



AFRICAN AMERICANS REVEALED

BET★
NETWORKS

In the past 18 months, we have interviewed over 80,000 Consumers:



- **Black Family Study**
- **African-American Segmentation Study**
- **Census 2010: The Changing Black Population**
- **Music Consumption Study**
- **Simmons Multi-Media Engagement Study**
- **Web 2.0/Digital Applications Study**
- **Brand Health Study**
- **Specials Viewing Habits & Practices Study**
- **BET Programming Diagnostic Research**
- **Color of Beauty – HBA Study**
- **Urban Youth Study**
- **SMG Beyond Demographics**

SMG Beyond Demographics



OBJECTIVE

To develop segment profiles generated by SMG and a futurist to communicate the black community is not monolithic

METHODOLOGY

Partnership with SMG included a recontact phone study of 500 AAs 18+ to understand purchase drivers in key categories

RESULTS

Category and Specific Category Drivers determined for:

- Autos
- QSR
- Apparel
- Department Stores
- Chain Drug Stores

OBJECTIVE

To understand the entertainment preferences, media consumption, lifestyles, behaviors, and attitudes of today's urban youth

METHODOLOGY

In person interviews (MEE Productions) were conducted among 1,500 young people between 15 and 20 in six urban centers across the US

RESULTS

- A significant portion of their time is spent watching TV, with $\frac{3}{4}$ saying they watch a minimum of two hours daily. BET was chosen as their favorite cable channel
- More than half of urban teens go to the movies at least twice a month, with 68% of those saying TV is the #1 source of awareness of new movies
- More than $\frac{1}{3}$ state they buy apparel/accessories at least 4x a month. Nearly $\frac{1}{2}$ admit they spend more than \$100 when shop
- 61% buy a new cell phone at least 1x/year and an additional 30% admit changing 2+X/year
- There is a video game console/platform in nearly every urban teen HH

The logo features three stylized human figures in green, orange, and purple, with a blue speech bubble above them. The text "Consumer Insights" is written in white below the figures.

Color of Beauty

OBJECTIVE

To understand the health and beauty habits of women overall and to understand the consumption, usage and buying patterns of AA women in the hair, skin care, and makeup categories

METHODOLOGY

An online study (TNS) conducted among their Health & Beauty World Panel 10,000 Total Women 18+, with a re-contact of 900 women 18-49 (including 600 AA Women)

RESULTS

- AA women account for 18% of total yearly HABA expenditures, with an avg of \$1,284 being spent per AA woman, compared to \$1,012 by general pop. Women
- 62% of AA women are more likely to remember TV advertised HABA products vs. 42% of general pop. Women
- AA women are fiercely brand loyal and overwhelmingly conscious of companies that appeal to ethnicity and cultural nuances

Programming Diagnostic Research



OBJECTIVE

Assess current and potential viewer reactions to new content and potential programming concepts

METHODOLOGY

Have conducted over 80 program testing sessions among various audience demos and several programming concept and support tests to make smarter programming decisions (n = 4000)

RESULTS

- Data has helped drive BET Viewership +17% in 2009, resulting in the #1 year in BET History
- Most CY09 Original Shows saw double or triple digit gains vs. YA (Time period if not a returning series)

Specials Viewing Habits & Practices Study



OBJECTIVE

To determine awareness, viewing habits and future viewing intent of BET Specials and competitive TV Specials, as well as perceptions towards our key franchise and interest in specific elements in the show, both current & proposed

METHODOLOGY

Online study conducted (OTX) among 1,500 respondents 16-54 (500 AA and 1000 other ethnicities)

RESULTS

All BET specials that have aired since this study was conducted have seen growth vs. the previous year:

- BET Honors +120%
- BET Awards +81%
- BET Celebration of Gospel +44%
- BET Hip Hop Awards +28%
- BET Rip The Runway +9%

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Cable Brand Health Study

OBJECTIVE

To understand how African-Americans evaluate leading cable networks and identify the networks that have the strongest connections with their audiences

METHODOLOGY

On-line Survey (OTX) of 1000 African-Americans 13-65 asked several dimensions of cable network, loyalty and affinity.

RESULTS

- 74% of BET Viewers say that can't live without it
- 45% of BET Viewers would be willing to pay more for BET if it was not available to them
- No cable network is mentioned more than BET on a top of mind basis
- BET scores higher than competitive net average on all attributes, with highest scores for
 - Features personalities I trust & like
 - A trusted source of information
 - Has a wide variety of programming
 - Is one of my favorite networks



OBJECTIVE

To understand the Web 2.0 habits of African-Americans and dispel the myth of the digital divide

METHODOLOGY

An online survey (The Market Research Department) of 1100 respondents - 300 general population & 800 African-Americans 15-64)

RESULTS

- AAs spend more time on the internet, purchase more high technology items, and look to the internet for info & entertainment more than the general population
- AAs are more comfortable with online ads featuring AAs or sites showing AA images
- Online AAs mirror the general population's demographics
- AA Web 2.0's are more heavily involved in social networking than general pop. Web 2.0s (including blogging, IM, FB, Twitter, etc.), creating more Word-of-Mouth marketing



Multi-Media Engagement Study

OBJECTIVE

To understand exposure and engagement metrics across multi-media properties

METHODOLOGY

An online survey (Experian Simmons) of over 17,000 consumers 18+ (including 4000 AAs) to measure eight engagement metrics across TV and the internet

RESULTS

- AAs have higher TV and Internet engagement than non-AAs
- Television
- AA BET viewers are significantly more engaged than AA adults viewing other TV networks
- BET ranks #6 among 94 ad-supported nets for Ad Attention/Receptivity
- BET ranks #9 among 96 ad-supported nets for Overall Engagement
- Internet
- BET.com ranks #10 among 66 ad-supported TV online sites in Ad Attention/Receptivity
- BET.com ranks #6 among 66 ad-supported TV online sites in Overall Engagement

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Music Consumption Study

OBJECTIVE

Determine how consumers are currently listening to and learning about music and the roles that TV in general and BET in particular play

METHODOLOGY

An online survey (OTX) conducted among 1,750 People 13+ (750 AAs and 1000 General Pop)

RESULTS

- BET leads in measures related to quality of music programming, introducing new music, and featuring music liked
- BET gets solid scores across the board for its connection with music culture and the quality of its music programming



Viewpoints from Today's Families



unity • connection • opportunity • striving • heritage • culture • possibility

Phase I: Immersion research of known resources, literature and white papers

Phase II: Expert Interviews

- Michigan State University
 - New York University
 - Princeton University
-

Phase III: Ethnographic In-Home Interviews conducted in NY, Birmingham, St. Louis and Oakland (20 Sessions)

- Families interviewed included nuclear traditional families, Families headed by other family members (i.e., Grandmother, Aunt, etc.), Families headed by Same Sex Couples, Families headed by Single Moms and Dads
-

Phase IV: Online Panel Recruitment (In-depth Quantitative Survey)

- **Research Objective:** Comprehensive questionnaire administered to measure attitudinal, psychographic, lifestyle and perceptions among African American Heads of Households nationally across the United States.
- **Criteria-** qualified respondents were identified as AA HOH 18+ years with sample composition and weighting to reflect US Census Race quotas among the ages of 18-34, 35-54 and 55+.
- **Completed Surveys-** a total of 1, 333 AA Heads of Household between 7/10-15/09; sample size yielded a margin of error +/- 3%

Central Themes Revealed

- **It Takes a Village: Each One, Reach One**
- **Parenting: The Eternal Balancing Act**
- **Education: Children Face Obstacles, Parents have Great Expectations**
- **Our Neighborhoods: Havens of Safety and Support**
- **Race Relations: A Work in Progress**
- **Finance 101: Help Wanted!**
- **Religion & Spirituality: It's about a Higher Connection**
- **Different Family Structures: A Budding Reality**
- **Gender Roles: Women Still the Bedrock, Men Can and Do Step Up**

It Takes a Village: Each One, Reach One

Today, everyone's involvement is necessary to create a functional black family unit. The phrase "it takes a village" is a heart felt reality and captures the spirit of why we need one another.

Key ingredients for creating successful families:

80% Holiday gatherings* are crucial for remaining in touch***

72% Extended family, friends & neighbors play significant roles in raising children

67% Like having male/female role models in their children's lives

58% Important to stay connected to family/extended family**

53% Faithfully attend family reunions to stay connected to multiple generations

*Annual or every 2-3 years attendance at Thanksgiving and Christmas

Question Detail:

- ** How important is for you to stay in touch with extended family?
- *** How often do you get together with extended family for Thanksgiving/Christmas?
Which of these statements represent your family for you? [Top 3 Box]

Parents Share Goals, Dreams For Families

Parents share how they navigate their responsibilities. Responses reveal realistic aspirations and accomplishments as it relates to living better, spending time, balancing/juggling the demands of work and finances.

“Blue Print” for sustaining viable, strong families:

94% Want open discussions with their children

93% Sacrifice to make sure children receive best education possible*

90% Dedicated to passing down life lessons from childhood

90% Spend more time with family

88% Focus on improving financial situations*

85% Invest in sharing religious/spiritual beliefs, practices with children

80% Admit they face more difficulties raising children today versus their parents

Overwhelmingly, the trials parents face today are far more complicated. The choices and decisions made are entirely different from the challenges parents faced in previous generations.

Education: Children Face Obstacles, Parents Have Expectations

Their children face many obstacles, but parents refuse to limit their expectations. Parents speak frankly on the state of education, existing barriers and goals they set for academic excellence:

36% **Feel their children face greater challenges in achieving the same educational levels**

25% **Are dissatisfied with the quality of their children's education***

AA parents are vigilant and determined to seek progress in their children's educational institutions. They will not settle for sub-par standardized test results and want committed teachers who impart knowledge.

Parents acknowledge many forces that hinder their children's progress:

- 1. Decline in academic standards**
- 2. Lack of committed and motivated teachers**
- 3. Poorly funded schools**
- 4. Peer Pressure**
- 5. Violence/Bullying/Intimidation in schools**
- 6. Increased pressure/too much emphasis on standardized testing**
- 7. Lack of access to a better school system**
- 8. Lack of guidance counselors/higher education career guidance**
- 9. Parents lack finances/poor financial preparation**
- 10. Lack of motivation/interest from your child**

Finance 101: Help Wanted!

In the age of economic uncertainty – many AA heads of households admitted they lack proper financial preparation and education even though they have bank accounts:

89% Have checking and savings accounts

33% Have investment accounts but acknowledge they don't quite have confidence in their financial knowledge

Being fiscally responsible and properly educated about finances is important for today's black families. Much work is needed and current economic conditions warrant additional knowledge and understanding.

Religion & Spirituality: Important for Grounding Values & Raising Kids

Religious beliefs and a spiritual understanding help to shape our response to our lives and each other. Fundamentally, religion and spirituality provide a structure for building the character of children and adds fortitude to the inner workings of the family. Being involved in the church community becomes a high priority when raising children:

85% of parents believe it is an important part in raising children to share religious beliefs

54% of Black Heads of Households believe it is very important to attend worship services regularly

Many African Americans seek a spiritual foundation to give them inner strength and when they become parents maintaining a religious home and sharing beliefs are the most frequently mentioned responses as a top priority for raising children and sustaining a structured and well balanced household.



**AFRICAN AMERICAN
SEGMENTATION STUDY**

BET★
NETWORKS

METHODOLOGY

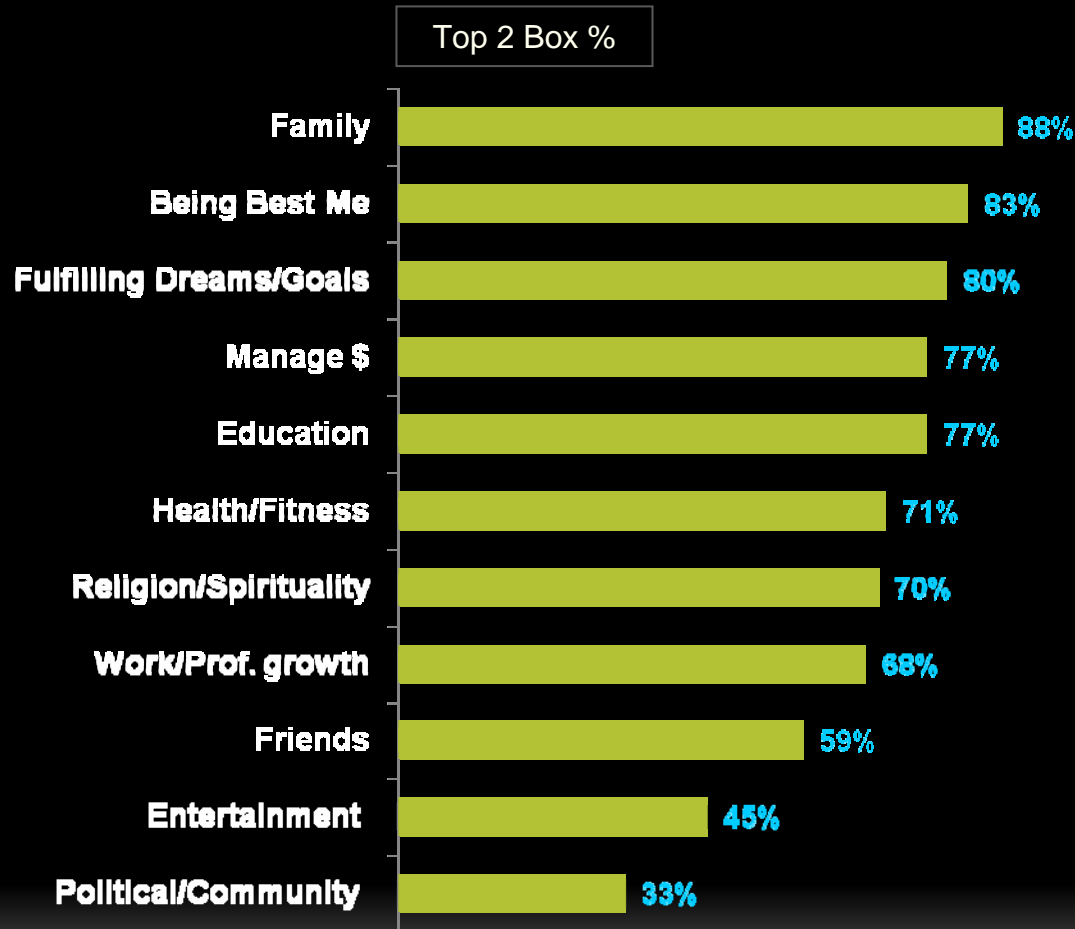
An in-depth segmentation analysis was conducted among 2,407 African Americans between the ages of 14 – 55. BET Networks and Questus designed a lifestyle and interest questionnaire for panel email recruitment in early 2009 to provide comprehensive details on African Americans-- Revealed.

Respondent data was weighted to demographic distributions of age, gender, income and marital status of African Americans 14-55 balanced to US Census statistics.

All data analyzed is statistically significant at the 95% confidence level.

AA PRIORITIES, LIFE FOCUS & GOALS

Respondents rated areas in their lives on importance, in the pecking order of responses given **the African American family is a top priority:**



Source: 2009 Questus Segmentation: African Americans-- Revealed, Base: Total sample (2,407 AA 14-55 year olds)

Q: Overall, how important are each of the following areas in your daily life? Top 2 Box % rankings based on total sample rating survey items on level of importance (6 or 7) on a 7-point scale.



AFRICAN AMERICAN SEGMENTS

SEGMENTATION

What does a segmentation/clustering approach provide?

Conducting an in-depth analysis of AA data insights allows BET to capitalize on patterns based on a respondents' demographics, psychographics, behaviors and characteristics.

Definitions (d.)

- The ability to reduce numerous data points into a research design grouped on similar characteristics
- Research technique usually explained as “birds of a feather flock together”

BET Approach (Step by Step)

- A 50-page survey classified into 154 identifiable segmentation variables
- 154 variables analyzed among 10 different question batteries
- Thorough analysis of all attributes, statements and opinions of over 2,400 plus participants age 14-55
- Two stages of data reduction used in the analysis process resulting in the identification of 54 AA Revealed concepts
- Composite factors were analyzed and formed “8 AA Life Dimensions”
- Clustering technique identified 7 African American Segments

BLACK CONSUMER SEGMENTS



Conscious

Strivers

Sisters

Tech-Fluentials

Bright Horizons

Description	<i>Adventurous, fashionable opinion leaders who have their eye on climbing the corporate ladder</i>	AA women who are conscious of culture, religion and life lessons	Tech-proficient Global 'culturalists' keen on learning, exploring and being world activists	Tech savvy students who are education & civic oriented; they are fashionable, trend setters and up & coming leaders
Life Stage	Gen X'ers late 20s-early 40s	Gen X'ers 30s-40s	Gen Y/Gen X 20s-mid30s	Gen Y/Gen X teens-20s
% of Black Pop	36%	22%	14%	10%
Est Segment Size	7.9 Million	4.9 Million	3.1 Million	2.3 Million
BET % Viewer	36%	23%	13%	13%
BET.com % Visitor	48%	12%	7%	19%

Source: Questus Segmentation: African Americans- Revealed conducted 1Q09 among 2, 407 respondents age 14-55; Executive Summary of Key Consumer Findings.

BLACK CONSUMER SEGMENTS



Urban Dreamers

Inner Circle Elites

Survivors

Description	Urban young adults who are social magnets and trendsetters	AA working adults who are rich in heritage and ancestry and avid 'masstige' brand shoppers	Teen/young adult males who are social and focusing on making it, despite education challenges
Life Stage	Gen X'ers 20s	Baby Boomers late 40s +	Millennials/Gen Y late teens-20s
% of Black Pop	7%	9%	2%
Est. Segment Size	1.5 Million	2.0 Million	1.0 Million
BET % Viewer	6%	8%	1%
BET.com % Visitor	8%	4%	2%

Source: Questus Segmentation: African Americans-- Revealed conducted 1Q09 among 2, 407 respondents age 14-55; Executive Summary of Key Consumer Findings.

Strivers

7.9 million African Americans



ADVENTUROUS, FASHIONABLE AND
SOCIAL ADULTS WHO WANT
TO SEE AND DO IT ALL
IN LIFE, AND THEY ARE LIKELY
TO HAVE THE FINANCIAL MEANS
BY WHICH TO DO IT.

A Day in the Life:

Miles has a stellar day at the office and learns that his company will be sending him to Miami in two weeks. After work, he runs to get a quick manicure, then changes into a new blazer and jeans before hopping into his BMW. He meets up with his friends in the skybox they've reserved for the Roots concert and the show is fantastic, especially from their VIP vantage point.

PROFILE

Segment Description: They have a thirst for life – adventure seeking, highly fashionable and considered “opinion leaders” and “social mavens” because they love to achieve everything. This group has the financial means to explore, aspire and reach the heights of their accomplishments. They’re surrounded by family and friends. They love to travel, are avid music listeners and are highly interested in looking good (personal grooming and exercise are important) and they’re conscientious about having nice things. Everything they do– is smooth, carefree and deliberately contemplated. They are heavily influenced by ads featuring AAs.

- Skews **MID 30s**
(Median age: 36 years)
- **EVEN GENDER SPLIT**
- **NOT Married**
- Well rounded **EDUCATIONALLY**
(**50%** high school grads/some college;
30% are college graduates plus)
- Employed full-time
- Household **INCOME** indices **HIGHER**
than norm (Mean: \$49,900 | Median: \$36,000)
- Reside in **URBAN** areas

CONSCIOUS SISTERS

4.9 million African Americans



WOMEN WHO ARE RELIGIOUS AND CONSERVATIVE AS WELL AS SOPHISTICATED, YET ALWAYS LOOKING FOR A GOOD BARGAIN. THEY ARE SELFLESS, PUTTING FAMILY ABOVE ALL ELSE.

A Day in the Life:

Keisha wakes up and gives the kids a bath before getting herself ready. She, the kids and her husband go to church to hear their favorite pastor speak. Afterwards, they all go out for a bite to eat before doing a bit of shopping at Target. When they get home, they watch TV together and then it's time to put the kids to bed. She then spends some quiet time paying bills on her computer.

PROFILE

Segment Description: **Selfless** AA women who are spiritually connected and highly conscious of their culture and passing on life lessons to family. They have sophisticated tastes and personalities, but, yet they still enjoy a touch of being 'real'- they are price-conscious and search for bargains and make sure that their money is able to go a long way. This group is also inclined to tell others about products they like.

- Skews **OLDER**
(Median age: **40 years**)
- **MARRIED** with KIDS in household
- **HIGHER EDUCATION** levels
(**35%** are college graduates, of which **33%** achieved a graduate/doctorate degree)
- **HOMEMAKERS** and many are **EMPLOYED FULL-TIME**
- Household **INCOME** indexes **HIGHER**
(Mean: \$48,700 | Median: \$38,600)
- **SUBURBAN** and **RURAL** areas

TECH-FLUENTIALS

3.1 million African Americans



TECH SAVVY, CULTURED AND SOCIAL ADULTS WHO ARE INTO LOOKING GOOD AND FEELING GOOD, SEEING THE WORLD, AND LEARNING AS MUCH AS THEY CAN.

A Typical Day:

Tina goes for a run with her iPod first thing in the morning. Her job flies her out to Chicago to attend a sales convention. During the flight she reads the financial section of the New York Times. After the convention, she attends a photography exhibit at one of the local museums. She then attends a late-night dinner party at the home of a sorority sister who lives in the city.

PROFILE

Segment Description: These folks are your most digitally savvy segment. They consider themselves “world culturalists” in touch with many cultures and ethnicities. They are magnets for learning, exploring and being socially active for the many causes that benefit humanity. Others look to them for leadership roles, especially about products/services. This group is focused on being healthy & creative.

- Skews YOUNGER-MID age
(Median age: 31 years)
- EVEN GENDER SPLIT
- SINGLE, never married
- HIGHER EDUCATION level
(32% are college graduates, of which
25% have a graduate/doctorate degrees)
- FULL TIME EMPLOYED
- Household INCOME indices LOWER than norm
(Mean: \$43,800 | Median: \$29,400)

BRIGHT HORIZONS

2.3 million African Americans



STUDENTS WHO ARE TECH-SAVVY AND FOCUS MORE ON THEIR EDUCATION THAN FRIENDS AND PARTYING, BUT STILL LIKE TO LOOK GOOD AND WEAR THE LATEST FASHIONS.

A Typical Day:

Malcolm wakes up, brushes his hair and puts on his new LRG sweat suit. He takes his laptop to the school library where he studies all day long, taking the occasional break to see if he has any new Facebook wall postings and to download the latest Lil Wayne mix. At the end of the day, he goes home and has dinner with Mom and Dad, while texting his friends to find out where they are hanging tonight.

PROFILE

Segment Description: These are students who are aware of all technology gadgets (they refer to themselves as 'Tech Proficient.')

Known as tech-savvy sophisticates in all things web 2.0 oriented. This segment focuses on their education, being civic-minded activists who are culturally, fashion & trend conscious forward thinkers. They are likely to ask their friends/families for advice before buying products.

- Skews **YOUNGER**
(Median age: **22 years**)
- **EVEN GENDER SPLIT**
- **SINGLE**
- **STUDENTS**
(About 50% are currently students)
- Household **INCOME** indices **LOWER**
(Mean: \$39,100 | Median: \$27,400)

URBAN DREAMERS

1.5 million African Americans



URBAN YOUNG ADULTS WHO ENJOY THEMSELVES WITH FRIENDS, THEY'RE SOCIAL MAGNETS AND TREND SETTERS WHO MAKE TIME FOR THAT "SPECIAL SOMEONE" IN THEIR LIVES.

A Perfect Weekend:

Tasha sleeps in late on Saturday, watches TV for a while and then heads to the movie theater with some friends. That night the five girls go to a party at the club, where they are regulars, and they stay until the club closes. She wakes up Sunday and heads to go bowling with her boyfriend. They spend the afternoon snuggled on the couch watching TV.

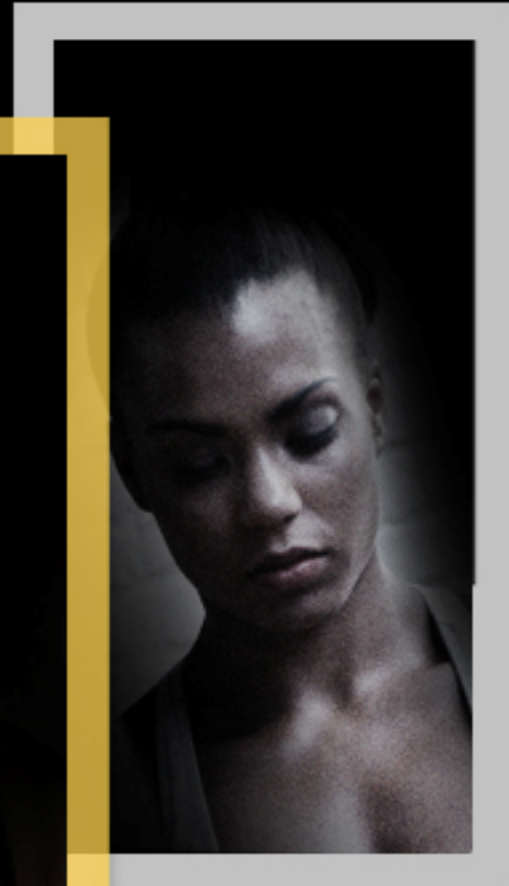
PROFILE

Segment Description: These are young adults with a carefree attitude who believe in having as much fun as possible. They are TV and movie fans who are always up on the latest and greatest. They also can't live without their mobile phones – it is the center of their social universe. Known for being the 'life of the party', they want the best that money can buy, regardless of the price.

- Skews **YOUNGER** (Median age: **26 years**)
- **EVEN GENDER SPLIT**
- **NOT MARRIED**
- **LOWER EDUCATION** level (22% are college graduates)
- Household **INCOME** indexes **LOWER**
(Mean: \$41,000 | Median: \$25,800)

INNER CIRCLE ELITES

2 million African Americans



STRONG, CONFIDENT,
SELF-SUFFICIENT, CONSCIOUS
WORKING ADULTS WHO ARE
SPIRITUAL AND PROUD OF THEIR
AFRICAN AMERICAN HERITAGE.

INNER CIRCLE ELITES

A Perfect Day:

Karen wakes up early enough to go to her favorite Pilates class and then puts on her new suit, which she got a great deal on the weekend before. She heads in to work and finds out that she got the promotion which she had been working so hard for the past few months. After work she does a brisk walk through the park, enjoying the chirping of the birds and the bubbling of the waterfall. She ends the day watching a documentary on TV of Maya Angelou.

PROFILE

Segment Description: These are confident, self-assured adults who are the decision-makers of their families. This group is more spiritual than religious; their focus is achieving happiness and balance in their lives. This segment keeps up-to-date on current events and politics and is always searching for positive portrayals of AAs. Their confidence lets them focus on being successful rather than waiting on others to tell them they are. They're comfortable financially and appreciate the finer things in life. They are driven by price and bargains, rather than trends.

- Skews **MUCH OLDER** (Median age: **48 years**)
- Skews **FEMALE**
- **HIGHER EDUCATION** levels (37% are college graduates, of which 1/3 have a graduate or doctorate degree)
- **EMPLOYED**
- Household **INCOME** indexes **HIGHER** (Mean: \$49,100 | Median: \$38,700)

SURVIVORS

0.5 million African Americans



TEEN/YOUNG ADULT MALES WHO ARE MORE FOCUSED ON HANGING WITH THEIR FRIENDS, HAVING FUN AND LOOKING GOOD. THEY LIVE BY LIFE'S RULES AND THE REAL WORLD.

A Typical Day:

Kevin wakes up and goes to school, although he's not excited about it. He spends a lot of class time on his iPhone visiting his friends' MySpace pages and checking out which pair of Jordans he wants to buy. As soon as the bell rings, he runs to the playground behind school to meet his friends to play some basketball. Afterwards, they spend the rest of the day playing Wii at his house. He forgets to do his homework again.

PROFILE

Segment Description: These young males seek excitement and thrills and are heavy media consumers. They focus on appearing successful, despite the fact that education is not a priority to them. This segment spends much of their time playing sports, video games, and watching TV with their friends. They're main focus in life is their family and they focus on making them happy and being well-liked.

- Skews **YOUNGER** (Median age: 20 years)
- Skews **MALE**
- **SINGLE**
- **LOWER EDUCATION** level
- **EMPLOYED PART-TIME** (only 14% are currently students)
- Household **INCOME** indexes **LOWER**
(Mean: \$39,100 | Median: \$18,300)

It's fair to say that in the next 3-5 years, members of these segments may progress somewhat predictably into other segments, in accordance with their personal choices and paths taken (e.g., “fun” vs. “work”).

