst African-Americans, it may require some context for others. Recently, an editor at Essence Magazine defined it as, “A term used to illustrate the universal awesomeness of Black women.” While it started as a social media hashtag and rallying call for Black women and girls to share images, ideas and sources of pride in themselves and other Black females, it has also become an illustration of Black women’s unique place of power at the intersection of culture, commerce and consciousness.

African-American Women: Our Science, Her Magic is Nielsen’s seventh look at African-American consumers and the second time we’ve focused our attention on Black women. Now more than ever, African-American women’s consumer preferences and brand affinities are resonating across the U.S. mainstream, driving total Black spending power toward a record \$1.5 trillion by 2021. At 24.3 million strong, Black women account for 14% of all U.S. women and 52% of all African-Americans. In the midst of data chronicling her steady growth in population, income and educational attainment, the overarching takeaway for marketers and content creators is to keep “value and values” top of mind when thinking about this consumer segment.

Black women’s values spill over into all the things they watch, buy and listen to, and while they control the lion’s share of the African-American community’s \$1.2 trillion in spending power, they are doing so with an eye toward the tangible and intangible value of those dollars spent. Black women not only vote at the ballot box, they vote at the cash register and with their highly influential voices on social media. Her faith is a cornerstone of how she engages the world, with 82% saying they pray each day. Her devotion to family and community makes her a vocal advocate for issues ranging from social justice and pay equity to global warming and clean water for all.

Part of that magic is her ever-evolving style. Whether it's fashion and jewelry, health and beauty or the booming Black hair-care market, Black women spend money to look and feel good. If manufacturers and retailers want to earn her patronage and loyalty, they must recognize her desire to see herself and her community positively reflected in branding, packaging and advertising. And if she doesn't like what she sees, she's going to tell her girlfriends (whether it's talking to three over coffee or 3,000 on Facebook). Similarly for content creators, it's important to understand she's a voracious consumer of video and music. At an average of more than 50 hours consumed per week, no one watches more television, and she wants to see the diversity of her life experiences and people who look like her on the screen.

To that end, the driving force behind Black Twitter is Black women. On average, 14% of Black women say they spend at least three to four hours a day on social media. Are they talking about hair, cosmetics, music and television? Yes. But they are also leveraging digital spaces as virtual townhalls to galvanize fellow citizen consumers around political movements, economic empowerment and social protest. A core tenet of the Black Girl Magic is her perseverance against socioeconomic and geopolitical headwinds, and her gains in entrepreneurship and academic success directly contribute to her being the economic engine of the Black community. This report offers data and insights to Black women's ability to drive product categories and shift culture—and make it look like magic.

EXECUTIVE SUMMARY

Young, independent and self-made, the majority of African-American women have a set of strong life-affirming values that carry over into all they do, including an array of consumer preferences and brand affinities that resonate across the U.S. mainstream. As trendsetters for women of every race and ethnic background, Black women increasingly are influencing mainstream culture across a number of areas, including in civic engagement, where Black women are taking the lead in efforts to improve their environment and in consumption, where Black women are prime influencers in fashion, television and music among many other areas. Because they know that style conveys confidence, staying on the cutting edge and projecting an impressive personal image is important to Black women.

Especially adept at using technology and social media to trade opinions and affirm each other's choices, Black women, more than any demographic group, have taken social media and adopted it for higher purposes. Black women have mobilized to advance women's rights and collective action through a hashtag with [#BlackGirlMagic](#), a term that describes a cross-platform gathering of empowered Black women who uplift each other and shine a light on the impressive accomplishments of Black women throughout the world, and [#which](#) uncovers and addresses the daily racism that some black women face at work. Whether they are buying cars, jewelry, cell phones beauty products, or many other staples or luxuries, community referrals, advice and feedback play an important



TWENTY-FIVE PERCENT OF BLACK WOMEN SAY THEY USE SOCIAL MEDIA TO RECEIVE EXCLUSIVE OFFERS, COUPONS AND DISCOUNTS, WHICH IS 12% MORE LIKELY THAN THEIR NON-HISPANIC WHITE COUNTERPARTS.

role in Black women's purchases, as do the style and image they project daily. With an ever-growing intercultural influence, Black women play an increasingly vital part in how all women see themselves, their families and the rest of the world. The purpose of this report is to bring to a clearer focus on the science and data that inform that magic of Black female empowerment and motivation.

The African-American woman's interdependent mindset is also present in her growing media presence and educational attainment and entrepreneurial success. Even as they join the global movement toward ecological sustainability, Black women see an equal footing with guaranteeing clean air, water and, most importantly, safety for their own families and communities.

They continue to break the mold in a myriad of ways, especially younger women who have been lifted up by the hard work and support of their mothers, grandmothers, and other family members who empowered them with a belief in their limitless potential. The established trend of Black women as the primary wage earner and head of household has found traction among Black millennial women who are ages 18–34, 81% of whom have never been married. That spirit of self-reliance and resilience is also helping to fuel rising levels of entrepreneurial success and collaboration. Black female entrepreneurship has grown substantially over the last decade. The most recent U.S. Census Survey of Business Owners showed that Black women are the majority owners in over 1.5 million businesses with more than \$42 billion in sales. The rise in Black female buying power, which is a result of their increased success in business and their careers, is spread across a wide swath of consumer industries, ranging from name-brand clothing and automobiles to food, entertainment and beauty products.

Black women are more likely than their white cohorts to own a smartphone and explore social platforms that provide entertainment and help them at work, but they are also willing to compromise on features and accessories that meet their budget. Black women have also adapted technology to engage with their faith communities, which brings a spiritual dimension to their expanding social and professional networks. Black women are not only redefining what it means to be a woman for themselves, but are at the vanguard of changing gender roles and unlimited possibilities for American women of all ages and races. Black women actively seek out mentors and role models in business, media, and entertainment, partly as a way to build networks that will help them fulfill their own goals and dreams, and also because of their own aspirations to be leaders and role models for the next generation of empowered, confident and fiercely independent Black women.

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SECTION I

TRENDSETTING CONSUMERISM AND CONSUMPTION



SOCIAL MEDIA AND THE MAGIC OF SISTERHOOD

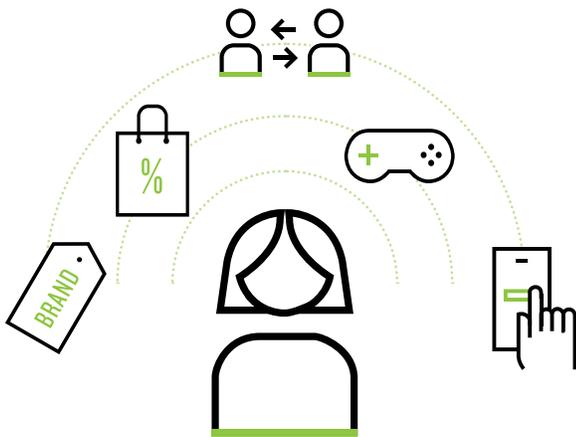
Black women are trendsetters, brand loyalists and early adopters who care about projecting a positive self-image. They are playing an increasingly vital role in how all women see themselves and influencing mainstream culture across a number of areas, including fashion, beauty, television and music. Black women have embraced the social media movement #BlackGirlMagic, a term that describes a cross-platform gathering of empowered Black women who uplift each other and shine a light on the impressive accomplishments of Black women throughout the country. Black Girl Magic (#BlackGirlMagic) was originally coined by CaShawn Thompson in 2013 as #BlackGirlsAreMagic. “I say ‘magic’ because it’s something that people don’t always understand,” Thompson told the Los Angeles Times. She went on to explain how “Sometimes our accomplishments might seem to come out of thin air, because a lot of times, the only people supporting us are other black women.” At its core, the purpose of this movement is to create a platform where women of color can stand together against “the stereotyping, colourism, misogynoir and racism that is often their lived experience.”

Originally inspired by a speech by former First Lady Michelle Obama, “Black Girl Magic” was intended to be an online dialogue centered on the achievements of Black women. #BlackGirlMagic can now be found around the world, not only on numerous social media sites, including on Twitter, Instagram, and Facebook, but also on clothing and in mainstream media such as in *Time*, *Teen Vogue* and *Essence* Magazines. Former President Barack Obama discussed the idea in a video series titled, ‘In Conversation,’ produced by *Time* and *Essence*, and celebrities such as Willow Smith, Solange Knowles and Misty Copeland are among those who have shown their support for this ethnic and gender pride movement. Copeland said on the topic: “I think it couldn’t be more positive for a young Black girl to see that it’s okay to be yourself, it’s okay to not have to transform and look like what you may see on the cover of a lot of magazines. That you are beautiful, that it’s possible to succeed in any field that you want to, looking the way that you do. With your hair the way it is.”

Black Girl Magic is just one example of how Black women have taken social media and used it to tailor an authentic message that speaks to her experiences; thus using social media in ways that differ somewhat from non-Hispanic White women. Black women over-index on a myriad of other reasons for using social media, including finding out about products and services (12% higher), receiving exclusive offers, coupons and discounts (12% higher), and showing support for their favorite companies or brands (25% higher). Black women ages 18–34 and 35–49 are especially likely to utilize social networking sites for these consumer engagement activities.

The most common reasons Black women consider it important for using social networking sites are keeping in touch (46%), reconnecting (36%), following the activities of family and friends (34%), finding information about news and current events (33%) and finding local information (29%). However, these reasons are on par with or under-index against non-Hispanic White women for using social media for these reasons as well.

OVER-INDEXING REASONS BLACK WOMEN USE SOCIAL MEDIA (VERY IMPORTANT OR SOMEWHAT IMPORTANT)



	Total Black Women 18+	Index: Total Black Women 18+ to Total Non-Hispanic White Women	Black Women 18-34	Index: Black Women to Non-Hispanic White Women 18-34	Black Women 35-49	Index: Black Women to Non-Hispanic White Women 35-49	Black Women 50-69	Index: Black Women to Non-Hispanic White Women 50-69
Find out about products and services	27%	112	36%	116	32%	114	21%	92
To receive exclusive offers, coupons or other discounts	25%	112	37%	116	27%	99	18%	93
Meet new friends	24%	121	33%	134	27%	127	19%	97
Play games	22%	110	30%	136	24%	109	19%	86
Meet or network with professional contacts	22%	117	27%	91	26%	117	18%	117
To show support for my favorite companies or brands	21%	125	29%	119	22%	110	16%	120
Find people who have interests similar to me	20%	114	26%	111	22%	112	17%	101
To gain access to VIP or Members-Only events	16%	148	21%	121	19%	132	11%	144

Read as: Twenty-seven percent of African-American women feel it is very or somewhat important to use social media to find out about products and services, which is 12% more likely than their non-Hispanic White counterparts.

Source: Nielsen Scarborough USA+ 2016 Release 2, Gfk/MRI Attitudinal Insights

SOCIAL MEDIA SITES AUDIENCE

Social Network	Black Women 18+	Index Black Women to Total U.S. Women
Facebook	72%	90
YouTube	69%	122
Instagram	51%	111
Pinterest	30%	90
Twitter	24%	105
Google+	16%	184
LinkedIn	12%	114

Read as: Sixty-nine percent of Black women use YouTube which is 22% more likely than total women in the U.S.

Source: Mobile Netview, All Devices, Females 18+

14% OF BLACK WOMEN SAY THEY USE SOCIAL MEDIA FOR THREE TO FOUR HOURS, ON AVERAGE, IN A DAY.

In addition to the reasons why Black women use social media, there are also specific sites they frequent as well. While Facebook is the top social media site among Black women, YouTube, Instagram, Twitter, Google+ and LinkedIn are all used by a higher percentage of Black women than they are total U.S. women.

In terms of recent usage, the majority of Black women (62%) have used Facebook in the last 30 days. Though not as many Black women have used other social media sites in the past 30 days, they over-index against non-Hispanic White women for having used Google+ (49% higher), Instagram (34% higher), YouTube (23% higher), and Twitter (18% higher). Black women ages 18–34, 35–49, and 50–69 over-index against non-Hispanic White women of the same age groups for having used Google+, Instagram and YouTube, while ages 18–34 and 50–69 also over-index for having used Twitter.*

In addition to over-indexing for recent usage on a number of social networking sites, Black women also over-index against non-Hispanic White women for time spent on social networking sites in an average day. Total Black women and in each age group over-index for spending three or more hours per day on social media. They over-index by 29% for spending three to four hours each day on social networking sites and by 86% for spending five or more hours each day on social networking sites.* This higher amount of time that Black women spend on social networking sites (as compared to non-Hispanic White women) may be due to their higher online engagement with brands and social causes.

*Source: Nielsen Scarborough USA+ 2016 Release 2.



SOCIAL MEDIA USAGE (PAST 30 DAYS)

	Total Black Women 18+	Index: Total Black Women 18+ to Total Non-Hispanic White Women	Black Women 18-34	Index: Black Women to Non-Hispanic White Women 18-34	Black Women 35-49	Index: Black Women to Non-Hispanic White Women 35-49	Black Women 50-69	Index: Black Women to Non-Hispanic White Women 50-69	Black Women 70+	Index: Black Women to Non-Hispanic White Women 70+
Facebook	62%	90	81%	94	71%	108	49%	74	19%	123
YouTube	45%	123	68%	115	50%	108	31%	106	10%	97
Instagram	27%	134	52%	117	30%	123	11%	101	3%	116
Google+	26%	149	31%	142	33%	122	20%	121	8%	107
Pinterest	19%	63	26%	53	23%	251	13%	54	4%	334
Twitter	13%	118	23%	109	14%	80	7%	103	2%	74
LinkedIn	11%	95	13%	80	14%	76	9%	92	3%	94

Read as: Twenty-seven percent of Black women used Instagram in the past 30 days, which is 34% more likely than their non-Hispanic White counterparts.

Source: Nielsen Scarborough USA+ 2016 Release 2



SOCIAL MEDIA USAGE ON AVERAGE, IN A DAY

Less than 1 hour	22%	77	20%	69	25%	75	24%	68	12%	57
1-2 hours	23%	85	28%	106	27%	81	20%	126	10%	78
3-4 hours	14%	129	23%	171	15%	128	8%	140	4%	106
5 hours or more	8%	186	15%	210	9%	170	4%	213	2%	173

Read as: Fourteen percent of Black women say they use social media, on average, for three to four hours in a day, which is 29% more likely than their non-Hispanic White counterparts.

Source: Nielsen Scarborough USA+ 2016 Release 2



TRENDSETTERS

IN STYLE, ONLINE SHOPPING RESEARCH AND VALUE HUNTING

While Black Girl Magic has revealed to the world the amazing sisterhood of Black women uplifting each other, their accomplishments definitely do not come out of thin air, but rather are born out of hard work, perseverance, creativity, and a fierce dedication to, and protectiveness of, their families, friends, communities, and each other. Black women are top influencers in an array of arenas, and through social media, this story is being shared and her influences can be seen connecting women of diverse ages, races and socio-economic backgrounds.

African-American women are setting trends for women of every race and ethnic background, and they are increasingly influencing mainstream culture across a number of areas including fashion, television and music. Because they know that style projects confidence, staying on the cutting edge and projecting an impressive personal image are important to Black women. Forty-two percent of Black women agree they are influenced by what's hot and what's not (57% higher than non-Hispanic White women), 47% agree their fashion style is trendy (37% higher), and 44% agree they'll buy trendy clothes even if they're not the highest quality (51% higher).* Meanwhile, 70% of Black women buy brands that reflect their style (3% higher than non-Hispanic White women), 52% would pay extra for a product that is consistent with the image they want to convey (31% higher), and 34% prefer to buy things of which their friends or neighbors would approve (60% higher). Additionally, 41% of Black women agree they like to live a lifestyle that projects a positive image to others (73% higher than non-Hispanic White women).*

Because of this desire to stay current and make a statement, some Black women also over-index on the influence designer names and celebrity tie-ins have on their purchases. Thirty-three percent agree a celebrity endorsement may influence them to consider or buy a product (108% higher than non-Hispanic White women), while 27% agree that when a celebrity designs a product, they are more likely to buy it (112% higher) and 34% agree clothes made by fashion designers are more appealing (33% higher).*

Communication and feedback is an important aspect of being a trendsetter, and Black women are especially adept at using technology and social media to trade opinions and confirm each other's choices.

*Source: Nielsen Scarborough USA+ 2016 Release 2.

They research products before buying, and they listen to other women when deciding. Fifty percent of Black women agree they often seek the advice of others before making a purchase (11% higher than non-Hispanic White women). In turn, 43% of Black women like to share their opinions about products and services by posting reviews and ratings online (59% higher) and 47% agree that people often come to them for advice before making a purchase (47% higher). In particular, when it comes to food, 77% of Black women agree that when they find a food product they like, they typically recommend it to people they know (4% higher), and 58% of Black women agree that people often ask their advice when it comes to food (43% higher). Additionally, 34% of Black women agree people often ask their advice when it comes to automobiles (113% higher), and 38% give others advice when they are looking to buy technology or electronics products (63% higher).

Brand-name products have an advantage among many Black women, since 63% agree they are typically willing to pay more for high-quality items (12% higher than non-Hispanic White women) and 42% percent agree that brand name is the best indication of quality (29% higher). Their over-indexing brand-name preference and brand loyalty extends through many product segments, with 43% of Black women preferring popular brand-name medications, even if they cost more (37% higher than non-Hispanic White women), 41% buying only food items that are name-brand, not generic brands (51% higher), and 46% agreeing they are loyal to only a few fashion brands and stick with them (7% higher).

63% OF BLACK WOMEN AGREE THEY ARE TYPICALLY WILLING TO PAY MORE FOR HIGH-QUALITY ITEMS.

Despite having a brand affinity that is higher than that of non-Hispanic White women, brands still need to work hard to gain their loyalty. Black women's desire for variety and change (part of what makes them trendsetters), their willingness to act on the spot, and their penchant for thriftiness, also strongly influences what they purchase. Sixty-two percent of Black women agree that they enjoy wandering a store looking for new, interesting products (10% higher than non-Hispanic White women), 68% agree they seek out variety in their everyday life (27% higher) and 43% agree they like to change brands often for the sake of variety and novelty (57% higher). Also, 45% agree they tend to make impulse purchases (20% higher) and 58% agree they will gladly switch brands to use a coupon (19% higher). Appealing to these attributes can be an important part of both wooing Black women away from their standard brands, as well as trying to keep them.



CAUSE-DRIVEN CONSUMERISM

BLACK WOMEN ALSO VOTE WITH THEIR DOLLARS

Black women are extremely community and family-oriented, and as such tend to be supportive and fiercely protective of each other and their loved ones. It is with these community and familial values in mind that many Black women have become conscious consumers, supporting those brands and companies that give back to and that do no harm to their environment, community, family, and health. The majority (60%) of Black women agree they are more likely to purchase brands that support a cause they care about (7% higher than non-Hispanic White women), 52% agree that they are more likely to buy a brand that they know supports a charity (6% higher), and 43% agree that they expect the brands they buy to support social causes (17% higher).

60% OF BLACK WOMEN AGREE THEY ARE MORE LIKELY TO PURCHASE BRANDS THAT SUPPORT A CAUSE THEY CARE ABOUT.

Black women have concerns that extends well into various social, political, and cause-related issues, including environmentalism. When Black women find themselves on the front lines of environmental degradation, as evidenced by the Flint water crisis and Hurricanes Katrina, Harvey, and Irma devastation, environmental issues often speak to them in terms that are personal and local, rather than national or global. They are fighting not only for environmental justice, but also for the safety and well-being of their family, home, and community. This reality affects their purchase decisions. Seventy-four percent of Black women agree global warming is a serious threat (7% higher than non-Hispanic White women) and 55% agree a company's environmental record is important to them in their purchasing decisions (13% higher).



Additionally, 59% of Black women agree they are willing to pay more for a product that is environmentally safe (2% higher) and 58% agree they are willing to give up convenience in return for a product that is environmentally safe (13% higher). Buying natural products is an extension of this concern for the safety of their environment. Sixty-one percent of Black women agree they buy natural products because they are concerned about the environment (6% higher than non-Hispanic White women), and 63% agree they buy natural products because they are concerned about their health and that of their family (10% higher). As far as particular products go, Black women over-index by 19% against non-Hispanic White women for agreeing they often use natural or organic beauty products (46% agree) and by 22% for agreeing they buy vehicles that reflect their commitment to support the environment (39% agree).

RELIGIOUS VALUES

Faith and the uplifting, community-affirming joys of spiritual gatherings, particularly Sunday Church for Christians, remain an important part of life for the majority of Black women. Eighty-three percent agree they consider themselves a spiritual person (9% higher than non-Hispanic White women), 82% agree prayer is part of their daily life (17% higher), 74% agree religion should be the pillar of our society (16% higher), and 62% agree they attend religious services regularly (34% higher). Though these values are more prevalent with older Black women, all age groups over-index against non-Hispanic White women.

Black women's spirituality is evident in many aspects of their lives, including their entertainment and finances. Black women over-index by 132% against non-Hispanic White women for watching religious TV shows (28% watch) and by 286% for ages 50–69 (38% watch). Black women also over-index against non-Hispanic White women for listening to religious radio programming and using religious apps.

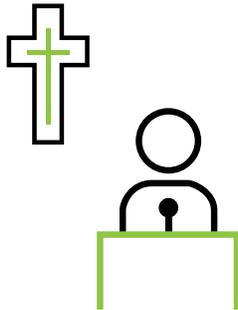
Additionally 38% of Black women contributed money to religious organizations in the last 12 months.* That number goes up to 44% for ages 50–69, and 48% for ages 70 and older. According to a report released in 2012 by W.K. Kellogg Foundation and Rockefeller Philanthropy Advisors, Black donors gave away 25% more of their incomes than White donors, and nearly two-thirds of Black households make charitable donations, worth a total of about \$11 billion per year. Though much of this philanthropy is directed toward the social betterment of their community, church tithing is still the largest category.

**38% OF BLACK WOMEN CONTRIBUTED
MONEY TO RELIGIOUS ORGANIZATIONS IN
THE LAST 12 MONTHS.**

*Source: Nielsen Scarborough USA+ 2016 Release 2.

RELIGION AND SPIRITUALITY

(AGREE COMPLETELY OR AGREE SOMEWHAT)



	Total Black Women 18+	Index: Total Black Women 18+ to Total Non-Hispanic White Women	Black Women 18-34	Index: Black Women to Non-Hispanic White Women 18-34	Black Women 35-49	Index: Black Women to Non-Hispanic White Women 35-49	Black Women 50-69	Index: Black Women to Non-Hispanic White Women 50-69	Black Women 70+	Index: Black Women to Non-Hispanic White Women 70+
Religion should be the pillar of our society	74%	116	67%	132	71%	121	78%	116	83%	109
Prayer is a part of my daily life	82%	117	75%	124	81%	124	87%	117	91%	112
I attend religious services regularly	62%	134	59%	149	60%	148	65%	135	70%	119
I consider myself a spiritual person	83%	109	80%	120	81%	112	86%	106	89%	107
Contributed money to religious organizations in the last 12 months	38%	95	28%	91	35%	98	44%	107	48%	96

Read as: Seventy-four percent of Black women agree completely or agree somewhat that religion should be the pillar of our society, which is 16% more likely than their non-Hispanic White women.

Source: Nielsen Scarborough USA+ 2016 Release 2, Gfk/MRI Attitudinal Insights



PRODUCT PREFERENCES AND OPPORTUNITIES

AUTO PURCHASES

While a vehicle being environmentally friendly is a buying consideration for many, the majority of Black women agree that fun, performance, acceleration, and styling are top considerations in purchasing a vehicle. Fifty-four percent of Black women agree that having a vehicle that is fun to drive is a top consideration in their purchasing decision (28% higher than non-Hispanic White women), and 53% look for vehicles that offer spirited performance and powerful acceleration (51% higher). Meanwhile, in line with their trendsetter tendencies, 56% of Black women agree their first consideration in choosing a vehicle is its exterior styling (34% higher than non-Hispanic White women) and 38% seek out vehicles with bold, innovative designs that stand apart from others on the road (75% higher). Additionally 55% of Black women agree that they enjoy personalizing their vehicle to reflect their individual tastes (47% higher than non-Hispanic White women). Fifty-seven percent of Black women agree that they want the cheapest and easiest-to-maintain vehicle they can find (23% higher than non-Hispanic White women) while only 34% generally purchase the most expensive model with all the luxury appointments and options (147% higher).

Aside from performance and styling, recommendations and rebates also influence vehicle purchase decisions for Black women. Sixty-eight percent of Black women agree that they often ask the advice of others when it comes to automobiles (7% higher than non-Hispanic White women), and 49% enjoy learning about automobiles from others (39% higher). Also, 61% agree that rebates and incentives strongly influence their new-vehicle purchase decisions (16% higher). However, 50% of Black women agree they're loyal to their vehicle brands and stick with them (21% higher than non-Hispanic White women), meaning that capturing those first-time vehicle buyers is an important part of capturing this market.

Thirty-seven percent of Black women say they last purchased a foreign vehicle, while another 37% say they last purchased a domestic vehicle, but 64% agree they buy the vehicle that best meets their needs no matter who makes it or in which country it is produced (12% higher than non-Hispanic White women). SUVs (29%), mid-size cars (23%), and compact cars (18%) are the most common vehicles for Black women to own, but Black women over-index on ownership of large cars and luxury vehicles, by 8% and 14%, respectively. Though 48% of Black women agree that their household doesn't own or lease any vehicle (vs. 41% of non-Hispanic White women), 9% say they plan to buy a new or leased vehicle in the next 12 months (vs. 7%). Black women are most likely to say they are going to buy a mid-size car (7%) or SUV (5%) in the next 12 months, but they over-index on planning to buy all types of cars except trucks.

OWNERSHIP AND LEASING BY VEHICLE TYPE

	Own		Plan to buy/lease in next 12 months	
	Black Women	Index: Black Women to Non-Hispanic White Women	Black Women	Index: Black Women to Non-Hispanic White Women
Compact car	18%	79	3%	140
Full-size/ Large car	10%	108	4%	314
Luxury vehicle (any size)	7%	114	3%	213
Mid-size car	23%	93	7%	186
Truck	12%	45	3%	81
Sport utility vehicle	29%	69	5%	113
Van	5%	53	3%	173

Read as: Ten percent of Black women own a full-size/large car, 8% more than non-Hispanic White women.

Source: Nielsen Scarborough USA+ 2016 Release 2

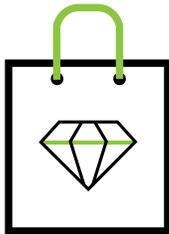
JEWELRY

Nothing makes a statement like a great piece of jewelry. And with Black women over-indexing by 16% against non-Hispanic White women for having bought costume jewelry and by 9% for having bought fine jewelry within the last 12 months, they seem to understand this as well or better than anyone. Black women over-index against non-Hispanic White women by 21% for having bought costume jewelry priced less than \$100, and by 33% and 8%, respectively, for having purchased fine jewelry priced less than \$100 and from \$100 to \$499. Additionally, for the past 12-month period, a higher percentage of Black women shopped at jewelry stores (for both costume jewelry and fine jewelry) than did non-Hispanic White women. Black women also over-index against non-Hispanic White women for watches and timepieces by 88% for dollars per buyer, and by 33% for buying households.

BLACK WOMEN ARE 16% MORE LIKELY TO PURCHASE COSTUME JEWELRY AND 9% MORE LIKELY TO PURCHASE FINE JEWELRY THAN NON-HISPANIC WHITE WOMEN.



JEWELRY SHOPPING AND PURCHASES



	Total Black Women 18+	Index: Total Black Women 18+ to Total Non-Hispanic White Women	Black Women 18-34	Index: Black Women to Non-Hispanic White Women 18-34	Black Women 35-49	Index: Black Women to Non-Hispanic White Women 35-49	Black Women 50-69	Index: Black Women to Non-Hispanic White Women 50-69	Black Women 70+	Index: Black Women to Non-Hispanic White Women 70+
Any jewelry store (shopped/used past 12 months)	23%	112	22%	114	24%	112	24%	106	18%	111
Any jewelry store for costume jewelry (shopped/used past 12 months)	17%	139	16%	151	18%	139	18%	129	13%	121
Any jewelry store for fine jewelry (shopped/used past 12 months)	13%	101	13%	96	14%	101	13%	93	10%	113
Costume jewelry (bought past 12 months)	28%	116	30%	134	30%	113	27%	102	21%	105
Fine jewelry (bought past 12 months)	15%	109	15%	96	17%	104	16%	106	11%	123
Costume jewelry: Less than \$100 (bought past 12 months)	25%	121	27%	138	28%	122	23%	107	17%	101
Costume jewelry: \$100 - \$499 (bought past 12 months)	3%	85	3%	108	2%	65	3%	77	3%	121
Fine jewelry: Less than \$100 (bought past 12 months)	6%	133	6%	105	5%	96	6%	171	4%	146
Fine jewelry: \$100 - \$499 (bought past 12 months)	7%	108	6%	114	8%	125	7%	88	4%	105

Read as: Twenty-three percent of Black women shopped at any jewelry store in the past 12 months, which is 12% more likely than non-Hispanic White women.

Source: Nielsen Scarborough USA+ 2016 Release 2

HEALTH AND BEAUTY

The majority of Black women are concerned with taking care of themselves, both inside and out. Sixty-eight percent of Black women agree they are content with their appearance (2% higher than non-Hispanic women).^{*} Perhaps that is because 82% agree that it's important for them to be well-groomed, 52% agree they follow a strict skin-care routine, 74% agree they eat right, and 53% agree that they follow a regular exercise routine.^{*} Considering this, and the fact that 66% of Black women agree maintaining a youthful appearance is important to them (5% higher than non-Hispanic White women), it is not surprising that in the last 12 months 50% of Black women bought cosmetics and perfumes and 49% bought skincare items.^{*} Black women actually over-index against non-Hispanic White women for dollars per buyer and buying households on women's fragrances, by 44% and 48%, respectively.^{**} They also over-index for both dollars per buyer and buying households for grooming aids, skin care preparations, personal soap and bath needs, deodorant, feminine hygiene, oral hygiene, and ethnic health and beauty products, as well as several other health and beauty product categories.^{**} For hair care products, Black women (at \$43.81) over-index against non-Hispanic White women (at \$42.28) by 4% for dollars per buyer.^{**}

IN THE LAST 12 MONTHS 50% OF BLACK WOMEN BOUGHT COSMETICS AND PERFUMES.

^{*} Source: Nielsen Scarborough USA+ 2016 Release 2

^{**} Source: Nielsen Homescan. Total U.S. 52 Weeks ending 6/24/17.



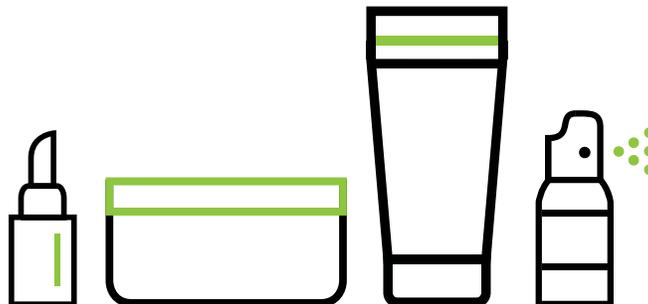
HEALTH AND BEAUTY PRODUCTS

	Dollars Per Buyer Index: Black to Non-Hispanic White Females	Buying Households Index: Black to Non-Hispanic White Females
Personal Soap/Bath Needs	161	107
Children's Cologne	105	124
Deodorant	115	104
Ethnic Health and Beauty Aids	206	6249
Feminine Hygiene	117	166
Sanitary Protection	106	113
Women's Fragrances	144	148
Grooming Aids	108	110
Men's Toiletries	140	120
Oral Hygiene	113	104
Skin Care Preparations	101	110
Hair Care	104	93

Read as: Black women are 61% more likely to spend more dollars per buyer on personal soap/bath needs than non-Hispanic White females and 7% more than non-Hispanic White households.

Source: Nielsen Homescan. Total U.S. 52 Weeks ending 6/24/17

Seventeen percent of Black women bought health and beauty products online in the last 12 months. However, with 70% agreeing that they smell personal care and household products in the store before buying them (5% higher than non-Hispanic White women), brick-and-mortar stores may for a while remain the preferred place of purchase for certain beauty products.



HER CROWNING GLORY

In the 2009 documentary film, “Good Hair,” the poet Maya Angelou describes a black woman’s hair as her glory. “You share that glory with your family,” Angelou says, “and they get to see you braiding it, and they get to see you washing it — it’s a glory.” The lifestyle choice that many Black women are now making — to leave behind the chemicals used to straighten hair, in part due to healthcare concerns, and to revel in the glory of their natural curls — is shaking up the haircare industry. Black women are fully embracing the natural hair movement, with celebrities such as Viola Davis, Alicia Keys, Solange Knowles, and Lupita Nyong’o wearing natural styles, and events like Curlfest drawing crowds from around the globe, along with 70 million media impressions and over 5,000 social media posts (in 2017). Social media has played an integral role in the expansion of the natural hair movement by providing not only a large community of supporters (and tie-ins to other movements such as Black Girl Magic), but also a means of learning about the vast array of new products promising to “define curl” and “defy frizz.”



BEVERAGES

Seventy-three percent of Black women consider themselves to be very sociable, a rate 13% higher than non-Hispanic White women. So it is no wonder that they also over-index on a number of non-alcoholic and alcoholic beverages, which are a staple of any social gathering. For non-alcoholic beverages, Black women over-index against non-Hispanic White women in dollars per buyer and buying households for bottled water, and both shelf-stable and refrigerated juices and drinks. They also over-index for buying households in the tea and non-carbonated soft drinks categories. The over-indexing on these products also holds true for all age groups of Black women, and may be due in part to the average Black household being larger than that of non-Hispanic Whites.

NON-ALCOHOLIC BEVERAGES

	Dollars Per Buyer Index: Black to non-Hispanic White Females	Buying Households Index: Black to non-Hispanic White Females
 Refrigerated Juices & Drinks	140	116
 Shelf-Stable Juices and Drinks	135	104
 Bottled Water	121	107
 Tea	91	109
 Non-Carbonated Soft Drinks	87	112
 Frozen Juices and Drinks	79	88
 Carbonated Beverages	65	100
 Milk	60	98
 Coffee	56	84

Read as: Black women spend 40% more dollars per buyer than non-Hispanic White females on refrigerated juices and drinks and 16% more per non-Hispanic White household.

Source: Nielsen Homescan. Total U.S. 52 Weeks ending 6/24/17.

BEVERAGES (DRANK IN PAST SEVEN DAYS)



	Total Black Women 18+	Index: Total Black Women 18+ to Total Non-Hispanic White Women	Black Women 18-34	Index: Black Women to Non-Hispanic White Women 18-34	Black Women 35-49	Index: Black Women to Non-Hispanic White Women 35-49	Black Women 50-69	Index: Black Women to Non-Hispanic White Women 50-69	Black Women 70+	Index: Black Women to Non-Hispanic White Women 70+
Bottled Teas	35%	150	37%	145	33%	136	36%	155	30%	147
Bottled Water	49%	114	48%	110	50%	111	50%	110	47%	133
Diet Soft Drink	23%	70	17%	70	22%	70	26%	71	28%	81
Energy Drink	9%	118	13%	80	11%	113	7%	147	3%	160
Any Juice	24%	177	23%	176	25%	184	25%	194	18%	125
Orange Juice	40%	125	38%	121	42%	135	41%	133	37%	105
Other Fruit Juice/Drink	38%	150	39%	151	39%	157	38%	153	30%	113
Regular Soft Drink	61%	139	64%	116	64%	135	57%	149	51%	148
Specialty Coffee	20%	88	24%	76	21%	73	18%	90	17%	119
Sports Drink	20%	137	27%	108	21%	123	16%	155	8%	129

Read as: Thirty-five percent of Black women say they drank bottled teas in the past 30 days which was 50% more likely than non-Hispanic White women.

Source: Nielsen Scarborough USA+ 2016 Release 2

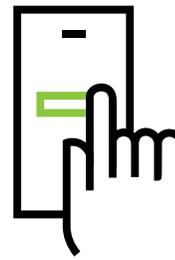
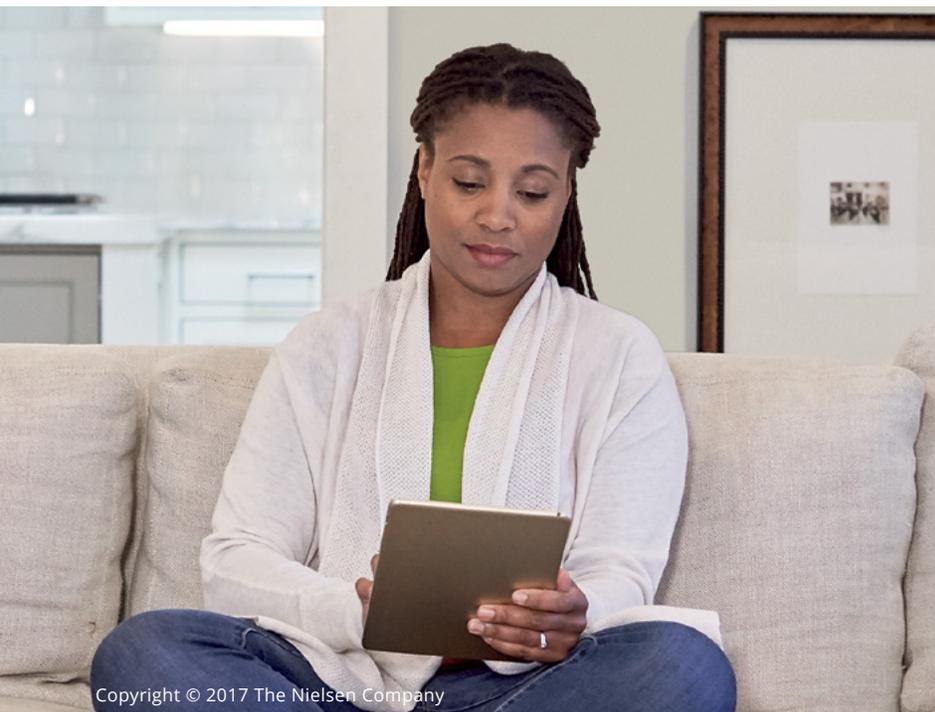
Looking at what non-alcoholic beverages they have had to drink in the last seven days, Black women of all ages over-index against their non-Hispanic White counterparts for bottled teas, bottled water, juices in general, orange juice, other fruit juices and drinks, regular soft drinks, and sports drinks. Black women age 70 and older also over-index for specialty coffees, and all ages except millennials over-index for energy drinks.

HANDHELD TECHNOLOGY

Ninety-two percent of Black households own at least one cell phone, a rate 2% higher than that of total U.S. households. Eighty percent of Black women currently own a smartphone (8% higher than non-Hispanic White women). Though 51% of Black women agree they enjoy customizing the look and sound of their cell phone (38% higher than non-Hispanic White women), and 38% agree their cell phone is an extension of their personality (72% higher), 67% of Black women agree the primary reason they have a mobile phone is for safety (12% higher). Additionally though, 55% think of their cell phone as a source of entertainment (25% higher than non-Hispanic White women), so video quality and entertainment offerings available on cell phones are important to many Black women. Fifty-five percent of Black women expect the quality of video on their cell phone to be as good as that on their television (26% higher than non-Hispanic White women), 47% are interested in watching video clips on their cell phone (30% higher), 42% are interested in watching live TV on their cell phone (115% higher), and 25% would be willing to pay a monthly subscription fee to receive live TV on their cell phone (147% higher).

80% OF BLACK WOMEN SAY THEY OWN A SMARTPHONE.

Forty-one percent of Black women agree they would be willing to receive ads on their cell phone in exchange for lower monthly costs (69% higher than non-Hispanic White women) and 29% agree they would be willing to receive ads on their cell phone in exchange for services such as live TV or text messaging (109% higher).



DEVICE OWNERSHIP

SMARTPHONE (iPhone, Galaxy, etc.)



108

INDEX
Black women to
Non-Hispanic
White Women

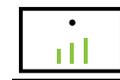
TABLET (iPad, Galaxy Tab, Kindle Fire, etc.)



96

INDEX
Black women to
Non-Hispanic
White Women

LAPTOP COMPUTER OR NOTEBOOK



96

DESKTOP COMPUTER



91



UNTAPPED OPPORTUNITIES FOR FINANCIAL SERVICE PROVIDERS

Black women over-index against non-Hispanic White women on many behavioral and attitudinal traits that indicate they would make good customers for the investment and financial services industries. Despite their access to funds that could be invested (instead of donated), Black women have not historically been a focus of the financial services industry. However the fact that 62% of Black women do not currently have any household investments (65% higher than non-Hispanic White women) and Black women's households under-index for every investment and financial service and product* (except student loans from their primary bank) presents a huge opportunity.

40% OF BLACK WOMEN AGREE THAT PEOPLE OFTEN ASK THEIR ADVICE WHEN IT COMES TO FINANCIAL MATTERS.

Black women over-index against non-Hispanic White women by 34% and 86% respectively for agreeing that they enjoy learning about financial products or services from others and that they regularly read financial news or financial publications (49% and 39% agree respectively). Additionally, they over-index by 109% for agreeing that they find the ups and downs of the financial markets exciting (33% agree), by 82% for agreeing they like to take risks when investing for the chance of a high return (35% agree), and by 60% for agreeing risk-taking is exciting to them (47% agree). The referral system for gaining new clients among Black women is also strong. Fifty-seven percent of Black women agree that when they find a financial product or service that they like, they typically recommend it to people they know (18% higher than non-Hispanic White women), 47% agree they often ask the advice of others when it comes to financial products or services (9% higher), 40% agree that people often ask their advice when it comes to financial matters (70% higher), and 39% agree that they often take the opportunity to discuss their knowledge of financial products or services with others (86% higher).

*Note: This includes auto loans, CDs, checking account, credit card, debit or ATM cards, home improvement or home equity loans, home mortgage, refinanced home mortgage, mobile banking, money market account, online banking, online bill paying, personal loans and savings accounts (all at primary bank), as well as 401(k)s, 529s, Bonds, IRAs, Money Market Funds, Mutual Funds, second home or real estate, stocks or stock options, and other securities or investments.

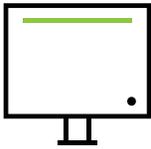


MEDIA CONSUMPTION

TV SHOW RANKINGS

Black women gravitate toward celebrities and multidimensional characters of color. “Empire,” a broadcast TV musical drama series about a fictional hip-hop music and entertainment company, is currently the top-rated show among Black women, with 24% watching. Cable shows “The New Edition Story,” “The Haves and The Have Nots,” and “Love & Hip Hop” are also among the five highest rated shows among Black women. All of the top-rated cable and broadcast shows among Black women have either predominately Black casts or a Black lead; the advantage to this focused TV viewing is that advertisers can more easily target their Black female consumers. Fifty-eight percent of Black women agree they feel really good about seeing celebrities in the media who share their ethnic background (156% higher than non-Hispanic White women).^{*} This attitude is evidenced not only by the current TV show rankings, but also by the N-Scores given to celebrities by Black Americans — only three celebrities in the top 40 were not Black.

^{*}Source: Nielsen Scarborough USA+ 2016 Release 2



COMBINED CABLE AND NETWORK TV RANKINGS (2016-2017 SEASON)

		Black Women 18+	Non-Hispanic White Women 18+
1	Empire (Fox)	24.2%	1.9%
2	The New Edition Story (BET)	17.0%	0.2%
3	Star (Fox)	12.1%	1.3%
4	Haves And The Have Nots (OWN)	12.0%	0.3%
5	Love & Hip Hop Atlanta (VH1)	11.4%	0.2%
6	Scandal (ABC)	10.7%	4.6%
7	Queen Sugar (Own)	10.2%	0.2%
8	How To Get Away With Murder (ABC)	9.8%	4.2%
9	Love & Hip Hop (VH1)	9.8%	0.1%
10	If Loving You Is Wrong (OWN)	9.2%	0.1%
11	Real Housewives Atlanta (Bravo)	9.1%	1.0%
12	Love & Hip Hop Hollywood (VH1)	8.9%	0.1%
13	Greenleaf (OWN)	8.7%	0.2%
14	Fox NFL Sunday-National (Fox)	8.3%	7.4%
15	Basketball Wives (VH1)	8.2%	0.1%
16	Shots Fired (Fox)	8.1%	1.3%
17	Power (Starz)	7.6%	0.2%
18	Lethal Weapon (Fox)	7.5%	3.8%
19	T.I. And Tiny 6 (VH1)	7.4%	0.1%
20	Love Hip-Hop Atlanta Specials (VH1)	6.9%	0.1%

Read as: Twenty-four percent of Black women 18+ watched "Empire" last TV season.

Source: NPOWER Program Rankings 8/29/16-5/28/17

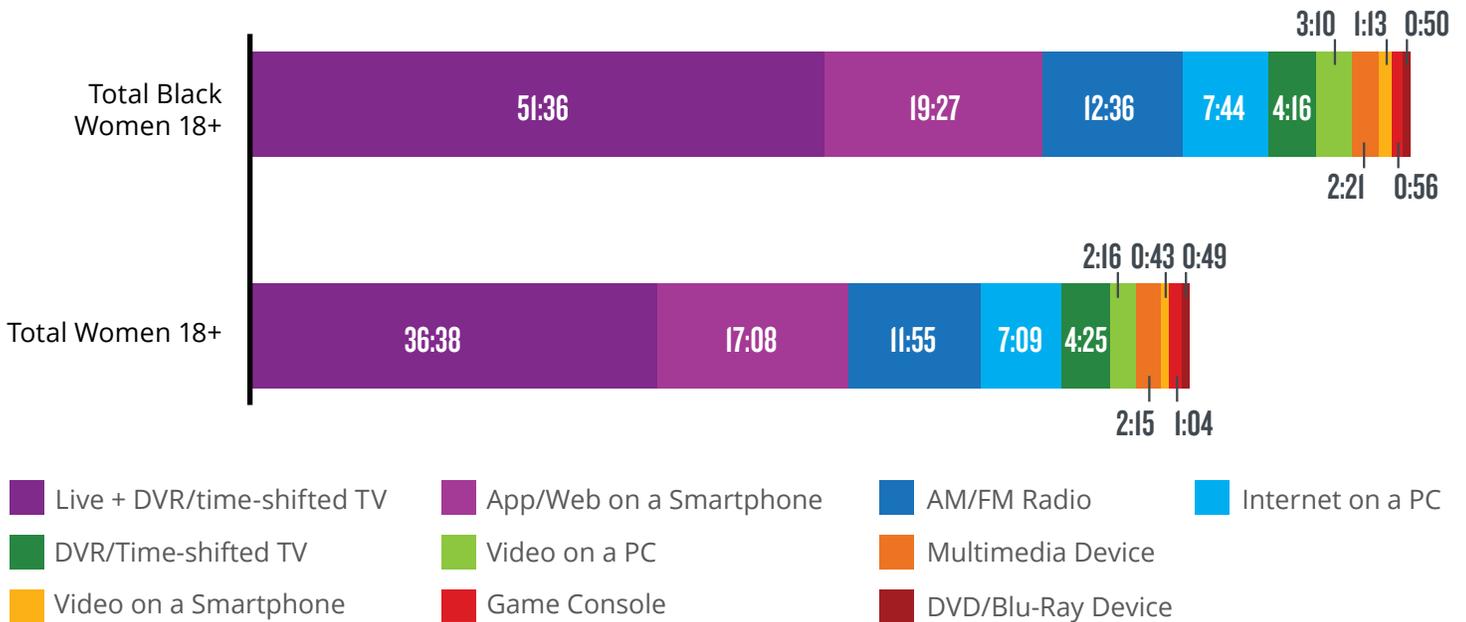
Black audiences' higher engagement on social media is also driving the success of shows with Black principal characters and predominately Black casts. Additionally, the chance to chat about shows online as they happen and to experience other viewer's reactions have driven Black women to watch the show's actual broadcasts, instead of waiting to watch an episode later. The resulting explosion on Twitter while a show is airing signals to potential viewers that it is not only a good show to watch, but a happening they need to be part of, which is exactly why Black audiences and the shows they watch have captured the attention of networks and advertisers.

TIME ON DEVICES

Black women are prodigious consumers of video, internet, and radio. Specifically, they spend more time weekly than do total U.S. females on TV, radio, multimedia devices, both internet and video on a PC, and both internet and video on a smartphone. Although all age groups spend the most time on TV, Black women’s time spent on live +DVR TV, radio, and internet on a smartphone increases with age, while younger Black women spend more time than their older counterparts on game consoles, multimedia devices, and video on a smartphone. Ages 35–49 spend a greater amount of time than other age groups on DVD, and both internet and video on a PC.

TECH USAGE

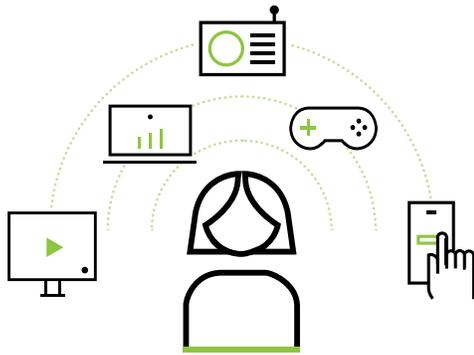
(WEEKLY TIME SPENT ON A DEVICE)



Source: Live+DVR/Time-shifted TV, DVR/Time-shifted TV, DVD/Blu-Ray Device, Game Consoles, Multimedia Devices 12/26/2016–03/26/2017 via Nielsen NPOWER/ National Panel, Radio 03/24/16–03/29/17 via RADAR 133, PC 01/01/2017–03/31/2017 via Nielsen Netview and Nielsen VideoCensus, Mobile PC 01/01/2017–03/31/2017 via Nielsen Electronic Mobile Measurement.

TECH USAGE BY AGE

(WEEKLY TIME SPENT ON A DEVICE)



	Total Black Women 18+	Index: Total Black Women 18+ to Total Non-Hispanic White Women	Black Women 18-34	Index: Black Women to Non-Hispanic White Women 18-34	Black Women 35-49	Index: Black Women to Non-Hispanic White Women 35-49	Black Women 50-69	Index: Black Women to Non-Hispanic White Women 50-69	Black Women 70+	Index: Black Women to Non-Hispanic White Women 70+
Live+DVR/Time-shifted TV	31:23	20:04	48:31	32:14	64:42	44:51	79:11	54:16	30%	147
App/Web on a Smartphone	18:35	17:36	23:28	19:52	25:08	24:20	IFR	4:41	47%	133
AM/FM Radio	10:25	10:06	12:58	12:21	14:56	13:39	13:01	11:50	28%	81
Internet on a PC	5:56	5:39	10:58	10:17	9:09	8:20	3:55	4:10	3%	160
DVR/Time-shifted TV	2:55	2:40	5:11	4:45	5:29	5:32	3:40	5:06	18%	125
Video on a PC	3:33	2:57	3:54	3:08	3:16	2:01	0:57	0:40	37%	105
Multimedia Device	3:20	3:27	2:46	2:36	1:32	1:40	0:47	0:58	30%	113
Video on a Smartphone	1:47	1:02	1:18	0:52	1:03	0:45	IFR	0:06	51%	148
Game Console	1:48	2:22	0:47	1:03	0:24	0:22	0:11	0:07	17%	119
DVD/Blu-Ray Device	0:45	0:49	0:59	1:05	0:56	0:50	0:35	0:32	8%	129

Source: Live+DVR/Time-shifted TV, DVR/Time-shifted TV, DVD/Blu-Ray Device, Game Consoles, Multimedia Devices 12/26/2016-03/26/2017 via Nielsen NPOWER/ National Panel, Radio 03/24/16-03/29/17 via RADAR 133, PC 01/01/2017-03/31/2017 via Nielsen Netview and Nielsen VideoCensus, Mobile PC 01/01/2017-03/31/2017 via Nielsen Electronic Mobile Measurement.



RADIO REACHES 92% OF BLACK WOMEN

RADIO

Radio is still an excellent medium for reaching Black women, with 92% penetration versus the next highest medium, TV, which has 90% reach. Black women listen to radio at slightly higher rates than other women with an average listening time of 14 hours and 7 minutes, versus other women, with an average weekly listening time of 12 hours and 52 minutes. Black women 35 and older have a higher weekly listening time of 15 hours and 17 minutes, compared to Black women ages 18 to 34, who have an average weekly listening time of 11 hours and 47 minutes. Additionally 33% of Black women agree that advertising on radio provides them with meaningful information about the product use of other consumers (37% higher than non-Hispanic White women), 38% agree it provides them with useful information about bargains (20% higher), 38% agree it provides them with new information about new products and services (16% higher) and 31% agree advertising on radio is amusing (28% higher).

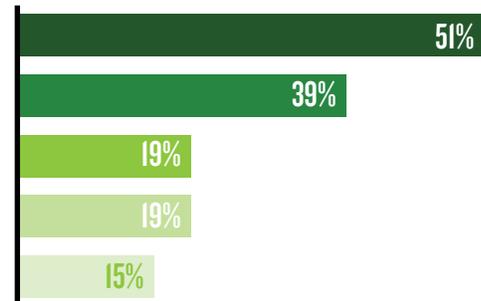
Looking at the top 20 radio stations among Black women nationwide, 11 are an Urban Adult Contemporary format, seven are Urban Contemporary, one is Adult Contemporary, and one is Rhythmic Contemporary Hit. Stations with Urban Contemporary formats are more popular among millennial Black women, while stations with Urban Adult Contemporary are more popular among those age 35 and older.* These trends hold up when polled by Scarborough, with 51% agreeing that they listen to Urban Adult contemporary and 39% agreeing they listen to Urban Contemporary.

*Source: Nielsen Radio Fall 2016

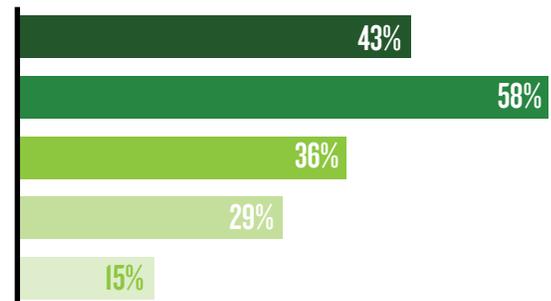
RADIO FORMATS (BY AGE)



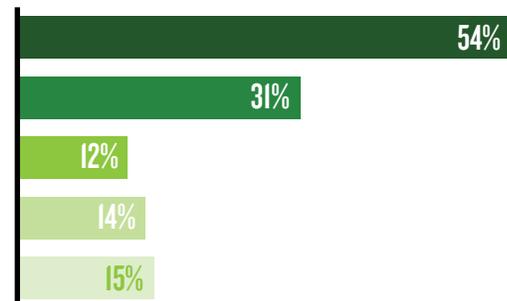
BLACK WOMEN 18+



BLACK WOMEN 18-34



BLACK WOMEN 35+



- Urban AC
- Urban Contemporary
- Pop Contemporary Hit Radio
- Rhythmic Contemporary Hit Radio
- Adult Contemporary

Source: Scarborough USA+ 2016 Release 2



MAGAZINE ADVERTISING

Being an influencer and trendsetter requires keeping abreast of multiple industries-especially in entertainment from fashion to music to celebrities. This might explain why Black women over-index by 18% against non-Hispanic White women for dollars per buyer spent on magazines. Additionally, Black women over-index by 57% for agreeing they love keeping up with celebrity news and gossip (43% agree) and by 17% for agreeing they rely on magazines to keep them up to date on fashion (39% agree).

Magazine advertising also seems to appeal to and be effective with Black women at a higher rate than non-Hispanic White women. Black women over-index by 55% for agreeing that when they smell a perfume or cologne sample they like in a magazine, they will purchase it (49% agree). They also over-index by 9% for agreeing that advertising in magazines provides them with meaningful information about the product use of other consumers (41% agree), by 14% for agreeing it provides them with useful information about bargains (43% agree), and by 33% for agreeing that advertising in magazines is amusing (29% agree). This medium for reaching Black female consumers is becoming even more attractive evidenced by the launch of a number of new tailored magazines from which to choose.



BLACK WOMEN OVER-INDEX BY 18% AGAINST NON-HISPANIC WHITE WOMEN FOR DOLLARS PER BUYER SPENT ON MAGAZINES.

SECTION I TAKEAWAYS



Style and image are important factors in Black female spending. The majority of Black women agree they buy brands that reflect their style and would pay extra for high-quality items consistent with the image they want to convey. They also over-index against non-Hispanic White women for the influence that trends, designer names, brand names, and celebrity tie-ins have on their purchases.



A desire for variety and change, willingness to act on the spot, and a penchant for cost-consciousness play strong roles in what Black women purchase, as do recommendations. Black women over-index against non-Hispanic White women for both giving and getting advice on what to purchase, and for sharing their opinions about products and services by posting reviews and ratings online.



The majority of Black women agree they are more likely to purchase brands that support a charity or a cause they care about, and that a company's environmental values are important to them in their purchasing decisions. They also agree they are willing to pay more and give up convenience for a product that is environmentally safe.



Black women over-index for time spent on social networking sites, using social media more for consumer engagement activities, and social movements adapting their use into communities such as #BlackGirlMagic. While Facebook is the top social media site among Black women, YouTube, Instagram, Twitter, Google+, and LinkedIn are all used by a higher percentage of Black women than they are total U.S. women.



Black women spend more time weekly than do total U.S. females on TV, radio, multimedia devices, and internet and video on both PCs and smartphones. Although all age groups spend the most time on TV, radio has the highest reach at 92%. And with Black women over-indexing against non-Hispanic White women for finding value in radio advertising, that medium still offers good opportunities for advertisers.



In most health and beauty product categories, Black women over-index against non-Hispanic White women for dollars per buyer and buying households. They also over-index in dollars per buyer for hair care products with a pronounced shift to natural hairstyles. Companies working to gain market share should be diversifying their product lines.



Black women agree that seeing celebrities in the media who share their ethnic background is important as evidenced by the fact that many of the top-rated cable and broadcast shows among Black women have either predominately Black casts or a Black lead. Their social media discussions about these shows, particularly while on air, helps drive viewership, as well as the creation of new predominately Black shows.



SECTION II

INFLUENCE ON POP CULTURE

THE MAINSTREAM APPEAL OF BLACK CONTENT

From music to movies, fashion and art, Black Americans have long played an important role in shaping popular culture in the U.S., and that influence remains strong. In fact, 73% of non-Hispanic whites and 67% of Hispanics believe that African-Americans influence mainstream culture. And this effect is clearly visible in last year’s TV season. According to a recent Nielsen analysis of TV viewership, several programs with a predominantly Black cast or a main storyline focusing on a Black character are drawing substantial non-black viewership.

SMALL SCREEN INFLUENCE ON POP CULTURE

Program	Network	% of Non-African-American Viewers	% of African-American Viewers
This Is Us	NBC	88.9%	11.1%
Black-ish	ABC	79.9%	20.0%
Secrets And Lies	ABC	75.2%	24.7%
How To Get Away With Murder	ABC	69.3%	30.6%
Pitch	FOX	63.8%	36.1%
Rosewood	FOX	62.2%	37.7%
Insecure	HBO	61.5%	38.4%
Atlanta	FX	50.1%	49.8%
Empire	FOX	37.2%	62.7%
Star	FOX	35.4%	64.5%
Real Housewives of Atlanta	Bravo	34.6%	65.3%

Read as: The average audience for “This is Us” was 88.9% non-African-American.

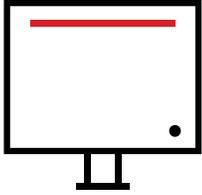
Source: NPOWER, Persons aged 2+, Broadcast and Cable, Live +7 Days, TV with Digital, TV with Video on Demand (VOD), Sept. 19, 2016-Jan. 1, 2017.

While this isn't the first time in history that a TV program with a Black lead has drawn non-Black audiences—think of “The Jeffersons,” “Sanford and Son” and “The Cosby Show”—what's unusual now is the sheer number of such programs that are carrying cross-cultural appeal.

Looking at the 2016-2017 television season, several shows stood out:

- With 89% non-Black viewership, “This Is Us,” NBC's Golden Globe-nominated ensemble dramedy, includes Sterling K. Brown as a black businessman raised by white parents and tackles topics such as drug addiction, racism, homosexuality, alcoholism, adoption, obesity and cancer.
- ABC's hit sitcom “Black-ish” follows a father and husband (Anthony Anderson) who's trying to create a sense of black cultural identity for his affluent family of four and has 79% non-black viewership. Tracee Ellis Ross, who plays his wife, won the best actress in a comedy series Golden Globe for her role.
- Three-fourths of the viewers are non-black for “Secrets and Lies,” the ABC crime drama that revolves around the biracial heir (Michael Ealy) to a Charlotte, N.C., equity firm and the murder of his wife.





- ABC's "How to Get Away with Murder" is the Shonda Rhimes hit drama starring Academy Award winner Viola Davis as a criminal defense professor who gets entangled in a murder plot. Sixty-nine percent of the show's viewership is non-black.
- Sixty-eight percent* of viewership is non-Black for ABC's "Scandal," another "Shondaland" thriller featuring Kerry Washington as a media consultant to the president.
- With 63% non-black viewers, Fox's "Pitch" is a dramedy about the first woman, a black woman, to play baseball in the Major Leagues.
- "Insecure" is the HBO original comedy series co-created by Golden Globe-nominated Issa Rae. Inspired by Rae's popular web series "The Misadventures of Awkward Black Girl," viewership is 61% non-black.
- Half of viewership for the newcomer "Atlanta" is non-Black. The show, a Golden-Globe winning comedy-drama on FX created by and starring Donald Glover, centers on two Black cousins navigating the Atlanta rap scene.

Some of these programs wade into the real-world tensions of today. Episodes of "Black-ish" have included discussions on police brutality and political upsets, provoking debate on social media.

Though some shows with a strong Black identity may not pull a majority non-Black audience, many still have noteworthy non-Black viewership. One of the most widely acclaimed programs of recent seasons, Fox's "Empire," which stars Terrence Howard and Taraji P. Henson as ex-spouses grappling over the future of a multimillion-dollar hip-hop company, is one such example. "Empire" commanded nearly 40% non-Black viewers on average each week during last year's season. Interestingly, both Fox's "STAR" and Bravo's "Real Housewives of Atlanta" pulled comparable numbers.

It's also noteworthy how a predominantly Black audience—63% for "Empire"—can propel a show to Emmy-nominated, award-winning mainstream success. Henson took home a best actress Golden Globe last year for her portrayal of Cookie. These accolades offer further evidence of a cultural recalibration in which Black voices increasingly are heard.

*Scandal figures represent the 2015-2016 TV season.



DEEP POPULAR MUSIC ROOTS

African-Americans have always been at the forefront of popular music with Jazz, and R&B (including Blues, Soul, Gospel, Funk and Disco) being the basis of most American music, including Rock and Roll. Over the last forty years as Hip-Hop and Rap have become popular, they have also become inextricably intertwined, and have, over the last decade, adopted R&B sounds blurring the distinction between the genres. Now this combined genre of R&B and Hip-Hop, still dominated by Black performers, has just been recognized as the top music genre in terms of consumption, at 25.1% versus Rock's 23%. This is the first time since Nielsen started tracking U.S. music consumption that Rock has not held that top spot. Though Rock still has higher album sales, music consumption is now predominantly streaming, and R&B/ Hip-Hop are almost as popular on streaming services as Rock and Pop combined.

R&B AND HIP-HOP IS RECOGNIZED AS THE TOP MUSIC GENRE IN TERMS OF CONSUMPTION, AT 25.1% VERSUS ROCK'S 23%.

As these music genres have evolved to include performers and listeners of all races and ethnicities, there has been a growing awareness of, or some say mis-appropriation and commercialization of, certain Black-American styles. Today African-Americans are seeing hairstyles such as cornrows, and fashion styles once only worn in urban music and dance culture appearing on the cover of global high fashion magazines and runways. Hip-hop has dramatically changed the dance world as well, finding its way into traditional ballet choreography, onto Broadway stages and taking center stage on network and cable variety shows.

INFLUENCERS WITH GRAVITAS

African-American mainstream influence cuts across virtually every walk of life and many Black females are making an impact. According to her N-Power score (100)*, Oprah Winfrey is ranked by African-Americans as the most influential person in media, And there is no doubt that Oprah Winfrey has for decades been one of the most, if not THE most, powerful and influential people on Americans of all races and ethnicities. A self-made billionaire, and one of the people most often on Time's 100 list, Oprah has not only entered the hearts and mind of America, but the power of Oprah's opinions and endorsements, because of her impact on public opinion, product sales and career success has been coined "The Oprah Effect."

AFRICAN-AMERICAN MAINSTREAM INFLUENCE CUTS ACROSS VIRTUALLY EVERY WALK OF LIFE, AND MANY BLACK FEMALES ARE MAKING AN IMPACT.

And as an Academy Award-nominated actress and film, stage and TV Producer, Oprah's media empire now includes Web sites, several magazines, a radio channel, personal growth tours, a YouTube channel, Facebook pages, and cable TV's Oprah Winfrey Network (OWN).

Well beyond the musicians, athletes, media moguls and social activists, there are countless other Black women and men changing the face of our nation, and shifting popular culture. Be they teachers, entrepreneurs, marketers or mothers, their culture and influence have an outsized effect on American mainstream culture which will only continue to advance in the years to come.

*Note: N-Score is a Nielsen metric that assesses the public perception and endorsement potential of celebrities in music, books, sports, film and TV.

SECTION II TAKEAWAYS



African-American influence on mainstream American popular culture, particularly in the area of music, dance, and fashion, is so pervasive that the two are often indistinguishable. The combined genre of R&B and hip-hop, dominated by Black performers, is the top music genre in terms of consumption, virtually equal to the pop and rock genres combined, due primarily to its popularity on streaming services.



Storylines with Black characters or identity are crossing cultural boundaries to grab diverse audiences and start conversations. Programs such as NBC's "This is Us," ABC's "Black-ish" and HBO's "Insecure" each had more than 60% non-Black viewers during the 2016-2017 TV season.

That insight is important for culture and content creators, as well as manufacturers and retailers looking to create engaging, high-impact advertising campaigns.



Well beyond the musicians, athletes, media moguls and social activists, there are countless other Black women and men changing the face of our nation, and shifting popular culture. Be they teachers, entrepreneurs, marketers or mothers, their culture and influence have an outsized effect on American mainstream culture which will only continue to advance in the years to come.



SECTION III

YOUNG, INDEPENDENT, AND
SELF-MADE

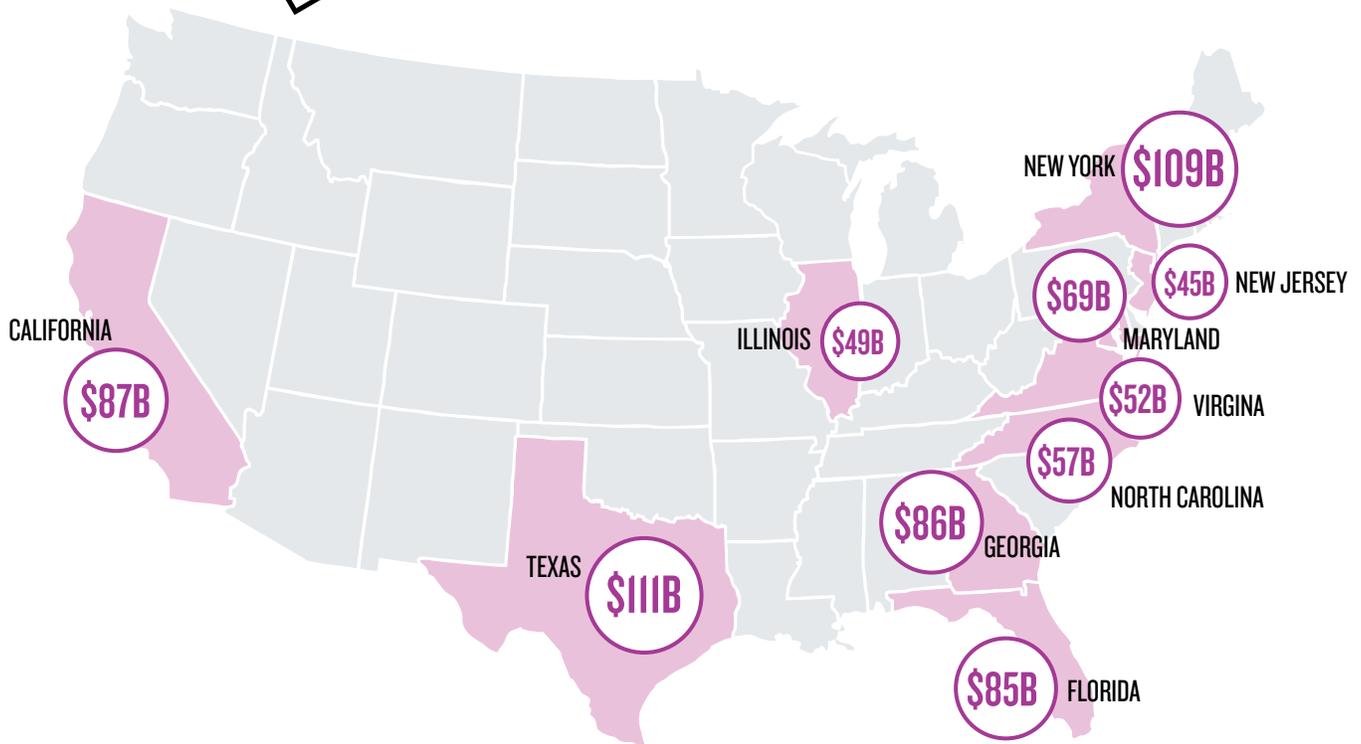
Young, single, diverse, and geographically concentrated, Black females are a growing population that is increasingly educated and affluent. The current African-American population is estimated to be around 46.8 million, of which 24.3 million are female. The Black female population, which grew 6% between 2010 and 2015, represents 14% of the total U.S. female population and 52% of the total black population.

The number of Black women starting and owning businesses, along with the population growth, increased education, and relative youth of the Black female population, are helping drive African-American buying power. The Selig Center for Economic Growth estimates that the nation's African-American buying power will rise from \$1.2 trillion in 2016 to \$1.5 trillion in 2021. In 2016, the 10 states with the largest African-American consumer markets were Texas (\$111 billion), New York (\$109 billion), California (\$87 billion), Georgia (\$86 billion), Florida (\$85 billion), Maryland (\$69 billion), North Carolina (\$57 billion), Virginia (\$52 billion), Illinois (\$49 billion), and New Jersey (\$45 billion); they account for 62% of the total African-American consumer market. Meanwhile, the 10 states with the largest African-American share of total buying power are the District of Columbia (25%), Mississippi (24%), Maryland (23%), Georgia (23%), Louisiana (20%), Alabama (18%), South Carolina (18%), Delaware (16%), North Carolina (15%) and Virginia (13%).

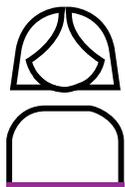


AFRICAN-AMERICAN BUYING POWER

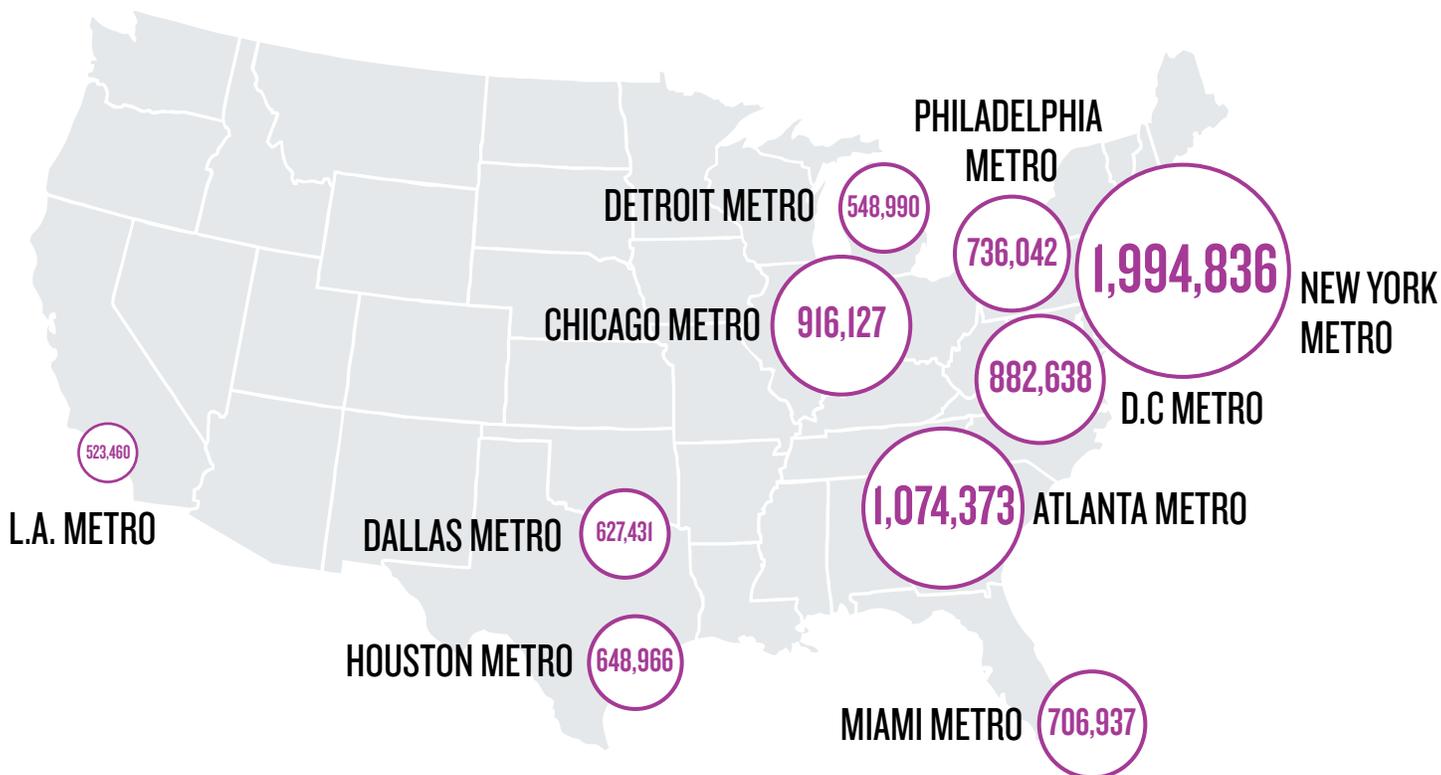
(TOP 10 STATES \$ BILLIONS)



Source: Selig Center for Economic Growth, Terry College of Business, The University of Georgia, June 2016.



U.S. CITIES WITH LARGEST BLACK FEMALE POPULATIONS (TOP METRO AREAS)



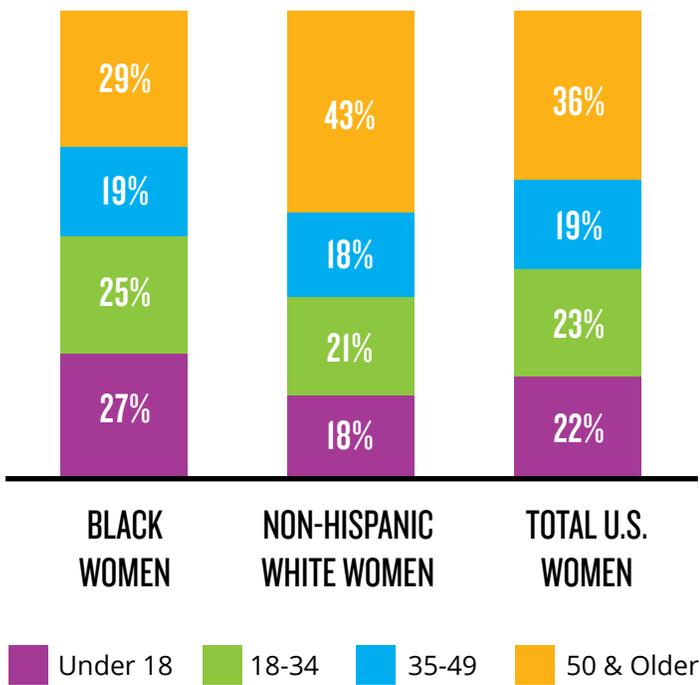
Source: U.S. Census Bureau, American Community Survey (ACS), One-Year Public Use Microdata Sample (PUMS), 2015, generated by EthniFacts

The states with the highest African-American buying power, and share of buying power, closely align with where the largest populations of African-Americans reside. Looking specifically at Black females, they are geographically concentrated, with 56% living in the South, and the largest populations living in Texas, Florida, New York, and Georgia. The metro areas with the largest Black American female populations are New York, Atlanta, Chicago, and D.C., which mirrors those with the largest overall Black populations.

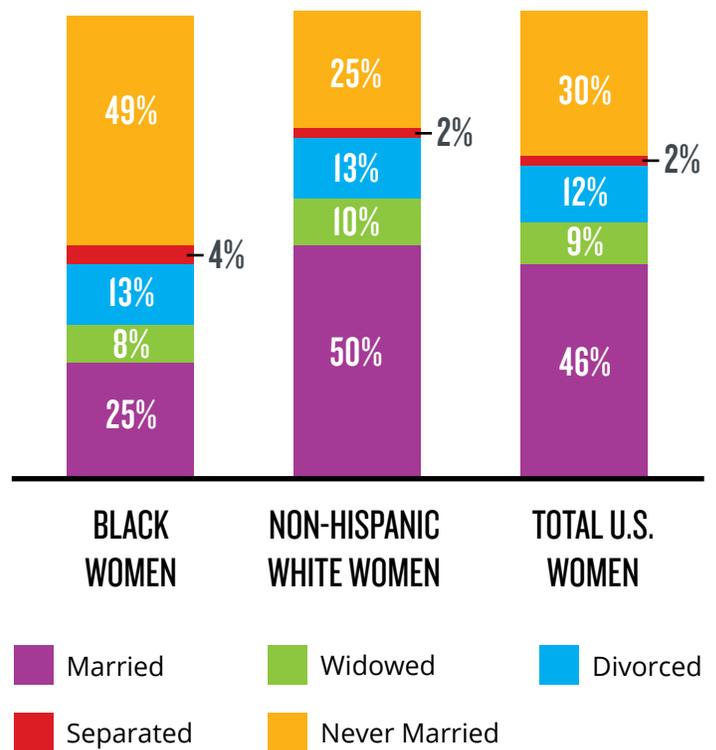
With a mean age of 35.1, Black females are younger than non-Hispanic White females at 42.8, as well as total females at 39.4. They are a culturally diverse group, with 9% who are multiracial (up from 5% in 2005), 4% who identify as Hispanic, and 9% who are foreign-born. Black females represented 6% of total immigration to the U.S. from 2010 to 2015, and those recent immigrants came primarily from Haiti, Jamaica, Nigeria, and Ethiopia. Nine percent of Black females over the age of 5 (1.96 million individuals) speak a language other than English, with 31% of those speaking Spanish, and 23% speaking French Creole.

Forty-nine percent of Black American women age 15 and older have never been married (up from 43% in 2005), as compared to only 30% of total U.S. women and 25% of non-Hispanic White women. Looking by age, an astounding 81% of Black millennial women (up from 71% in 2005), 40% of those ages 35–49, and 20% of those age 50 and older have never been married. U.S.-born Black women are more likely to have never been married (51%) than foreign-born Black females (32%). Plans to marry are higher amongst Black women though, with 11% of never-married Black women planning to get married in next 12 months versus 8% of never-married non-Hispanic White women.

TODAY'S BLACK WOMEN ARE YOUNG (AGE OF FEMALES)

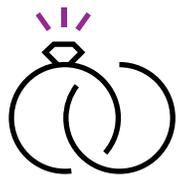


SINGLE & INDEPENDENT (MARITAL STATUS)

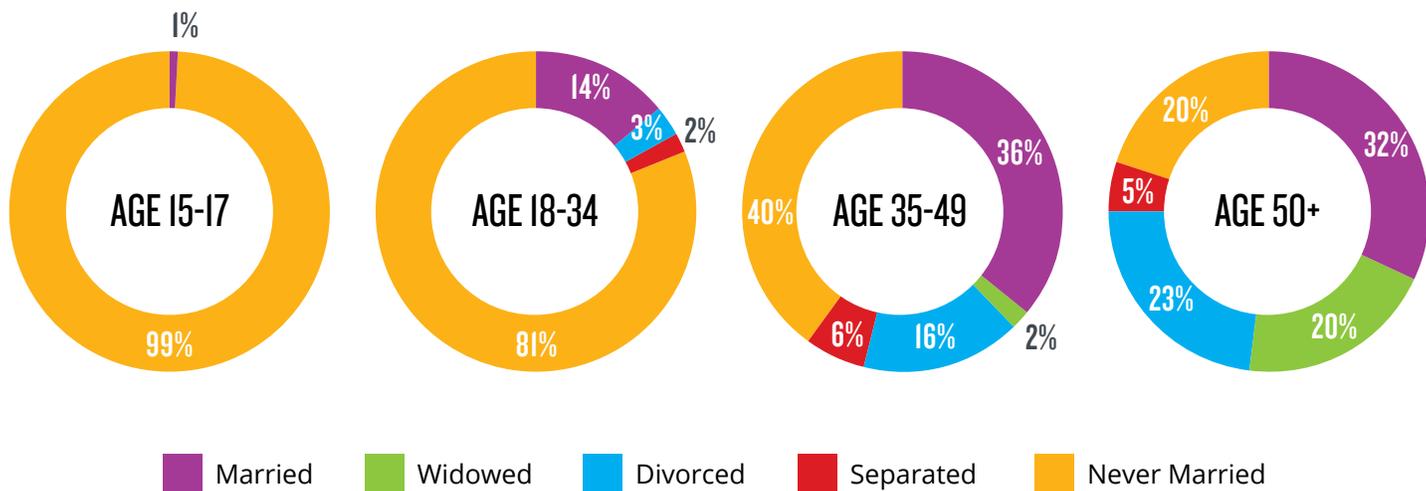


Source: U.S. Census Bureau, American Community Survey (ACS), One-Year Public Use Microdata Sample (PUMS), 2015, generated by EthniFacts

Source: U.S. Census Bureau, American Community Survey (ACS), One-Year Public Use Microdata Sample (PUMS), 2015, generated by EthniFacts, Ages 15+



BLACK WOMEN'S MARITAL STATUS BY AGE



Source: U.S. Census Bureau, American Community Survey (ACS), One-Year Public Use Microdata Sample (PUMS), 2015, generated by EthniFacts, Ages 15+

Of the 25% of Black women who are married, 10% are married to someone of a different race and 4% are married to someone not of their Hispanic or Non-Hispanic origin. These intercultural unions only increase Black women's influence on the nation, as they share their culture not only with their spouse and in-laws but also with their partner's friends, colleagues, and acquaintances.

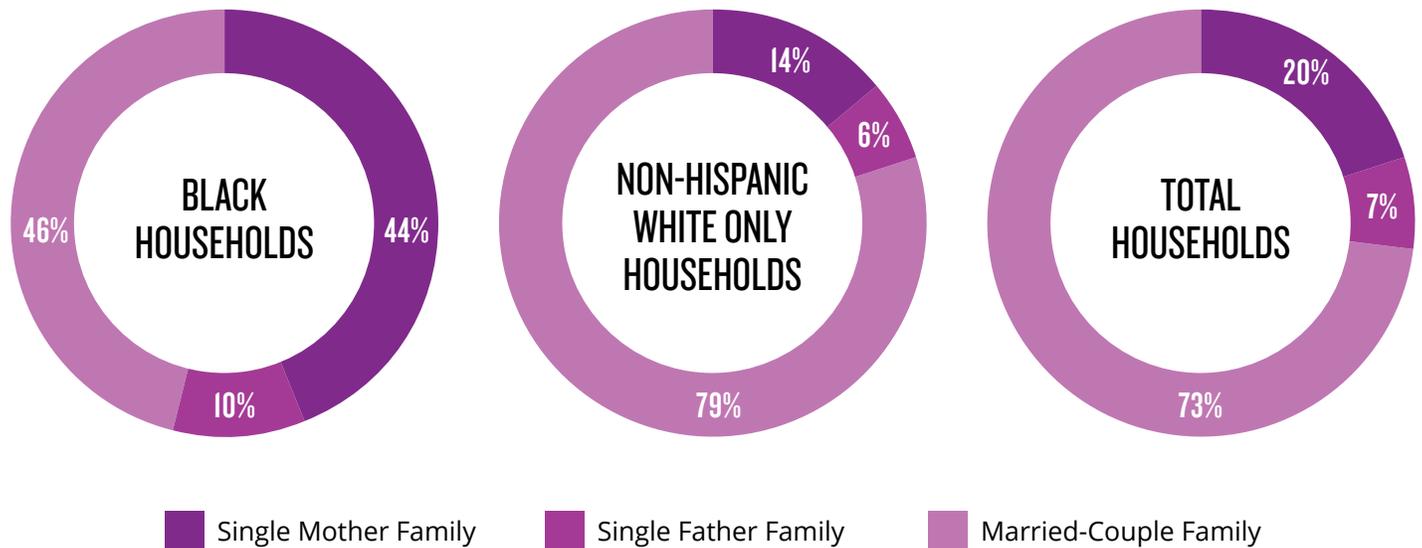


With an average household size of 2.47, only 29% of total Black American households (as compared to 50% of non-Hispanic White and 48% of total U.S. households) contain a married couple. Additionally, only 46% of Black American family households contain a married couple, as compared to 79% of non-Hispanic White family households and 73% of total U.S. family households. Forty-four percent of Black American family households are single-mother households (vs. 14% of non-Hispanic White family households and 20% of total U.S. family households). As a result, 57% of Black children are growing up in a single mother household (vs. 18% of non-Hispanic White children and 28% of total U.S. children).

Overall, 28% of Black women are living with their own minor children (compared to 23% of non-Hispanic White women and 26% of total U.S. women). Additionally, though, 7% of Black women over age 30 have grandchildren living in the home with them (vs. 3% of non-Hispanic White women and 5% of total U.S. women). Nine percent of Black family households are multigenerational and 2% are grandparent-headed family households.



FAMILY HOUSEHOLD TYPE

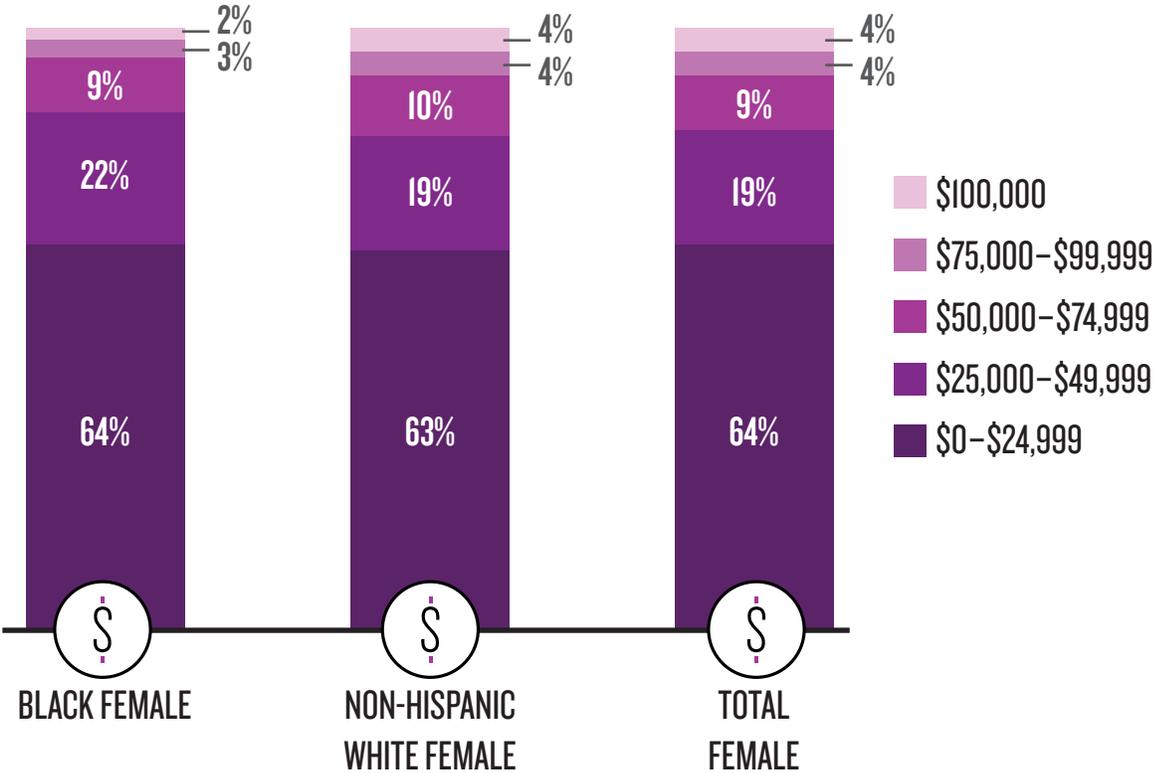


Source: U.S. Census Bureau, American Community Survey (ACS), One-Year Public Use Microdata Sample (PUMS), 2015, generated by EthniFacts

The average household income of Black Americans, at \$53,681, is lower than that of other ethnic or racial groups. The fact that single mother households exist at a rate twice that of the general population the relative youth of Black women (7.7 years younger than their non-Hispanic White counterparts), and the general lower incomes of females vs. males all exacerbate the household income issue. The resilience of Black women in providing for their families in the face of these challenges is an underlying story of Black Girl Magic. The overall average Black female income is \$21,729. The percentage of Black women with higher incomes, however, is close to that of their counterparts, with 14% having an annual income of \$50,000 or higher (up from 9% in 2005), as compared to 17% of total females, and 18% of non-Hispanic White women. Since many millennials are still pursuing educations or not at the peak of their careers, Black women ages 35–49 are the most affluent, with 22% having an annual income of \$50,000 or higher.

The disparity between Black women’s lower income levels, non-equal pay and their spending habits is apparent. However, she should not be negated as a prominent decision maker and consumer in her household. Marketers can benefit from understanding how to customize products and campaigns to adjust to her unique lifestyle.

WOMEN’S INCOME DISTRIBUTION (18+)



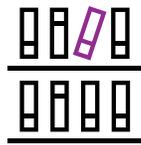
Source: U.S. Census Bureau, American Community Survey (ACS), One-Year Public Use Microdata Sample (PUMS), 2015, generated by EthniFacts, Ages 18+



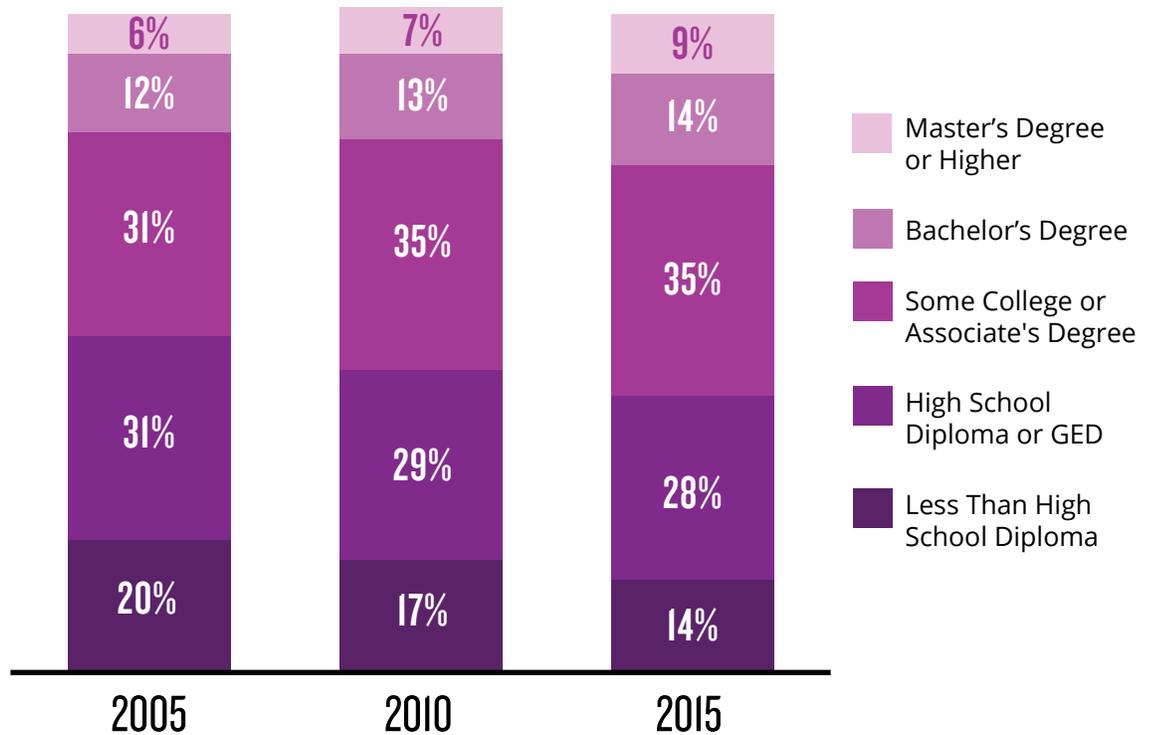
BETWEEN 2013 AND 2015, 64% OF BLACK FEMALES ENROLLED IN COLLEGE IMMEDIATELY AFTER COMPLETING HIGH SCHOOL.

Part of what is driving the increased income among Black American women is increased education. Twenty-three percent of Black women over age 25 have completed at least a Bachelor's degree, an increase from only 18% in 2005. The educational attainment rate for foreign-born Black women is even higher, with 27% holding at least a Bachelor's degree. There is understandably a slight generational divide for education levels, with 25% of ages 25–34 and 27% of ages 35–49 having attained a Bachelor's degree or higher, as compared to only 19% of those ages 50 and older.

Between 2013 and 2015, 64% of Black female high school students enrolled in college immediately after graduation. Though that number is below the enrollment rates of non-Hispanic White women (74%) and total U.S. women (73%) for that same period, Black women over-index for going back to school, perhaps later in life. This reflects the perseverance of Black women and therefore the overall essence of Black Girl Magic. Seventeen percent of Black American women plan to return to school for a degree or certification in next 12 months (151% higher than non-Hispanic White women) and 9% plan to attend adult continuing-education classes in the next 12 months (28% higher than non-Hispanic White women). Additionally, 10% of Black women took college courses on the internet in the past 30 days (85% higher).

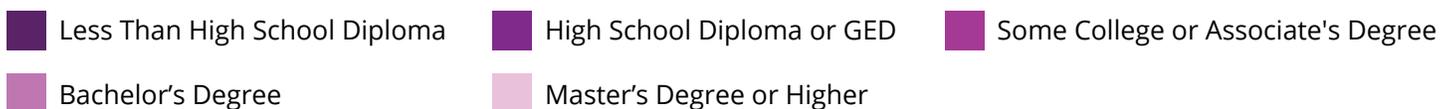
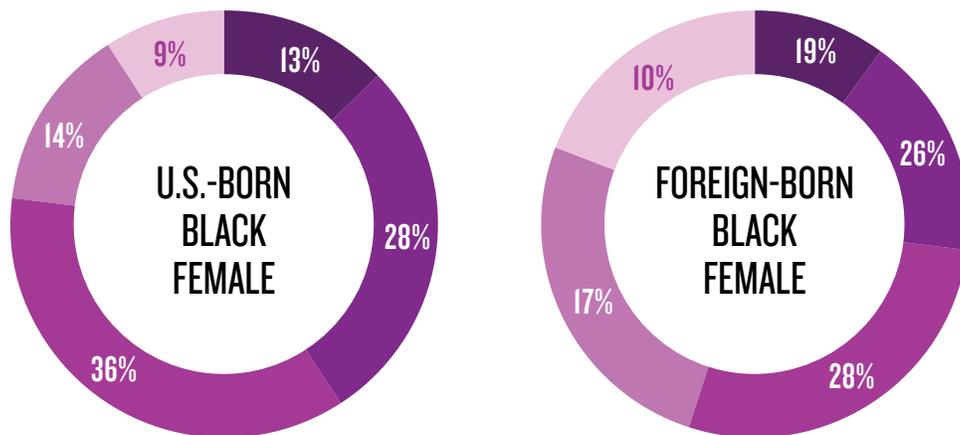


EDUCATIONAL ATTAINMENT 2005-2015 (BLACK WOMEN 25+)



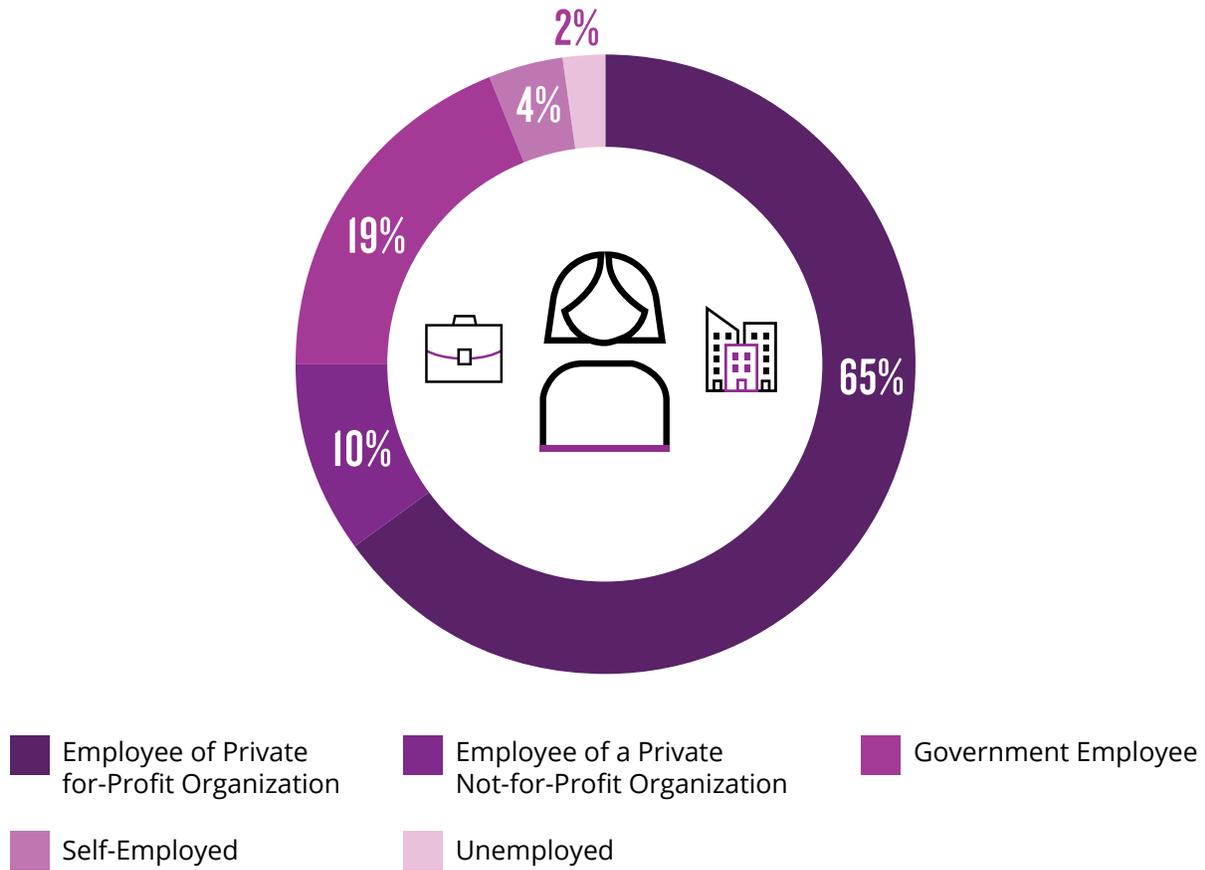
Source: U.S. Census Bureau, American Community Survey (ACS), One-Year Public Use Microdata Sample (PUMS), 2005, 2010, 2015, generated by EthniFacts

EDUCATIONAL ATTAINMENT BY NATIVITY (BLACK WOMEN 25+)



Source: U.S. Census Bureau, American Community Survey (ACS), One-Year Public Use Microdata Sample (PUMS), 2005, 2010, 2015, generated by EthniFacts

BLACK FEMALE WORKFORCE



Source: U.S. Census Bureau, American Community Survey (ACS), One-Year Public Use Microdata Sample (PUMS), 2005, 2010, 2015, generated by EthniFacts

64% OF BLACK WOMEN AGREE THAT THEIR GOAL IS TO MAKE IT TO THE TOP OF THEIR PROFESSION.

Career is an essential part of most women’s lives, and Black women are no exception. Sixty-four percent of Black women agree their goal is to make it to the top of their profession (95% higher than non-Hispanic White women), 58% agree that they don’t mind giving up their personal time for work (20% higher), and 64% agree they would continue working even if they won the lottery (19% higher). As of 2015, 75% of Black females in the active workforce were employees of private organizations and 19% were government employees. The top industries of employment for Black women are health care (21%), retail trade (12%), arts, entertainment and recreation (11%), and educational services (10%). Seven percent of Black women agree they plan to retire in the next 12 months (56% higher than non-Hispanic White women).

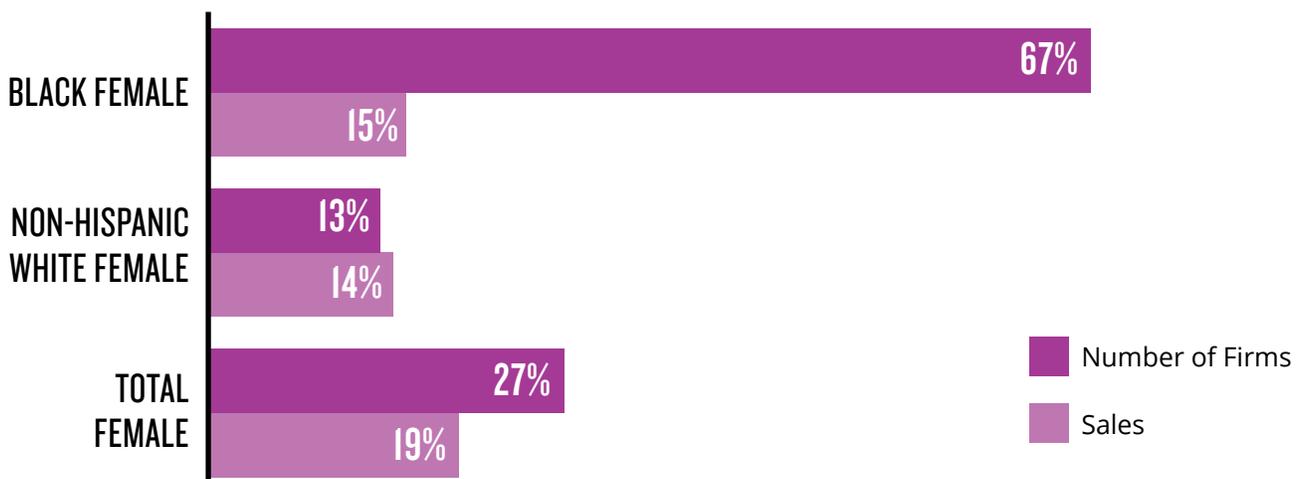


SELF-MADE ENTREPRENEURS

Black female entrepreneurship has grown substantially over the last decade. The most recent U.S. Census Survey of Business Owners, released in 2015, showed that Black women are the majority owners in more than 1.5 million businesses with more than \$42 billion in sales. Of those businesses, 38,600 have employees with \$7.7 billion in payroll. The number of firms primarily owned by Black women grew 67% between 2007 and 2012 according to the latest U.S. Census Survey of Business Owners, as compared to 13% for those owned by White women and 27% for those owned by all U.S. women. In the same time period, the sales of firms primarily owned by Black women grew 15% vs. 14% for those owned by White women and 19% for those owned by all U.S. women. Those industries with the largest number of Black female majority-owned firms are: other non-specified services (30%); health care and social assistance (28%); administrative and support and waste management and remediation services (10%); and professional, scientific and technical services (7%). Though only 4% of Black women are currently self-employed (as compared to 8% of non-Hispanic White women and 7% of total U.S. women,) 84% agree that if given the choice, they would be their own boss (13% higher than non-Hispanic White women) and 67% agree they often find themselves in a leadership position (26% higher), so there is tremendous room for growth in Black female entrepreneurship.

ECONOMIC PACESETTERS

(GROWTH IN MAJORITY-OWNED FEMALE BUSINESSES)



Source: U.S. Census Bureau, Survey of Business Owners, 2007 and 2012.

SECTION III TAKEAWAYS



Black females are a growing and culturally diverse population whose buying power is increasing due in part to youth, expanding entrepreneurship, and higher education. Both population and buying power of Black females are geographically concentrated, with 56% of Black women living in the South and 10 states accounting for 62% of African-American buying power.



With a mean age of 35, Black women are younger than their non-Hispanic White counterparts. They are also less likely to get married, with almost half (49%) of Black women having never been married, including 81% of Black millennial women, 40% of those ages 35–49, and 20% of those age 50 and older.



Many Black women are raising families by themselves with Black single mothers heading 44% of Black American family households, and raising 57% of all Black American children. As such, they are the sole decision makers for not only purchases for themselves, but also for purchases for the majority of Black children and almost half of Black families.



The education levels and income of Black women have both increased over the past decade, with 23% of Black women over age 25 now having completed at least a bachelor's degree, and 14% of Black women earning an annual income of \$50,000 or higher. Black women ages 35–49 are the most affluent, with 22% having an annual income of \$50,000 or higher, making them attractive consumers for manufacturers and sellers of high-end goods.



Entrepreneurship is increasing. Black women are the majority owners in more than 1.5 million businesses with more than \$42 billion in sales and \$7.7 billion in payroll, making them the ultimate decision makers for purchases of supplies, equipment and raw materials, as well as employee benefit products.

SUMMARY STATISTICS

U.S. BLACK WOMEN

MEAN AGE: 35

PERCENT MARRIED (AGE 15+): 25%

NATIVITY: FOREIGN BORN = 9%;

U.S.-BORN = 91%

AVERAGE HOUSEHOLD INCOME: \$53,681

SHARE OF POPULATION WITH AVERAGE INDIVIDUAL INCOME OF \$50,000+: 14%

AVERAGE HOUSEHOLD SIZE: 2.47

EDUCATION (BACHELOR'S DEGREE OR HIGHER, AGE 25+): 23%

Source: U.S. Census Bureau, American Community Survey (ACS), One-Year Public Use Microdata Sample (PUMS), 2015, generated by EthniFacts.

CONCLUSION

African-American women are making advances in key categories that can not be ignored: population growth, educational attainment and entrepreneurship. Building on the resourcefulness and perseverance of previous generations of Black women, they are embracing their power to choose—taking charge of how they look, how they work, how they consume entertainment and information and how they leverage the dollars they spend. The impact of that awareness will continue to shape core facets of American popular culture—from entertainment and fashion to politics and social change.

Increasingly the heads of households, Black women are core decision makers for a lion share of African-Americans' enormous spending power. Their roles as both caregivers and providers make them stalwarts of the Black community and often the principal link for sharing cultural nuance, tradition and heritage between generations. Values and faith play an integral role in how Black women engage the world around them, and those values can be seen in how they spend their money and use their voices in digital spaces. As African-American music, celebrities and content creators gain mainstream exposure and notoriety, understanding what's interesting and popular with Black consumers becomes an increasingly important predictor for pop culture as a whole. Black women's fingers are on the pulse of future trends just as much as their fingers are on the technologies they use to juggle busy lives and protect household budgets.

Marketers who understand the unique influence African-Americans have on popular culture and identify culturally reflective ways to engage them will find a multiplier effect on their marketing investment. With Black women in particular, when they like a product, service or piece of content, they share the experience with their sphere of influence. By and large, African-Americans all speak the same language, but they are not monolithic. Understanding cultural nuance is important when attempting to build brand awareness and affinity with African-American consumers. As the U.S. population continues to shift toward diversity and a multicultural majority, brands can not afford to ignore the unique preferences of African-Americans. To that end, African-American women are leaving an indelible imprint on America's economy, social consciousness and cultural landscape, and they're showing no signs of slowing as they become more and more aware of that influence.

METHODOLOGIES

Insights used in this report were sourced from the following Nielsen analytical tools and solutions. All tools offer their own representative levels of consumer insights and behavior across African-American, non-Hispanic White and total respondents (based on data collection, survey/panel design, and/or fusion approaches).

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 to record items with a UPC code purchased from any outlet. Data for this report is based on Homescan panel data from the following period: 52 weeks ending, June 24, 2017.

NIELSEN SCARBOROUGH

Nielsen Scarborough USA+ 2016 Release 2, GfK/MRI Attitudinal Insights Module August 2015–November 2016: (Base: Age of respondent summaries: Adults 18+ – Projected 248,283,255, Respondents: 204,312) By integrating 400+ attitudinal statements and segmentations with Nielsen Scarborough's syndicated data set, this analysis reflects consumer psychographics in the studied categories..

RADAR

AM/FM Radio includes listening to programming from AM/FM radio stations or network Programming.

Audience estimates for 48 large markets are based on a panel of people who carry a portable device called a Personal People Meter (PPM) that passively detects exposure to content that contains inaudible codes embedded within the program content. Audience estimates from the balance of markets and counties in the U.S. are based on surveys of people who record their listening in a written diary for a week.

The estimates in this report are based on RADAR and the National Regional Database. RADAR reports national network radio ratings covering the U.S. using both PPM and Diary measurement and it is based on a rolling one-year average of nearly 400,000 respondents aged 12+ per year.

Listening to HD radio broadcasts, Internet streams of AM/FM radio stations and Satellite Radio is included in the Persons Using Radio estimates in this report where the tuning meets our reporting and crediting requirements of at least five minutes of Usage.

Data used in this report is inclusive of multicultural audiences.

TELEVISION METHODOLOGY

Live+DVR/Time-shifted TV includes Live usage plus any playback viewing within the measurement period. DVR/Time-shifted TV is playback primarily on a DVR but includes playback from video on demand, DVD recorders, server based DVRs and services like Start Over.

TV-connected devices (DVD, Game Console, Multimedia Device) would include content being viewed on the TV screen through these devices. This would include when these devices are in use for any purpose, not just for accessing media content. For example, Game Console would also include when the game console is being used to play video Games.

Multimedia Devices is a combination of usage of the Internet Connected Devices viewing source and Audio-Video viewing sources. It would include viewing on an Apple TV, Roku, Google Chromecast, Smartphone, Computer/Laptop, etc. connected to the TV.

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. Hispanic consumer audiences are comprised of both English and Spanish speaking representative Populations.

ONLINE METHODOLOGY

Nielsen Netview and VideoCensus data is reflective of the hybrid methodology which combines a census level accounting of page views and video streams where Nielsen measurement tags have been deployed in order to project audience and behavior to the full universe of all Internet users. For VideoCensus, the portion of the total video streams calibrated by census data are allocated to other devices and locations such as smartphones and viewing outside of home and work.

Hours:minutes for Internet and video use are based on the universe of persons who used the Internet/watched online video. All Internet on a PC metrics are derived from Nielsen NetView, while all Video on a PC metrics are derived from Nielsen VideoCensus. The audience of Video on a PC is a subset of Internet on a PC.

For passively measured video, audience and duration are credited when a) video content is rendered and the stream URL matches Nielsen's classification and b) if the meter detects audio. Actively measured/tagged video is credited when the meter detects and collects tags from the video playback metadata. Duration is observed from the computer panel and then weighted/projected. If no audio is detected neither audience nor duration is credited.

NIELSEN N-SCORE

Nielsen N-Score evaluates consumers perception of top talent in music, sports, books, film and TV through the measurement of Awareness, Likeability and 11 additional personality based attributes such as "Influential" or "Social Media Savvy." Using these attributes, brands, talent and content developers can better evaluate a celebrity's public perception and overall endorsement value.

CONTRIBUTORS

Thank you to all the contributors to this report:

NIELSEN

Angela Talton – Chief Diversity Officer

Courtney Jones – Vice President, University Relations

Lara Colton – Senior Research Analyst, Client Services

Brian Campbell – Senior Research Executive

Daniel R. Koenig – Research Analyst

Monica Narvaez – Director, Hispanic Client Solutions

Tiffany Dorris – Associate Client Director, C&S Analytics, SABLE Midwest

Andrew Lucas – Associate Client Manager, SABLE Midwest

NIELSEN EXTERNAL ADVISORY COUNCIL SUB-COMMITTEE MEMBERS

Deborah Gray-Young – Managing Partner, D. Gray-Young, Inc.

ETHNIFACTS

Guy Garcia

Mike Lakusta

Awren Zemborain

ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers watch and buy. Nielsen's Watch segment provides media and advertising clients with Nielsen Total Audience measurement services for all devices on which content — video, audio and text — is consumed. The Buy segment offers consumer packaged goods manufacturers and retailers the industry's only global view of retail performance measurement. By integrating information from its Watch and Buy segments and other data sources, Nielsen also provides its clients with analytics that help improve performance. Nielsen, an S&P 500 company, 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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