FROM CONSUMERS
TO CREATORS
THE DIGITAL LIVES OF BLACK CONSUMERS
FOREWORD

Every so often, life presents you with an opportunity to make impactful change on the world around you. For Nielsen's State of the African American Consumer Diverse Intelligence Series, this presents our eighth such opportunity. For the last seven years, we have shared with brands, advertisers and communities strategies on how best to attract, connect with and retain the rapidly growing Black consumer base. As consumer packaged goods giants, global streaming behemoths and massive media companies barrel toward pure conglomerate mergers, the lines between traditionally distinct industries are often blurred. Virtual actions are no longer distinct from in real life behavior. This influences and changes not only how consumers expect brands to do business, but also how they expect to see themselves represented, both “IRL” and in the digital marketplace. African Americans are no longer content being thought of simply as voracious consumers; they want to be known for the influence they’ve always possessed, as the creators they’ve always been.

So we detour slightly from our historic model of exclusively sharing insights on what motivates and drives Blacks’ consumption habits and purchasing behaviors and have expanded the report to include resources on how to find the influencers and professionals who can keep brands relevant with this increasingly tech-savvy demographic.

Now more than ever, the opportunities presented to African Americans through digital democratization have solidified this segment’s position as harbingers of cultural expression, content and creativity. Because “business as usual” will no longer be the norm, we've gone to new lengths to curate findings that will better assist you in facilitating, understanding and most importantly collaborating with African American consumers for business growth and mutual satisfaction.
EXECUTIVE SUMMARY

African Americans’ cultural and economic impact on America is undeniable. Black influence on mainstream America and popular culture is ingrained in every facet of American life, including music, fashion and sports, as well as social awareness and justice. More recently, this influence has been intensified by Black consumers’ participation in the digital universe and their adoption of social media and technology platforms. African Americans, long understood to be voracious and highly sought-after consumers, are now identifying gaps in entertainment, product delivery and services, and they are using technology to bypass barriers to entry and fill those gaps. Black Americans are leveraging digital know-how and open-source innovation to critique, connect, collaborate and create everything from new platforms and content to new product categories and successful competitors in saturated markets that have failed to understand their unique needs. Smart marketers are seeing this shift from consumer to creator and are building new inroads to this culturally conscious and digitally native consumer segment, often finding these consumers’ digital lives are the most effective point of engagement.

Acutely aware of Black history and bounding toward a technology-enabled future, African Americans are leaning into the democratization of digital platforms to circumvent old standards of information and idea sharing as they demand more reciprocal commerce. While African Americans have had enormous influence in culture and the arts for many generations, advances in technology are enabling far greater numbers of talented individuals to reach a broader audience. At the nexus of digital interconnection, entrepreneurship and an unyielding desire to control and share their own images and ideas, African Americans are using the media-verse as a springboard for content creators to become decision makers.

Writer, producer, actress, and CoverGirl pitchwoman Issa Rae recently told Fast Company, “This is such a great time period for young voices of color. People are finally listening. It feels like we’re taking the reins, and we’re not letting go. We’re realizing how powerful our voices are. The content has always been there. It’s just the trust hasn’t.”

Thanks to their relative youth compared with the rest of the population, and the plethora of interconnected digital devices and social-media platforms available to them, African Americans are finding and redefining personal and collective vehicles to express their views, needs and truth in their own way and on their own terms. The borderless terrain of the digital ecosystem and the Black community’s colossal presence in it are amplifying their already-pervasive impact on culture, breaking down barriers in driving social change, and most importantly for brands, driving the success or failure of television seasons and entire product categories.

The mainstream ascendance of hip-hop and R&B has launched a new vanguard of cross-cultural superstars whose streaming sales have rescued the music industry. According to the Nielsen Music Mid-Year 2018 Report, U.S. music consumption rose 18.4% 2018, mostly due to streaming-music sales, which were dominated by Top 10 R&B and hip-hop artists such as Drake, Kendrick Lamar, The Weeknd, Migos, Cardi B and XXXTentacion. Drake’s singles “God’s Plan” and “Nice Work for What” spent a combined 18 of the first 26 weeks of the year at No. 1 on the Billboard Hot 100, with 1.12 billion and 484 million on-demand streams, respectively. In 2017, rap music, fueled almost exclusively by Black artists, surpassed rock as the No. 1 genre of music in America. This is the first time rock ‘n’ roll has been unseated as America’s musical go-to in the history of the music charts.
Black influence is not limited to music. Black consumers are speaking directly to brands in unprecedented ways and achieving headline-making results. Over the past year, popular brands witnessed the power of Black Twitter and the brand impact of socially conscious Black consumers. Through social media, Black consumers have brokered a seat at the table and are demanding that brands and marketers speak to them in ways that resonate culturally and experientially—if these brands want their business. And with African Americans spending $1.3 trillion annually, brands have a lot to lose. Agreeing at double the rate of non-Hispanic Whites that they feel “really good about seeing celebrities in the media that share my ethnic background,” African Americans are tuning in to TV shows and movies featuring Black actors and logging on to high-profile websites like “Black Girl Nerds,” where Black intellectual creativity is celebrated and encouraged. A space has been created where nuanced Black representation has become increasingly more prevalent. It is in these spaces that African Americans can extol the virtues of these nuances, where intellects, technical obsessions and even nerdiness are now being celebrated.

Armed with qualitative data about the value and power of their collective presence in the marketplace, Black consumers are taking a “for us, by us” approach to building new platforms and business models, thereby creating entirely new Black financial ecosystems in and out of entertainment. Jaden Smith, son of actor Will Smith, is part of a new generation of Twitter-wielding multiplatform African American artists who are fearlessly mixing and merging genres and causes, from hip-hop and eco-consciousness to rock music and skateboarding culture. Smith, like R&B artist and reality show star Ray J, are also using their high-profile status online to create and promote successful businesses in the digital economy. Smith is running an eco-minded plastics-recycling company he founded with his dad, and Ray J’s electric-transportation start-up, now officially known as Raycon, just signed a $31 million distribution deal to take the innovation global. And it’s not just celebrities creating these financial ecosystems. Black Millennial-owned and -operated lifestyle platform Blavity celebrated its four-year anniversary with more than 7 million unique monthly visitors and a $6.5 million Series A round with Google Ventures.

African American shopping habits also are shifting in the digital age. The Selig Center estimates that the nation’s African American buying power will rise to $1.54 trillion by 2022 (a five-year estimated growth of 21%, vs. 18% for non-Hispanic Whites), driven by inspirational gains in population, income and education. Working-parent lifestyles have led African Americans to over-index against the total U.S. population for dollars per buyer spent online in a majority of grocery categories, including refrigerated pizza and frankfurters, baby food and frozen vegetables. African Americans on the go are also looking for quick and efficient mealtime solutions in the form of prepackaged meals and home delivery meal kits such as Hello Fresh and Blue Apron.

Young African Americans are entering an information-based, technology-driven marketplace with an unprecedented sense of community, economic consciousness and digital-native know-how. Sixty-one percent of African Americans agree that they enjoy learning about technology or electronics products from others (14% higher than for non-Hispanic Whites), and 54% agree they enjoy reading about new technology products (8% higher). African Americans exceed the reach of non-Hispanics for social networking on a smartphone (81%), internet-connected TV devices (75%) and streaming audio on a tablet (75%), and they also over-index for total time spent on TV, radio, smartphone and tablet. They are voracious consumers of streaming video and podcasts, both of which have become important sources of African American entertainment. They are second only to Asian Americans in playing video games, which implies a $36 billion opportunity for games that speak authentically to the African American experience. If recent history is prologue, that gap may very well be getting filled by the tech-savvy Black digital elite at this very moment. More and more, Black Americans, particularly Millennials, are using technology not only to be seen and heard, but also to get paid in the same arenas where traditionally they have only been consumers.
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SECTION I
DEMOGRAPHICS, GROWTH
AND ADVANCEMENTS DRIVE
DIGITAL ENGAGEMENT
YOUTH, GROWTH, AND BORDERLESS ACCESS

Digital tools and social media are enabling African Americans to express and celebrate their cultural identity in untethered and highly amplified ways. As marketers develop campaigns, the cultural influences that make up African American identity should be embraced and celebrated, and the far-reaching influence of African Americans on mainstream culture must be recognized and represented.

This cannot be reiterated enough: Black consumer brand loyalty is contingent upon a brand’s perception as authentic, culturally relevant, socially conscious and responsible. In fact, 43% of African Americans between the ages of 18 and 34 and 41% of those aged 35 or older say they expect the brands they buy to support social causes, 21% and 23% more than their non-Hispanic White counterparts, respectively. Moreover, Black consumers’ brand preferences are increasingly becoming mainstream choices, which illustrates that the investment in connecting with Black consumers can often yield sizable general-market returns.

41% of African Americans aged 35+ and 38% of African Americans aged 18-34 agree they expect the brands they buy to support social causes.
With a mean age of 34.02, African Americans are the second-youngest racial or ethnic group. More than a quarter (28%) of African Americans are still under the age of 18, while another 26% are Millennials, ages 18–34. This means that over half (54%) of all African Americans have lived their entire life in the digital age, making the digital universe and its conveniences central to the lives of the majority of African Americans.

More than 47.4 million African Americans, comprising 14% of the total U.S. population, are living in the U.S. today. The geographic centralization that exists in the physical world, with the majority of African Americans living in the Southern U.S., does not exist in the virtual world, leaving no physical barriers to connecting culturally. The digital universe gives African Americans unfettered and borderless exposure to, and influence over, the latest ideas, trends and social influencers shaping America today, regardless of where they may reside.
ADVANCING EDUCATION AND THE IMPORTANCE OF ROLE MODELS

Although there is still an educational gap for the African American population, college enrollment is rising among recent African American high school graduates at a growth rate higher than for non-Hispanic Whites (11% vs. 1%). Sixty-three percent of African American high school students enrolled directly in college between 2014 and 2016, up from the 55% who enrolled between 2006 and 2008. With 28% of African Americans currently under the age of 18 and approaching college enrollment years, their enrollment in degree-granting institutions is expected to increase 20% between 2015 and 2026, compared with only a 1% increase for Whites.*

The increased visibility of smart, educated African Americans, both on screen and in real life, serves to inspire, encourage and normalize being a Black nerd or “blerd” for Black children and adults alike. Young Black women like Mareena Robinson Snowden, who recently became the first Black woman to earn a Ph.D. in nuclear engineering from the Massachusetts Institute of Technology (MIT), and young Black men like Brandon Frame, creator of BlackManCan.org and director of business partnerships and program development for Hartford’s High School, Inc. program, can inspire others to follow in their footsteps.

High-profile brainy websites are coming to prominence and filling the need for inspiration as well. The popular Black Girl Nerds site, created by Jamie Broadnax in 2012, describes itself as “a place for women of color with various eccentricities to express themselves freely and embrace who they are. It’s for ALL women who are just as nerdy as we are and the men who love and appreciate us.” The site further says, “It is not often that you will find an unsuccessful nerd.”

The Hidden Genius Project, an organization working to increase representation of young Black men in the tech industry, received a $1 million grant last year from Google with the goal of advancing this segment of the workforce into STEM careers. The Oakland-based group mentors Black boys and equips them with the skills they need to succeed in tech fields. Other efforts, like the recently created Vector 90 project in South Central L.A., brainchild of entrepreneur and rapper Nipsey Hussle, are working to bridge the gap between Silicon Valley and communities of color by bringing professional co-working space and STEM opportunities to local youth.

As more young Black boys and girls are offered opportunities in the digital world where they can find inspiration and a creative outlet for their intellectual pursuits, the world will benefit from this surging pool of talent.

As a result of African Americans’ increasing population, educational attainment and entrepreneurship, as well as a younger population aging into the workforce, the Selig Center estimates that the nation’s Black buying power will rise from $1.3 trillion in 2017 to $1.54 trillion in 2022 (21% estimated growth, vs. 20% for the total U.S. and 18% for non-Hispanic Whites). This estimate for 2022 reflects a 5.4% increase over last year’s estimate of reaching $1.46 trillion in 2021. The 108% increase in Black buying power between 2000 and 2017 outperformed the 87% rise in White buying power and the 97% increase in total buying power (all races combined) during the same period.
SECTION I TAKEAWAYS

1. More than 47.4 million African Americans, comprising 14% of the total U.S. population, are living in the U.S. today. Despite the fact that the majority live in the south, the digital universe gives African Americans unfettered and borderless exposure to, and influence over, the latest ideas, trends and social influencers shaping America today.

2. Over half (54%) of all African Americans are age 34 and younger, meaning the majority have lived their entire life in the digital age making the digital universe and its conveniences central to their lives.

3. Increased visibility of well-educated African Americans, both on screen and in real life, as well as the emergence of high-profile African American-focused “brainy” websites have served as one means to inspire and encourage educational attainment in Black children. Non-profits such as The Hidden Genius Project and Vector 90 are working to encourage STEM careers among communities of color. College enrollment among African American recent high school graduates rose 11% between 2014 and 2016 and their enrollment in degree-granting institutions is expected to increase 20% between 2015 and 2026.

4. As a result of African Americans’ increasing population, educational attainment and entrepreneurship, as well as a younger population aging into the workforce, the Selig Center estimates that the nation’s Black buying power will rise from $1.3 trillion in 2017 to $1.54 trillion in 2022. The 108% increase in Black buying power between 2000 and 2017 outperformed the 87% rise in White buying power and the 97% increase in total buying power (all races combined) during the same period.
SECTION II
CULTURALLY CONNECTED DIGITAL POWER AND INFLUENCE

At Nielsen, data drives everything we do—even art. That’s why we used real data to create this image.
Digital media has changed how African Americans consume art and entertainment and how they shop, communicate and even promote social justice. Passionate about being connected, Black Americans have adopted digital formats at a higher rate than the general population and have adapted the formats to provide a powerful platform to amplify their voices. The democratization of the digital world has also enabled African Americans to create, share and control their own content, including podcasts, music and film, whether used for entertainment, education or social awareness.

HIGHER DEVICE AND TECHNOLOGY OWNERSHIP

African Americans are on the cutting edge of household device ownership. Compared with the U.S. population as a whole and with non-Hispanic Whites, African Americans have higher household ownership of smartphones, tablets, gaming consoles, wireless headphones, smart TVs, smartwatches, smart speakers, internet-to-TV streaming devices and virtual-reality devices.

AFRICAN AMERICAN HOUSEHOLD DEVICE OWNERSHIP

SMARTPHONE
- Total Population: 90%
- African American: 90%
- Non-Hispanic White: 81%

TABLET
- Total Population: 68%
- African American: 63%
- Non-Hispanic White: 65%

GAMING CONSOLE
- Total Population: 66%
- African American: 46%
- Non-Hispanic White: 51%

WIRELESS HEADPHONE
(e.g., Apple AirPods, Beats Solo3)
- Total Population: 47%
- African American: 48%
- Non-Hispanic White: 30%

SMART TV
(e.g., LG B7A, Sony X900E)
- Total Population: 47%
- African American: 47%
- Non-Hispanic White: 42%

INTERNET-TO-TV STREAMING DEVICE
(e.g., Amazon Fire, Roku Ultra)
- Total Population: 40%
- African American: 40%
- Non-Hispanic White: 37%

SMART WATCH
(e.g., Fitbit Ionic, Apple Watch Series 3)
- Total Population: 28%
- African American: 28%
- Non-Hispanic White: 22%

VIRTUAL REALITY HEAD-MOUNTED DEVICE
(e.g., Google Cardboard, Oculus Rift)
- Total Population: 22%
- African American: 22%
- Non-Hispanic White: 11%

Read as: 90% of African Americans live in a household that owns a smartphone.
Source: MediaTech Trender Q1 2018
The majority (61%) of African American adults agree that they are fascinated by new technology (7% higher than the total population and 10% higher than non-Hispanic Whites). They are also 28% more likely than the total population and 44% more likely than non-Hispanic Whites to agree that they are the first of their friends and colleagues to try new technology products, and 31% and 46% more likely, respectively, to agree they like to have a lot of gadgets.

In addition to having higher device ownership, African Americans also use many types of technology more than either the total population or non-Hispanic Whites, including video and audio streaming, digital wallets, messaging websites, discovery and ideation websites, and voice assistants.
One of the factors influencing higher household ownership may be African Americans’ affinity for researching and sharing product recommendations and information. Sixty-one percent of African Americans agree they enjoy learning about technology or electronics products from others (14% higher than for non-Hispanic Whites), and 54% agree they enjoy reading about new technology products (8% higher). Additionally, 56% of African Americans agree that when they find a technology or electronics product they like, they typically recommend it to people they know (9% higher than for non-Hispanic Whites). They are also 36% more likely than non-Hispanic Whites to agree they give others advice when they are looking to buy technology or electronics products, and 33% more likely to agree they often take the opportunity to discuss their knowledge of technology or electronics products with others.

**VORACIOUS MEDIA CONSUMERS AND CREATORS**

African Americans remain voracious media consumers, but when converged with the access that digital advances enable, that fact is giving enterprising African Americans more control over the conversation as creators, not just consumers in the digital universe. In terms of time on device, TV is by far the bulk of time spent weekly, with over 42 hours spent on live TV and more than four hours spent on time-shifted TV. African Americans also spend upwards of 19 hours weekly on smartphone apps and internet (about three hours more than the total population), and they over-index for total time spent on TV, radio and smartphone.

African Americans over-index for all things done on a smartphone, with a higher reach for social networking (75%), video (66%) and audio streaming (45%) on their smartphones. They also spend more time listening to radio, with the average African American spending over 13 hours weekly listening to the radio. Savvy marketers looking to connect authentically with the African American population should be aware of these multi-platform media consumption behaviors.
AFRICAN AMERICAN MEDIA UNIVERSE

WEEKLY TIME SPENT ON A DEVICE

SOCIAL NETWORKING

- 4:04 Social Networking on a Smartphone
  - 3:58 Total Population

VIDEO CONTENT OR SCREENS

- 52:19 Total Use of Television
  - 38:46 Total Population

- 4:07 Time-Shifted TV
  - 4:13 Total Population

- 46:17 Live+Time-Shifted TV
  - 33:22 Total Population

MOBILE & COMPUTERS

- 19:25 App/Web on a Smartphone
  - 16:32 Total Population

- 2:01 Video Focused App/Web on a Smartphone
  - 1:07 Total Population

- 0:29 Streaming Audio on a Smartphone
  - 0:26 Total Population

WEEKLY REACH PERCENTAGE, 18+

<table>
<thead>
<tr>
<th></th>
<th>TOTAL POPULATION</th>
<th>AFRICAN AMERICAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Use of Television</td>
<td>91%</td>
<td>92%</td>
</tr>
<tr>
<td>Live+Time-Shifted TV</td>
<td>88%</td>
<td>90%</td>
</tr>
<tr>
<td>Time-Shifted TV</td>
<td>52%</td>
<td>52%</td>
</tr>
<tr>
<td>Radio</td>
<td>92%</td>
<td>92%</td>
</tr>
<tr>
<td>App/Web on a Smartphone</td>
<td>79%</td>
<td>81%</td>
</tr>
<tr>
<td>Video-focused app/web on a smart phone</td>
<td>58%</td>
<td>66%</td>
</tr>
<tr>
<td>Streaming Audio</td>
<td>43%</td>
<td>45%</td>
</tr>
<tr>
<td>Social Networking</td>
<td>73%</td>
<td>75%</td>
</tr>
</tbody>
</table>

Source: Nielsen Q1 2018 Nielsen Total Audience Report
AVID CONSUMERS OF A WIDE VARIETY OF DIGITAL CATEGORIES

African Americans spend their online time on a wide variety of apps and websites, making understanding where and how to make an authentic connection to them critical for those working to meet their needs. Though African Americans spend the most time on search engines, portals and communities, they over-index against total U.S. and non-Hispanic Whites by the most for entertainment sites (by 25% and 31% respectively), government and non-profit sites (by 26% and 29% respectively), financial services (by 22% and 23% respectively) and for telecom and internet services (by 21% and 22% respectively). In addition to using apps and websites to affect change and procure services, African Americans are also advancing their education and careers — these sites have a 60% reach within African Americans, as compared to 55% reach for both total U.S. and Non-Hispanic Whites, and Black consumers over-index both total U.S. and Non-Hispanic Whites by 14% and 15% respectively.

### DIGITAL CATEGORIES: WEEKLY TIME PER USER (HH:MM)

<table>
<thead>
<tr>
<th>Category</th>
<th>TOTAL U.S. HOUSEHOLDS</th>
<th>AFRICAN AMERICAN HOUSEHOLDS</th>
<th>NON-HISPANIC WHITE HOUSEHOLDS</th>
<th>INDEX: AFRICAN AMERICANS/TOTAL U.S.</th>
<th>INDEX: AFRICAN AMERICANS/NON-HISPANIC WHITES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Engines/Portals &amp; Communities</td>
<td>41:41</td>
<td>43:24</td>
<td>41:46</td>
<td>104</td>
<td>104</td>
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<tr>
<td>Entertainment</td>
<td>23:26</td>
<td>29:15</td>
<td>22:18</td>
<td>125</td>
<td>131</td>
</tr>
<tr>
<td>Computers &amp; Consumer Electronics</td>
<td>7:06</td>
<td>7:32</td>
<td>7:19</td>
<td>106</td>
<td>103</td>
</tr>
<tr>
<td>Telecom/Internet Services</td>
<td>9:38</td>
<td>11:38</td>
<td>9:33</td>
<td>121</td>
<td>122</td>
</tr>
<tr>
<td>Finance/Insurance/Investment</td>
<td>1:40</td>
<td>2:01</td>
<td>1:38</td>
<td>122</td>
<td>123</td>
</tr>
<tr>
<td>Family &amp; Lifestyles</td>
<td>3:09</td>
<td>3:21</td>
<td>3:09</td>
<td>106</td>
<td>107</td>
</tr>
<tr>
<td>Home &amp; Fashion</td>
<td>1:38</td>
<td>1:40</td>
<td>1:38</td>
<td>102</td>
<td>102</td>
</tr>
<tr>
<td>Travel</td>
<td>1:37</td>
<td>1:56</td>
<td>1:36</td>
<td>119</td>
<td>120</td>
</tr>
<tr>
<td>Education &amp; Careers</td>
<td>1:25</td>
<td>1:36</td>
<td>1:24</td>
<td>114</td>
<td>115</td>
</tr>
<tr>
<td>Government &amp; Non-Profit</td>
<td>0:30</td>
<td>0:38</td>
<td>0:30</td>
<td>126</td>
<td>129</td>
</tr>
<tr>
<td>Automotive</td>
<td>0:33</td>
<td>0:37</td>
<td>0:32</td>
<td>113</td>
<td>116</td>
</tr>
</tbody>
</table>

One of the critical ways African Americans spend time on the internet is online shopping. African Americans over-index against the total U.S. for dollars per buyer spent online in the majority of grocery categories. Eighty percent of African Americans agree that the internet is a great way to gather information on products and services they are considering purchasing, and 75% agree it’s a great way to actually buy products. The result is dollars per buyer spent by African Americans online are growing in the majority of grocery categories.

Some of the categories where African Americans over-index the most against non-Hispanic Whites for dollars per buyer spent online are men's toiletries (by 47%), children's colognes (by 46%), diet aids (by 42%) and feminine hygiene (by 35%). Children's colognes and feminine hygiene are also the categories with the highest year-over-year growth (234% and 116%, respectively) for African American online dollars per buyer. The other highest-growth category in terms of African American online dollars per buyer is ethnic health and beauty aids, which grew 86% in the last year.

### DOLLARS PER BUYER SPENT ONLINE
#### NON-FOOD GROCERY

<table>
<thead>
<tr>
<th></th>
<th>AFRICAN AMERICAN ONLINE SHOPPING</th>
<th>INDEX: AFRICAN AMERICAN/TOTAL U.S.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disposable Diapers</td>
<td>$79.87</td>
<td>105</td>
</tr>
<tr>
<td>Diet Aids</td>
<td>$70.93</td>
<td>142</td>
</tr>
<tr>
<td>Baby Needs</td>
<td>$65.75</td>
<td>125</td>
</tr>
<tr>
<td>Women's Fragrances</td>
<td>$55.63</td>
<td>125</td>
</tr>
<tr>
<td>Medications/Remedies</td>
<td>$48.13</td>
<td>102</td>
</tr>
</tbody>
</table>

Source: Homescan, Total Online Shopping, 52WE 4.14.18 vs. YA

### HIGHEST YEAR OVER YEAR GROWTH IN ONLINE SPEND
#### NON-FOOD GROCERY

<table>
<thead>
<tr>
<th></th>
<th>YEAR OVER YEAR GROWTH ('16-'17 TO '17-'18)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Children's Cologne</td>
<td>234%</td>
</tr>
<tr>
<td>Feminine Hygiene</td>
<td>116%</td>
</tr>
<tr>
<td>Ethnic Hair and Beauty Aids</td>
<td>86%</td>
</tr>
<tr>
<td>Household Cleaners</td>
<td>54%</td>
</tr>
<tr>
<td>Sanitary Protection</td>
<td>46%</td>
</tr>
</tbody>
</table>

Source: Homescan, Total Online Shopping, 52WE 4.14.18 vs. YA
When it comes to food items, African Americans over-index the most against non-Hispanic Whites in terms of dollars per buyer spent online on refrigerated pizza (by 190%), beer (by 56%), frozen novelties (by 29%), ice cream (by 29%) and frozen unprepared meats and seafood (by 28%). Spending online by African Americans on those categories has grown 275%, 89%, 81%, 68% and 10%, respectively, in the last year. Baby food also has grown tremendously, with dollars per buyer spent online having increased by 120% in the last year. With 68% of African Americans agreeing they would rather prepare a meal than eat in a restaurant and 74% agreeing that during a given week, they cook meals frequently, while 62% agree they are so busy they often can't finish everything they need to in a day, it is no surprise that sales of quick-and-easy meal ingredients such as refrigerated frankfurters, frozen vegetables and refrigerated dough products are also on the rise.

### DOLLARS PER BUYER SPENT ONLINE

#### FOOD GROCERY

<table>
<thead>
<tr>
<th>Item</th>
<th>African American Online Shopping</th>
<th>Index: African American/Total U.S.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baby Food</td>
<td>$77.31</td>
<td>104</td>
</tr>
<tr>
<td>Beer</td>
<td>$64.69</td>
<td>156</td>
</tr>
<tr>
<td>Refrigerated Pizza</td>
<td>$57.51</td>
<td>290</td>
</tr>
<tr>
<td>Frozen Unprepared Meats and Seafood</td>
<td>$30.65</td>
<td>128</td>
</tr>
<tr>
<td>Carbonated Beverages</td>
<td>$27.20</td>
<td>104</td>
</tr>
</tbody>
</table>

Source: Homescan, Total Online Shopping, 52WE 4.14.18 vs. YA

### HIGHEST YEAR OVER YEAR GROWTH IN ONLINE SPEND

#### FOOD GROCERY

<table>
<thead>
<tr>
<th>Item</th>
<th>Year over Year Growth ('16-'17 to '17-'18)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refrigerated Pizza</td>
<td>275%</td>
</tr>
<tr>
<td>Baby Food</td>
<td>120%</td>
</tr>
<tr>
<td>Beer</td>
<td>89%</td>
</tr>
<tr>
<td>Frozen Novelties</td>
<td>81%</td>
</tr>
<tr>
<td>Refrigerated Dough Products</td>
<td>70%</td>
</tr>
</tbody>
</table>

Source: Homescan, Total Online Shopping, 52WE 4.14.18 vs. YA
MEAL KITS: A GROWING SOLUTION FOR BUSY AFRICAN AMERICANS

With African Americans searching for quick efficient mealtime solutions, meal kits are showing healthy growth among African Americans. Home delivery options such as HelloFresh and Blue Apron, as well as pre-packaged grocery store options are all popular choices. Seventy-five percent of African Americans agree they prefer cooking with fresh food and 66% agree that dinners in their home are usually planned ahead of time. So, with easy online ordering options and subscription packages, as well as a variety of delivery options, meal kits offer a convenient way to cook quick but fresh meals at home. African Americans over-index against non-Hispanic Whites by 21% for agreeing they would consider trying meal kits (47% to 39%). Some of African Americans’ most common determinants for buying meal kits are saving time on grocery shopping (40% vs. 29% for non-Hispanic Whites), saving time on meal prep and cooking (43% vs 34%), saving time on meal planning (42% vs. 33%), and the ability to ship to their home (36% vs 33%). Continued innovation in the meal kit industry in providing healthy and economical convenience solutions to busy African Americans will continue to spur growth in this industry.

75% OF AFRICAN AMERICANS AGREE THEY PREFER COOKING WITH FRESH FOOD
VIDEO STREAMING: A PRIMARY SOURCE OF ENTERTAINMENT AND CULTURAL CONNECTION

Video streaming is becoming a primary source of African American entertainment, as African Americans stream videos more frequently on all devices than the total population and non-Hispanic Whites. Looking specifically at streaming on phones, African Americans use their smartphones to watch video content more frequently than non-Hispanic Whites and the total population. Once a week or more often, 74% of African Americans use their smartphones to watch video content on social-networking sites (vs. 55% of Non-Hispanic Whites and 62% of the total population), 78% do so on video-streaming services (vs. 49% and 60%), 62% on discovery/ideation websites such as Pinterest and Instagram (vs. 39% and 45%), and 55% on other platforms (vs. 31% and 40%).

VIDEO STREAMING DEVICES: ONCE A WEEK OR MORE OFTEN

Source: MediaTech Trender Q1 2018
Not only are African Americans top consumers of streaming video, they are also a major force in creative content. U.S. consumers use Netflix to stream video content more than any other streaming video on-demand (SVOD) platform, and Netflix is making a big investment in Black content. The Obamas inked a multiyear contract with Netflix to produce series and films under their company Higher Ground Productions. Netflix also has a multiyear content deal, valued at $100 million, with award-winning show creator Shonda Rhimes. Actor Tiffany Haddish and directors Spike Lee and Ava DuVernay are other Black content creators working with Netflix.

Meanwhile, in an effort to compete with Netflix, Amazon has signed a deal with Jordan Peele, the writer and director of the hit film Get Out, to get the first option on his Monkeypaw Production company ideas for television series, and Apple has signed a multiyear content deal with Oprah to “create original programs that embrace her incomparable ability to connect with audiences around the world” (quoting Apple’s announcement). Notably, all of these African American creators have developed content that provides prominent roles for Black actors. It seems that major digital platforms are betting that authentic Black storytelling is the key to winning viewers and platform loyalty.

The influence of African American–created content is having a profound effect on the mainstream, as evidenced by a recent Nielsen analysis of TV viewership, in which shows with a predominantly Black cast or a storyline focused on a Black character, such as Black-ish, How to Get Away With Murder and This Is Us, drew substantial non-Black viewership. Further, African American actors like Anthony Anderson, Viola Davis, Taraji P. Henson and Tracee Ellis Ross have broad appeal with general audiences (receiving 82, 81, 80 and 77 points, respectively, on Nielsen’s N-Score). Netflix and others are betting that these trends will hold true for their original content and their performers as well.

### Mainstream Appeal of On-screen Diversity

<table>
<thead>
<tr>
<th>Originator</th>
<th>Program</th>
<th>Non-Hispanic White</th>
<th>Non-Hispanic Black</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC</td>
<td>Black-ish</td>
<td>58%</td>
<td>28%</td>
</tr>
<tr>
<td>ABC</td>
<td>How To Get Away With Murder</td>
<td>58%</td>
<td>31%</td>
</tr>
<tr>
<td>Fox</td>
<td>Empire</td>
<td>25%</td>
<td>61%</td>
</tr>
<tr>
<td>FX</td>
<td>Atlanta</td>
<td>27%</td>
<td>51%</td>
</tr>
<tr>
<td>NBC</td>
<td>This Is Us</td>
<td>79%</td>
<td>10%</td>
</tr>
<tr>
<td>HBO Prime</td>
<td>Westworld</td>
<td>76%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Read as: The audience of This Is Us is 79% non-Hispanic White.

**LEADERSUP**

From powerful and culturally relevant storytelling to effective marketing, multicultural consumption rates of digital and streaming media demand that companies focus on thriving in a New American Economy: one that is led by multicultural consumers. Though some companies understand this charge they are still hard pressed to find solutions that help them to operationalize their commitments. But there are organizations who can help identify resources. LeadersUp is one such organization that works with businesses and corporations to identify, source, and train young adults from under-utilized communities that can contribute important talent and perspective.

> "SMART BRANDS ARE ESTABLISHING PARTNERSHIPS AND STRATEGIC ALLIANCES THAT CAN PERMANENTLY EXTEND THEIR REACH BY INVESTING IN DEVELOPING A DIVERSE PIPELINE OF TALENT THAT WILL BE ABLE TO MEET THEIR CURRENT AND FUTURE NEEDS."

**JEFFERY WALLACE**
President & CEO, LeadersUp

“Watershed multicultural content including those shared on these pages have activated unprecedented engagement and spending on record breaking productions which point to the profit expansion and consumer loyalty potential that stems from intentional inclusion of overwhelmingly underrepresented media content.”

**BLEBRITY**

There is no mobile gaming app on the market celebrating the Black experience with the popularity of Webby Award winning mobile game, BLEBRITY. Co-created by actor, activist, and entrepreneur Jesse Williams and entrepreneur and Emmy Award winning conceptual artist Glenn Kaino, BLEBRITY is a charades-inspired mobile game that curates a hilarious dose of Black pop cultural trivia.

According to Williams, he saw Black culture as a dominating force in entertainment, sports, and the arts, but without any agency in the digital realm. So, he and friend/collaborator Kaino, decided to create an app for, by and about the community.

With that in mind, the team chose to launch BLEBRITY at the 2017 AfroTech Conference, and with categories like Momma Phrases, #BlackTwitter, Bad and Bougie, Soul Food and Excuses to Get Off the Phone, BLEBRITY shot to #1 on the iTunes AppStore in two categories and was selected as “Game of the Day” before being featured on outlets like ABC’s The View, Vice and Complex. Williams and Kaino have boldly stepped into the digital gaming ring speaking to the Black consumer audience in an authentic, creative voice. The game’s global popularity is growing fast, with fans submitting gameplay videos from around the world and viral social posts from famous users including Tiffany Haddish, Usher, Yvonne Orji and Issa Rae.
PODCASTS: CREATING A COMMON INTEREST COMMUNITY

The ability to inexpensively create a podcast and attract a microtargeted community with common interests has created an explosive medium to reach African American audiences. African American engagement with podcasts increased dramatically between 2014 and 2017. The number of African Americans ages 18 and older who listened to a podcast on any device in the past 30 days rose from 2.12 million to 3.60 million (70% growth) during that period. The increased number of users resulted in the African American share of total U.S. podcast listeners rising from 19% to 22%.

Whether discussing the intersection of race with religion and spirituality or LGBT+ identity, the number of Black-hosted and -curated podcasts has grown exponentially. Hosts are sharing experiences and discussing wide-ranging topics including politics, race, relationships, pop culture, beauty, fashion and entertainment. The medium allows hosts the freedom to create their own unfiltered space, free from the need for code switching (the need to alter language in an effort to connect with a broader audience) and the limitations of the mainstream media. Listeners either get it or they don’t, which typically creates an intimate feeling of cultural connection and attracts an authentic audience. This authenticity is an especially important element in the digital space and more specifically with podcasts, which are known to cater to the diversity of interests within the Black community such as Black LGBT+ community members, Afro-Latinos and Caribbeans, Black Muslims and much, much more.

The portability and mobility of smartphones makes them a centerpiece of podcast usage. In 2017, 2.55 million African Americans used smartphones to watch, listen to or download a podcast in the preceding 30 days (an increase of 114% since 2014), compared with only 1.04 million who used computers, 691,000 who used tablets and 248,000 who used other devices.

*Source: Nielsen Scarborough, Release 2, 2014-2017*
SOCIAL NETWORKING AT CENTER STAGE

African Americans are not only frequent users of social media, but also have helped build social media platforms like Twitter into the giants they are today by adopting and adapting them to their needs. Social networking has tremendous reach among African Americans, with 81% of African Americans engaging on a smartphone, 43% on a tablet and 13% on a computer, for a total time spent on social media of 44 minutes per day, roughly equivalent to the total population.

Looking specifically at mobile apps, Facebook, Instagram, Twitter and LinkedIn have higher reach among African American adults than total U.S. adults. Facebook and Instagram are the social-media sites with the broadest mobile reach among African Americans, as well as the greatest length of time spent on the site.

African Americans are also using social media as a platform for content creation, and many have turned their insta-stories into big business, including entertainment contracts and endorsement deals. For example, Kash Doll released a remix of Junior Mafia’s track “Get Money” on social media on a whim, and the attention it received caught the attention of Chicago rapper Chief Keef, which led to stage and recording gigs. Since then, she has released her debut project Keisha vs. Kash Doll to critical success. She and other popular African American social-media stars, such as LaLa Milan, Blame It on Kway, Jess Hilarious, Kendall Kyndall and Amara Le Negra, were recently honored at this year’s BET Social Awards.


AVERAGE TIME SPENT PER MEDIA USER

#BLACKTWITTER AS A PLATFORM FOR CULTURAL IDENTITY

The affinity for personal connection and cultural interaction makes African Americans the most likely racial or ethnic group to get their news from social media, as well as the most likely group to use Twitter. Thus, the rise of Black Twitter has been a natural evolution. Black Twitter isn’t merely a series of hashtags or a subgroup on Twitter; it is a platform for African Americans to mobilize Black culture and identity, to speak out against injustice, to cover issues affecting their community, and to create social change. Extending beyond just news and activism, Black Twitter covers entertainment, humor and all sorts of relatable content. It has made hashtags including #blackgirlmagic, #growingupblack and #askrachel go viral.

Approximately 28% of Twitter’s 67 million users are African American (double this segment’s 14% share of the total population), and 40% of African Americans are on Twitter. Of the 19 million African Americans on Twitter, 9.3 million (or 20% of all African Americans) are on Black Twitter.

BLACKS ON TWITTER VS. BLACK TWITTER

<table>
<thead>
<tr>
<th>TOTAL TWITTER USERS</th>
<th>AFRICAN AMERICAN TWITTER USERS</th>
<th>AFRICAN AMERICAN #BLACKTWITTER USERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>67 MILLION</td>
<td>19 MILLION</td>
<td>9.3 MILLION</td>
</tr>
</tbody>
</table>

Black Twitter has become such an influential and powerful tool that in 2017, Twitter and BET, eager to understand more about this growing community, teamed up to launch a comprehensive study about the phenomenon. Twitter and BET have shared with Nielsen the way they describe and segment Black Twitter, as well as some of its accomplishments and tips on how brands can successfully enter the space. This section is an amalgamation of that study and supporting Nielsen data and insights.
Dr. Meredith Clark, an assistant professor of media studies at the University of Virginia, whose dissertation on Black Twitter landed her on the Root 100, the news site’s list of the most influential African Americans in the country, described Black Twitter as “a digital safe space where Black people exchange ideas and opinions that are centered on the Black experience, where all dialogue is unapologetically black, and is exclusive to things that impact the black community.”

Lanae Spruce, the manager of social media and digital entertainment for the National Museum of African American History and Culture, identifies Twitter’s format as a reason for African Americans’ high engagement rate. The previous upper limit of 140 characters per tweet (doubled to 280 over the past year) is similar to the short call—abbreviations and shortened responses of geographical terms—used by Black people. The functions of retweeting, quoting and mentioning other users represent the response aspect, similar to church services, when the pastor or minister speaks and an “Amen” is given in response.

Whatever the reason for its success, Black Twitter has become a voice of the people and a digital family reunion, as well as a place to share accomplishments, hold people accountable and bring the popcorn, the wine and, of course, the “shade.”

Black Twitter isn’t merely a series of hashtags or a subgroup on Twitter; it is a platform for African Americans to mobilize Black culture and identity, to speak out against injustice, to cover issues affecting their community, and to create social change.

Black Twitter has several primary “neighborhoods” or usage segments, including activism, pop culture, TV, music, Black pride and Black church/religious culture. Black Twitter is the home of live, mainstream chatter that includes active conversations about popular cultural touchstones. It embraces critiques and praise for cultural representations and media agendas. Conversations can range from personal experiences to politicians and pop icons. Additionally, Black Twitter’s engagement with, and commentary on, television programming that speaks to the Black community or Black sensibilities allows people to feel a sense of direct connection with their favorite actors and shows and has transformed into “social TV.” Its commentary and appreciation of music also actively encourages fans to engage in conversation around genres like hip-hop, R&B, soul and jazz, thereby creating a discovery tool for music. Black Twitter is also a celebration of all things Black, or Black pride. It empowers Black users to revel in Black excellence, with a goal of unifying the Black community while strengthening the collective power of the Black diaspora. Black Twitter facilitates an exchange of viewpoints, attitudes and images that are centered on the Black experience. The conversation has an unflinching dedication to the complexities of Blackness. In terms of activism, Black Twitter has offered the opportunity and space where Black people can flex their political power and voice their opinions through the creation of movements borne on Twitter like #BlackLivesMatter. It’s an exchange of ideas driven by action, energy and emotion, and often creates the kind of instantaneous political awareness that can affect public discourse.
This online community, which filters the world through the Black experience, is doing more than just serving the Black community, driving popular culture or creating words that have made their way into the vernacular, like “lit” and “bae.” It has also been the birthplace of great social change for the country as a whole. Conversations on Black Twitter have led to advancements such as body cameras on police, heightened attention to the Flint water crisis, higher attendance at the 2017 Women’s March, and the birth of the #metoo movement.

### WHAT IT HAS ACHIEVED

<table>
<thead>
<tr>
<th>FORCED CONVERSATIONS</th>
<th>TO CELEBRATE</th>
<th>TO CHANGE POLICY</th>
<th>TO COURSE CORRECT BRANDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>#OSCARSSOWHITE</td>
<td>#WAKANDAFOREVER</td>
<td>#AIRBNBWHILEBLACK</td>
<td>#PAULASBESTDISHES</td>
</tr>
<tr>
<td>POLICE BODY CAMERAS</td>
<td>PANTENE GOLD SERIES</td>
<td>FLINT WATER CRISIS</td>
<td>BRAND</td>
</tr>
<tr>
<td>2017 WOMEN’S MARCH</td>
<td>SERENA WILLIAMS AND COLIN KAEPERNICK FOR NIKE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#METOO</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Additionally, 2015’s #OscarsSoWhite movement, created by Twitter user @ReignofApril, led to a significant change in the makeup of the board of the Academy of Motion Picture Arts and Sciences and launched a debate about the industry’s fidelity to representation and valuing of non-White contributions.
Using the viral campaign slogan #BringItHome, Tallahassee Mayor Andrew Gillum staged an upset in Florida’s Democratic 2018 primary for governor. The 39-year-old is the first African American to win either major party's nomination for statewide office in Florida, and the third top-of-ticket Black candidate in the United States to be nominated this year (along with Maryland’s Ben Jealous and Georgia’s Stacey Abrams).

Gillum’s campaign was outspent by his competitors – by tens of millions – but Black politicians are using grassroots campaign tactics, including social media and other digital formats. These formats resonate well with liberal progressive constituents that include African Americans, Hispanics, LGBT+ voters and a youthful internet generation of millennials and Gen Zers who make up a consequential voting base. Between June 1, 2018 and September 4, 2018 there were over 130,000 mentions of #bringithome, #gillumforgovernor and #gillum4governor, and 1.1 million mentions of @AndrewGillum.

Another primary election shocker driven in large part by a social media push occurred in Massachusetts: African American Boston City Councilwoman Ayanna Pressley unseated an incumbent running for his 11th term as Representative in an urban congressional district, and is now likely to become Massachusetts’ first African American woman in Congress. Turning a 13-point deficit at the polls the day before election day into a 17-point victory, Ayanna Pressley rallied her supporters around the #ChangeCantWait slogan to bring a fresh new face and perspective to a Democratic primary victory where she will have no Republican challenger in November.
TWITTER POWER OVER TV RATINGS

It is well established that TV programs with high social interaction have a more engaged audience, and spikes in conversation on Twitter during live programming signal that there is high engagement with the programming among the general viewing audience. In fact, the number of tweets during live programs stands as a bellwether for general audience engagement (both overall and minute by minute as programs unfold). Thus, agencies and advertisers can look to Twitter TV metrics as a part of the media-planning and buying process to identify shows with engaged audiences and, by extension, opportunities to increase ad memorability and sales outcomes.

Looking at the most-tweeted broadcast and cable TV shows, it’s easy to see that reality shows and dramas with diverse casts have the most engagement. *This Is Us, Scandal, Timeless, Grey’s Anatomy, The Walking Dead* and *Wynonna Earp* all have Black actors in lead roles.

### MOST TWEETED BROADCAST AND CABLE TV SHOWS

<table>
<thead>
<tr>
<th>BROADCAST NETWORK</th>
<th>PROGRAM NAME</th>
<th>PROGRAM/GENRE TYPE</th>
<th>TWITTER INTERACTIONS PER EPISODE (OVER 100K)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC</td>
<td>The Bachelor</td>
<td>Reality Series</td>
<td>441,155</td>
</tr>
<tr>
<td>ABC</td>
<td>The Bachelorette</td>
<td>Reality Series</td>
<td>208,208</td>
</tr>
<tr>
<td>NBC</td>
<td>THIS IS US</td>
<td>Comedy Series, Drama Series</td>
<td>160,856</td>
</tr>
<tr>
<td>ABC</td>
<td>SCANDAL</td>
<td>Drama Series</td>
<td>152,781</td>
</tr>
<tr>
<td>CW</td>
<td>Riverdale</td>
<td>Drama Series</td>
<td>144,019</td>
</tr>
<tr>
<td>NBC</td>
<td>THE VOICE</td>
<td>Reality Series</td>
<td>141,657</td>
</tr>
<tr>
<td>NBC</td>
<td>TIMELESS</td>
<td>Drama Series, Sci-Fi Series</td>
<td>135,172</td>
</tr>
<tr>
<td>ABC</td>
<td>GREY’S ANATOMY</td>
<td>Drama Series</td>
<td>129,896</td>
</tr>
<tr>
<td>CBS</td>
<td>Big Brother</td>
<td>Reality Series</td>
<td>125,241</td>
</tr>
<tr>
<td>FOX</td>
<td>The Four</td>
<td>Reality Series</td>
<td>123,233</td>
</tr>
<tr>
<td>ABC</td>
<td>American Idol</td>
<td>Reality Series</td>
<td>108,270</td>
</tr>
</tbody>
</table>


<table>
<thead>
<tr>
<th>CABLE NETWORK</th>
<th>PROGRAM NAME</th>
<th>PROGRAM/GENRE TYPE</th>
<th>TWITTER INTERACTIONS PER EPISODE (OVER 100K)</th>
</tr>
</thead>
<tbody>
<tr>
<td>VH1</td>
<td>RUPAUL’S DRAG RACE</td>
<td>Reality Series</td>
<td>152,517</td>
</tr>
<tr>
<td>VH1</td>
<td>RUPAUL’S DRAG RACE: ALL STARS</td>
<td>Reality Series</td>
<td>143,563</td>
</tr>
<tr>
<td>AMC</td>
<td>THE WALKING DEAD</td>
<td>Drama Series, Sci-Fi Series</td>
<td>141,113</td>
</tr>
<tr>
<td>SYFY</td>
<td>WYNONNA EARP</td>
<td>Drama Series, Sci-Fi Series, Docs &amp; Special Interests</td>
<td>125,185</td>
</tr>
</tbody>
</table>

BIG SCREEN ROLE MODELS

The growing number of African American roles in TV and film as well as on stage is influencing young African Americans. With African Americans agreeing at a rate of better than 2-to-1 vs. non-Hispanic Whites (+238%) that they feel “really good about seeing celebrities in the media that share their ethnic background,” the importance of successful role models in the spotlight is of paramount importance.

This year, 2018, will long be remembered for the cultural milestone film *Black Panther*, an aspirational and inspirational portrayal of Black culture that offers African Americans the opportunity to reexamine and reimagine their place in the world, with Wakanda emerging as a vision of what’s possible. The film recently crossed $700 million in domestic box office, making it the third film ever to top that mark. Currently with a global cumulative box office take of $1.35 billion to date, *Black Panther* not only represents a wildly successful movie with historic box office success, but also is a cultural watershed for young African Americans.

Role models in entertainment are increasingly becoming more prominent as the breakout performance of Letitia Wright as Shuri in *Black Panther* led to other high-profile, smart and capable Black female performances, including Storm Reid as the inquisitive Meg Murry in *A Wrinkle in Time*, Rihanna as an effortlessly cool hacker in *Ocean’s 8* (which also featured a brief performance from Nathanya Alexander as her younger but equally smart sister), and Lena Waithe as the tomboy gamer Aech/Helen in *Ready Player One*. Meanwhile, on Broadway, Black actor Noma Dumezweni wowed Broadway audiences and earned a Tony nomination with her portrayal of the wizarding brainiac Hermione in *Harry Potter and the Cursed Child*. Shining examples of Black women and men represented in entertainment as brainiacs can have an empowering impact on how Black youth view the possibilities for their futures.

AFRICAN AMERICANS AGREE AT A RATE OF 238% VS. NON-HISPANIC WHITES THAT THEY FEEL “REALLY GOOD ABOUT SEEING CELEBRITIES IN THE MEDIA THAT SHARE THEIR ETHNIC BACKGROUND”
MUSIC: R&B AND HIP-HOP TAKE THE LEAD

The influence of African American music on mainstream culture has had a rich history from the birth of gospel, rock 'n' roll and blues to the ascent last year of R&B and hip-hop to the summit of the music world. R&B and hip-hop are now decidedly mainstream. After surpassing rock last year as music's most consumed genre, R&B/hip-hop continues to grow, representing 31% of total album equivalent volume (album + Track Equivalent Albums [TEA] + audio and video Streaming Equivalent Albums [SEA]). R&B/Hip-Hop's share of total album equivalent volume has grown from 29%, while that of the next biggest genre, Rock, has dropped from 25% to 23%. Additionally, R&B/hip-hop now represents 36% of total on-demand streams, 38% of on-demand audio streams and 34% of on-demand video streams. The R&B/hip-hop domination has extended to radio, too. Among persons 18-49, the average quarter-hour audience share of Urban Contemporary stations has increased by 15% in the past four years.

African Americans spend 38 hours each week listening to music and $173 each year on purchased music, exceeding the total population, which averages 32 hours weekly and $156 annually. Additionally, in a typical week, African American music listeners listen to music on an average of four devices, versus 3.4 devices for the total population. African Americans spend 39% more than the total population on satellite radio (which is 11% of their total music spend), 57% more on physical music such as CDs and vinyl (22% of total spend) and 80% more on digital tracks and albums (13% of total spend).*

When it comes to the share of consumers using content platforms, radio is No. 1 for Black consumers. Ninety-two percent of Black consumers tune in to radio each week, averaging 13 hours and 32 minutes. However, 81% of Blacks use their smartphone as their main device for consuming audio content.

African Americans are also more likely than non-Hispanic White consumers to use smart speakers and audio-streaming services. Nineteen percent of Blacks versus 18% of Whites have a smart speaker in their household. Fifty-two percent of Black listeners use audio streaming services such as Spotify, iHeartRadio, TuneIn, Pandora, Apple Music, and Soundcloud, versus only 40% of Whites.

*Source: Nielsen Music 360, 2017
BLACK ARTISTS DOMINATE THE CHARTS

With the rise of R&B and hip-hop, Black artists are dominating Billboard’s Top 10 Artists list, holding seven positions during the first half of 2018. The Top 10 list based on streaming by on-demand audio has the same names, except Kanye West’s 1,242,652,000 streams edge out Eminem, meaning eight of those top 10 are Black.

TOP 10 BILLBOARD ARTISTS

<table>
<thead>
<tr>
<th>ARTIST</th>
<th>TOTAL ALBUM EQUIVALENT CONSUMPTION</th>
<th>ALBUM SALES</th>
<th>DIGITAL SONGS</th>
<th>STREAMING ON-DEMAND AUDIO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post Malone</td>
<td>2,625,000</td>
<td>324,000</td>
<td>2,030,000</td>
<td>3,146,425,000</td>
</tr>
<tr>
<td>Drake</td>
<td>2,474,000</td>
<td>71,000</td>
<td>1,999,000</td>
<td>3,305,326,000</td>
</tr>
<tr>
<td>Migos</td>
<td>1,470,000</td>
<td>112,000</td>
<td>900,000</td>
<td>1,903,286,000</td>
</tr>
<tr>
<td>XXXTentacion</td>
<td>1,416,000</td>
<td>70,000</td>
<td>651,000</td>
<td>1,920,710,000</td>
</tr>
<tr>
<td>J. Cole</td>
<td>1,339,000</td>
<td>288,000</td>
<td>303,000</td>
<td>1,530,900,000</td>
</tr>
<tr>
<td>Ed Sheeran</td>
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<td>338,000</td>
<td>1,926,000</td>
<td>1,104,168,000</td>
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<td>Kendrick Lamar</td>
<td>1,264,000</td>
<td>228,000</td>
<td>864,000</td>
<td>1,424,713,000</td>
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<td>Cardi B</td>
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<td>183,000</td>
<td>1,007,000</td>
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<td>500,000</td>
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<td>302,000</td>
<td>917,000</td>
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Source: Nielsen Midyear Music Report, 2018

MAJOR SUCCESSES FOR AFRICAN AMERICAN ARTISTS IN 2018 INCLUDE:

Drake’s singles “God’s Plan” and “Nice for What” spent a combined 18 of the first 26 weeks of the year at No. 1 on the Billboard Hot 100, with 1.12 billion and 484 million on-demand streams, respectively. The singles previewed Drake’s blockbuster album Scorpion, which features 25 tracks and includes a guest appearance by Jay-Z and a previously unreleased vocal by Michael Jackson. The day Drake dropped Scorpion, social-media comedian Shiggy posted an Instagram video dancing to the album track “In My Feelings” and dubbed it #DoTheShiggy. That challenge is credited with catapulting Drake’s track “In My Feelings” to No. 1 on the Billboard Hot 100 and contributed to the success of Scorpion, which broke the world record with 1 billion streams in a week. Shiggy’s original clip has racked up over 6.5 million views and counting, with Will Smith, Odell Beckham Jr., the Queer Eye cast and other celebrities joining in the dance challenge craze. The success of “In My Feelings” is a testament to the power of a viral social-media post and its potential to catapult a product and artist to even greater heights. Drake generated 3.3 billion on-demand streams through the first half of 2018 alone.

XXXTentacion’s album titled ? debuted at No. 1 on the Billboard 200, powered by over 159 million audio on-demand streams in its first week. Following the rapper’s death on June 18, sales of the album resurged to 94,000 units in album-equivalent consumption.
Kendrick Lamar’s all-star soundtrack to Black Panther has become the year’s fifth-most-consumed to date, with over 1 million album-equivalent units.

Cardi B’s debut album, Invasion of Privacy, made her the fifth female rapper ever to reach No. 1 on the Billboard 200 chart. The album’s rise was fueled by 202 million audio on-demand streams and over 102,000 in album-equivalent consumption.

Earlier this spring, Beyoncé became the first Black female headliner at Coachella and live-streamed her extensively choreographed 90-minute set on YouTube. The set, a tribute to the Black college and Black Greek experience, broke YouTube’s live-stream record for the festival and led to an 83% increase in sales of Beyoncé’s solo and Destiny’s Child catalogs. Beyoncé also joined forces with Jay-Z (as the Carters) on the album Everything Is Love, which debuted at No. 2 on the Billboard 200 with first-week volume of 123,000 units in total album-equivalent consumption after a two-day exclusive with Tidal. Lead single “Apes**t” was the set’s most streamed song, with 24.1 million U.S. streams in its first week.

THE INFLUENCE OF BLACK MUSIC ON THE MAINSTREAM IS CONTINUING ITS RICH TRADITION IN 2018. MARKETERS WOULD BE WISE TO UNDERSTAND AND ACTIVATE THE MYRIAD OF OPPORTUNITIES SURROUNDING THIS JUGGERNAUT.
GAMING: A MASSIVE CONNECTION VEHICLE TO YOUNG AFRICAN AMERICANS

With the relative youth of the African American population, gaming offers an important opportunity for marketers to connect with a young Black audience. Gaming revenues in the U.S. topped $36 billion in 2017, according to the Entertainment Software Association, versus $11 billion for the Hollywood box office over the same period. Gaming thus has firmly taken its place as a central vehicle of entertainment and an opportunity for savvy marketers to make authentic connections. African Americans make up a significant portion of U.S. gamers and are the second-likeliest ethnic group to play, after Asian Americans. Seventy-three percent (73%) of African Americans 13 and older are gamers, compared with 66% of the total population.

African Americans tend to play on fewer devices than the total population, with 64% of African American gamers using only one device, versus 48% of the total population of gamers. This focus on using only one gaming device is a change since 2017 and 2016. In those previous years, 48% of African Americans played on only one device (vs. 46% in 2017 and 42% in 2016 for the total population).
The majority (55%) of African American gamers prefer playing on a game console (vs. 49% of total gamers), while 31% prefer gaming on a mobile device (vs. 30% of the total population) and only 15% prefer a computer (vs. 21% of the total population). Looking forward at gaming systems they intend to buy, African Americans ages 13 and older are more likely than gamers as a whole to purchase the PlayStation 4, the Xbox One X, the Xbox One, and the Xbox One S.

Despite the large number of African American gamers, there is a lack of diversity and diverse stories within the games themselves and within gaming developers in the industry. Developers like Culture Shock Games and Dim Bulb Games are bringing in diverse voices to influence their games, including notable projects like We Are Chicago and Where the Water Tastes Like Wine, to make sure different demographics are accurately represented or are a part of the creative process. As African American tech CEO Dr. Paul Judge said, “Blacks are a creative people, and writing software is an art. Its creation is a near-pure translation of thought into value. Raw materials, land or money, which were historically difficult for African Americans to acquire, are not needed to write software. Open source and software-as-a-service create an environment that allows even more efficient creation of products and companies.”

One prominent African American seeking to take the lead in gaming is 22-year-old Delane Powell, founder and CEO of PlayVS, who just completed a $15 million funding round to bring e-sports to the high school level. His company partnered with the National Federation of State High School Associations (NFHS) to build out leagues, rules and other infrastructure around high school e-sports. Nearly 200 colleges and universities are actively recruiting for e-sports scholarships, but there is currently no infrastructure for high school e-sports. Delane’s company intends to change that by allowing students to play e-sports on behalf of their school all the way to the state championship level. In October, PlayVS will launch its inaugural season, bringing organized e-sports to more than 18 states and approximately 5 million students across 5,000 high schools.
SECTION II TAKEAWAYS

African Americans have higher household ownership of smartphones, tablets, gaming consoles, wireless headphones, smart TVs, smartwatches, smart speakers, internet-to-TV streaming devices and virtual-reality devices than both the total population and non-Hispanic Whites. They also use many types of technology more, including video and audio streaming, digital wallets, messaging websites, discovery and ideation websites, and voice assistants. African Americans have high affinity for reading about new technology products, learning about tech and electronics from others, and sharing product recommendations and information.

Marketers looking to connect authentically with the African American population must understand they are multi-platform media consumers, spending over 46 hours weekly watching TV, upwards of 19 hours weekly on smartphone apps and internet (~3 hours more than the total population), and over 13 hours weekly listening to the radio. African Americans over-index for their total time spent on TV and radio, as well as for all things done on a smartphone. They have higher reach for social networking (75%), video (66%) and audio streaming (45%) on their smartphones.

African Americans over-index against the total U.S. for dollars per buyer spent online in the majority of grocery categories. Some of the non-food categories where African Americans over-index the most against non-Hispanic Whites are men's toiletries, children's colognes, diet aids, and feminine hygiene. Children's colognes and feminine hygiene are also the categories with the highest year-over-year growth, along with ethnic health and beauty aids. In food, African Americans over-index the most on refrigerated pizza, beer, frozen novelties, ice cream, and frozen unprepared meats and seafood. Their spending online on those same categories, as well as for baby food, has grown tremendously in the last year. With their expressed need for quick efficient mealtime solutions, sales of meal kits are showing healthy growth.

African Americans are not only top content consumers, they are also becoming a major force in content creation. Netflix, Amazon, and Apple are all making big investments in Black content. A recent Nielsen analysis of TV viewership found that shows with a predominantly Black cast or a storyline focused on a Black character, drew substantial non-Black viewership and networks are betting that authentic Black storytelling is the key to winning viewers and platform loyalty. The most-tweeted broadcast and cable TV shows, the reality shows and dramas with Black casts and creators have the most Twitter conversations during live programming, and thus the highest engagement among the general viewing audience.

African American share of total U.S. podcast listeners is 22%. The number of African Americans ages 18 and older who listened to a podcast on any device in the past 30 days rose 70% (to 3.6 million) between 2014 and 2017. The ability to create a podcast has allowed the number of Black-hosted and -curated podcasts to grow exponentially as the medium allows hosts the freedom to create their own unfiltered, culturally connected space, free from the limitations of the mainstream media.

Social networking has tremendous reach among African Americans, with 81% of African Americans engaging on a smartphone, 43% on a tablet and 13% on a computer, for a total time spent on social media of 44 minutes per day. Facebook, Instagram, Twitter and LinkedIn mobile apps have higher reach among African American adults than total U.S. adults. African Americans are using social media as a platform for content creation, and many have turned their insta-stories into big business, including entertainment contracts and endorsement deals. Black politicians, like Andrew Gillum, are using social media to reach younger, more diverse voters at a fraction of the cost of more traditional campaigning methods.
Approximately 28% of Twitter’s users are African American, and 40% of African Americans (19 million) are on Twitter. Of those, 9.3 million (or 20% of all African Americans) are on Black Twitter, which is a platform for African Americans to mobilize Black culture and identity, to speak out against injustice, to cover issues affecting their community, and to create social change. Extending beyond just news and activism, Black Twitter covers entertainment, humor and all sorts of relatable content. But beyond just serving the Black community and driving popular culture, Black Twitter has also been the birthplace of great social change for the country as a whole, including having led to advancements such as body cameras on police, heightened attention to the Flint water crisis, frank discussions about representation in Hollywood, higher attendance at the 2017 Women’s March, and the birth of the #metoo movement. For brands that do it right, the rewards of connecting through Black Twitter can be enormous. But overlooking Black Twitter or sending out a misfired message can have lasting repercussions.

After surpassing rock last year as music’s most consumed genre, R&B/hip-hop continues to grow, now representing 31% of total album equivalent volume. Additionally, R&B/hip-hop represents 36% of total on-demand streams, 38% of on-demand audio streams and 34% of on-demand video streams. This domination has extended to radio as Black artists are dominating Billboard’s Top 10 Artists list, holding seven positions during the first half of 2018. In the Top 10 list based on streaming by on-demand audio, eight of the top 10 artists were Black.

Radio is #1, as 92% of Black consumers tune in to radio each week, averaging 13 hours and 32 minutes. African Americans spend 38 hours weekly listening to music and $173 each year on purchased music, exceeding the total population. In a typical week, African American music listeners listen to music on an average of four devices. They spend 39% more than the total population on satellite radio, 57% more on physical music such as CDs, and 80% more on digital tracks and albums.

Seventy-three percent (73%) of African Americans 13 and older are gamers. African Americans gamers tend to play on fewer devices than the total population, with 64% using only one device, and the majority (55%) preferring to play on a game console.

Despite the large number of African American gamers, there is a lack of diversity within the industry and within the games themselves, but developers like Culture Shock Games and Dim Bulb Games are trying to change that, as is Delane Powell, founder and CEO of PlayVS, who is bringing e-sports to the high school level.
CONCLUSION

Led by a youthful, tech-enabled population that sees no limits to their self-expression and ingenuity, African Americans are having an influence on the U.S. mainstream that is becoming ingrained in every facet of American life. Inspired by the rising visibility of Black artists in the music industry, on the silver screen and behind the camera, African Americans are using digital devices, social media and software apps in myriad ways to express their feelings and aspirations and transmit them across a global audience.

Astronomical record and streaming sales by R&B- and hip-hop-influenced artists have revitalized the music industry and cemented the dominance of hip-hop, rap and R&B as the leading cross-cultural music genres in America. At the same time, mega movie hits like Black Panther are elevating the visibility and reach of African American directors and movie stars to the front ranks of the entertainment industry and establishing a mass intercultural audience for Black-themed movies and entertainment.

African Americans are also forging ahead in education and buying power, which is projected to reach $1.54 trillion by 2022. They are over-indexing against non-Hispanic Whites in a variety of online-shopping categories, ranging from household cleaners and children's cologne to refrigerated pizza, frozen vegetables and for interest in purchasing meal kits.

African Americans are voracious consumers of digital media, social media, and video streaming, outpacing the rest of the population in hours spent weekly on smartphone apps and the internet. Along with a high propensity to seek out information about new technology products and share their digital interests with family and friends, they have an overall higher reach than the rest of the population for social networking on a smartphone, interconnected TV devices and streaming audio on a tablet.

As marketers develop campaigns, they should embrace and celebrate the vitality and intercultural fluidity of African American identity. In addition, the far-reaching influence of African Americans at the leading edge of American culture must be respected and understood in order to be activated.
METHODOLOGIES

**NIELSEN HOMESCAN PANEL DATA**
The Homescan national panel consists of a randomly dispersed sample of households that is intended to be representative of, and projectable to, the Total U.S. market. Panel members use hand-held scanners and/or a mobile app to record items with a UPC code purchased from any outlet. Data for this report is based on Homescan panel data from the following period: 52 weeks ending, April 14, 2018.

**NIELSEN SOCIAL**
No sports, specials, or talk/news. New/live episodes only. 9/25/17–7/23/2018. Interactions are a measure of total relevant U.S. social-media activity grossed across Facebook, Instagram and Twitter from three hours before through three hours after broadcast, local time. Owned Facebook and Instagram activity includes comments on owned program-related posts. Twitter activity includes owned and organic program-related tweets and the corresponding retweets, quotes, replies and likes.

**NIELSEN MEDIATECH TRENDER**
Nielsen's MediaTech Trender is a quarterly consumer tracking study launched in Q1 2018 by Nielsen Media Analytics. The online survey is offered to a U.S. general population sample 13 years or older. Based on Q1 2018 data.

**NIELSEN NPOWER**
Audience estimates based on a nationally representative panel of people whose televisions are metered with a device called the National People Meter (NPM), which detects exposures to codes embedded in content. A comprehensive questionnaire is also collected of the panel.

**NIELSEN N-SCORE**
N-Score is Nielsen’s syndicated Talent Analytics application that enables users to evaluate the endorsement or casting potential for personalities across various industries. N-Score aligns fans of celebrities with their affinity towards specific behaviors, brands or media consumption. By polling U.S. consumers on a weekly basis on specific attributes, awareness, and sentiment, N-Score provides metrics that help inform a personality’s ability to move products, enhance brand reputation and add value to content. The survey is offered in English and Spanish.

**TIME SPENT AMONG USERS AND REACH OF USERS**
Total Use of Television, Live + Time-Shifted TV, Live TV, Time-Shifted TV, TV-Connected Devices (DVD, Game Console, Internet Connected Device) 01/01/2018–04/01/2018 via Nielsen NPOWER/National Panel; Radio 03/30/2017–03/28/2018 via RADAR 137 and Radio Nationwide Fall 2017; Computer, Smartphone, Tablet via Total Media Fusion sourced from Nielsen Media Impact. For digital data, weeks that cross calendar months are not included. Weeks included for digital: 01/01/18, 01/08/18, 01/15/18, 01/22/18, 02/05/18, 02/12/18, 02/19/18, 03/05/18, 03/12/18, 03/19/18. Digital data was produced on 06/01/18, and slight variations in data processed after this point reflect ongoing updates.

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

TELEVISION 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.

NIELSEN SCARBOROUGH

NIELSEN MUSIC 360
Nielsen’s Music 360 study is a comprehensive, in-depth study of consumer interaction with music in the United States. Interviews were conducted among 2,500 Gen Pop consumers (13+ years of age).

NIELSEN MEAL KIT STUDY
The Nielsen Meal Kit Study was conducted by fielding a survey from November 30, 2017 to December 25, 2017, via Homescan panel; 28,289 responses were received. Questions gathered information about consumers’ attitudes and whys behind purchasing meal kits and about their general cooking behavior.

NIELSEN GAMING 360° REPORT
Annual data for the Nielsen 360° Gaming Report is collected via consumer online surveys in Q1 of each year, using Nielsen's proprietary, high-quality ePanel in the United States. Groups surveyed: Teens/Adults Aged 13+, 2,000+ interviews among a 50% male, 50% female sample. Post-survey, raw data is weighted to ensure representation of the U.S. general population, based on U.S. Census data.

DIGITAL METHODOLOGY (COMPUTER, SMARTPHONE, TABLET)
Digital data is based on Nielsen's Total Media Fusion, which is reflective of both panel and census measurement. The Total Media Fusion is the best representation of the total digital landscape as it reflects digital activity as a whole. It leverages the most granular and comprehensive cross-platform respondent-level data from our panels, along with census data from Nielsen's Total Audience Measurement solutions, to provide the highest quality, representative sample of digital media consumption. Digital data for the Nielsen Total Audience Report was sourced from Nielsen Media Impact (Nielsen's cross platform planning solution). Data used in this report is inclusive of multicultural audiences.
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