

A Fresh Take On

Staying ahead of evolving dynamics in the marketplace and our culture

Engaging Black Consumers



As we celebrate Black History Month, it's essential for all brands to recognize the importance of inclusivity marketing in today's modern society and how marketers can integrate this within their media plans.

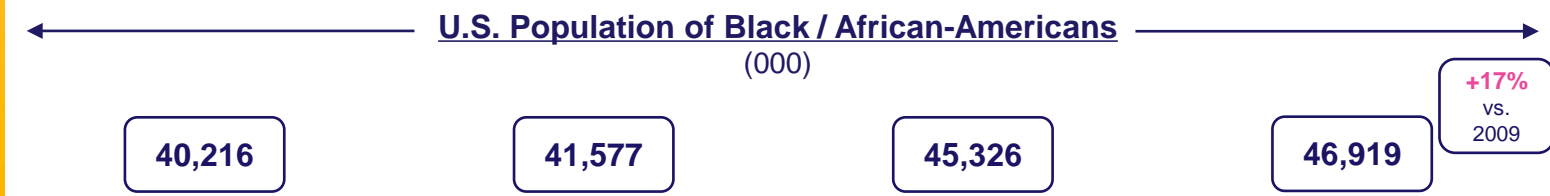
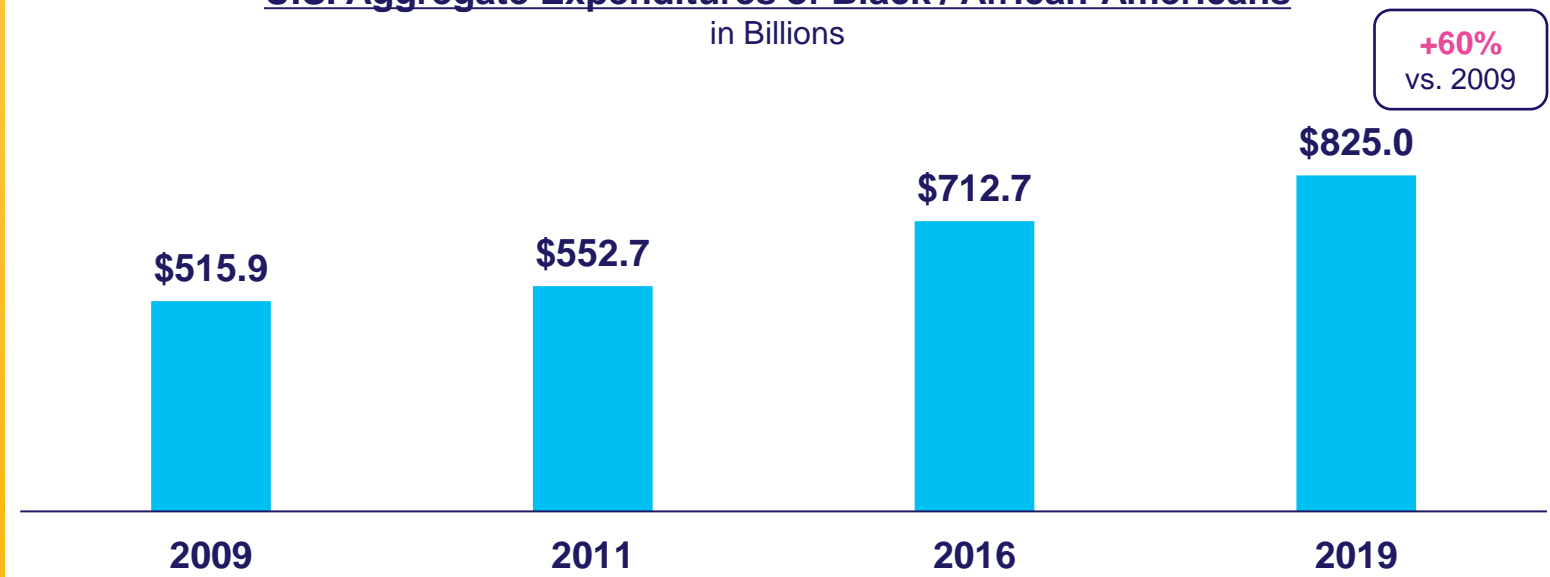
Learn about the buying power of Black consumers and how you can successfully engage these audiences and enable action through culturally-relevant content and communications.



Black consumers have collectively increased their spending power by 60% over the last decade which far outpaces their population growth during the same time period



U.S. Aggregate Expenditures of Black / African-Americans
in Billions

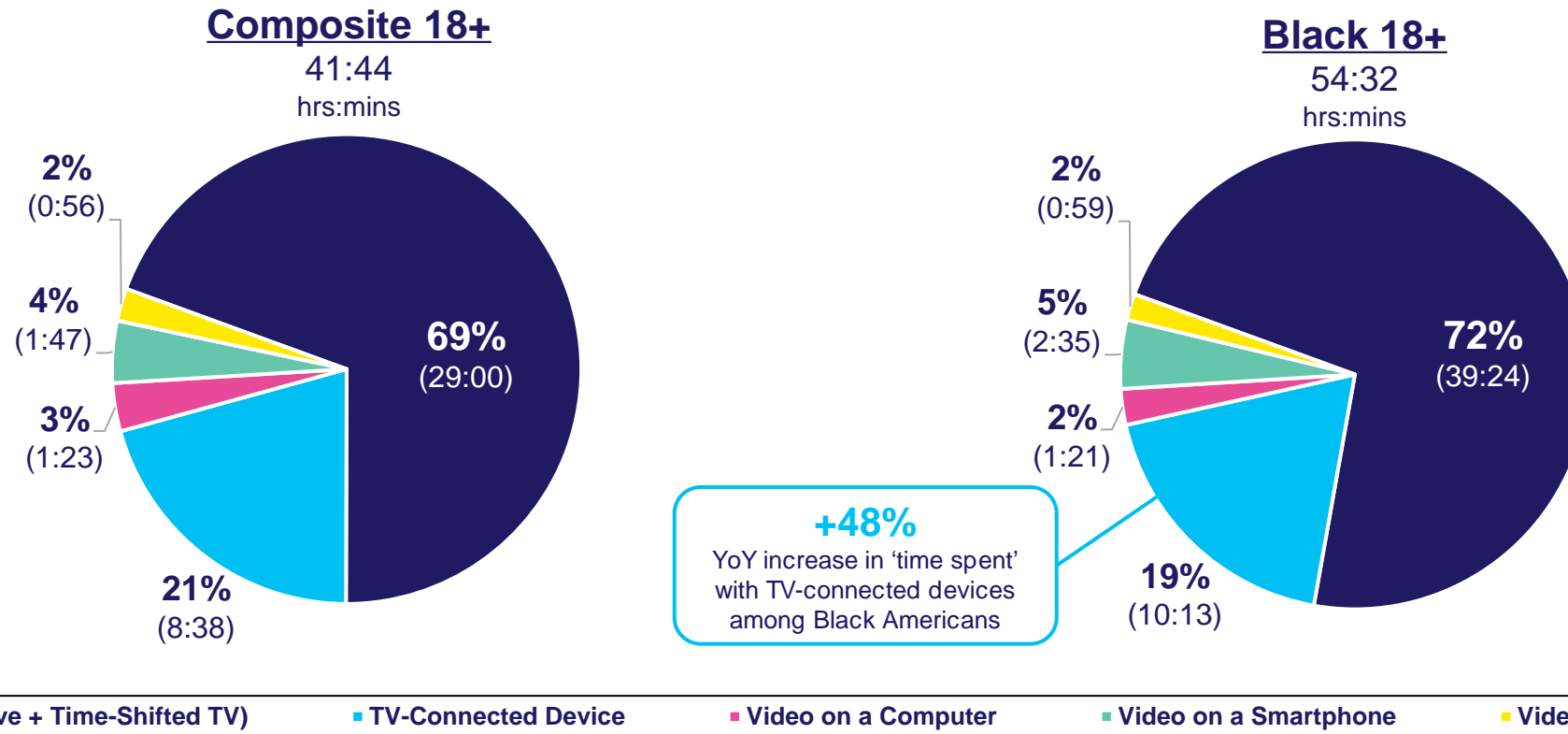


Source: VAB Analysis of Bureau of Labor Statistics data, Race of reference person: Shares of annual aggregate expenditures and sources of income, Consumer Expenditure Survey, 2009, 2011, 2016 & 2019. VAB Analysis of U.S. Census Bureau data The Black Alone or in Combination Population in the United States: Table 1. Population by Sex and Age, for Black Alone or in Combination : 2009; Table 1. Population by Sex and Age, for Black Alone or in Combination: 2011; Table 15. Population by Sex and Age, for Black Alone or in Combination: 2016; Table 15. Population by Sex and Age, for Black Alone or in Combination: 2019.

Black audiences watch almost **13 more hours of video per week** than the average adult 18+, led by linear and connected TV

- ▶ Black 18+ total video consumption is **30% higher** than the average adult; **36% higher for linear TV**

% Share Of Weekly 'Time Spent' By Video Device – Q2 '20
(Hrs:Mins Among U.S. Population)



Source: Nielsen Total Audience Report, November 2020, hours:minutes among users, P18+. TV-Connected Device = DVD, game console, internet connected device; Internet Connected Device = devices connected to the TV that are used to stream content such as Apple TV, Roku, Google Chromecast, Amazon Fire TV, Smartphone, Computer/Laptops, etc. (inclusive of smart TV app usage).

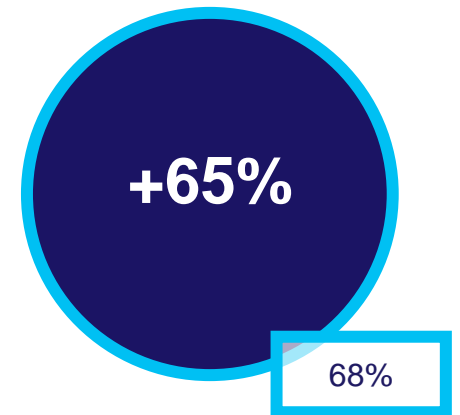
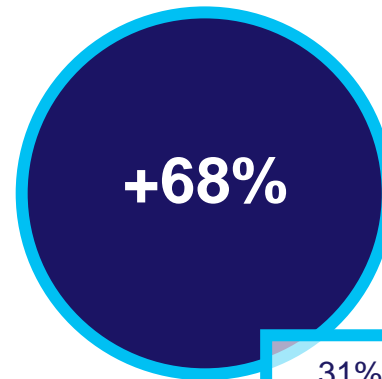


Black audiences are more likely to watch a TV program if they find it **relevant to their identity** which **increases the purchase propensity of the products advertised**

% of Black Respondents vs. Non-Hispanic White
P18+

'I'm more likely to watch a TV show if it is **relevant to my own cultural identity**'

'I have **purchased a product** I saw while watching a TV program or endorsed by a favorite TV personality / actor'



XX% = % of Respondents

Source: VAB's 'Discover the Difference: How Culturally Relevant Video Content Drives Action By Multicultural Audiences'. VAB / Dynata 'Multicultural Video Engagement Survey,' August 2019. Q7: What qualities make you more likely to watch a TV program? Select any or all that apply. Q10: Please indicate how often you do the following. Respondents Answer = Always, Frequently or Occasionally. African American/Black/Caribbean American = 302 Respondents, Non-Hispanic White = 300 Respondents.

60%

of Black sports fans are **habitual viewers**, watching live sports on any device at least every other day (vs. 44% of NH Whites)

Black sports fans are also **much more engaged, habitual viewers of live sports** which drives greater consumer action through the purchase funnel

% Of Sports Fans Who Have Done The Following...

	All	Black	Index*
Awareness & Consideration			
I have talked with friends and/or family about an advertisement I saw while watching sports on TV	30%	40%	136
Consideration & Intent			
I have visited a website for a product that I saw advertised while watching sports on TV	22%	28%	129
Sales			
I have purchased a product or service I saw advertised while watching sports on TV	23%	25%	110

*index vs. all P18+ sports fan

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q18. Which of the following statements do you believe are true for you? Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc). All Sports Fans based on P18+. NH White = Non-Hispanic White.

Beyond relevant programming, ad campaigns with a core message of diversity and inclusion resonate with black audiences and have the power to drive lower-funnel metrics like website traffic and sales



Ulta Beauty: An ad campaign on the beauty of possibility and inclusivity drove over a one-quarter increase of adult women to the brand's website

In September 2018, Ulta Beauty launched their *'The Possibilities are Beautiful'* campaign with a positive message of inclusiveness through both an English-language and Spanish-language spot. The ads featured people from a spectrum of age groups, ethnicities, body types and gender identities, illustrating the brand's belief that nothing is more beautiful than possibility

Results: Ulta Beauty maintained strong growth in their monthly female website visitors through the duration of their inclusivity campaign with average visitation up over one-quarter vs. the 18-month average before the campaign launch (during which other campaigns were periodically active, totaling 80% of TV spend as *'The Possibilities are Beautiful'*).

'The Possibilities are Beautiful' TV spot (two creatives) - \$47.5 MM 20-Month Campaign: 9/2/18 – 4/5/20 14,814 Airings / 3,670.0 MM HH IMPs	Business Outcomes Women 18+ Website Traffic: +28% increase In Ulta Beauty's average monthly unique W18+ website visitors during the first 18 months of the campaign vs. the 18-month pre-campaign average (Mar '17–Aug '18). Black Women 18+ Website Traffic: +21% increase during the same 18-month time period as above for Women 18+.
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P&G: The company saw their best sales growth in over a decade amid high-profile corporate and brand campaigns centered around diversity, inclusion, racial equality and social justice

P&G has long been a champion of diversity, inclusion, equality and social justice issues and these themes are integrated into many of their advertising campaigns on both the corporate and brand level (My Black Is Beautiful, Gillette, Pantene and Tide, just to name a few). Over the last few years, P&G corporate has taken on racial equality issues head-on with spots like *'The Talk'*, *'The Look'* and *'The Choice.'*

Results: While outspoken in their messaging, P&G has been showing consistent 4% – 10% growth over the last couple of years. According to *Bloomberg*, P&G posted their best sales growth in over a decade for FY 2019 and this momentum has carried through to 2020 where P&G reported their biggest sales rise in decades for their quarter ending in March '20.

'The Talk' TV spot - \$3.1 MM Airings: Throughout 5+ Years: 6/17/17 – on-going 317 Airings / 64.3 MM HH IMPs	'The Look' TV spot - \$3.0 MM Airings: Throughout 11+ Months: 9/12/19 – on-going 104 Airings / 18.0 MM HH IMPs	'The Choice' TV spot - \$2.5 MM New Ad 6/10/20 – on-going 63 Airings / 21.6 MM HH IMPs	Business Outcomes Annual U.S. Organic Sales* Increase: FY '19 vs. PY: +4% FY '20 vs. PY: +10% Quarterly U.S. Organic Sales* Increase: Jan-Mar '19 v. PY: +4% Jan-Mar '20 v. PY: +10% Apr-Jun '19 v. PY: +4% Apr-Jun '20 v. PY: +19% Jul-Sep '19 v. PY: +6% Oct-Dec '19 v. PY: +4%
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Denny's: The 'See You At Denny's' diversity and inclusivity campaign drove a triple-digit increase in website traffic among Black / African-American audiences

In late April 2019, Denny's launched their *'See You At Denny's'* campaign with a message of inclusiveness in both English and Spanish language spots. The ads were inspired by the diversity of Denny's guests and captures the inclusive gatherings of modern, multicultural families and friends.

Results: There was an immediate surge in Denny's website visitation upon launch, especially by Black / African-Americans, and monthly visitors continued to increase through the duration of the campaign.

'See You At Denny's' TV spot (three creatives) - \$6.4 MM 4-Month Campaign: 4/29/19 – 8/25/19 (Spanish-Language ad was extended through 2/17/20) 3,381 Airings / 574.7 MM HH IMPs	Business Outcomes Persons 18+ Website Traffic: +86% increase In Denny's avg monthly unique P18+ website visitors during August '19 (final month of campaign) vs. March '19 (month prior to the campaign launch). Black 18+ Website Traffic: +135% increase during the same time period comparison
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Nike: Record-breaking sales have been achieved in each quarter since the launch of their 'Dream Crazy' campaign featuring Colin Kaepernick

VAB analysis of spot by TV occurrence date, time period: 1/1/19 – 6/30/20, estimated media spend; Impressions represent US TV HHs and include activity within measured national broadcast and cable TV linear, national time shifted, local, VOD and OTT. VAB analysis of Comscore media/multiplatform media trend data (desktop and mobile), P18+, Black 18+, March '19 – May '20.

In September 2018, Nike released their first in a series of *'Dream'* spots for their on-going *'Just Do It'* campaign which featured NFL star turned social activist, Colin Kaepernick. The series celebrated the rich diversity found in sports through the collection of stories that represented athletes who are household names and younger, unknown athletes (including 29-year-old basketball wheelchair athlete Megan Blunk and Isaih Bird, a 10-year-old wrestler born without legs).

Results: Nike launched the Kaepernick *'Dream Crazy'* ad at the beginning of their 3rd quarter and saw their highest 3Q revenues ever at that point. Record-breaking quarterly sales continued in each successive quarter through our evaluation period (ending Feb '20).

'Dream Crazy / Dream Crazier / Dream With Us' TV spots (five creatives) - \$21.7 MM 14-Month Campaign: 9/6/18 – 10/23/19 683 Airings / 371.1 MM HH IMPs	Business Outcomes North America Quarterly Revenue Comparison: Sep-Nov '18 (<i>'Dream Crazy'</i> launch) vs. PY: +9% Dec '18-Feb '19 vs. PY: +7% Mar-May '19 (<i>'Dream Crazier'</i> active) vs. PY: +7% Jun-Aug '19 (<i>'Dream Us'</i> active) vs. PY: +4% Sep-Nov '19 vs. PY: +5%
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Key Marketer Takeaways

- ▶ Marketers can directly tap into the growing spending power of the Black population through a holistic video plan featuring linear TV, connected TV and mobile
- ▶ By aligning with culturally relevant content, marketers can create an intimate bond with Black audiences through their favorite programming and personalities which drives purchase decisions
- ▶ Ad campaigns that showcase authentic voices and promote diversity, equity and inclusivity resonate with Black audiences and drive successful business outcomes, particularly lower funnel metrics

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Looking for more data, insights and takeaways?
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We are committed to providing marketers with the data and insights they need to develop thoughtful, inclusive campaigns & strategies. To find out more on the unique media consumption behaviors and cultural trends of multicultural consumers, visit our **Multicultural Marketing Resource Center.**



Do The Right Thing
How Diversity & Inclusion
Drives Brand Outcomes



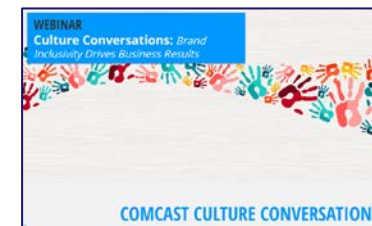
Discover The Difference
How Culturally Relevant Video
Content Drives Action By
Multicultural Audiences



**The Best Seats
In The House**
Recreating The Gameday
Sports Experience At Home



Left To Your Own Devices
The Latest on Multiplatform
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About VAB

VAB is an insights-driven organization that inspires marketers to reimagine their media strategies resulting in fully informed decisions.

Drawing on our marketing expertise, we **simplify** the complexities in our industry and **discover** new insights that **transform** the way marketers look at their media strategy.

Simplify

We save you time by bringing you the latest data & actionable takeaways you can use to inform your marketing plans.

Discover

We keep you one step ahead with the latest thinking so you can create innovative, forward-looking strategies.

Transform

We help you build your brand by focusing on core marketing principles that will help drive tangible business outcomes.

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