



2020 – Volume III

A Second Look

10 Slides to Diversify Your Marketing Strategy

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.

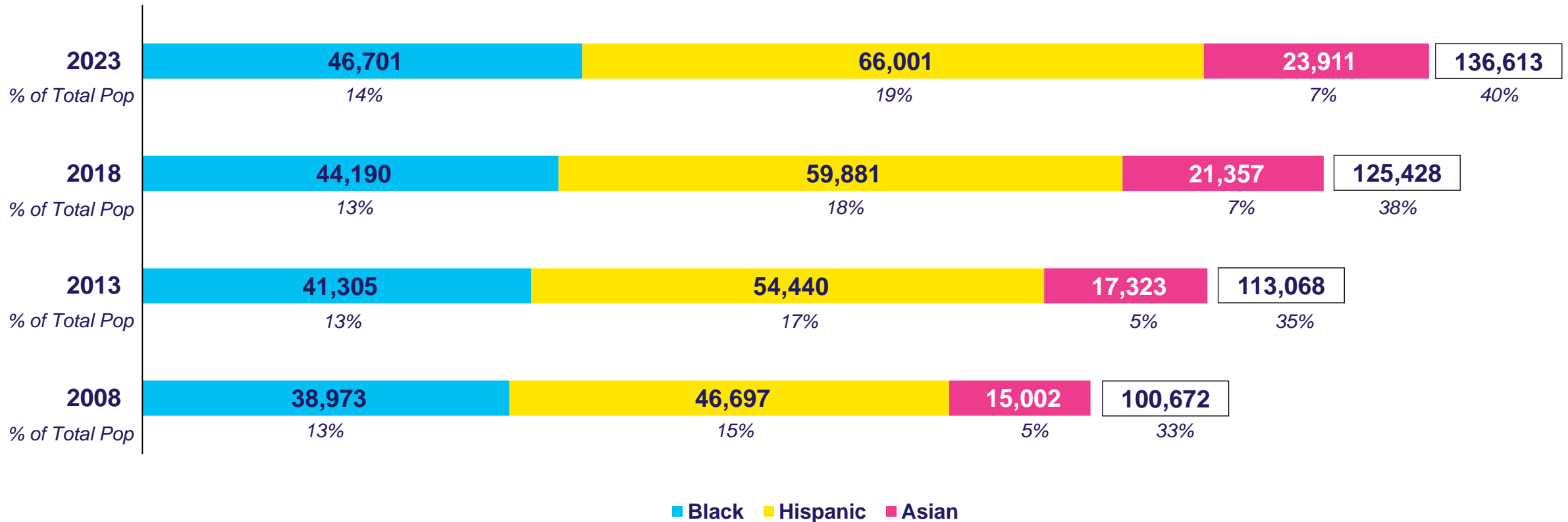


Multicultural consumers are particularly important to reach as Black, Hispanic and Asian Americans will collectively account for 40% of the population by 2023



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U.S. Population by Ethnicity
(000)



Source: VAB Analysis of U.S. Census Bureau data, 2017 National Population Projections Datasets: Table 1. Projected Population by Single Year of Age, Sex, Race, and Hispanic Origin for the United States: 2016 to 2060. 2008 National Population Projections Datasets, Table 1. Projected Population by Single Year of Age, Sex, Race, and Hispanic Origin for the United States: July 1, 2000 to July 1, 2050. Population = age 0 – 100.

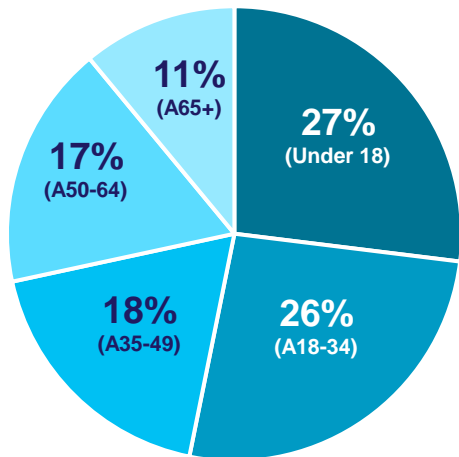
Black, Hispanic and Asian Americans skew much younger than their non-Hispanic white counterparts – with approximately **one-half under the age of 34**



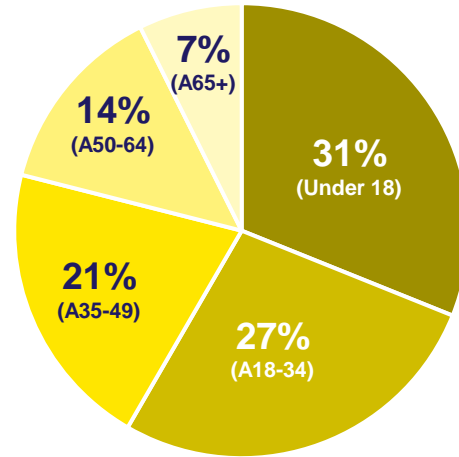
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% 2018 U.S. Population by Age & Ethnicity
(000)

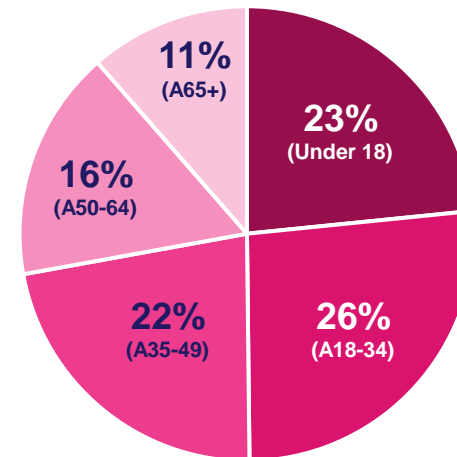
Black



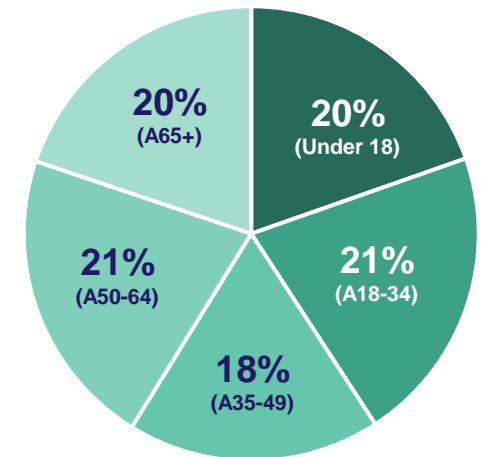
Hispanic



Asian



Non-Hispanic White



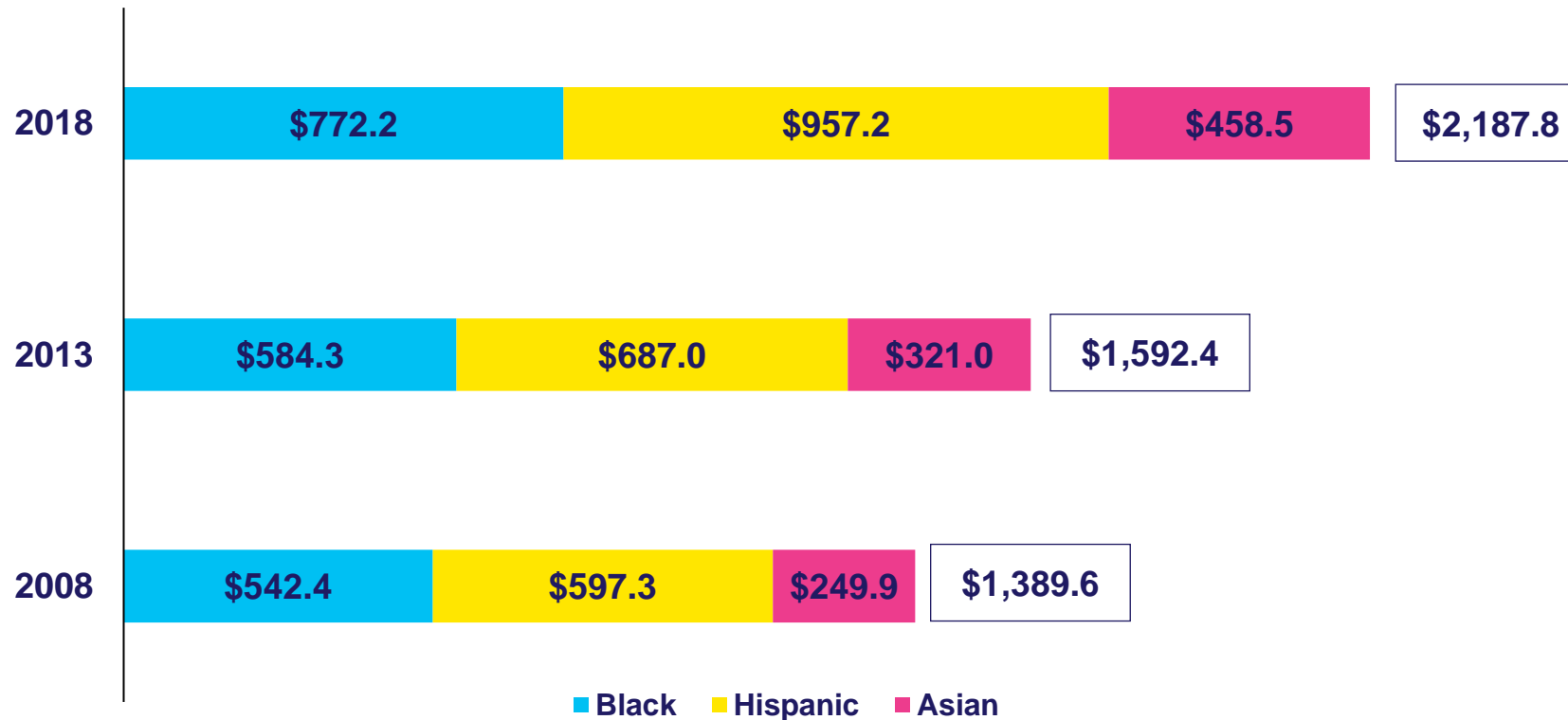
Source: VAB Analysis of U.S. Census Bureau data, 2017 National Population Projections Datasets: Table 1. Projected Population by Single Year of Age, Sex, Race, and Hispanic Origin for the United States: 2016 to 2060.

Multicultural consumers have immense spending power – their collective expenditures have increased **57%**, or almost **\$2.2 trillion**, over the last 10 years



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U.S. Annual Aggregate Expenditures
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, 2008, 2013 & 2018; Hispanic or Latino origin of reference person: Shares of annual aggregate expenditures and sources of income, Consumer Expenditure Survey, 2008, 2013 & 2018.

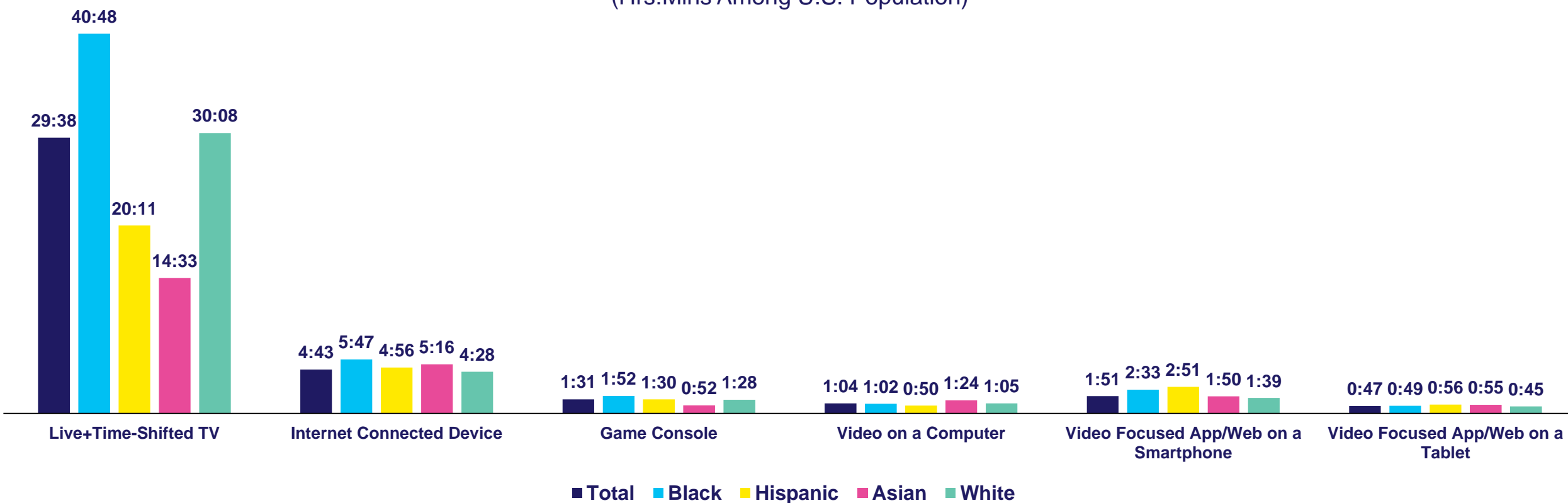
All major ethnicities are spending a large portion of their video time with TV, especially Black audiences



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P18+ Average Weekly “Time Spent” – Q4 ’19

(Hrs:Mins Among U.S. Population)



Source: Nielsen Total Audience Report Q4 2019, hours:minutes among users, P18+. 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). Charts exclude reach for DVD/Blu-ray devices.

Multicultural audiences have a high affinity for their favorite TV programming, characters and personalities and this relevancy is much more likely to drive product purchases

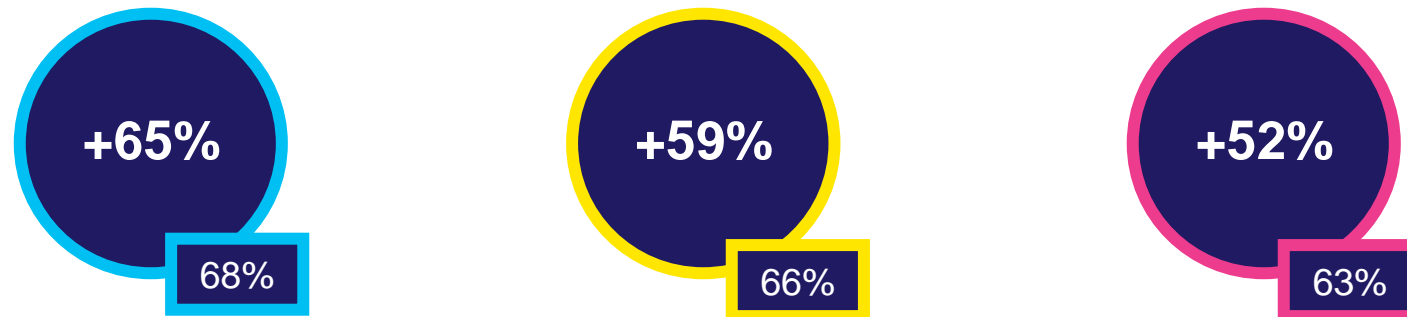


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% vs. Non-Hispanic White 18+

 Black A18+  Hispanic A18+  Asian A18+

'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 / Dynata 'Multicultural Video Engagement Survey,' August 2019. Q10: Please indicate how often you do the following. Respondents Answer = Always, Frequently or Occasionally. African American/Black/Caribbean American = 302 Respondents, Hispanic = 300 Respondents, Asian American/Pacific Islander = 100 Respondents, Non-Hispanic White = 300 Respondents.

TV programming plays an important role when it comes to inspiring viewers to get **involved in social issues** that are critical to their community, especially among **Black audiences**

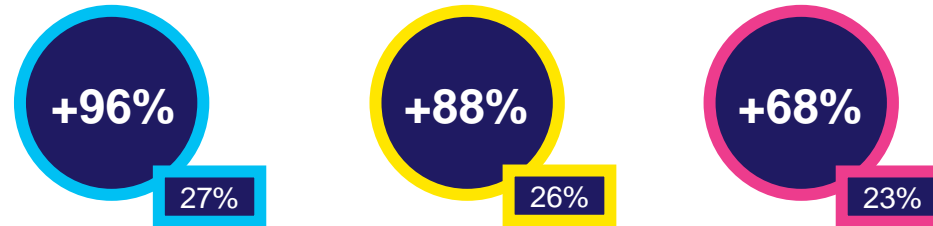


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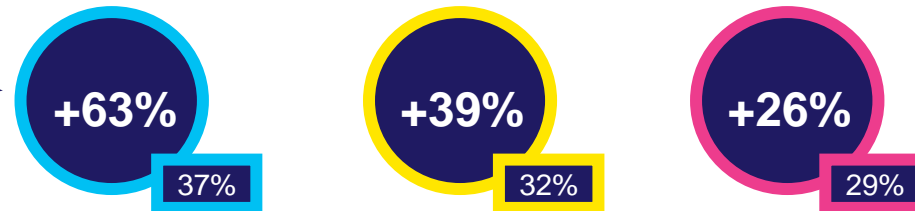
% vs. Non-Hispanic White 18+

● Black A18+
 ● Hispanic A18+
 ● Asian A18+

*'I felt inspired to **take a social action / take up a cause** because of something I saw on a TV program'*



*'I felt inspired to have **sought out more info about a social cause or historical event** because of something I saw on a TV program'*



XX% = % of Respondents

Black & Hispanic A18-34 are **23% more likely** than **Non-Hispanic White A18-34** to have sought out more information about a social cause or a historical event because of something they saw on TV

Source: VAB / Dynata 'Multicultural Video Engagement Survey,' August 2019. Q12: Which of the following actions have you taken as a result of something you saw on a TV program? African American/Black/Caribbean American = 302 Respondents, Hispanic = 300 Respondents, Asian American/Pacific Islander = 100 Respondents, Non-Hispanic White = 300 Respondents.

Powerful and **culturally relevant storytelling** within TV content also has the ability to energize multicultural audiences to **make their voices heard**



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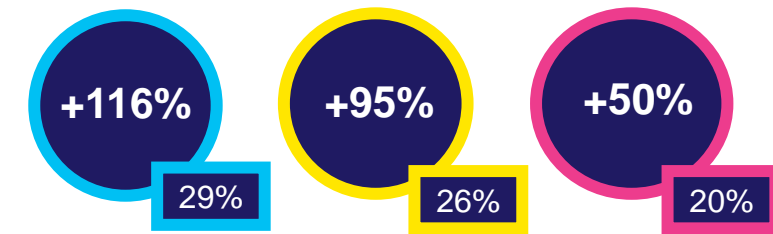
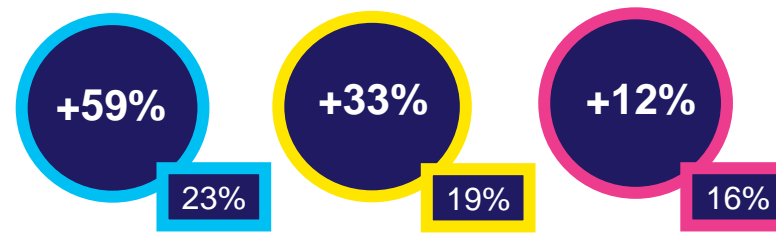
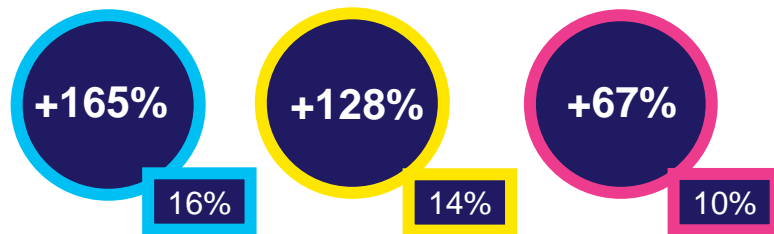
% vs. Non-Hispanic White 18+



'I felt inspired to attend a rally / protest because of something I saw on a TV program'

'I felt inspired to sign a petition because of something I saw on a TV program'

'I felt inspired to register to vote because of something I saw on a TV program'



XX% = % of Respondents

Source: VAB / Dynata 'Multicultural Video Engagement Survey,' August 2019. Q12: Which of the following actions have you taken as a result of something you saw on a TV program? African American/Black/Caribbean American = 302 Respondents, Hispanic = 300 Respondents, Asian American/Pacific Islander = 100 Respondents, Non-Hispanic White = 300 Respondents.

Commitment runs deep among avid sports fans, especially among multicultural ones - they are **passionate to the point of superstition** when it comes to their favorite teams

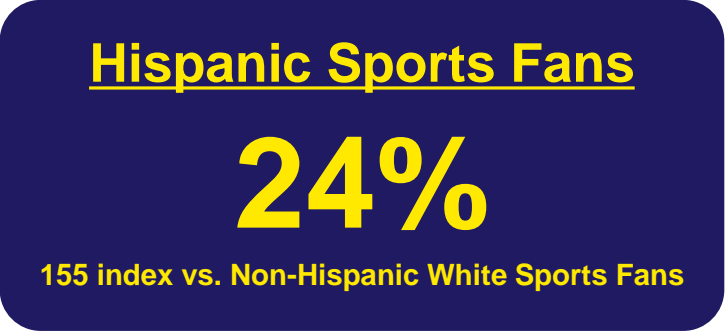
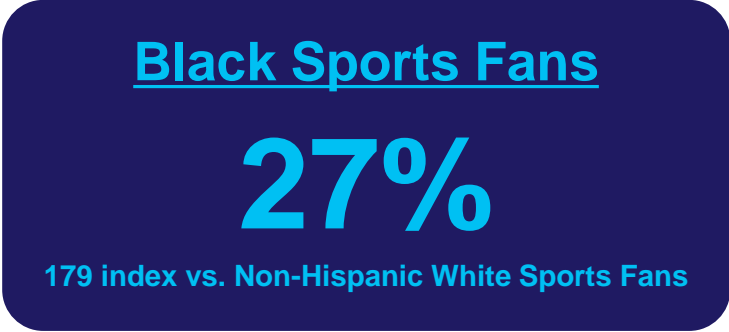


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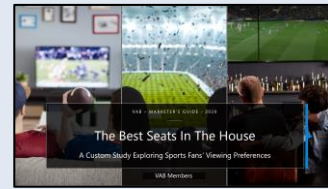
*“I have a **ritual** I do before or during ‘big’ games to help my team win”*

(% who agree)



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q20: 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).

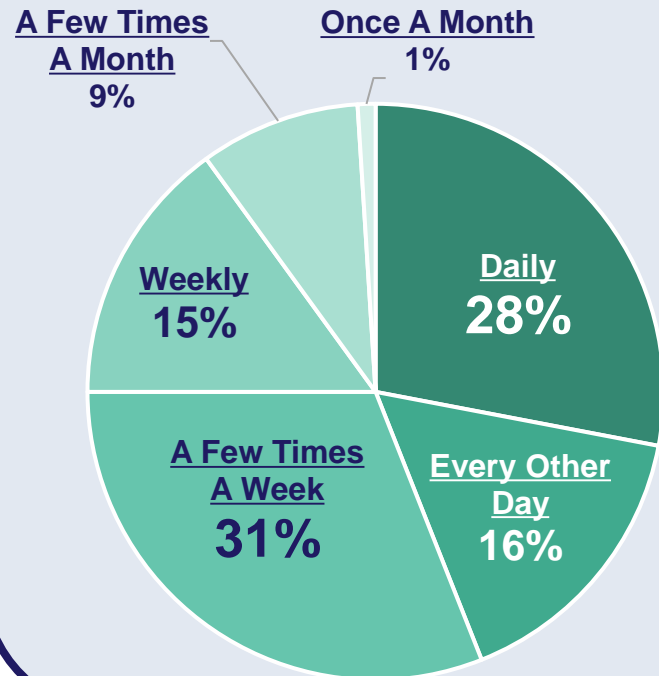
Multicultural sports fans are heavier sports TV viewers – 60% of Black fans and 58% of Hispanic fans watch live sports at least every other day



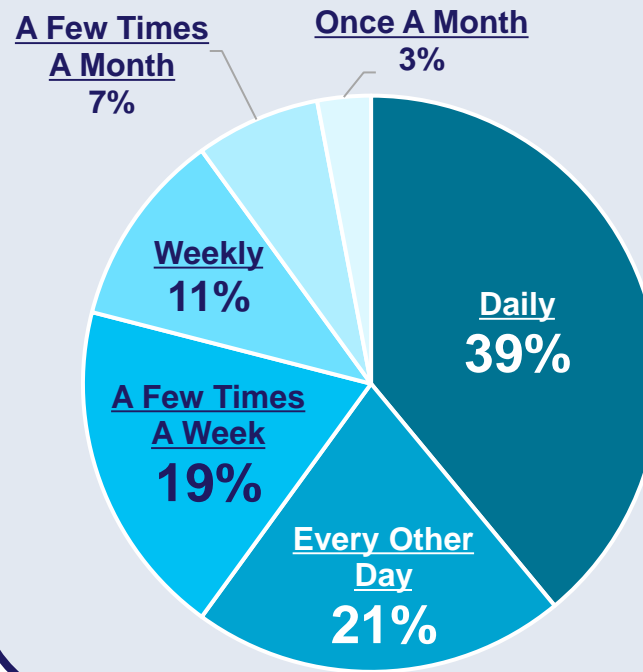
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How Often Do Sports Fans Watch Live Sports On TV*?

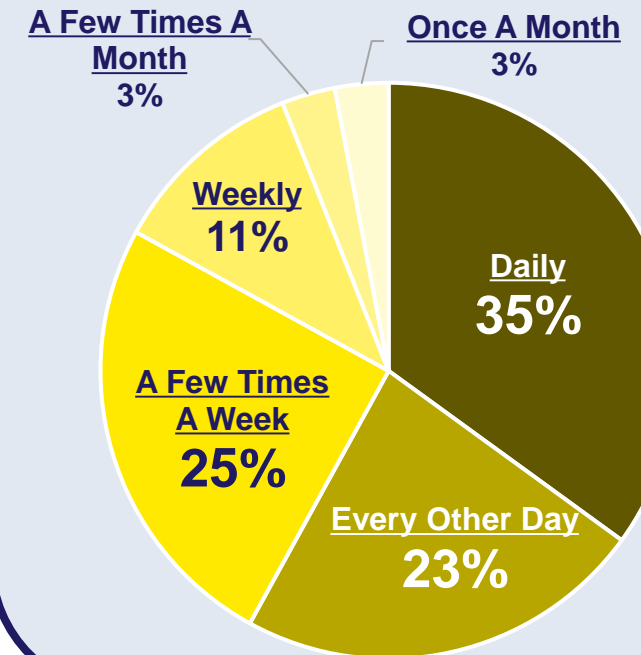
Non-Hispanic White Sports Fans



Black Sports Fans



Hispanic Sports Fans



*TV is inclusive of all devices (i.e., TV, connected-TV device, smartphone, tablet, etc) and locations (i.e., at home, at a bar/restaurant, someone else's home, etc)

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019, Survey base: self-identified sports fans, P18+. Q S4: On average, how often do you watch live sports on TV in a given month? Please indicate any viewing that takes place regardless of device (i.e., TV, smartphone, tablet, etc) or location (i.e. at home, at a bar / restaurant, someone else's home, etc).

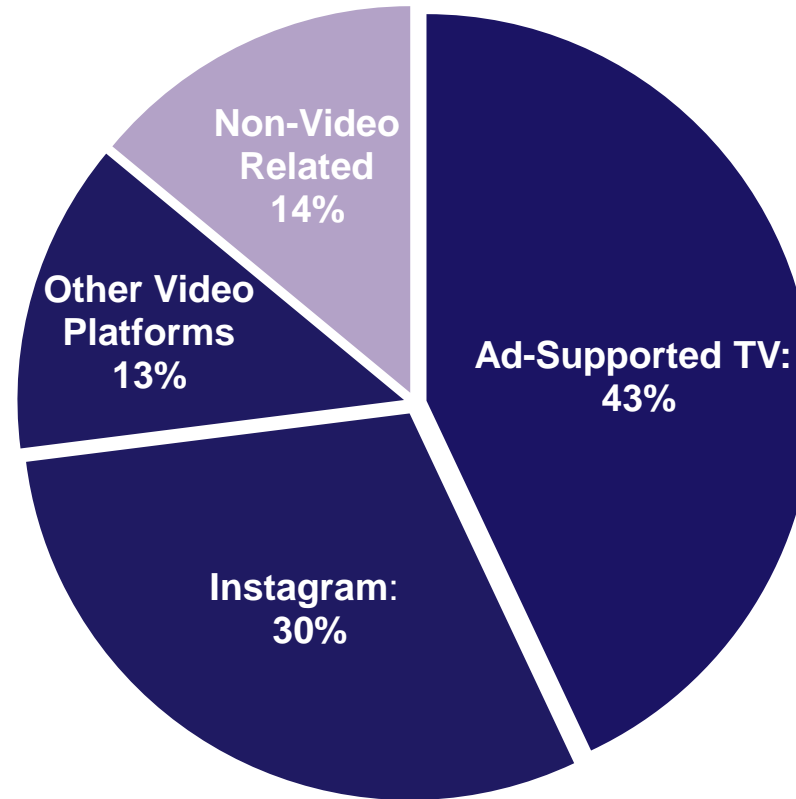
Multicultural audiences have significant influence on online conversation - **27%** of total trending topics were related to subjects, content and programming that **specifically featured people of color or a diverse cast**



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% of Top 10 'Diversity-Focused' Trending Topics by Platform

(March 16th – April 26th)



86% of total topics were video-based

Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics. Other video platforms include Facebook Live, HBO, Netflix, Twitter and YouTube. NFL is excluded from the count of topics due to the mainstream nature of the sport and online conversations.

Diversity-focused social conversations during the COVID-19 pandemic were led by ad-supported TV, streaming programs, Instagram Live music battles, K-Pop streaming events and more



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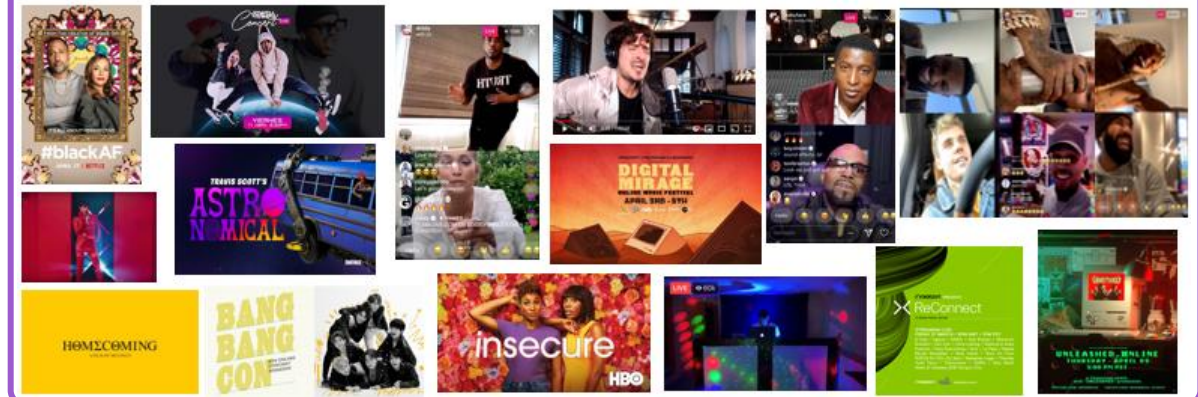
Diversity-Featured Programming / Content Trends In The Top 10 By Platform

(March 16th – April 26th)

Ad-Supported TV (23+)



Other Video Platforms (15+)



K-Pop and Album Releases (13+)



Source: VAB custom analysis of Top 10 trending Twitter Topics each night (9:30p & 11p) aggregated during the analysis time period (3/16/2020 – 4/26/2020). Results include both 'direct' and 'related' topics. Various Video Platforms include YouTube, Netflix, Fortnite, Facebook Live, Twitch, and HBO. Ad-supported TV Networks count (+) because TV-related news topics can be trending due to coverage across multiple TV news networks and Other Video Platforms count (+) because some events were streamed across multiple platforms. (#) = number of programs / content within each grouping that have trended. Music shown is a sampling of content. Various Video Content features Bad Bunny's music video for 'Yo Perreo Sola', Diddy and J.Lo reuniting on Instagram Live, Tommy Torres performing live via YouTube, DJ Yamil on Facebook Live, and Quarantine Radio on Instagram Live. Music features several K-Pop artists and groups including Astro, BTS, Soobin and Bebe Rexha, along with album releases from J Balvin and Kid Cudi.

Thank You

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