



CONSUMER DEEP DIVE

Understanding the Influence of Heritage on Black Consumers



About this Report

The Black community in the United States is an important and multifaceted group for brands and retailers to understand, making up 12.4% of the US population* and accounting for 9.9% of FMCG spending.**

Understanding and best-serving this consumer group requires going beyond high-level insights and diving deeper into additional segments within the Black community. While there are many angles to explore, in this report, we'll break down the behaviors and preferences of Black consumers as a whole and through the lens of heritage identity, or the countries these consumers consider important to their identity & ancestry.



[*2020 US Census Data](#)

**Numerator TruView 2021, FMCG Sectors: Grocery, Health & Beauty, Household, Pet and Baby

Consumer Groups Analyzed

Members of the Numerator OmniPanel self-select on a wide variety of personal traits including racial identity & ancestry. For the latter, consumers were asked to select any countries that were relevant to their family heritage or ancestry. The three largest segments selected by Black consumers were the United States (**58.6%**), African countries (**15.4%**), and Caribbean countries (**13.6%**). Overall, **78.2%** of Black consumers identified at least one of these three regions / countries as part of their ancestry, while **14.7%** shared their ancestry was unknown and **7.1%** selected countries outside of these three regions. Below are four key consumer groups that will be analyzed in this report.



**Black Consumers
(Total)**



**Black + United
States Heritage**



**Black + African
Heritage**



**Black + Caribbean
Heritage**

Executive Summary



Understanding Spending

- Black consumers tend to make **smaller, more frequent trips**, likely driven by an over-index in city living.
- **Smart shopping and deal-seeking** is a key consideration for many Black consumers, holding true across income levels & heritage groups.
- **Private label is less appealing** to many Black consumers than brand-name items, despite their budget-driven shopping habits.



Identifying Consumption

- Half of Black consumers say the foods they purchase have a **strong tie to their heritage & ancestry**.
- A **commitment to organic** eating is important to many Black consumers, particularly those with a Caribbean heritage identity.
- One in three Black consumers say **brand values are highly important** to them, with a strong preference for diversity, inclusion and equity efforts.



Activating Media

- Black consumers consider **emails, social media, and online ads** the most influential.
- Specific avenues like **Twitter, TikTok, Podcasts and YouTube** are also key locations for connecting with Black consumers.
- Black consumers are generally **more trusting of advertisements**, though this varies significantly based on heritage identity.

Understanding Spending

Where are Black consumers most likely to make their purchases, and how do budget & beliefs come into play when shopping?



Black consumers make smaller, more frequent shopping trips.

Within Grocery and Health & Beauty, these smaller trips ultimately lead to lower spending overall compared to the average US shopper, while Household spend is elevated. Those with African or Caribbean heritages differ slightly, outspending in Health & Beauty as well compared to other Black consumers and US consumers in general.

Annual Shopping Behaviors

Black Consumer Behavior vs. Total US Shoppers

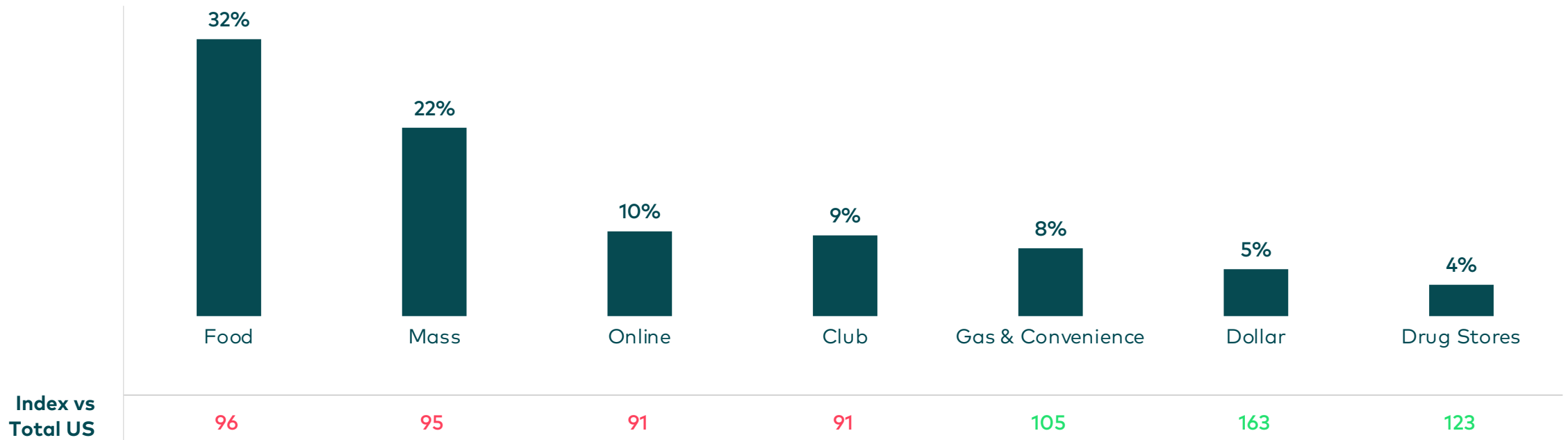
Sector	Trips	Spend per Trip	Buy Rate
Health & Beauty	84 (+4)	\$14.48 (-\$1.75)	\$1,212 (-\$80)
Household	70 (+9)	\$12.14 (-\$0.81)	\$851 (+ \$64)
Grocery	324 (+15)	\$20.60 (-\$3.54)	\$6,669 (-\$786)

These smaller trips are driven by a propensity for smaller-format stores.

Much of this can be attributed to store availability by location, with a higher portion of Black consumers living in Urban areas where small-format thrives. While Food, Mass, Online and Club are still their top channels overall, Black consumers spend comparatively more of their FMCG dollars in Dollar, Drug, and Gas & Convenience stores compared to the total US.

FMCG Share by Channel

% Share of Dollars by Channel for Black Consumers

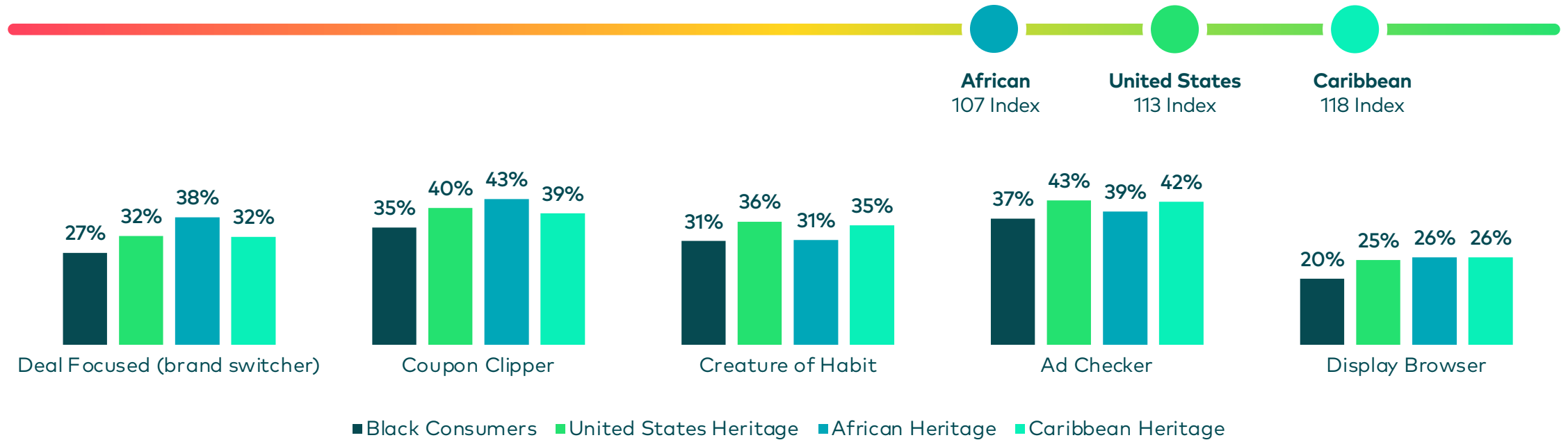


Lower spending may also be an effect of smart, budget-driven shopping.

Roughly 4 in 10 Black consumers (38.2%) would qualify themselves as budget-driven. Certain heritage / ancestry associations have even stronger affiliations to their budgets and find different ways to fit that lifestyle.

Budget Driven Tendencies

% of Group | Heritage Group Index to Total Black Consumers

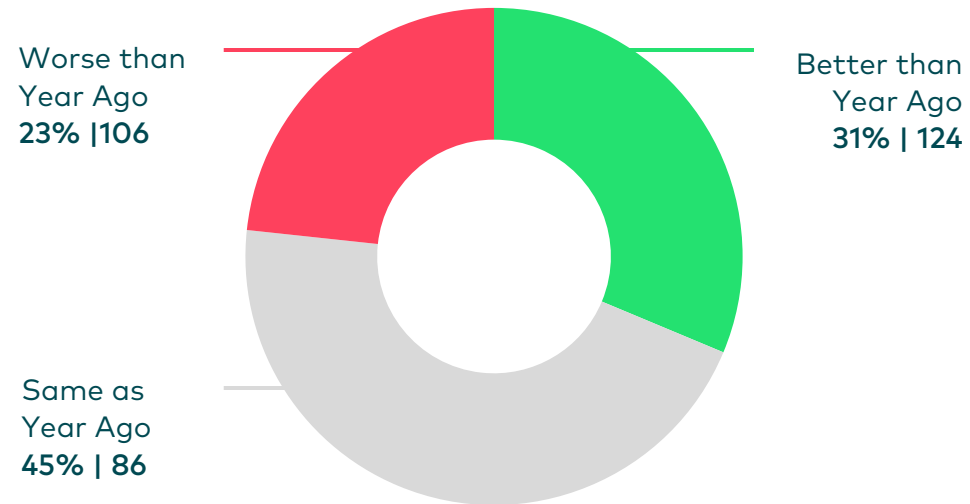


Faced with inflation, budget-driven Black consumers may further adjust habits.

While nearly a third of Black consumers say their current finances are better than they were a year ago, inflationary pressures could cause a shift in financial situation & behaviors. In response to rising prices, Black consumers are most likely to opt for smaller sizes of the products they currently purchase, followed by switching retailers.

Financial Situation vs Year Ago

% of Black Consumers | Index to Total US



Reaction to Rising Prices

Black Consumers Index to Total US



Private Label highlights an interesting middle ground with Black consumers.

Despite budget-driven tendencies, Black consumers prefer popular brand names over private label. This preference is evident in their spending, with Black consumers spending less on private label than the average US shopper.

Private Label Associations

% Black Consumers | Index to Total US

12.5%

Prefer popular brand names
(Index 136)

10.9%

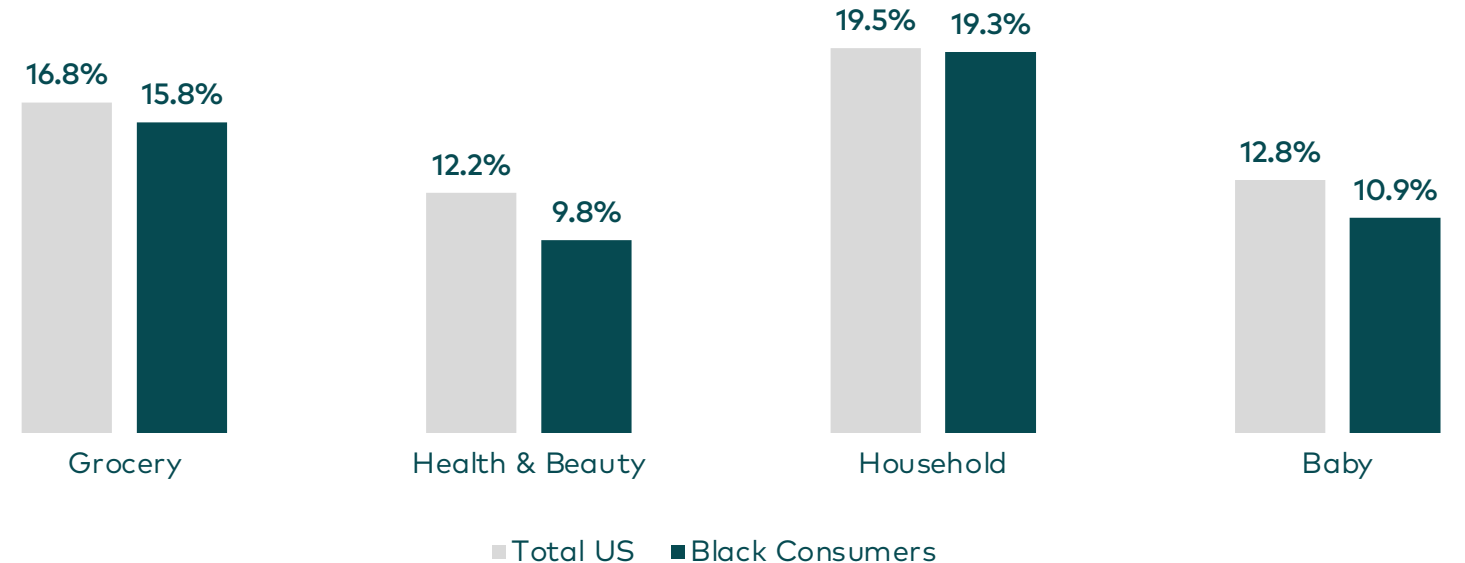
Rarely consider private label
(Index 129)

6.2%

Brand name indicates quality
(Index 138)

Private Label Share

% Sector Spend



(Left) Numerator Insights 12M ending 12/31/21

(Right) Numerator TruView 12M ending 12/31/2021, FMCG Sectors: Grocery, Health & Beauty, Household and Baby

Identifying Consumption

How do values and heritage identity play into Black consumers' preferences when it comes to the foods they eat and the brands they buy?

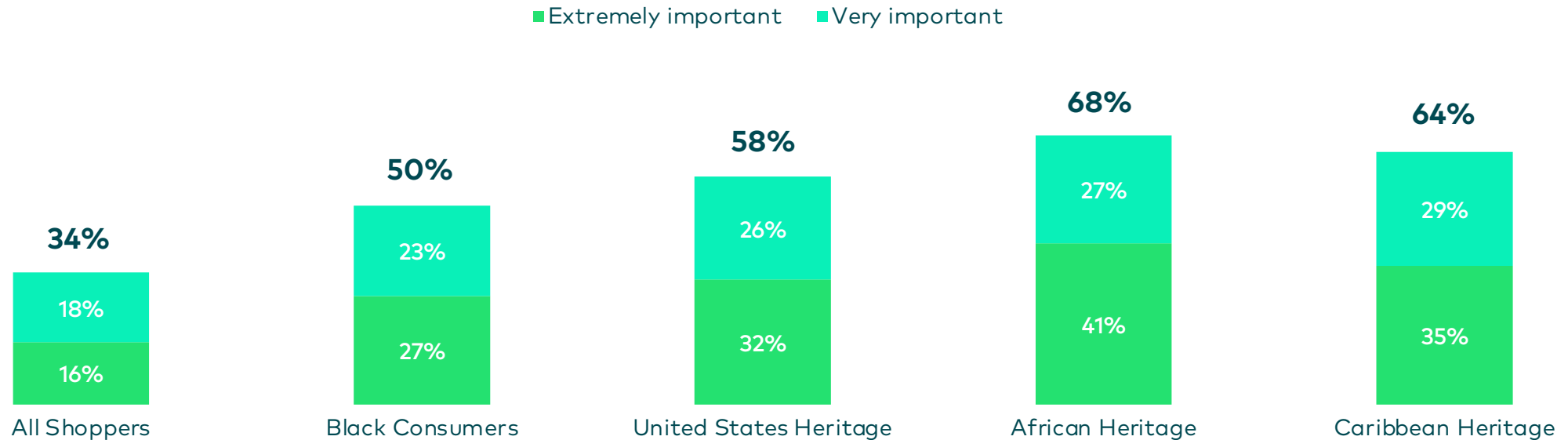


Heritage identity and ancestry have a direct tie to consumer behaviors.

50% of Black consumers say their family heritage / ancestry has a strong impact on the foods they purchase and holidays they celebrate, compared to 34% of US consumers overall. Importance of heritage is significantly higher among Black consumers with African heritage identities (68%) or Caribbean heritage identities (64%).

Heritage Importance

% of group who say heritage is very/extremely important

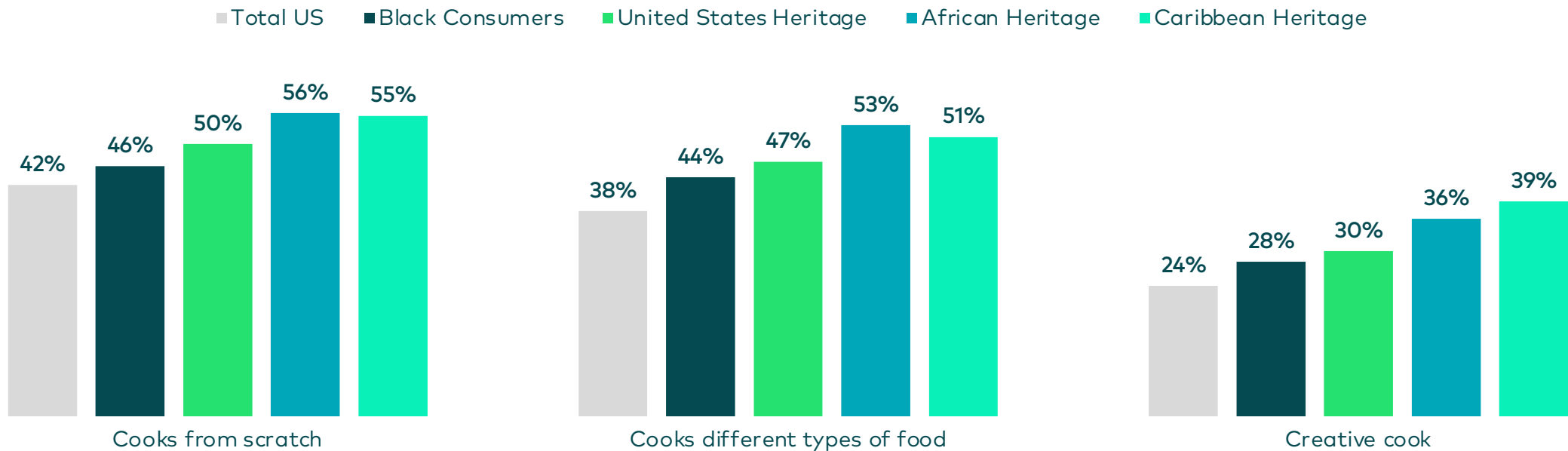


These identities are evident when it comes to attitudes on cooking.

Black consumers– especially those with Caribbean and African heritages– are much more likely to enjoy cooking and to get creative with new types of food than the average US consumer.

Black Consumer Dining In Attitudes

% of group, select all that apply

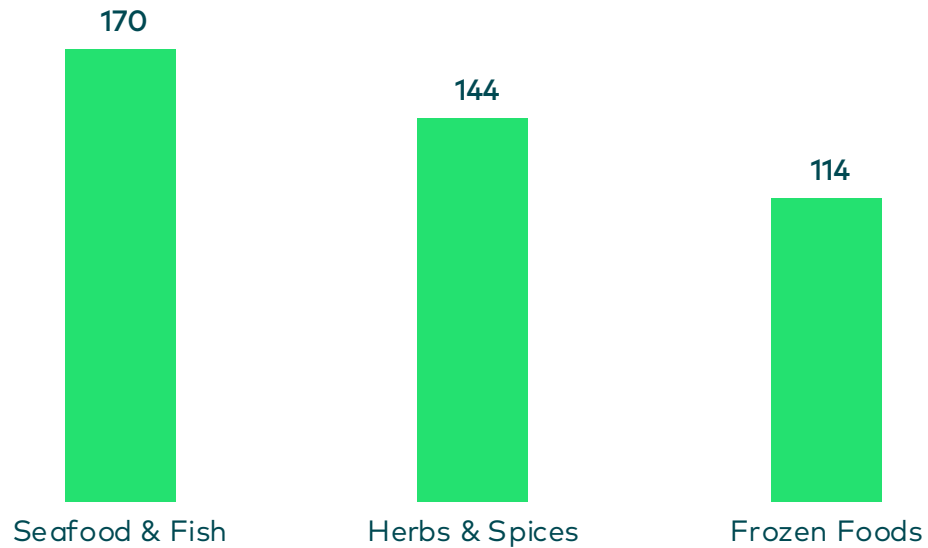


Seafood & spices set Black consumers apart in the grocery aisle.

Along with frozen foods – which are driven by frozen seafood & alternative meats – seafood & spices are the top two grocery departments where Black consumers spend more of their grocery dollars. The group spends less comparatively on pasta, bakery, and dairy products.

Top 3 Grocery Department

Black Consumers Share Index to Total US



Bottom 3 Grocery Department

Black Consumers Share Index to Total US

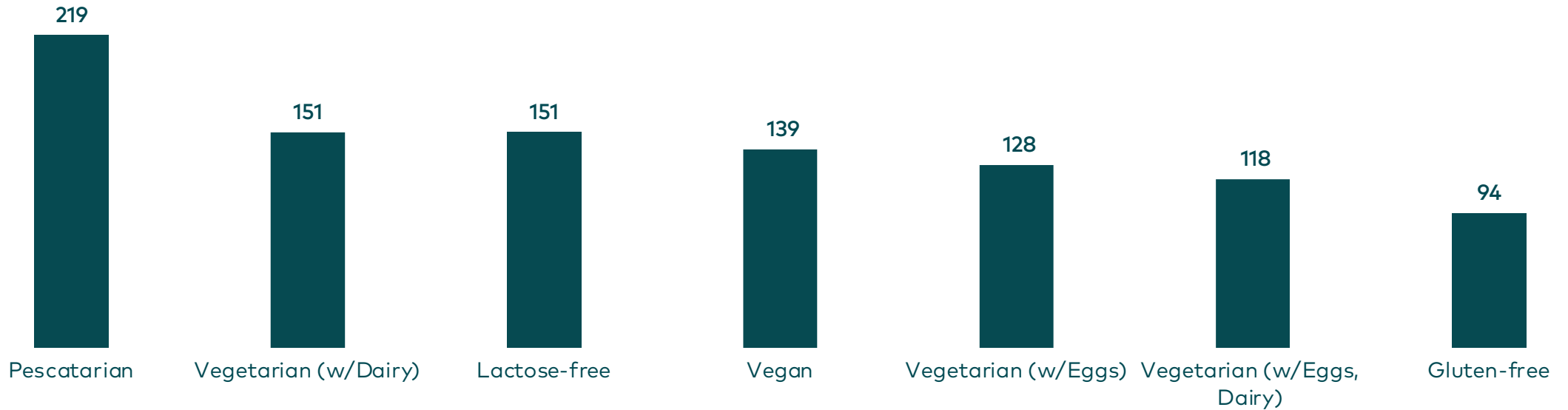


These top and bottom grocery departments tie directly to household diets.

1 in 4 Black consumers have a dietary restriction in their household, compared to 1 in 5 total US households. Pescatarian, Vegetarian and Lactose-free are the most common dietary considerations among Black households.

Diets in the Household

Black Consumers Index to Total US



...and these dietary preferences also tie back directly to heritage identities.

Black African consumers are twice as likely to be vegetarian than the average Black consumer, while Black Caribbean consumers are 50% more likely to be vegan or pescatarian. These groups are also likely to make dietary decisions based on health and valuing animal welfare.

Diet	United States	African	Caribbean
Vegan	88	136	154
Vegetarian (w/ Egg & Dairy)	113	223	126
Pescatarian	77	165	150
Gluten-Free	96	179	105

Heritage group index to Total Black Consumers

Reason for Diet

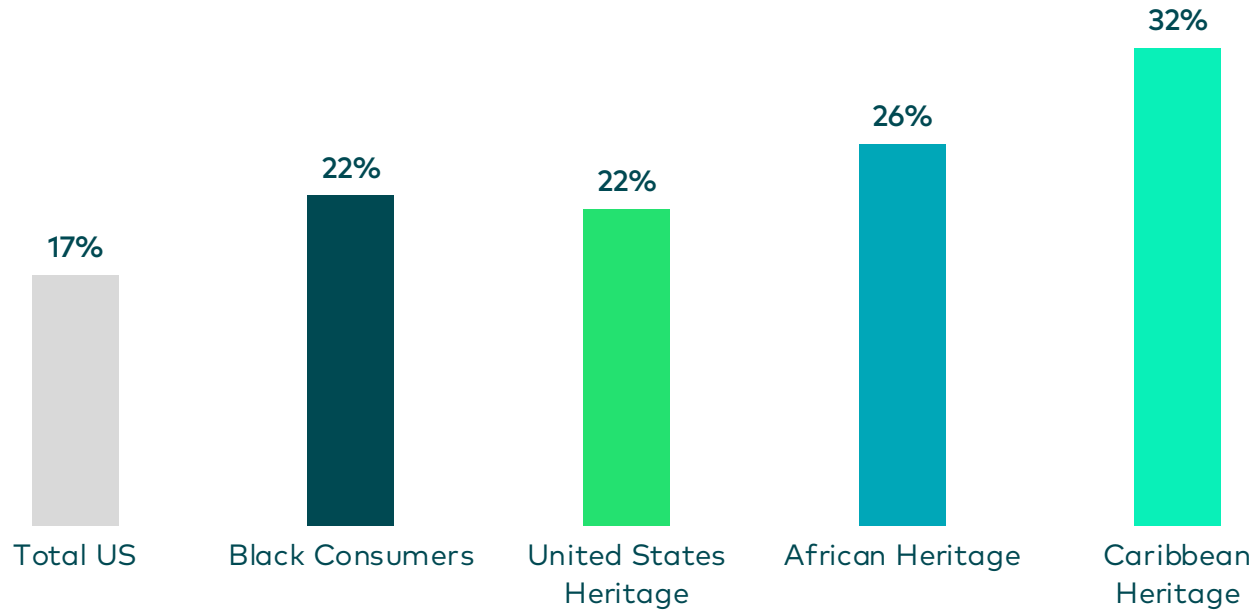
Hypertension	94	129	144
High Cholesterol	92	98	121
Animal Welfare	111	126	180

An organic commitment is also important to many Black consumers.

Compared to the average US consumer, Black consumers and Caribbean Black consumers in particular have a strong preference for organic foods. This is due to perceived health & safety benefits, as well as taste preferences.

Organic Commitment

% Committed or Very Committed



Reason for Organic

% Black Consumers



Black consumers place more importance on brand values than other consumers.

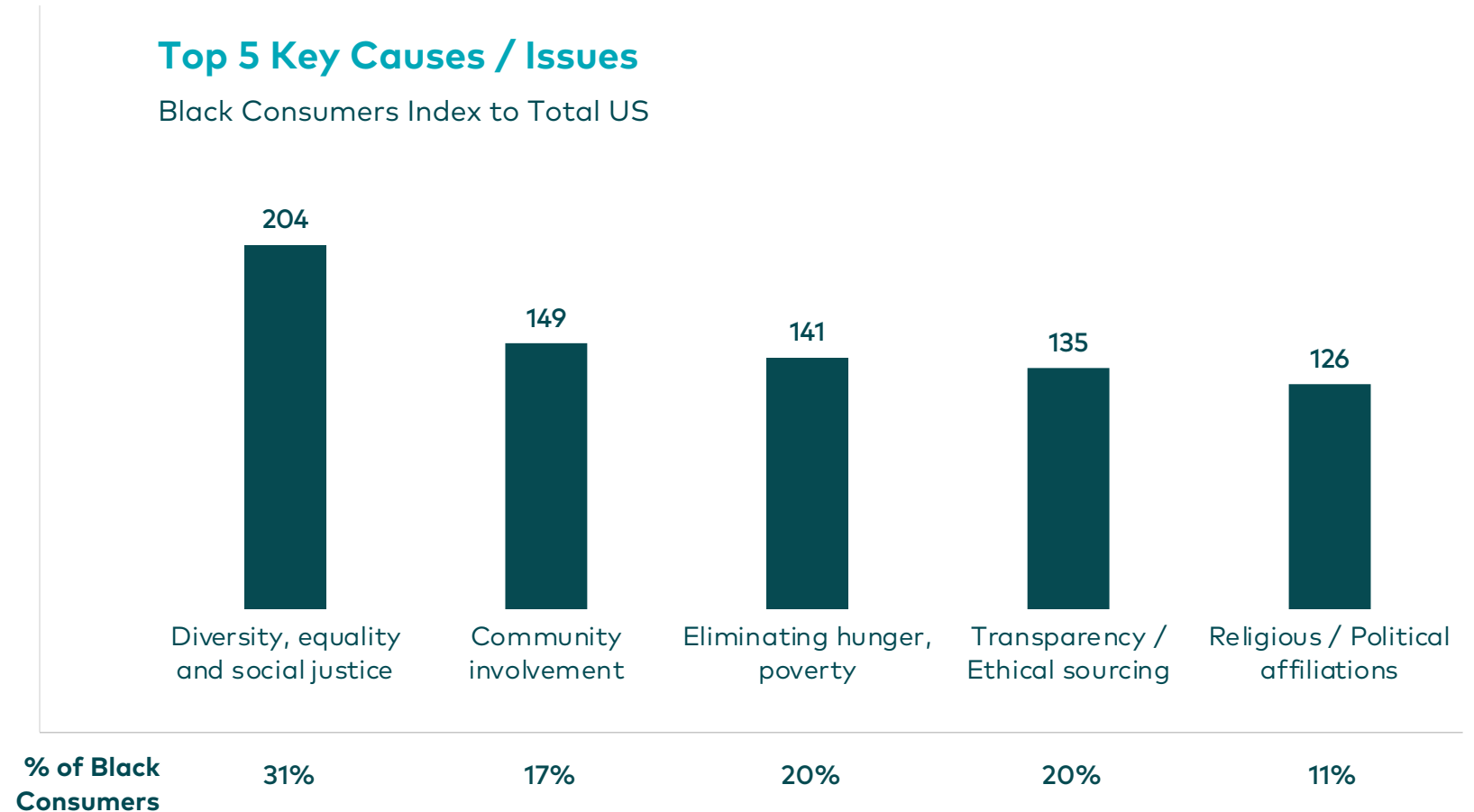
One in three Black consumers have a high awareness of the corporate values behind the products they buy compared to one in four shoppers overall. Brands committed to diversity, equality and social justice are particularly important.

33%

Extremely or Very aware of the corporate values behind the products they purchase (index 133 vs. total US)

23%

The values a brand stands for is important to me when deciding what to buy (index 135 vs. total US)



Brand values resonate differently across Black consumer heritage groups.

While all three groups are more aware of corporate values than the average Black consumer, key causes differ significantly between groups, ranging from animals to the environment to community programs.

Top 3 Key Causes / Issues

Heritage Group Index vs. All Black Consumers

United States Heritage

1. Community Focus 121
2. Charitable Causes 121
3. Made in the USA 119

40%

Extremely or Very aware of the corporate values

African Heritage

1. Religion/Politics 156
2. Charitable Causes 145
3. Renewable Energy 145

36%

Extremely or Very aware of the corporate values

Caribbean Heritage

1. Animal Welfare 183
2. Natural/Organic 151
3. Eco-Friendly 151

40%

Extremely or Very aware of the corporate values

Activating Media

What are the best media avenues for connecting with Black consumers, and how does this vary by heritage group?

Connecting with Black consumers requires knowing where to find them.

Black consumers consider promotional emails, social media, and online web their most influential advertising mediums. Influence varies by group as well, with Black Caribbean consumers preferring digital ads and Black African consumers preferring print.




Most Influential Advertising Touchpoints

Black Consumers Index to Total US



Group Preference

Based on Group Index vs. All Black Consumers

-  **United States Heritage**
In-Store Advertising
-  **African Heritage**
Print Advertising
-  **Caribbean Heritage**
Digital Advertising

Specific media outlets are also more popular with Black consumers.

Social media avenues like Twitter and Tiktok, streaming services such as podcasts or Pandora, and video formats like local news and Youtube are also key locations for connecting with Black consumers.

Media Consumption

% Black Consumers | Index to Total US

Twitter User

32.3% | Index 133



TikTok User

18.3% | Index 131



Pandora Listener

31.7% | Index 146



Podcast Listener

22.4% | Index 113



Local News Watcher

29.5% | Index 114



YouTube Watcher

34.1% | Index 142



Black consumers are generally more trusting of advertising than other shoppers.

However, these advertising associations can vary significantly across different groups within the Black community, particularly among heritage groups. This is also in-part driven by where these groups get their advertising.




Advertising Associations

Black Consumers Index to Total US



Group Preference

Based on Group Index vs. All Black Consumers

-  **African Heritage**
Most trusting
-  **Caribbean Heritage**
Less Trusting
-  **United States Heritage**
Least Trusting

There's always more to know.

Interested in learning more about Black consumers or any other group? Numerator has what you need for the deepest, most comprehensive understanding of consumers with 2500+ demographic, psychographic and premium segmentation attributes available.

Reach out to us at hello@numerator.com or visit our website for the latest research.

