POWERFUL. GROWING. INFLUENTIAL.

THE AFRICAN-AMERICAN CONSUMER
2014 REPORT

nielsen + ESSENCE
This year Nielsen and ESSENCE, the number one media company dedicated to African-American women, engaged in one of the largest, custom surveys, of its kind, pertaining to African-American consumer behavior ever conducted in U.S. history. Together we surveyed more than 10,000 online and in-person participants to uncover what matters most to Black men and women and drives their purchasing behaviors. As part of the methodology, we asked the same questions of the general market and fused the results with panelists in Nielsen’s existing measurement portfolio. Additionally, we randomly selected more than 300 consumers to step into Nielsen’s Confessions of a Conscious Consumer booth during the 20th Annual ESSENCE Festival presented by Coca-Cola®, held in New Orleans, and videotaped their candid responses about their viewing, listening, and purchasing habits. We’re excited to share all of the results with you in this report!

Several recurring themes emerged: an affinity for positive cultural images, the desire to support the growing number of Black-owned businesses, the value of seeing more African-American faces in ads and celebrity endorsements, and the importance Blacks place on the inclusion of cultural heritage and identity in both media consumed and in the advertising messages for products purchased.

The 360-degree perspective of the Black consumer provided on the following pages is expansive and comprehensive. For many participants, it was the first time they’d ever been queried for their opinions. Having their voices heard as one participant states, “...very empowering. Thank you for giving me the chance to tell someone what’s important to me when it comes to spending my money.” We’ve included some of these real-time commentaries to give voice to why Black consumers will (or will not) do business with companies – further illustrating the insights across media platforms (radio, television, digital, magazines, newspapers, or mobile devices) and retail channels. It’s all here. It is our hope that this 2014 report ignites and drives compelling conversations in both corporate corridors and communities alike.
The African-American woman is a trendsetter, a social maven, the head of her household, a leader in business and community. She is progressive with her thoughts on health, entertainment and diversity in advertising. She is becoming more empowered with saving, spending and investments. Religion plays a strong role providing a foundation for her decisions and family values. Passionate about products she likes, she will share her experience with friends and family on social media and through word of mouth. She is culturally engaged and is a conscious consumer making mindful decisions on how she engages with products, brands and companies often outpacing other demographic groups. The African-American woman offers an unparalleled opportunity for brands.

Get to know her, understand the key drivers of her purchasing habits, likes and dislikes, her preferences, behaviors and her value of culture and community.

**Culture & Community**

- 62% Of African-American Women Believe Embracing and Supporting Their Ethnic Culture is Important.
- 59% Of Black Women Believe Supporting Minority Business Enterprises are Important
- 59% Of Black Women Expect Companies They Support to Give Back to the Community in a Meaningful Way
- 58% More Likely to Attend Religious Services Regularly
- 31% More Likely to Pray Daily Than the General Market

**Health & Wellness**

- 79% Of African-American Women Agree That Pursuing Good Health is Important.
- 80% Of Black Women Agree Being Conscious of Purchasing Decisions is Important
- 79% Of Black Women Agree That it is Important to Trust a Brand When Purchasing its Products.
- 63% More Likely to Purchase a Luxury Vehicle in the Next Year Than the General Market
- 45% More Likely Than the General Market to Shop at Bloomingdale's
- 40% More Likely to Purchase Movie Tickets Online Than the General Market

**Shopping**

- 40% More Likely to Shop at Neiman Marcus Than the General Market

**Nearly 40% of Black Women 18-54 Consider Themselves to Be Trendsetters**
80% of black women will tell their friends about a product if they like it.

2x more likely to spend more than 3 hours on social networking sites in an average day than the general market.
CONTENTS

THE AFRICAN-AMERICAN MARKET SEGMENT ........ 5
THE IMPORTANCE OF CULTURAL IDENTITY ........ 6
ADVERTISING INVESTMENT ............................ 9
MEDIA CONSUMPTION ................................ 13
SHOPPING ............................................... 16
MARKETING OPPORTUNITIES ...................... 17
SUMMARY .............................................. 20
SOURCING & METHODOLOGY ...................... 22
CONFESSIONS OF A CONSCIOUS CONSUMER

Nielsen speaks to thousands of multicultural consumers each year sharing insights about the collective purchasing power and what it means to be a Conscious Consumer. A Conscious Consumer is a responsible shopper who understands his or her influence, is willing to be a social change agent to better their community, and is willing to research the companies they financially support. During the 20th ESSENCE Festival held in New Orleans, Nielsen randomly selected more than 300 consumers to step into our Confessions of a Conscious Consumer booth and videotaped their candid responses regarding their viewing, listening, and purchasing habits. A few of those confessional videos are sprinkled throughout this report. Enjoy all of the videos and candid responses by visiting, www.nielsen.com/africanamericans.
According to current Census estimates, there are 44 million African-Americans living in the United States, representing approximately 14.2 percent of the population, with 53 percent under the age of 35.¹

Higher academic achievement has translated into increases in household income with 44 percent of all African-American households earning $50,000 or more (a 13% increase), and 23 percent earning above $75,000.² These surges in household income coupled with overall population growth are driving the substantial purchasing power of the African-American consumer, which is expected to reach $1.3 trillion in a few short years.

The increase in Black household income has also been driven by a marked rise in the number of African-American owned businesses. Black business ownership increased 61 percent between 2002-2007, which is substantially higher than the 18 percent general market growth rate. Additionally, receipts of African-American owned businesses grew 55% compared to 28% of general market receipts during that time.³

Source: All sourcing references in this report can be found on page 22.
THE IMPORTANCE OF CULTURAL IDENTITY

The Nielsen+ESSENCE customized study reveals just how important diversity and cultural identity is to Blacks. The majority of those surveyed, 87 percent, feel ethnic recognition is important compared to 59 percent of the general population. Seventy-three percent of African-American adults 18-54 years old stated that cultural/ethnic heritage is a critical part of their cultural identity. Among African-Americans 18-54 with a household income greater than $50,000, 77 percent indicated their heritage was an important part of who they are compared to 58 percent of the general population.

RELIGION CROSSES PLATFORMS

Any discussion regarding African-American cultural identity is not complete without a look at what many consider the foundation of that identity: the Black church. Fifty-six percent of African-Americans say they attend church regularly. The church provides more than fundamental religious training, faith reinforcement and spiritual healing. Blacks often depend on churches for community news, support services, trusted leadership, and to mobilize for community activism. Religious influence in the Black community has evolved beyond Sunday morning worship, and can be found across various platforms. Radio, television, print and digital media with religious and gospel formats or content tend to see higher consumption patterns with African-Americans than with general market audiences.
When it comes to advertising, ethnic identity is closely linked to Blacks’ affinity for products and purchasing behavior. Compared to the general population, African-Americans are 30 percent more likely to believe diversity in advertising is important, and 38 percent are more likely to make a purchase when the advertisements have African-American people included.4

Forty-four percent of African-Americans said they are more likely to purchase or support products that are owned or supported by African-Americans or other diverse groups, and 43 percent are more likely to patronize a business if it is a minority-owned entity.4 Twenty percent of Blacks attest to being more likely to purchase a product supported or endorsed by an African-American celebrity or musician.5 The importance of cultural identity continues to be more significant to higher income households in the areas of business ownership and celebrity endorsements. Fifty-five percent of Blacks with household incomes of $50,000 or more said they would purchase or support a product if it was sold or supported by a person of color or minority-owned business, while only 20 percent of non-African-Americans in the same income bracket felt this way. Furthermore, nearly half of all higher-income African-Americans say they actively seek out diverse businesses.4

I WOULD PURCHASE OR SUPPORT A PRODUCT IF IT WAS SOLD OR SUPPORTED BY A PERSON OF COLOR OR MINORITY-OWNED BUSINESS.

55%

20%

- African-American 18-54 w/HHLD income $50K+
- Non-African-American 18-54 w/HHLD income $50K+
The emphasis African-Americans place on diversity in advertising varies by industry and product categories. The greatest difference between the African-American’s and general population’s feelings of how important diversity is in advertising can be found in the health care and auto industries, with 82 percent and 70 percent of Blacks, respectively, reporting that diversity is important - compared to 63 percent and 51 percent of the general population who felt the same.4

Using multiple platforms to reach African-American consumers is an effective marketing strategy as 62 percent of Blacks are more likely to feel advertising content accessed via mobile phones and devices is useful. Fifty-three percent agreed that TV ads provided useful information about new products and services, while advertising with newspapers (47%), magazines (46%), radio (39%), and internet (38%) showed similar sentiment as the general population.5

I FEEL DIVERSITY IN ADVERTISING IS IMPORTANT

Source: Nielsen + Essence African-American Custom Study 2014
In 2013, $2.6 billion was spent with media focused on African-American audiences, on Cable TV, National Magazines, Network TV, Spot Radio, and Syndicated TV. This represents a 7 percent growth over 2012, compared to a 2% increase in overall advertising spending. While this growth in spending is a positive sign, it should be noted that this amount is only 2.6 percent of the total $69.3 billion companies spent advertising on these media platforms in 2013.

**WHAT DO YOU THINK RETAILERS NEED TO KNOW AND UNDERSTAND ABOUT AFRICAN-AMERICANS?**

*I think retailers need to know that we are conscious buyers, and need to see more African-American faces in their advertising.*
Looking more closely at advertising investments, the largest year-over-year industry changes occurred in life insurance, hair care products, loans, and universities. While these represent the largest changes, many key industries experienced significant growth. Decreases in advertising spending occurred most notably in automobile insurance, bank services, store apparel, and charitable giving sectors.6

A strategic focus on the African-American consumer has led some corporations to increase spending and ad buys from 2012 to 2013. The top advertisers, based on spend focused on Black audiences, are in the beauty, movie, and consumer product sectors.6

Companies that had the highest brand recall and likeability among African-Americans feature advertising campaigns that incorporate diversity in casting and culturally relevant themes. For example companies like Proctor and Gamble, L’Oréal, Pillsbury, and Colgate-Palmolive have focused content emphasizing products for skin tone matching, African-American celebrity spokespersons and African-American couples and families.7

Not only do African-Americans say they have an affinity towards campaigns featuring Blacks, such campaigns also resonate with Caucasian and Hispanic audiences as they find diverse casting in ads equally or more likable than advertisements featuring only their own ethnicity.7

### TOP INDUSTRY YEAR TO YEAR INCREASE IN ADVERTISING INVESTMENT WITH BLACK MEDIA (000)

<table>
<thead>
<tr>
<th>Industry</th>
<th>Year-to-Year Increase</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insurance - Life</td>
<td>$18,684</td>
<td>134%</td>
</tr>
<tr>
<td>Hair Care Products</td>
<td>$25,119</td>
<td>98%</td>
</tr>
<tr>
<td>Loan Company</td>
<td>$31,087</td>
<td>46%</td>
</tr>
<tr>
<td>University</td>
<td>$20,078</td>
<td>46%</td>
</tr>
<tr>
<td>Candy</td>
<td>$40,155</td>
<td>39%</td>
</tr>
<tr>
<td>Legal Services</td>
<td>$38,056</td>
<td>21%</td>
</tr>
<tr>
<td>Medical Services</td>
<td>$18,894</td>
<td>19%</td>
</tr>
<tr>
<td>Restaurant</td>
<td>$49,844</td>
<td>17%</td>
</tr>
<tr>
<td>Insurance</td>
<td>$47,129</td>
<td>16%</td>
</tr>
<tr>
<td>Supermarket</td>
<td>$28,510</td>
<td>15%</td>
</tr>
</tbody>
</table>

Source: Nielsen Monitor Plus
WOULD YOU RATHER HAVE QUALITY OR QUANTITY?

I would rather have quality (products) because I work hard for my money...

CABLE TV, NATIONAL MAGAZINE, NETWORK TV, SPOT RADIO, AND SYNDICATED TV ADVERTISING SPEND

Ad Spend on African-American Focused Media

<table>
<thead>
<tr>
<th>Year</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>$2.4 B</td>
<td>$2.6 B</td>
</tr>
</tbody>
</table>

Ad Spend on General Marketing Media

<table>
<thead>
<tr>
<th>Year</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>$67.5 B</td>
<td>$69.3 B</td>
</tr>
</tbody>
</table>

Source: Nielsen Monitor Plus

TOP INDUSTRIES SPEND WITH MEDIA FOCUSED ON BLACK AUDIENCES

<table>
<thead>
<tr>
<th>Industry</th>
<th>2012 AFRICAN-AMERICAN SPENDING ($000)</th>
<th>2013 AFRICAN-AMERICAN SPENDING ($000)</th>
<th>%CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automotive</td>
<td>$134,635</td>
<td>$125,474</td>
<td>-7%</td>
</tr>
<tr>
<td>Restaurant-Quick Services</td>
<td>$118,966</td>
<td>$122,726</td>
<td>3%</td>
</tr>
<tr>
<td>Motion Picture</td>
<td>$89,432</td>
<td>$100,184</td>
<td>12%</td>
</tr>
<tr>
<td>Department Store</td>
<td>$89,593</td>
<td>$93,642</td>
<td>5%</td>
</tr>
<tr>
<td>Wireless Telephone Services</td>
<td>$75,822</td>
<td>$73,204</td>
<td>-3%</td>
</tr>
<tr>
<td>Pharmaceutical</td>
<td>$58,597</td>
<td>$63,139</td>
<td>8%</td>
</tr>
<tr>
<td>Direct Response Product</td>
<td>$50,345</td>
<td>$52,521</td>
<td>4%</td>
</tr>
<tr>
<td>Restaurant</td>
<td>$42,777</td>
<td>$49,844</td>
<td>17%</td>
</tr>
<tr>
<td>Insurance</td>
<td>$40,545</td>
<td>$47,129</td>
<td>16%</td>
</tr>
<tr>
<td>Candy</td>
<td>$28,843</td>
<td>$40,155</td>
<td>39%</td>
</tr>
<tr>
<td>Insurance-Auto</td>
<td>$51,792</td>
<td>$38,252</td>
<td>-26%</td>
</tr>
</tbody>
</table>

Source: Nielsen Monitor Plus
DO YOU SHOP MORE INSIDE YOUR NEIGHBORHOOD OR OUTSIDE OF YOUR NEIGHBORHOOD?

“I usually shop outside of my neighborhood because there are not a lot of opportunities (to do so) inside of my neighborhood.”

### TOP ADVERTISERS’ ANNUAL SPEND WITH MEDIA FOCUSED ON BLACK AUDIENCES

<table>
<thead>
<tr>
<th>ADVERTISER</th>
<th>2012 AFRICAN-AMERICAN SPENDING $(000)</th>
<th>2013 AFRICAN-AMERICAN SPENDING $(000)</th>
<th>%CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Procter &amp; Gamble Co.</td>
<td>$105,703</td>
<td>$117,935</td>
<td>12%</td>
</tr>
<tr>
<td>L’Oréal Salon</td>
<td>$60,998</td>
<td>$63,341</td>
<td>4%</td>
</tr>
<tr>
<td>Hershey Co.</td>
<td>$31,339</td>
<td>$41,004</td>
<td>31%</td>
</tr>
<tr>
<td>Unilever</td>
<td>$44,401</td>
<td>$39,146</td>
<td>-12%</td>
</tr>
<tr>
<td>AT&amp;T INC</td>
<td>$29,217</td>
<td>$35,371</td>
<td>21%</td>
</tr>
<tr>
<td>Wal-Mart Stores INC</td>
<td>$30,305</td>
<td>$35,326</td>
<td>17%</td>
</tr>
<tr>
<td>Berkshire Hathaway INC</td>
<td>$30,038</td>
<td>$33,617</td>
<td>12%</td>
</tr>
<tr>
<td>McDonald’s Corporation</td>
<td>$38,724</td>
<td>$33,501</td>
<td>-13%</td>
</tr>
<tr>
<td>Pepsico INC</td>
<td>$28,934</td>
<td>$31,746</td>
<td>10%</td>
</tr>
<tr>
<td>General Motors Co.</td>
<td>$26,580</td>
<td>$27,093</td>
<td>2%</td>
</tr>
</tbody>
</table>

Source: Nielsen Monitor Plus
Fifty-two percent of African-American consumers are more likely to be heavy readers of magazines, 30 percent higher than the general population (40%). Forty-five percent of Black adults with incomes greater than $50,000 have read an African-American focused magazine in the last 30 days. And 52 percent of affluent African-Americans agree that advertising in culturally relevant magazines provides useful information about products and bargains.8

The National Newspaper Publishers Association, also known as the Black Press of America, is a 73-year-old federation of nearly 200 Black community newspapers from across the United States with a long history of influencing and engaging the African-American community. Fifty-nine percent of African-Americans agree that advertisers in Black newspapers know how to connect with the African-American audience.4 Many general market news services have also recognized the importance of Black media and niche online sites, such as TheGrio.com, TheRoot.com, BlackNews.com, and BlackVoices.com.

DO YOU SHOP MORE INSIDE YOUR NEIGHBORHOOD OR OUTSIDE OF YOUR NEIGHBORHOOD?

I like to shop in my neighborhood because I feel like I am contributing to my community and small businesses.
DIGITAL MEDIA

African-Americans are heavy users of audio/video media, video games, and social networking extending across both PC and mobile devices. Smartphone penetration is 78% among Black consumers with mobile video viewing at an increase of 24 percent year-over-year.\(^9\)

Blacks feel stronger about the utility of social media and its impact on products and brands than the general market. African-Americans are 81 percent more likely to show support for a favorite company or brand using social media than the general population, and 76 percent more likely to share opinions by posting reviews and ratings online.\(^{10}\)

WHY DO YOU SHOP ONLINE?

“I love shopping online because (there is) a better variety, and sometimes you get great prices.”
African-Americans are heavily engaged viewers of television – watching nearly 45 hours per week, about 14 more hours on a weekly basis than any other group.\(^9\) While African-Americans continue to view television in the traditional ways with real-time watching, a change in viewing behavior is emerging as a result of time shifted viewing, video on demand, smart TV’s, and internet streaming; 25-48 minutes per day are spent viewing video online, exceeding the usage of the general market.\(^9\) Networks focused specifically on reaching the African-American audience such as, Black Entertainment Television, Centric, TV One, and the Bounce TV networks produce programming that accounts for 76 percent of the top 25 indexing programs for Black adults.

Radio consumption amongst African-Americans remains high. Ninety-two percent of all African-Americans surveyed indicate they tune in to radio each week and listen for more than 12 hours; 5 percent longer than the general market. Peak listening hours occur between 10:00AM and 3:00PM, with 61 percent of listening occurring outside of the home.\(^11\) Top ranked radio formats for African-Americans, with audiences that are more than 70 percent Black, are Urban Contemporary, Adult Urban Contemporary, and Rhythmic Contemporary. Other significant formats like Gospel and Urban Oldies maintain 90 percent Black audiences.\(^11\) These stations broadcast some of the top rated morning and afternoon programs, feature culturally relevant topics and news, and provide a substantial avenue for reaching African-American consumers.

"WHAT DO YOU LIKE ABOUT YOUR FAVORITE RADIO PERSONALITY?"

*I listen to my favorite radio show personality because they’re easy to relate to, and talk about topics that are important to me.*
AFRICAN-AMERICANS MAKE 8 MORE SHOPPING TRIPS PER HOUSEHOLD TO GROCERY STORES THAN THE GENERAL POPULATION.

SHOPPING

As noted in Nielsen’s previous reports on African-Americans, the shopping behavior differs from that of the general market. African-Americans, on average, make 8 more shopping trips per household, but spend less per trip. Most notable is the increased frequency of visits to food channels, such as Whole Foods, Trader Joe’s, and Fresh Market indicating a growing importance on health and healthy food purchases. The number of trips to these stores has more than doubled compared to the rate for the general market.5

The greatest surge in this growth stems from African-American adults earning greater than $50,000 per year who increased shopping in these channels at a 40 percent rate. In addition to patronizing healthy food stores, African-Americans are more likely to shop for health and beauty aids online than the general market.4

WHAT DO YOU THINK RETAILERS NEED TO KNOW AND UNDERSTAND ABOUT AFRICAN-AMERICANS?

Pricing is everything.

40%

THE INCREASE IN BLACK ADULTS 18-54 WITH INCOME GREATER THAN $50,000 WHO SHOP AT HEALTH FOOD STORES LIKE WHOLE FOODS, TRADER JOE’S, OR FRESH MARKET
In reviewing the results from the Nielsen+ESSENCE custom study, opportunities for marketers to connect with African-American consumers have surfaced. The pursuit of a healthy and balanced life was essential for survey respondents. Ninety-seven percent of affluent African-Americans stated a healthy lifestyle is important. While healthy bodies are important, Blacks are also very interested in their financial health. Survey results show maintaining and/or cultivating strong financial management is of significant importance to this consumer group.4
HEALTH AND WELLNESS

African-American attitudes toward healthier living have had an impact on a wide range of behaviors and activities. In addition to adding healthy habits, African-Americans are more likely to reduce, what are considered, unhealthy or bad habits like fatty foods, alcohol intake, and cigarette consumption than the general population. Like most Americans, the top health concerns for African-Americans are weight loss and lowering stress. However, African-Americans are more likely to have concerns for weight maintenance, work/life balance, and disease treatment. Moreover, African-American fitness and participation in athletic activities have increased to align with the overall change in attitudes towards health and fitness. African-American adults age 18-54 have increased fitness and outdoor activities more than the general population. This includes running, swimming, and biking – where African-Americans have reported activity levels of 40 percent, 34 percent, and 30 percent respectively, in the last year. The largest increases have occurred in pursuits such as yoga/pilates, jogging, tennis, soccer, and camping.

WHAT ARE YOUR HEALTH GOALS?

Source: Nielsen+ESSENCE Custom Survey 2014
FINANCIAL MANAGEMENT

Affluent Black adults surveyed believe that activities focused on saving are indicative of good financial management. Thirty-four percent are proud of the amount of money they have saved; however, only 7 percent are aggressively investing. As previously noted, African-American attainment of higher education and post-graduate degrees is increasing. Additionally, Black-owned businesses grew over 60% between 2002-2007. Consequently, earning potential, household income, and purchasing power is growing and creates opportunities for banking institutions and financial management professionals that focus on financial education, debt management, and retirement preparation to engage Black consumers.

WHAT WOULD YOUR SIGNIFICANT OTHER SAY ABOUT YOUR SHOPPING HABITS IF YOU WEREN’T AROUND?

“I make a lot of impulsive purchases. I basically buy things based on my feelings at that moment. Before I make a purchase, I should do more research about the product.”
African-Americans represent a substantial growth segment of the American consumer market for companies and organizations. As a young population with growing economic power and influence it is an important market for those organizations looking for future domestic growth.

When looking toward the future prospects of the African-American demographic some key factors indicate a fertile economic opportunity for corporations.

• The buying power of African-Americans is $1 trillion and expected to grow to $1.3 trillion in the next few years.

• A younger, growing population and higher educational achievement are the engines behind gains in economic power and show no signs of slowing down or plateauing.

• Overall growth in the number of households with incomes higher than $50,000, $75,000, and $100,000 indicates the overall buying power increases are broad-based and not concentrated at the top, allowing for increased branding and sales opportunities for companies.

• Along with exercising more purchase power, African-Americans have started adopting behavioral changes in their lifestyles. These lifestyle changes and consumer behaviors are concentrated in a majority that is in a prime age demographic, have more durable household income levels, and are driven by cultural and ethnic awareness.

• Cultural identity and ethnicity are key drivers for consumption for African-Americans.

• African-Americans are very receptive to advertising and programming that include positive cultural themes and include people of color.

• Black consumers are more likely to support or purchase products and services that are represented or owned by people of the same ethnicity.

• Not only are African-American consumers culturally aware they are early adopters of new technology and are heavy users of digital media.
• Blacks are more likely to positively receive advertising and content via mobile phones and use applications to recommend products to others or rate their experiences.

• African-Americans consume television and video at higher rates than the general population.

• Black adults are adopting healthier habits including greater participation in exercise and athletics, eating healthier organic foods, cutting back on riskier habits like smoking and drinking alcohol.

• Healthier living also includes financial awareness, literacy, and preparedness activities like managing debt, saving, investing, and retirement planning.
SOURCING

1. U.S. Census 2014
2. Nielsen NPM Universe Estimates May 2014
4. Nielsen+ESSENCE Custom Survey 2014
5. Scarborough USA+ Release 1 2014
6. Nielsen Monitor Plus
7. Nielsen TV Brand Effect Jan-Jun 2014
8. Nielsen NPower May 2014
10. NielsenTV/MRI Fusion May 2014
11. Nielsen State of the Media Audio Today April 2014

METHODOLOGY

Nielsen+ESSENCE Custom Survey 2014 METHODOLOGY
The custom data used in this report is composed of a collection of surveys. 1.) Survey of Adults 18+ that was collected from a nationally representative online panel, plus an additional oversample of African-Americans. 2.) Survey collected in person at the 2014 ESSENCE Festival in New Orleans. 3.) Interviews conducted in person at the 2014 ESSENCE Festival in New Orleans.

TELEVISION METHODOLOGY
Audience Estimates based on a nationally representative panel of people whose televisions are metered with a device called the National People Meter (NPM) that passively detects exposures to codes embedded in content. A comprehensive questionnaire is also collected of the panel.

NielsenTV/MRI FUSION METHODOLOGY
A statistically matched “fusion” combining the Nielsen National People Meter panel with results from a survey data published by GfK MRI.
ONLINE METHODOLOGY
Based on Nielsen’s NetView and VideoCensus products. This methodology combines a census level accounting of page views and video streams where Nielsen measurement tags have been deployed in order to project audience and behavior to the full universe of all Internet users. For VideoCensus, the portion of the total video streams calibrated by census data are allocated to devices and locations such as smartphones and viewing both inside and outside of home and work. All “Using the Internet on a Computer” metrics are derived from Nielsen NetView product, while all “Watching Video on the Internet” metrics are derived from Nielsen VideoCensus product.

RADIO METHODOLOGY
AM/FM RADIO METHODOLOGY: Audience estimates for 48 large markets are based on a panel of people who carry a portable device called PPM that passively detects exposure to content that contains inaudible codes embedded within the program content. Audience estimates from the balance of markets and counties in the US are based on surveys of people who record their listening in a written diary for a week.

MOBILE METHODOLOGY
Nielsen’s Electronic Mobile Measurement (EMM) is an observational, user-centric approach that uses passive metering technology on smartphones to track device and application usage on an opt-in convenience panel. Results are then reported out through Nielsen Mobile NetView 3.0. There are approximately 5,000 panelists in the US across both iOS and Android smartphone devices, and this method provides a holistic view of all activity on a smartphone as the behavior is being tracked without interruption.

MONITOR PLUS METHODOLOGY
Advertisements are tracked across the country using a variety of methodologies including meters, analyst collection, and vendor provided data. Expenditures for these advertisements are then estimated based off SQAD, CPP averages, or rate cards.

NIELSEN TV BRAND EFFECT METHODOLOGY
Survey collected of panel members exposed to advertisements on television. The survey is conducted in the 24 hrs following the exposure to the advertisement to capture recall, likability, and purchase intent.

SCARBOROUGH METHODOLOGY
Comprehensive qualitative survey questionnaire collected across the largest 77 markets including an additional survey across the balance of the remaining markets.
THANK YOU
TO ALL THE CONTRIBUTORS TO THIS REPORT.

NIELSEN
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Rebecca Roussell

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Ronald Franklin
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Ken Smikle
Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence and mobile measurement. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands.

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