

Beyond Demography

BLACK AUDIENCES ONLINE

Using media data to understand where Black Americans are and what they care about to inform more impactful outreach ▢

WIN BLACK / PA'LANTE

A/B

HARMONYLABS

Understanding people’s media habits gives us a deeper view into who they are, the values they hold, and how we might best engage them. To do this well, we need to move beyond the traditional demographics provided by polls and surveys and create a more complete picture of the culture people are consuming, creating, and being inspired by.

Win Black / Pa’lante, A/B Partners, and Harmony Labs teamed up to produce this report to deepen our understanding of distinct audience segments for Black Americans, and how they might differ from other segments of the population, as well as to surface insights that can help sharpen the stories we are telling and improve how and where we reach these audiences.

To create a map of media consumption for this report we used the following online usage data:

JAN-APR 2020	47K VOLUNTEER PANELISTS, 7.5K WHO IDENTIFY AS BLACK	MINUTE-BY-MINUTE, URL-LEVEL DATA	USAGE DATA PAIRED WITH AGE, GENDER, EDUCATION, INCOME, FAMILY SIZE, AND OTHER DEMOGRAPHICS
		DESKTOP ONLY	



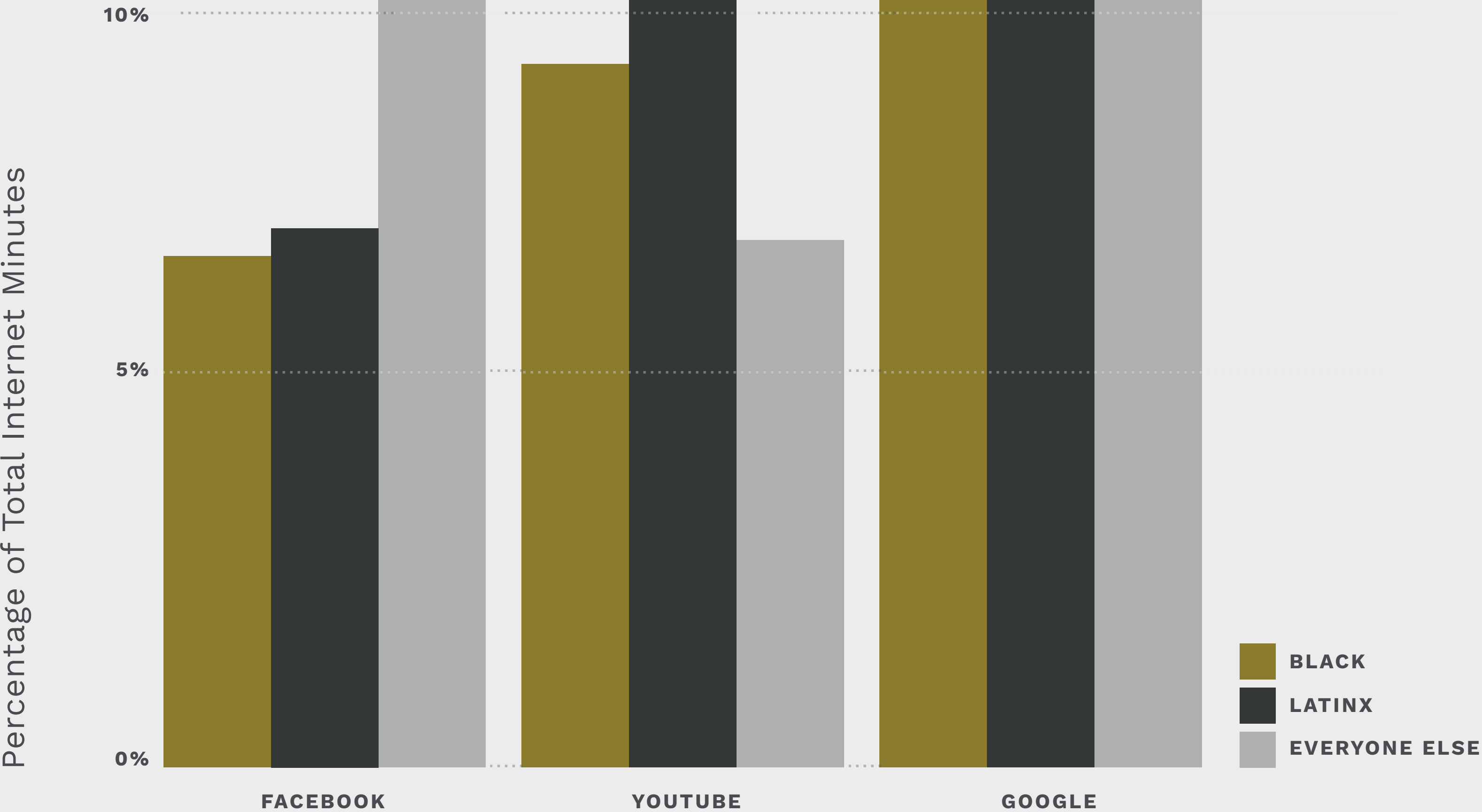
Photo Kyle Sykes | @kylesykes

This report is being created at a historical moment for the Black community and democracy, writ large. We’re facing a global pandemic that disproportionately affects Black communities; **#BlackLivesMatter** protests are rising across the globe; and media and democratic systems are in more need of transformation than ever. Too often, Black audiences are treated as a monolith. At this moment when Black communities are raising their voices and others are shifting their perspectives, we aim to understand the nuanced identities and perspectives that fuel digital consumption behaviors.



MAPPING MEDIA CONSUMPTION ONLINE AND IN THE NEWS

Google and YouTube more popular than Facebook



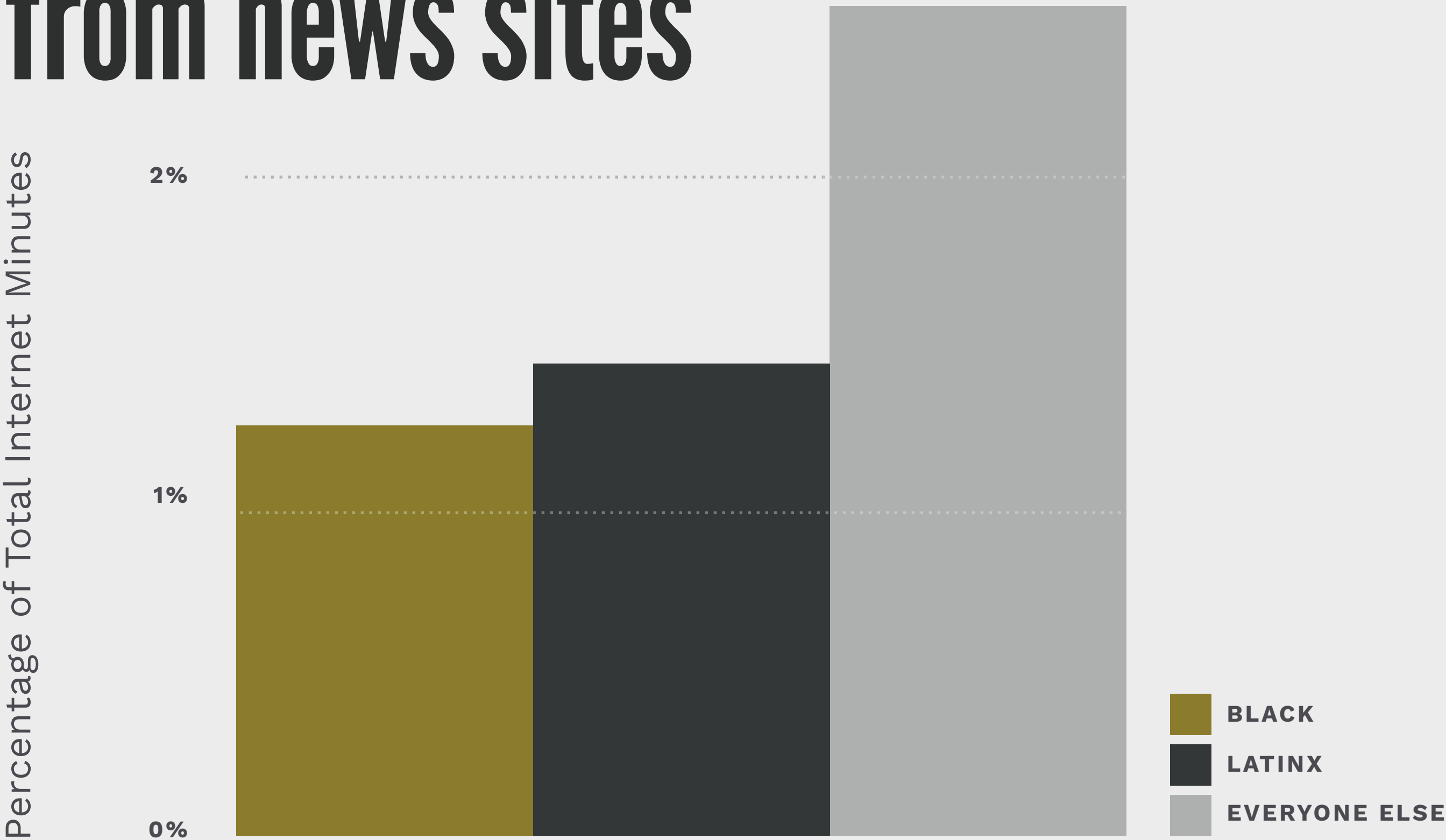
Black audiences spend 23% of their time on these two websites.

While the aggregate time spent on Google, YouTube, and Facebook dominates their time online, the similarities end there.

Black and Latinx audiences spend nearly double the amount of time on YouTube compared to Facebook, whereas for Everyone Else this trend is reversed.

All three of these sites serve as effective digital advertising platforms. However, not every audience is on these platforms equally.

Not consuming news directly from news sites



What is “News”? We classified domains as “news” if they were both classified as news or information by the internet consumption panel *and* they had published articles about key news topics in 2020. This is a conservative estimate that filters out more general information sites like Wikipedia and captures journalism outlets like the New York *Times*, CNN, local news.

Like most Americans, Black audiences spend a small fraction of their online time—just 1%—reading news.

This roughly translates to 10 minutes a month watching news. Comparing with other parts of the population, Latinx audiences spend roughly the same (~10 mins/mo), while everyone else spends just slightly more (~20 mins/mo). As there are exceptions to every rule, certain segments of the Black audience are more “newsy” than others (more on that later).

Clearly, when thinking about “where people get their news,” we need to be thinking beyond traditional news formats, in order to meet people where they are already engaging.

While other parts of the population also use YouTube for music — particularly Latinx audiences—the consumption data is far more pronounced and distinctive for a Black audience, specifically with R&B and Hip Hop.

[illegible]

Position Words that appear close to an axis “belong” to that group. For example, HIP HOP is most watched by the Black audience. Words that appear between axes are shared. For example, Black and Latinx audiences both watch FAMILY FRIENDLY videos.

Online media behaviors surface a diversity of online lives

Within the Latinx and Everyone Else audiences, domains often group together, with Latinx audiences spending a lot of time on YouTube, Google, and Netflix, while Everyone Else gravitates towards Facebook and the news. However Black audiences have varied habits spread across a variety of different types of domains.

Black audiences are spending time on everything from finance-related sites like irs.gov to gaming sites like roblox.com to religious sites like biblegateway.com.

Together, those don't seem to tell one coherent story about a single

audience, but rather reveal that there are distinct audience segments that use the internet in ways that uniquely reflect their personalities, interests, and concerns.

Zooming out to a map of most visited domains yields a more complex picture.

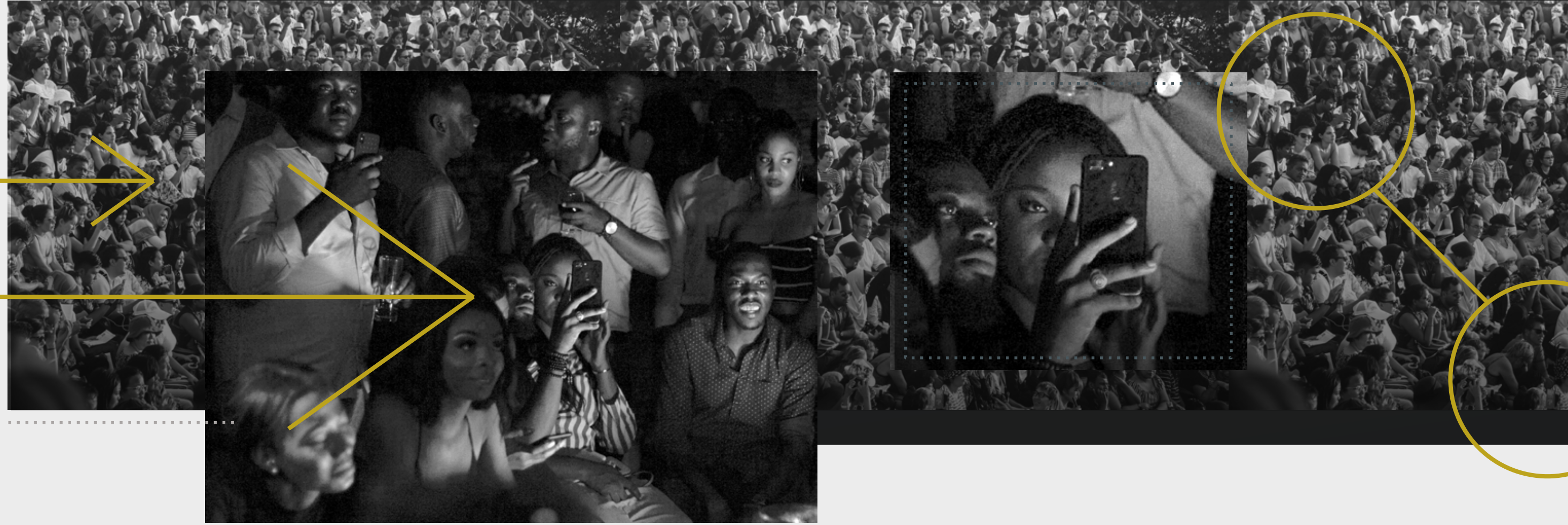


IDENTIFYING DISTINCT AUDIENCE SEGMENTS



Seeing segments through shared behavior

2019



1. Hundreds of thousands of domains

Desktop internet use across 100,000 different domains visited from 2019

2. Machine Learning

We use algorithms that learn which groups of domains people tend to visit together. We use genre information so that Roblox “goes with” Twitch. We also use consumption patterns to tell us, for example, that Twitch users also visit learning sites.

3. Audience Clusters

We use the amount of time people spend in groups of domains to find audiences who routinely visit related sets of sites. These clusters yield audiences—people who are in the same places, consuming the same content.

5 distinct Black audiences

Within the set of all Black internet users, we found 5 distinct segments. While each segment spends time on major sites like Google, YouTube, and Facebook, their online behavior beyond those platforms, and differences depending on their age, reveal different profiles.

1 .

Strivers

are shopping, banking and working.

2 .

Planners

are working, managing money, and doing their taxes.

3 .

Learners

are learning, especially in 2020 with remote school.

4 .

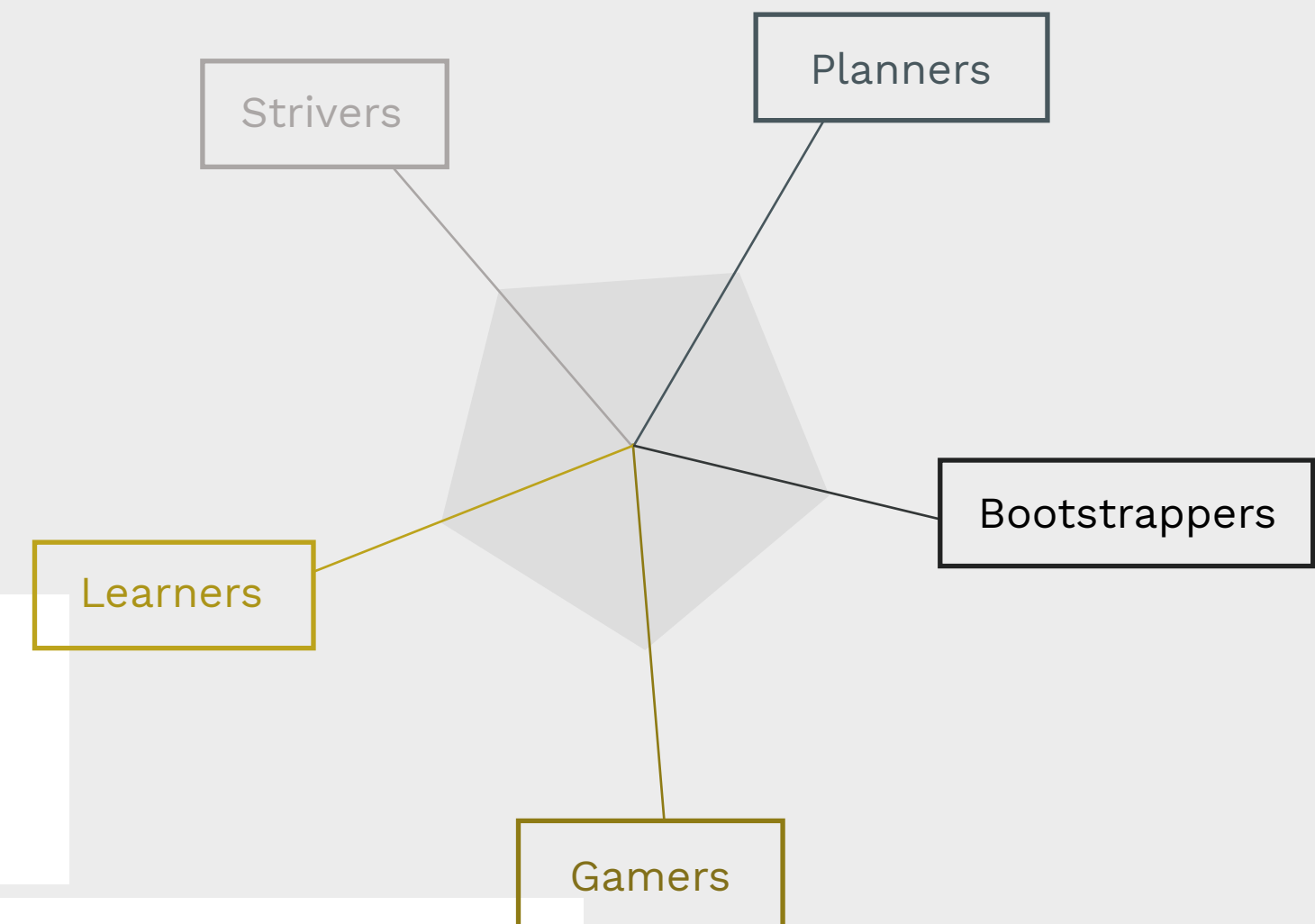
Gamers

are entertaining themselves through social gameplay.

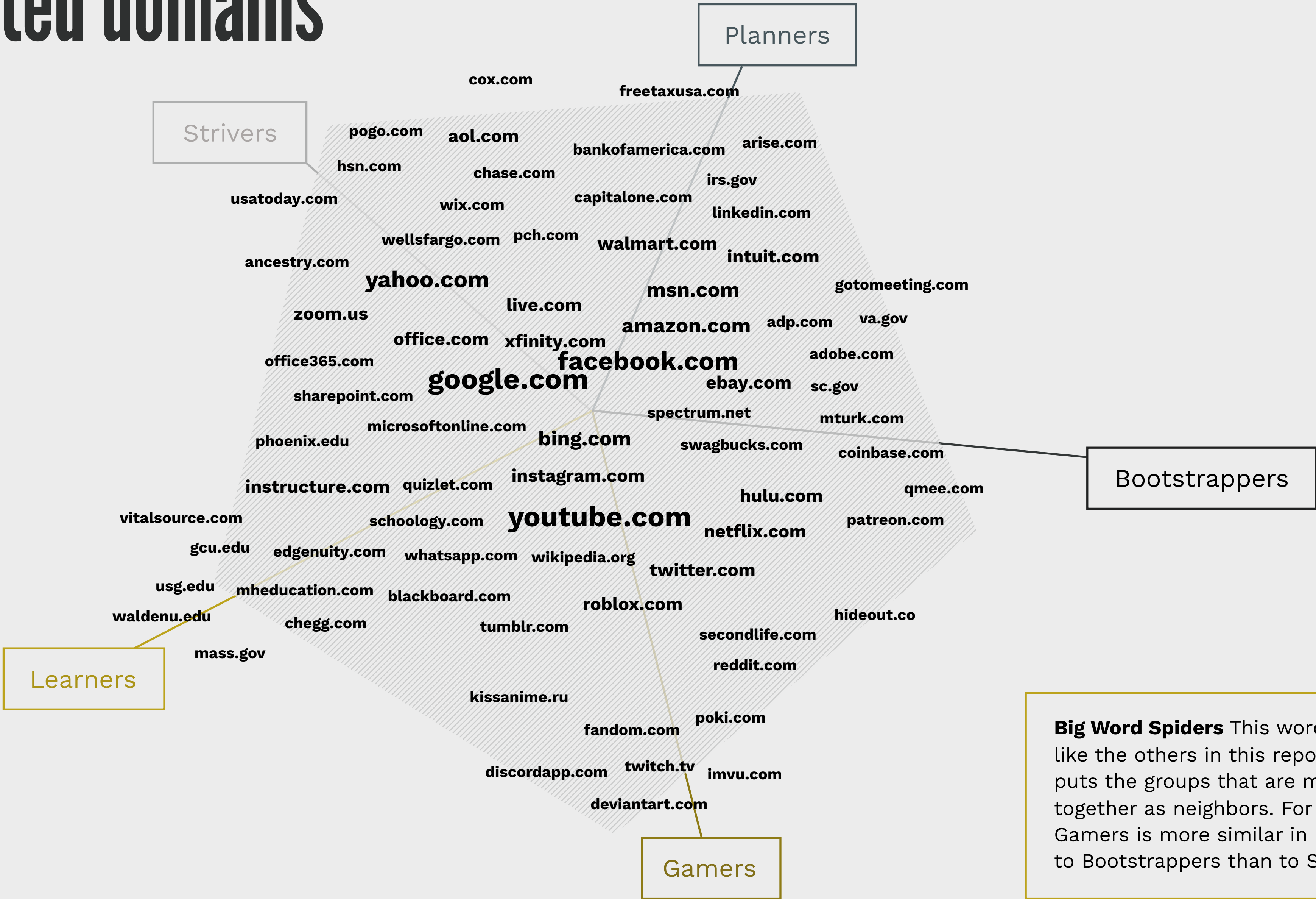
5 .

Bootstrappers

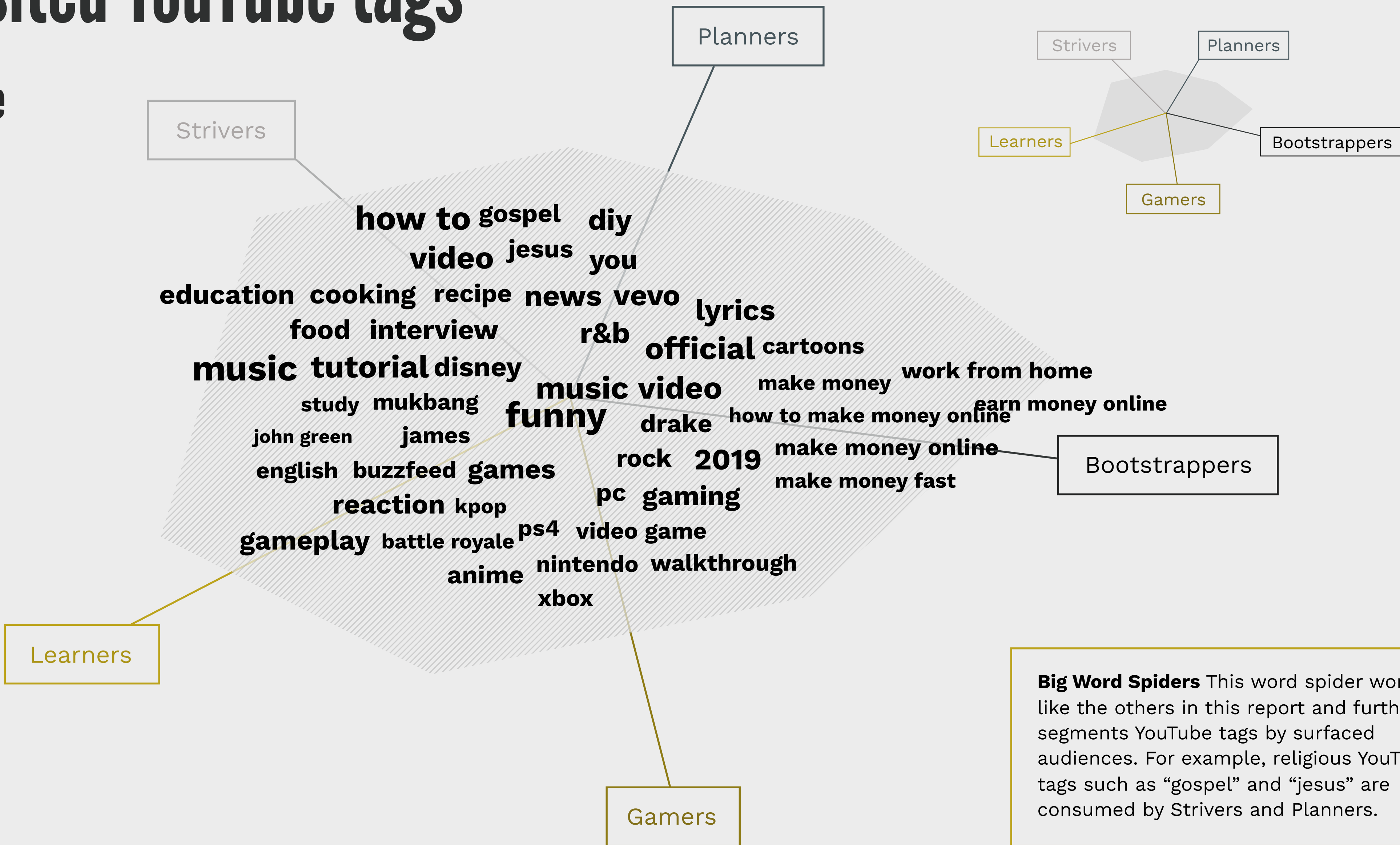
are getting deals and making money.



Most visited domains



Most visited YouTube tags



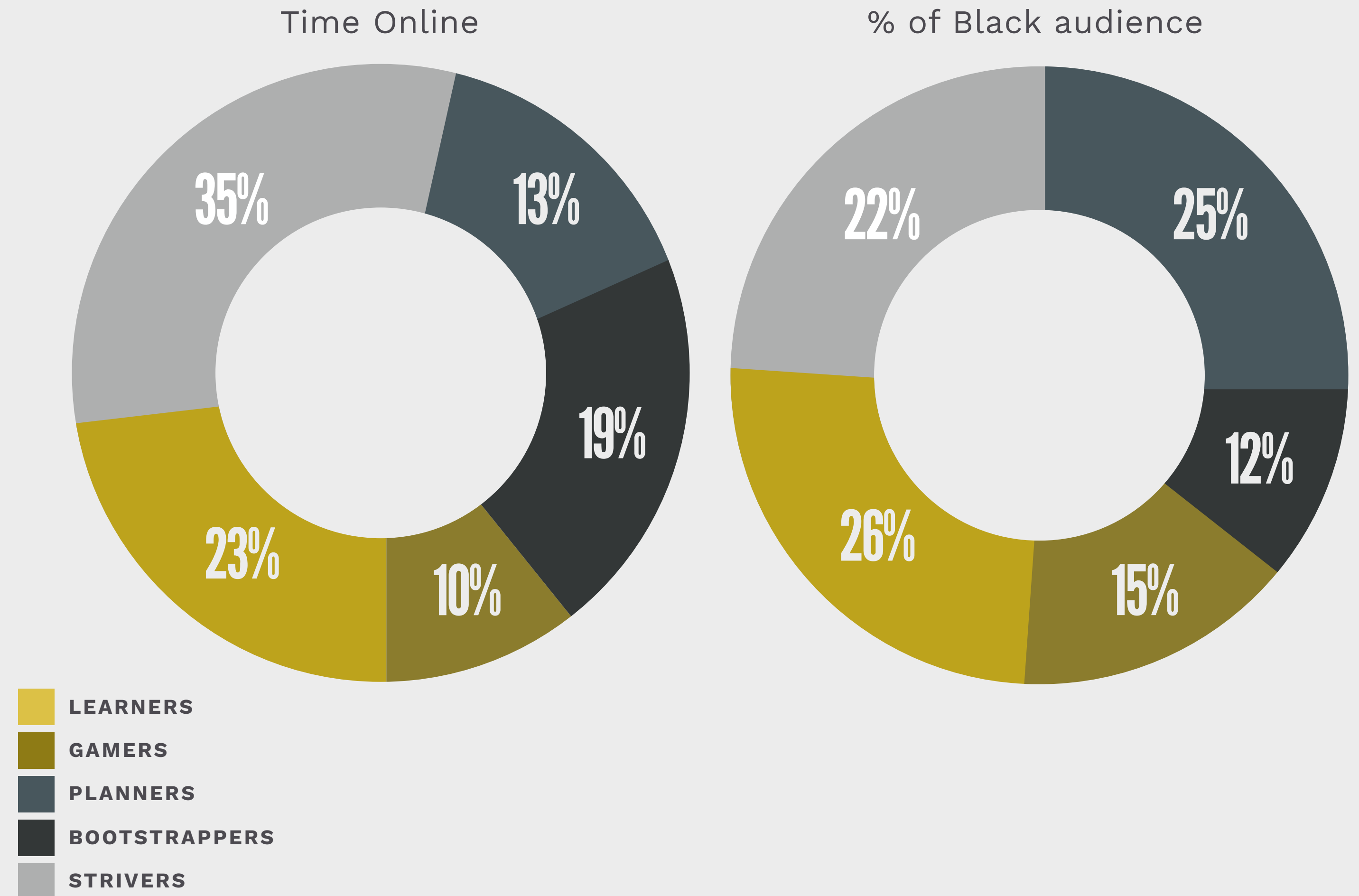
Big Word Spiders This word spider works like the others in this report and further segments YouTube tags by surfaced audiences. For example, religious YouTube tags such as “gospel” and “jesus” are consumed by Strivers and Planners.

Usage is not distributed equally among audiences

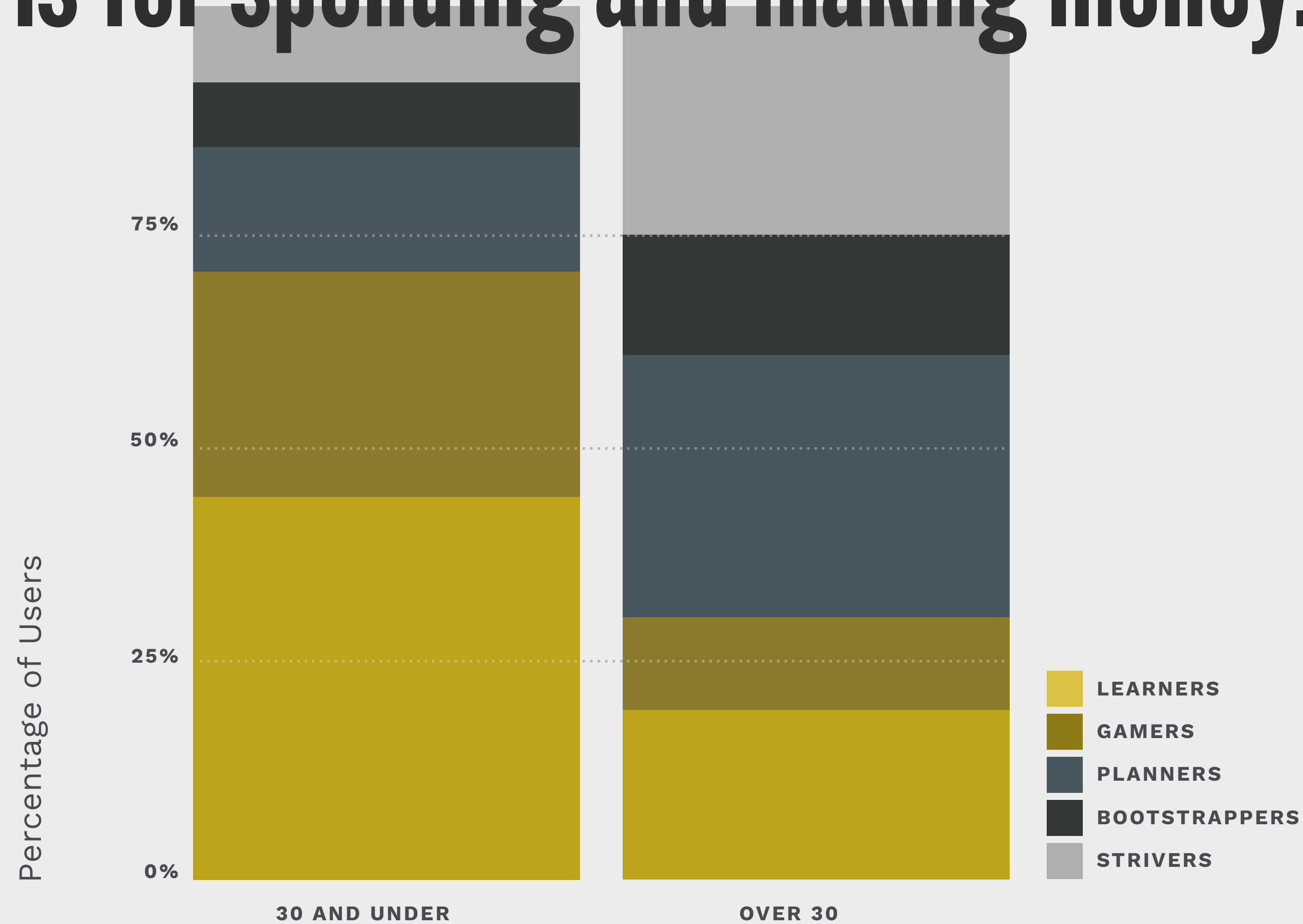
Some segments are online a lot, while others may be harder to reach via the internet.

Strivers and Bootstrappers over-index on their online usage relative to the size of their segments. In particular, Strivers account for the most time online—35%!—while only accounting for 22% of the total audience.

There are definitely audiences that don't spend all day, everyday online, instead, only using the internet for entertainment or specific tasks—like school. Learners, Gamers and Planners all account for a lower percentage of usage relative to the size of their segments.



For older audiences, the internet is for spending and making money.



76% of Black users are over 30, and 68% of those users are in Strivers, Planners, and Bootstrappers

Across these older audiences, experiences with money vary tremendously. From the relatively well-off Strivers, who are shopping, to Bootstrappers, who are gigging on mturk.com and answering surveys for money on qmee.com, the diversity of these audiences reflects the diversity of the Black economic experience.

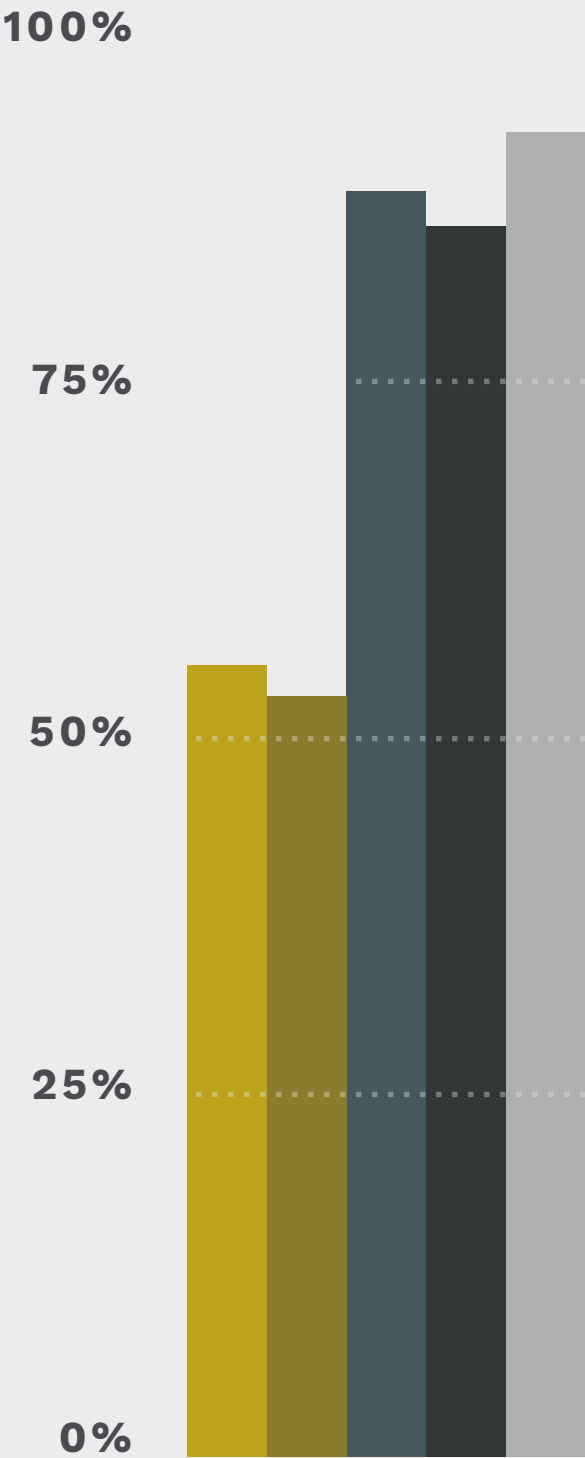
In addition to time dedicated online to work and money, all these audiences spend plenty of time on Facebook, Google, and YouTube.

Demographic distribution

LEARNERS GAMERS PLANNERS BOOTSTRAPPERS STRIVERS

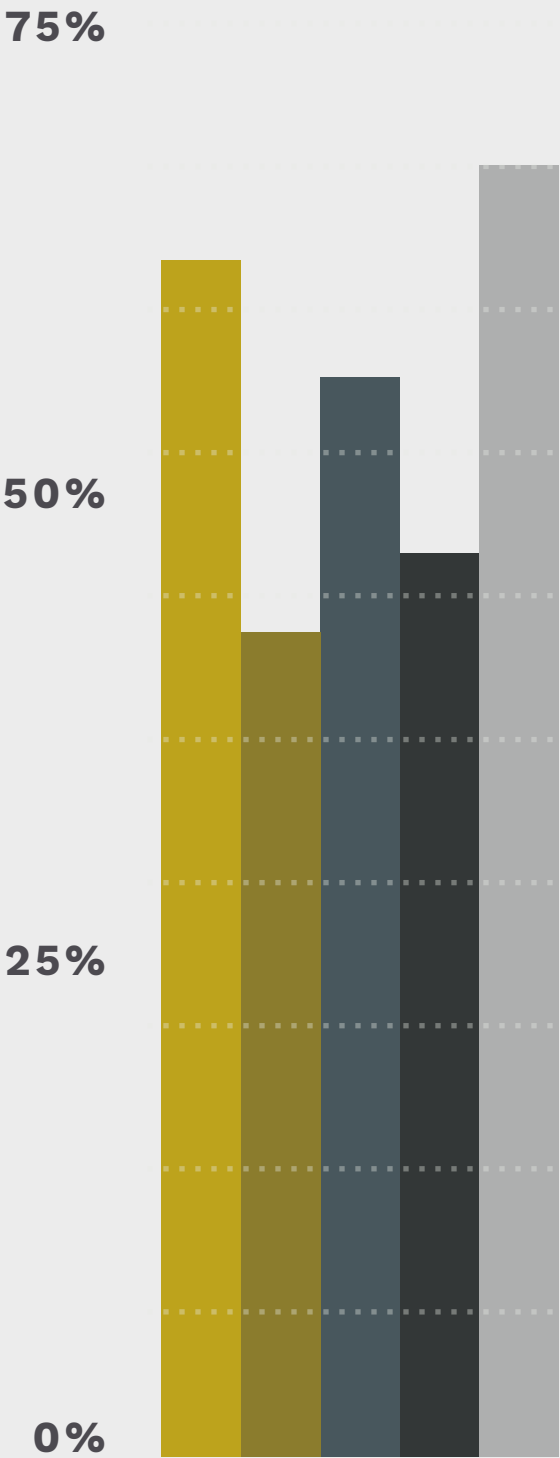
Age

% AGE 30+



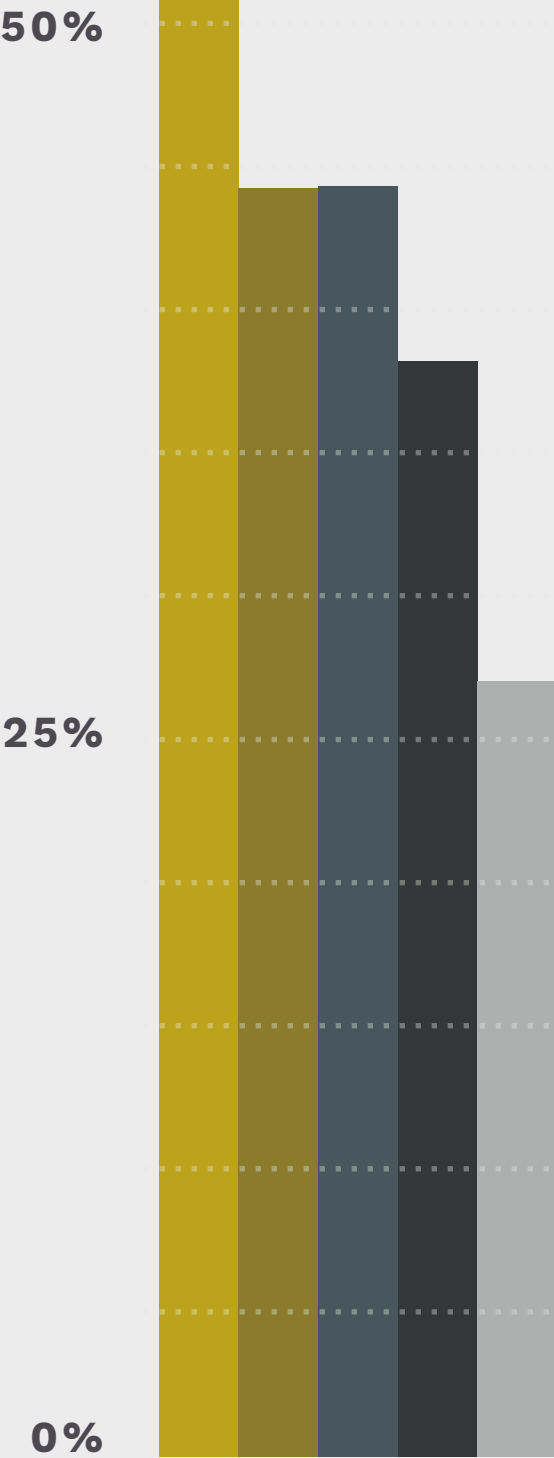
Gender

% FEMALE



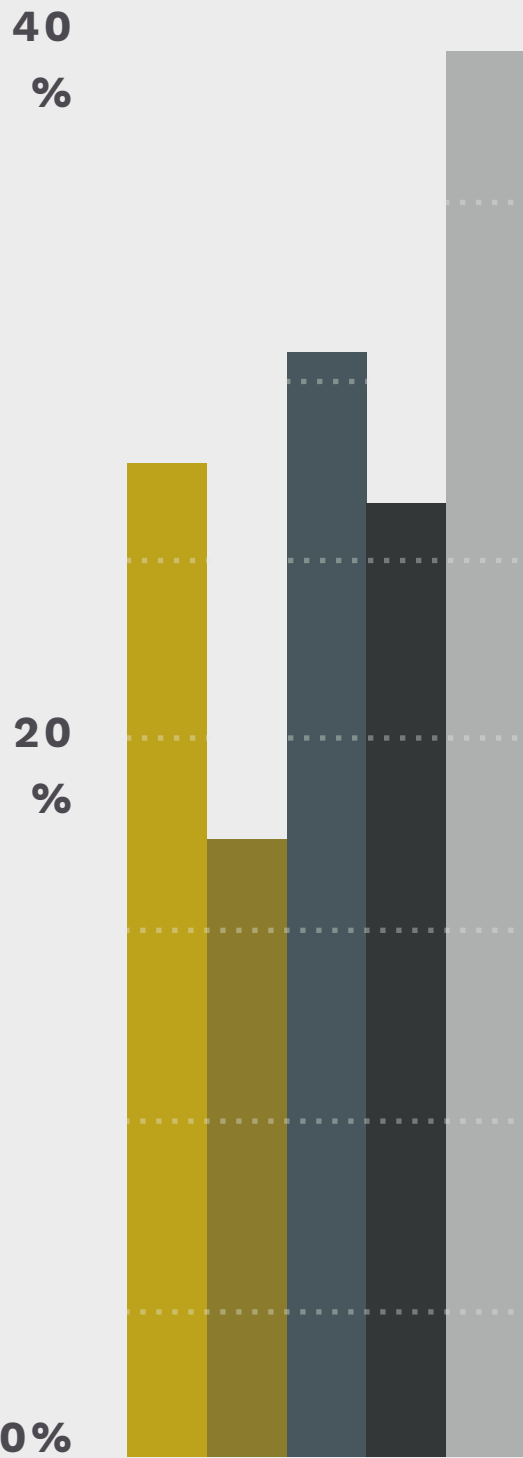
Kids

% W/ UNDER 18



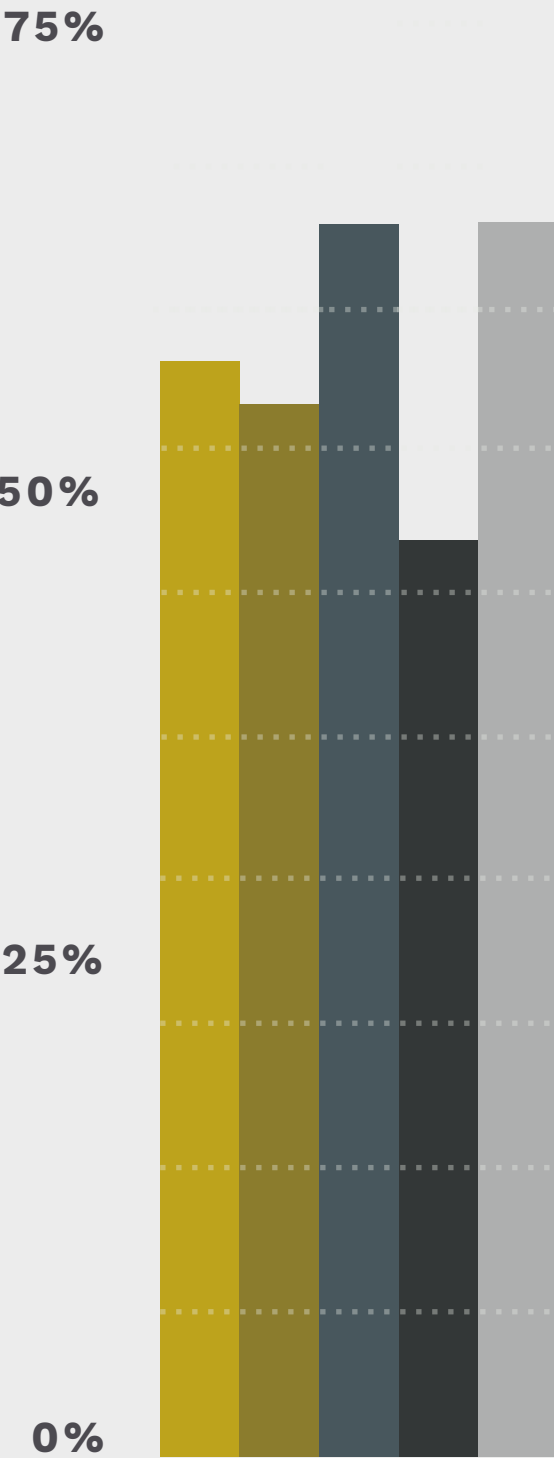
Education

% BACHELORS



Income

% >\$50K



Audience Spotlight

STRIVERS

Strivers are older, educated, and well-off, shopping and exploring hobbies in their downtime.

Demographics

STRIVERS ARE OLDER (JUST 10% ARE UNDER 30 AND 56% AGE 55+), MAJORITY WOMEN (67%).
ONLY 27% LIVE IN A HOUSEHOLD WITH A CHILD UNDER THE AGE OF 18.
23% ARE RETIRED, 12% ARE PROFESSIONALS, AND 12% ARE UNEMPLOYED.
THEY ARE THE MOST EDUCATED GROUP (40% HAVE BACHELOR’S DEGREES OR ABOVE).
THEY HAVE THE HIGHEST INCOMES OF ANY AUDIENCE (63% MAKE MAKE 50K+).

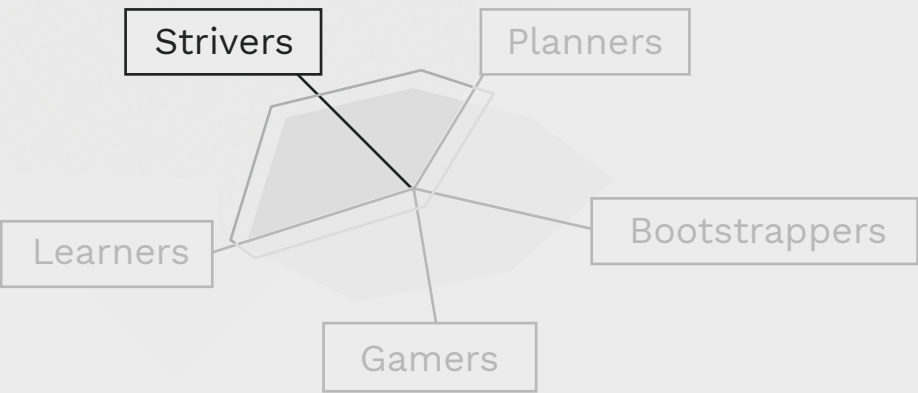
how to gospel diy
video jesus you
education cooking recipe news vevo
food interview r&b of
music tutorial disney
study mukbang music
john green james funny
english buzzfeed games
reaction kpop
gameplay battle royale

Strivers spend more time online than any other group.

They also spend more time with the news: 2% of their overall consumption is news related, double that of other segments.

When turning off the news, Strivers are tuning into YouTube, specifically to learn and explore their hobbies. Tags like “how to”, “interview,” “recipe” and “cooking” are common for Strivers. These

interests are something they share with Learners, in shared tags like “education”, “tutorial”, “disney”, and “mukbang”! Or, they are using the Internet transactionally to shop (ex. hsn.com), bank (ex. wells Fargo.com), and work (ex. office.com and zoom.com)



Audience Spotlight

BOOTSTRAPPERS

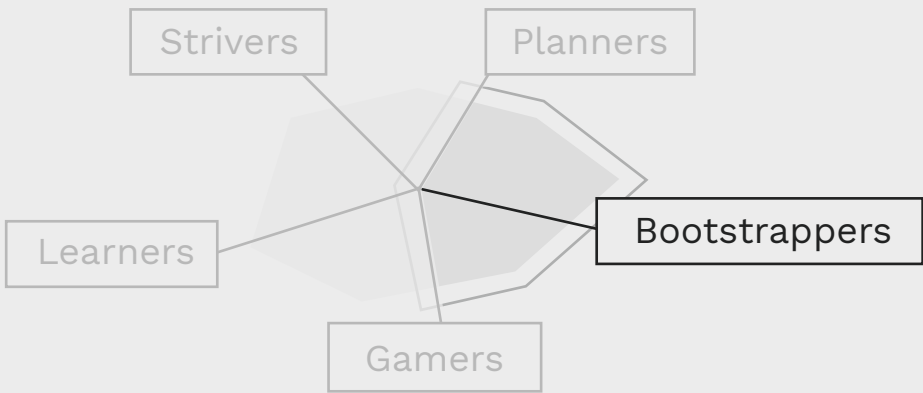
Bootstrappers are online to find work and earn.

Demographics

THE MAJORITY OF BOOTSTRAPPERS ARE MIDDLE AGE (43% ARE BETWEEN 35 AND 54) AND MALE (52%).
38% LIVE IN A HOUSEHOLD WITH A CHILD UNDER 18.
19% ARE UNEMPLOYED, 11% ARE RETIRED, AND 11% IDENTIFY AS OTHER.
27% HAVE BACHELOR’S DEGREES OR ABOVE.
ABOUT HALF (46%) MAKE 50K OR MORE.

Bootstrappers are the second oldest audience segment—both are made up primarily with people over 30—and like Strivers, they spend a lot of time online. Bootstrappers use the internet to seek out work opportunities and are defined by quick survey sites like mturk.com, swagbucks.com, qmee.com, in addition to money sites like patreon.com and coinbase.com.

This entrepreneurship is also reflected in their YouTube videos, with tags like “how to make money online” and “work from home.” They are also watching videos for entertainment with tags like “drake”.



Audience Spotlight

PLANNERS

Planners spend their time online focused on banking, personal finance, and taking care of young children.

Demographics

THE MAJORITY ARE MIDDLE AGED (61% BETWEEN 35 AND 54), AND FEMALE (59%).

45% LIVE IN A HOUSEHOLD WITH A CHILD UNDER 18.

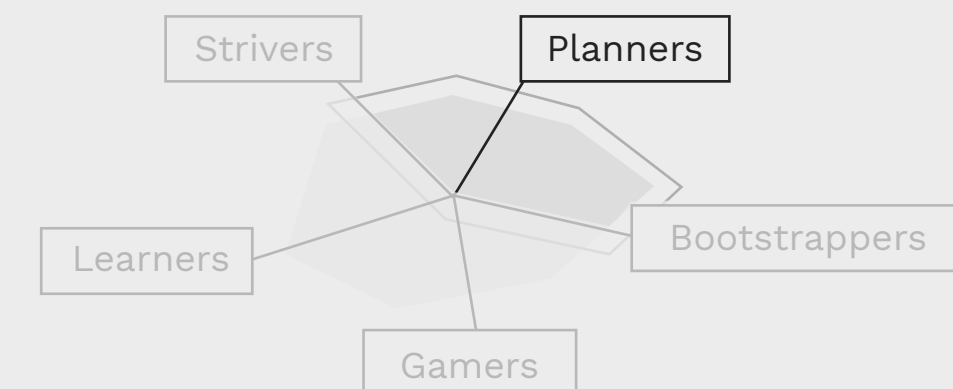
13% ARE UNEMPLOYED, 10% ARE RETIRED, 10% ARE PROFESSIONALS, AND 11% IDENTIFY AS OTHER.

31% HAVE BACHELOR'S DEGREES OR ABOVE.

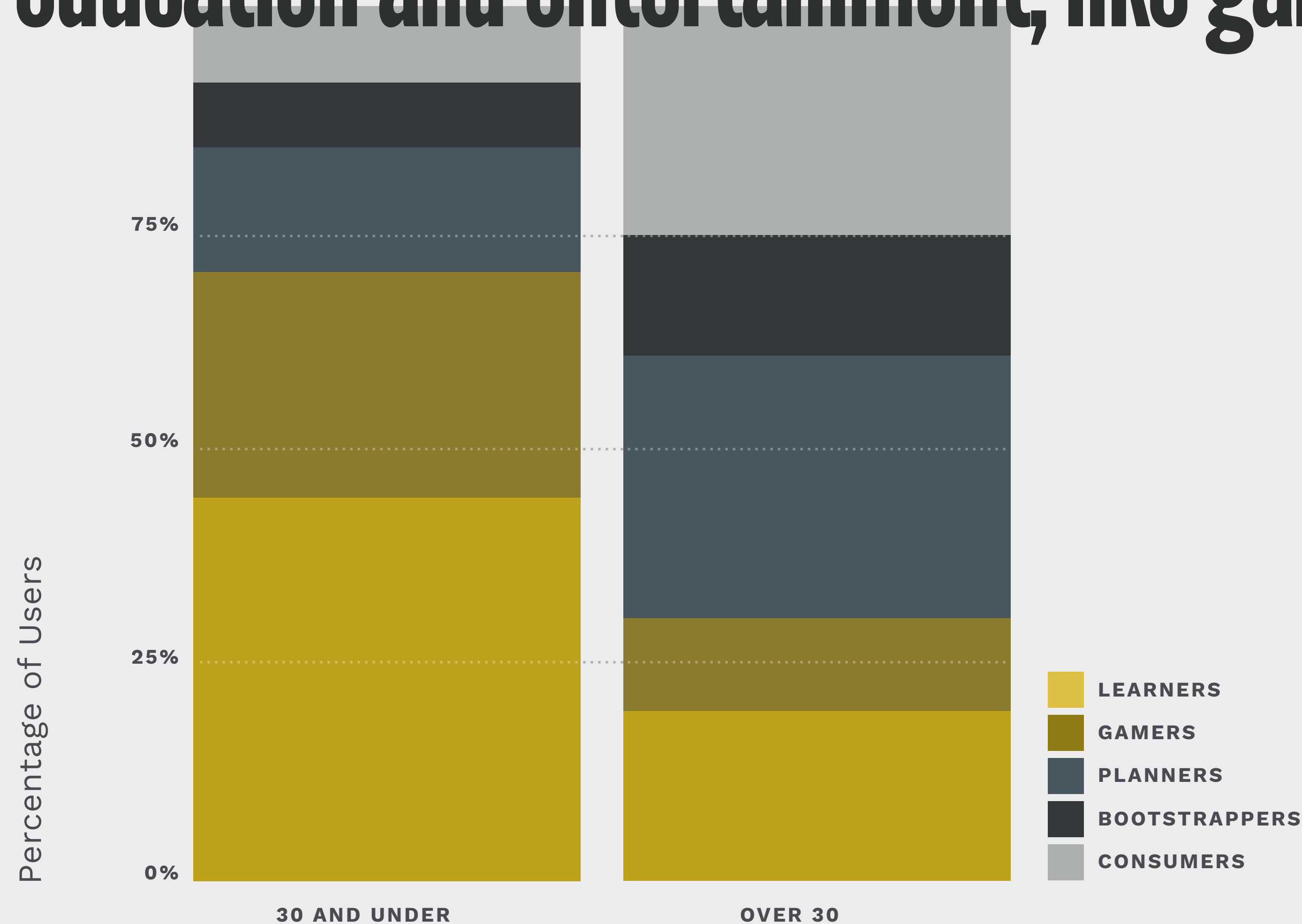
A MAJORITY OF THE GROUP (63%) MAKES 50K OR MORE.

Although Planners makes up 25% of the Black Audience, they make up only 13% of total consumption. When they do go on, they are banking (capitalone.com, bankofamerica.com, chase.com), paying bills or taxes (xfinity.com, irs.gov, intuit.com, freetaxusa.com), and shopping (walmart.com, amazon.com). Their YouTube

consumption is centered around news and entertainment, with tags like “r&b”, “vevo”, and “news”. Interestingly, they share religious tags with Strivers such as “jesus” and “gospel”.



For younger audiences, the internet is for education and entertainment, like gaming.



26% of the Black audience is under 30, and 70% of these users are in Learners or Gamers.

These audiences spend less of their time on traditional news sites, so connecting with them means engaging in a voice that resonates with the values that their online behaviors reflect.

Both groups are drawn to entertainment on sites like netflix.com. Learners, however, spend a lot of time focused on self-enhancement through learning. Gamers spend more time on pleasure and fun on gaming and pornography sites.

Audience Spotlight

LEARNERS

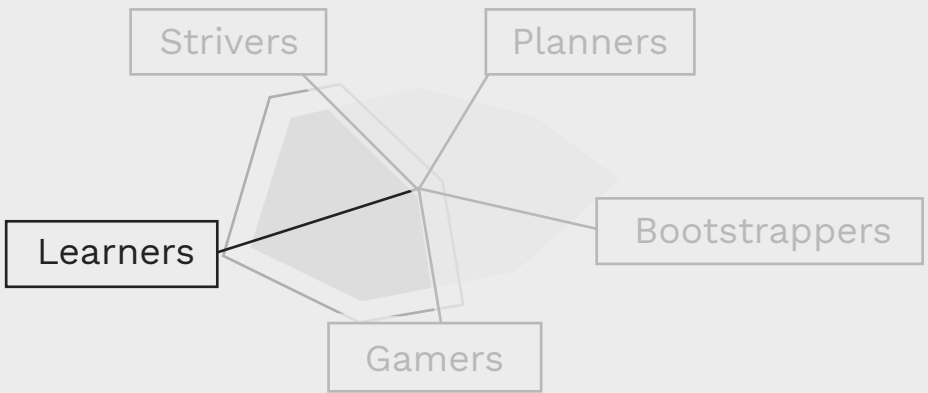
Learners are young, educating themselves and exploring culture online.

Demographics

WHEN WE THINK ABOUT POST-MILLENNIAL INTERNET USE, LEARNERS DEFINITELY REPRESENT ONE MAJOR GROUP, WITH 54% BEING 35 AND UNDER.
THEY ARE ALSO MAJORITY WOMEN (63%), AND 52% LIVE IN A HOUSEHOLD WITH A CHILD UNDER 18.
21% ARE FULL TIME STUDENTS, 15% ARE UNEMPLOYED AND 11% IDENTIFY AS OTHER.
28% HAVE BACHELOR’S DEGREES OR ABOVE.
A LITTLE OVER HALF (55%) MAKE 50K OR MORE.

Learners are defined by their unique use of learning sites such as chegg.com, instructure.com, blackboard.com, quizlet.com and others. However, that doesn’t mean they don’t also use the internet for entertainment. Hulu.com is a top domain for Learners, and they are watching videos on YouTube, with tags like “gameplay”.

They also share a lot of YouTube interests tags with another younger segment, Gamers, including tags such as “games”, “ps4”, and “kpop”, and “anime”.



Audience Spotlight

GAMERS

Gamers are young people gaming and exploring culture.

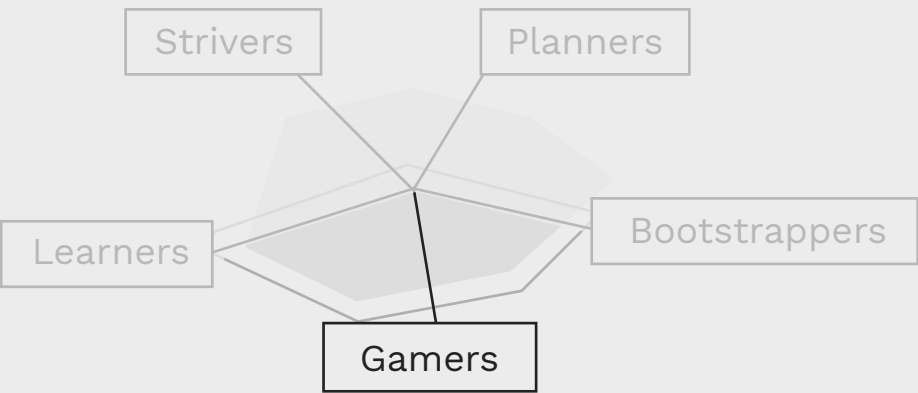


Demographics

GAMERS REPRESENT THE OTHER FACET OF POST-MILLENNIAL INTERNET USE, WITH 52% BEING 35 AND UNDER.
HOWEVER, THIS GROUP IS MAJORITY MEN (57%) AND 46% LIVE IN A HOUSEHOLD WITH A CHILD UNDER 18.
COMPARED TO LEARNERS, A GREATER NUMBER ARE UNEMPLOYED (19%), 12% ARE FULL TIME STUDENTS, AND 11% IDENTIFY AS OTHER.
18% HAVE BACHELORS DEGREES OR ABOVE.
A LITTLE OVER HALF (53%) MAKE 50K OR MORE.

Gamers share many similarities both demographically and behaviorally with Learners. When it comes to YouTube tags, they are both drawn to gaming and manga, with Gamers owning the word “nintendo” and Learners owning “gameplay”. However the other domains they visit are quite distinct, with Gamers spending their time mostly on gaming sites while Learners primarily

search educational websites. Demographically both are young—with the majority of both groups being 30 and under—with men making up the majority of Gamers and women making up the majority of Learners.

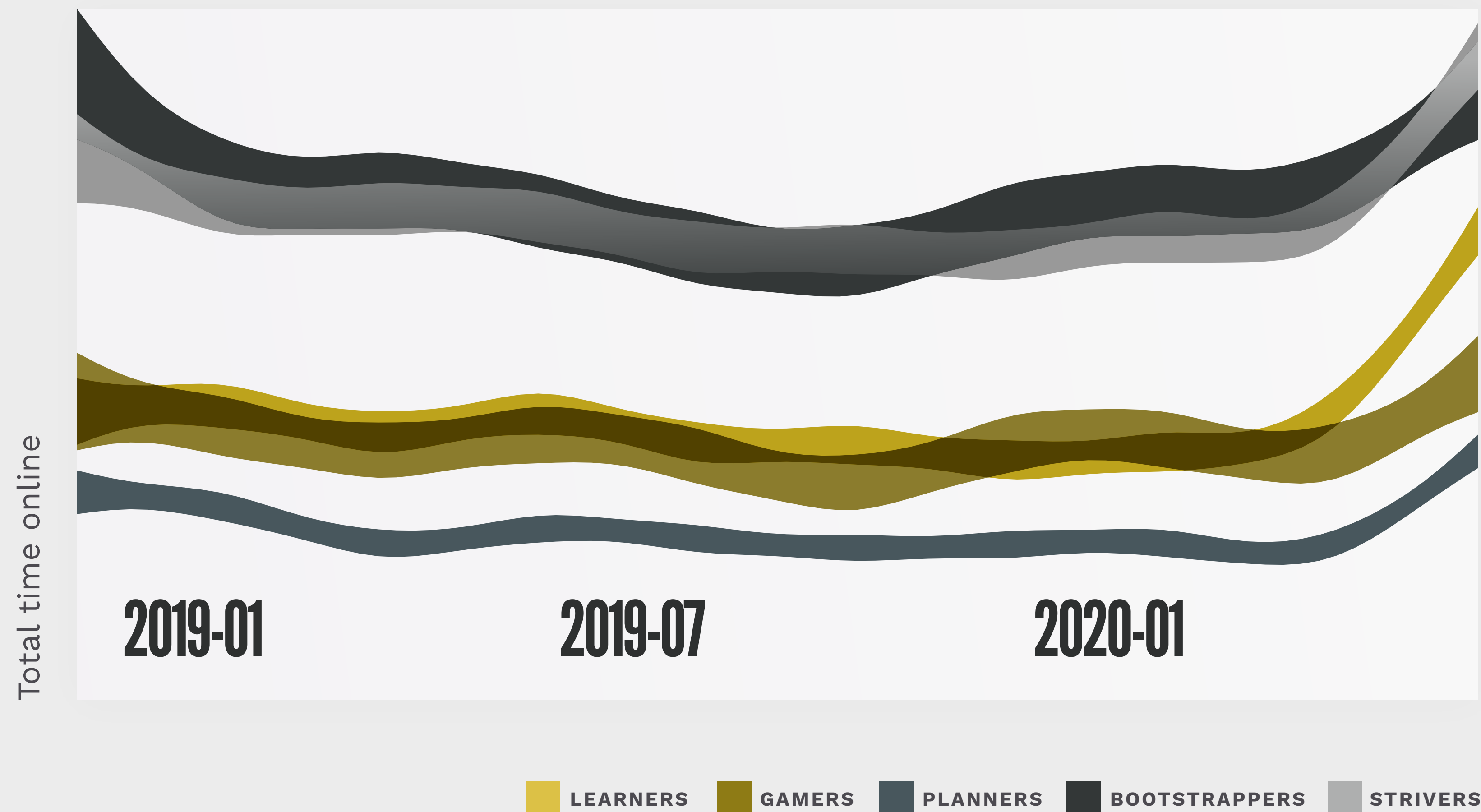


THE IMPACT OF A GLOBAL PANDEMIC

Photo Eric Parthum | Agitate Photography

WIN BLACK / PA'LANTE A/B HARMONYLABS

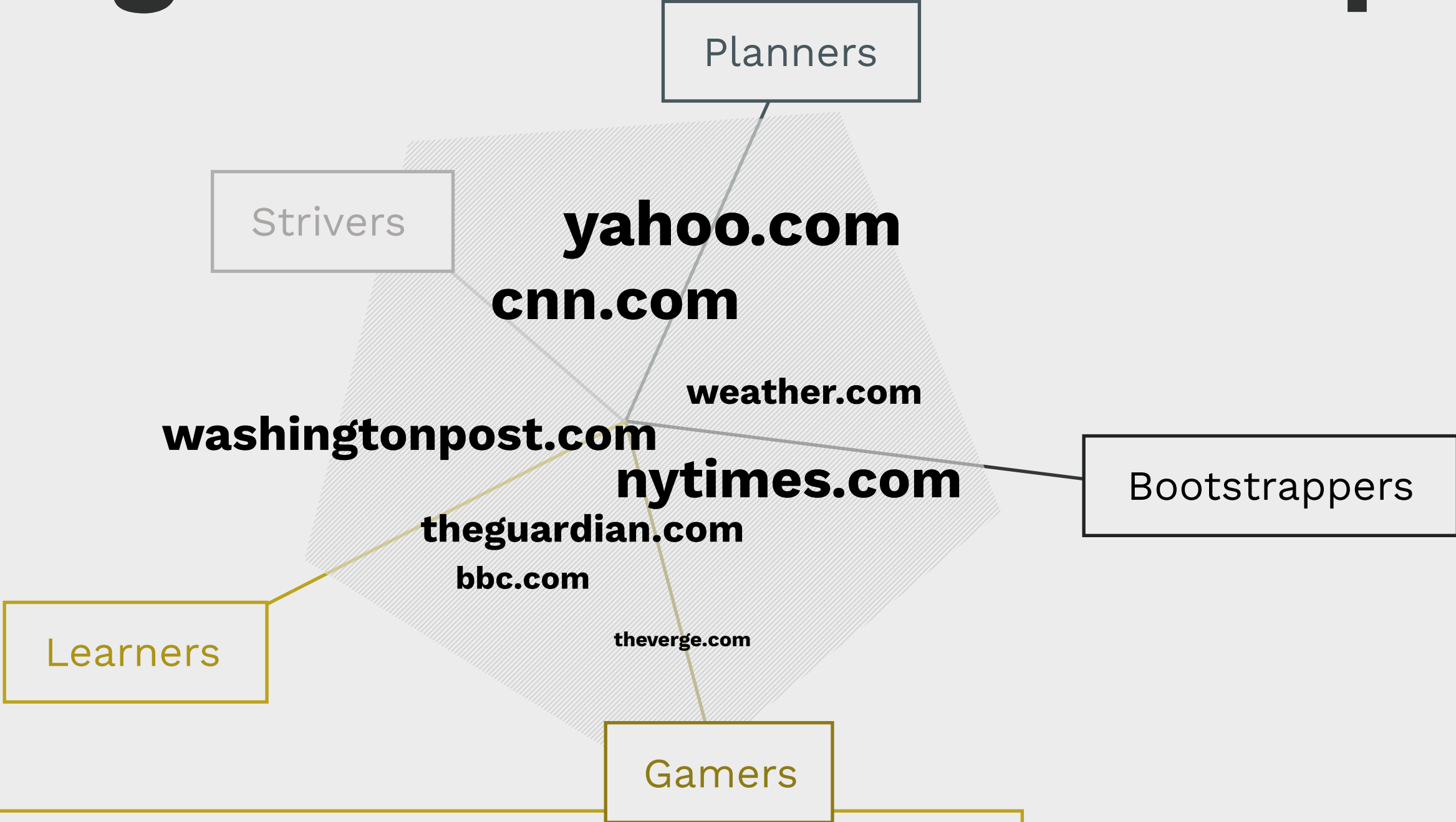
COVID means more time at home and on the desktop, especially for Learners



Most people are spending more time online. Some of the increase is likely displacement—internet use from phone or at work that is now taking place at home where the desktop internet panel detects it—and some is likely increased reliance on the internet for entertainment and to complete tasks while most businesses are closed.

The biggest increase is for Learners, who are doing their school online now, but the pandemic has also substantially increased internet usage for Planners whose usage in 2019 was quite low. Bootstrappers were already spending a lot of time online, and their usage hasn't increased much; they may already have been home before the pandemic.

Black audiences are getting their COVID news from mainstream and left-leaning outlets on their desktops



News Aggregators It is not always possible to tell exactly what a user is doing on a site, but the yahoo.com estimates here do exclude use of that site for e-mail. This is time spent on yahoo.com itself, reading headlines, looking at the weather, etc.

Zooming in on news sites that reached the largest Black audiences in March and April of 2020, during the COVID pandemic, Strivers spent nearly twice as much time reading news as other audiences, and that news is mainstream and left-leaning news. The younger audiences— Learners and Gamers—are reading less news, but it’s markedly left-leaning, from outlets like theguardian.com, washingtonpost.com, and nytimes.com

News aggregator sites like yahoo.com and even weather.com are important sources of headlines for the Black audience overall and especially for Bootstrappers, who spend a lot of time online but very little on news sites.

KEY TAKEAWAYS

Effective engagement requires a segment specific approach

LEARNERS

Represent largest proportion of the rising American electorate

Young Black Americans, especially women

Spending hours online studying and learning, especially during COVID lockdowns

Choosing light-hearted entertainment like KPop and fun like gamer videos

GAMERS

A sizeable chunk of the rest of the rising American electorate

Young Black Americans, especially men

Using the internet to play social games and for social media

Choosing entertainment that is related to their social gameplay

STRIVERS

The most politically engaged audience

Older, well-off Black Americans, especially women

Easy to reach on a variety of banking, working, shopping and gaming sites

Choosing entertainment that helps them learn more about their interests, and religious music

BOOTSTRAPPERS

Hardworking, but not necessarily politically engaged

Middle aged, freelance or unemployed Black Americans, especially men

Spending time making money from internet surveys

Choosing entertainment that helps them make more money online

PLANNERS

Hard to reach, but motivated audience

Middle aged, busy Black Americans, especially women

Using the internet to bank, do their taxes and shop

Choosing entertainment that is related to news, religion and music

THANK YOU. ▣

For more information contact:

Andre Banks

Founder, A/B Partners

andre@abpartners.co

Michael Slaby

Community Director, Harmony Labs

michael@harmonylabs.org

Ashley Bryant

Principal, Win Black / Pa'lante

ashley@abpartners.co

A/B

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