



CONSUMER DEEP DIVE

Food Culture In the Black Community



Executive Summary

A SOULFUL HISTORY

- 68% of Black consumers express their cultural identity through food and cooking. Culturally significant ingredients set Black consumers apart in the grocery store.
- Soul foods can often be found together in a higher-priced basket, reflecting the inclusion of multiple soul food dishes in one meal.
- Cookouts and family dinners are the most popular food occasions for Black consumers. Soul food sales spike in the summer months, when cookouts are most likely.

ADAPTING TO MODERN DAY

- While value and variety are top deciding factors of grocery stores, 35% of Black consumers prefer to shop where culturally relevant products are offered.
- Black consumers are creative in the kitchen and frequently share these meals with loved ones. 60% of Black consumers agree that eating a meal together strengthens relationships.
- Dining out is a convenient way to satisfy a craving. 75% of Black consumers say that they are likely to choose a restaurant that offers soul food.

FUTURE CONSIDERATIONS AND TRENDS

- Black consumers are more likely to enjoy food related magazines, television, and mobile apps than the average consumer. Finding recipes has become easier with technology.
- Online ordering (delivery), and in-store pickup are more popular with Black consumers, who say these services make their grocery shopping experience more convenient.
- Special diets and a focus on organics set Black consumers apart from other shoppers. Meal kit preferences reflect this health-focused behavior.

A Soulful History

What are significant foods and traditions in the Black community and how do these tie into Black consumer behavior?

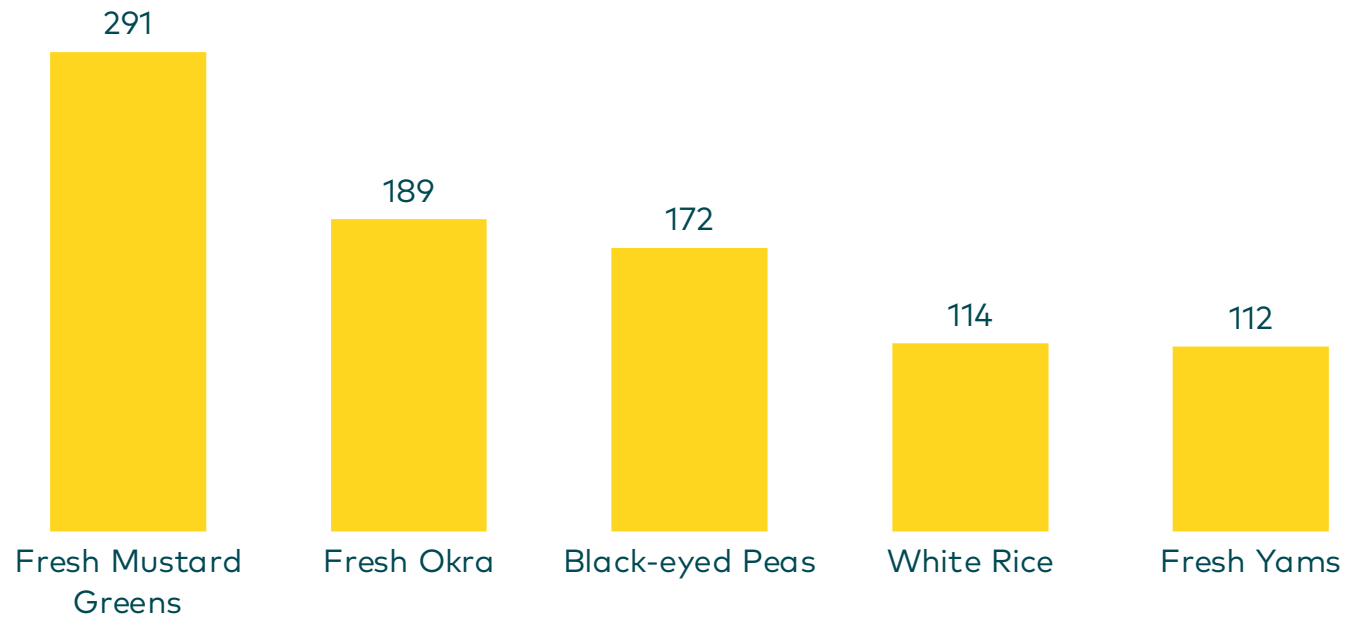


Food plays a pivotal role in the African heritage story.

Food allowed people of African descent to share and carry on identity. Okra, yams, rice, black-eyed peas, and greens are among the significant foods that represent heritage and play a key part in the foods Black consumers purchase today.

HISTORICALLY SIGNIFICANT INGREDIENTS

% of Black consumers buying indexed to Total US



68%

of Black consumers express personal or cultural identity through food / cooking

These ingredients evolved into what is now referred to as soul food.

The average grocery spend is three times higher when soul food is present in Black consumers' baskets. Many soul food ingredients can be found in the same basket with the intent of cooking multiple dish types.

WHEN OKRA IS PURCHASED...

% of trips when other soul food products are in the basket

20X

More likely for yams to be in the same basket

9X

More likely for fresh greens to be in the same basket

6X

More likely for white rice to be in the same basket

4X

More likely for fresh green beans to be in the same basket

BASKET SIZE

With and without soul food in basket

\$79.17

Average spend per trip **with soul food products in the basket**

\$25.37

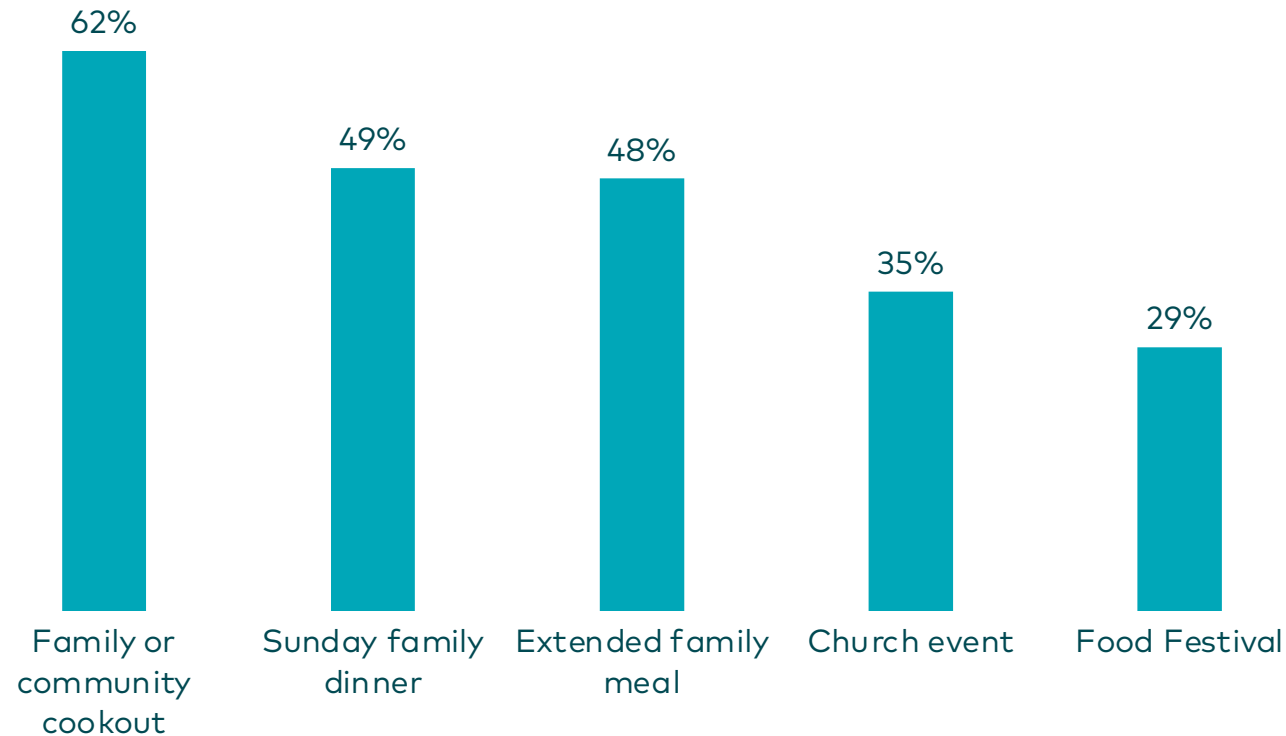
Average spend per trip **without soul food products in the basket**

Sharing these meals strengthens communities and relationships.

Food plays a crucial role in building and maintaining Black consumers' relationships. Occasions like family cookouts and family dinners bring communities together while sharing a meal.

FOOD-RELATED OCCASION ATTENDANCE

% of Black Consumers



BLACK SHOPPERS ARE...

29%

More likely to make Labor Day purchases compared to the average shopper

18%

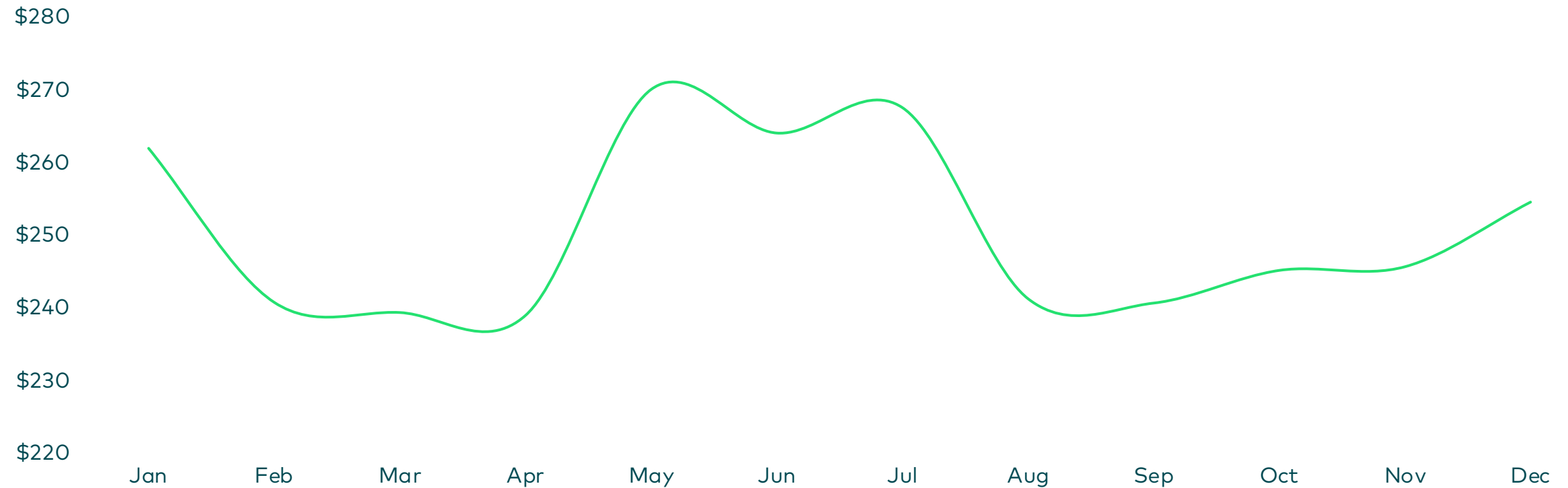
More likely to make Memorial Day purchases compared to the average shopper

Time of year reflects increased sales in soul food category groceries.

With warmer weather brings more opportunity for outdoor gatherings and cookouts. Soul food groceries spike during the summer months, when these gatherings are most likely to occur.

SOUL FOOD PROJECTED SALES

\$ Projected sales (in millions) | Black consumers



Numerator Insights 12M rolling ending 12/31/22

Adapting to Modern Day

What differentiates Black consumers in grocery and dining behavior, and what is the impact of food culture on these habits?

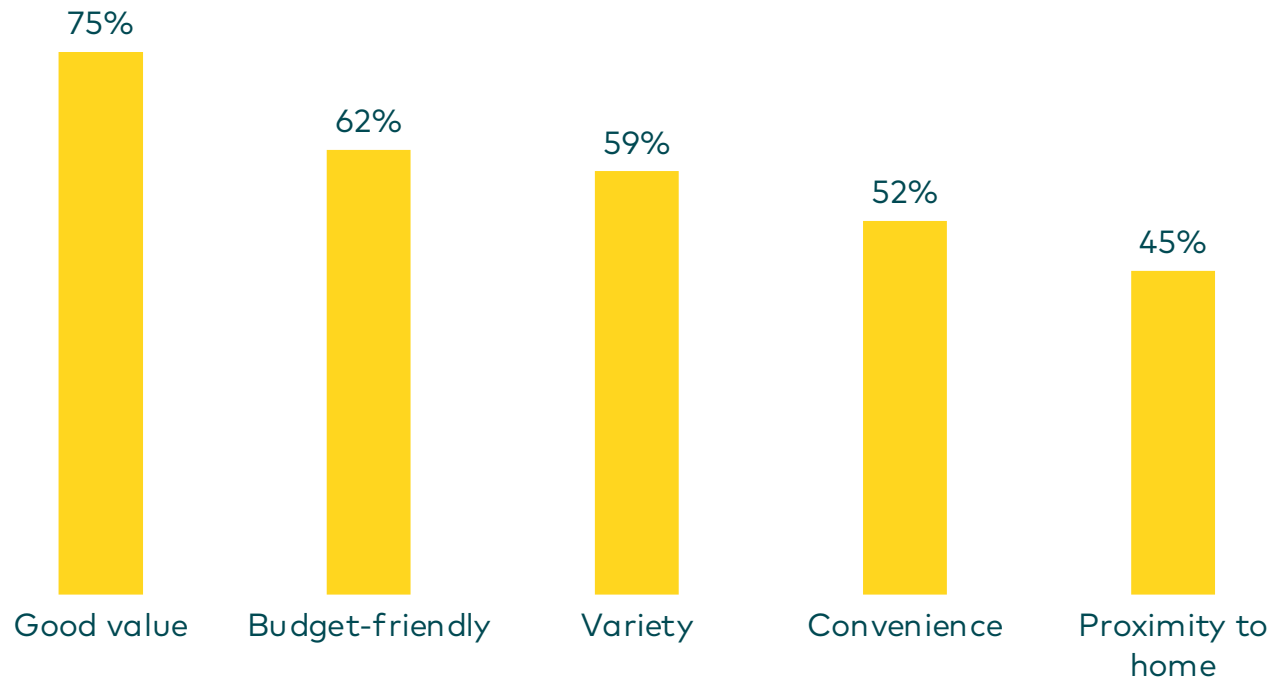


Value and convenience are key when choosing grocery stores.

When grocery shopping, Black consumers look for convenient wallet-friendly grocery stores. Culturally relevant offerings when grocery shopping are also top of mind for over a third of Black consumers.

TOP 5 GROCERY STORE DECISION FACTORS

% of Black consumers



35%

Prefer to shop at grocery stores that carry culturally relevant foods and ingredients

33%

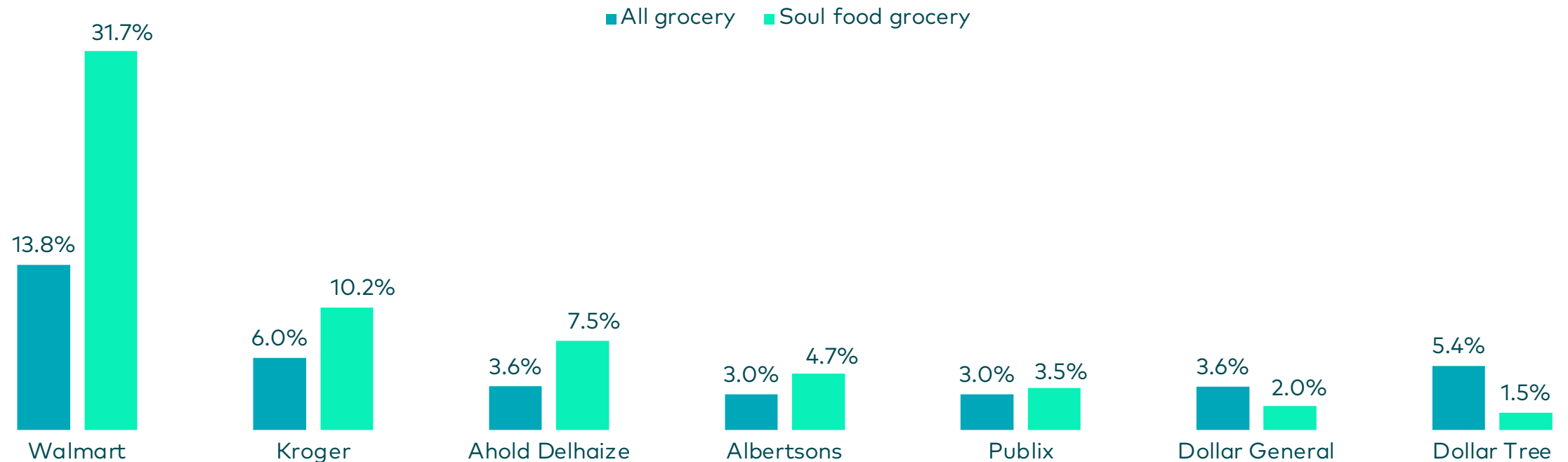
Strongly agree that most grocery stores carry their desired types of foods and ingredients

But grocery decisions vary based on products purchased.

When purchasing culturally significant groceries, like soul food ingredients, Black consumers prefer stores with more variety and fresh offerings. Walmart, Kroger, and Ahold Delhaize are among favorites for soul food groceries.

SOUL FOOD STORE PREFERENCES

% share of grocery trips

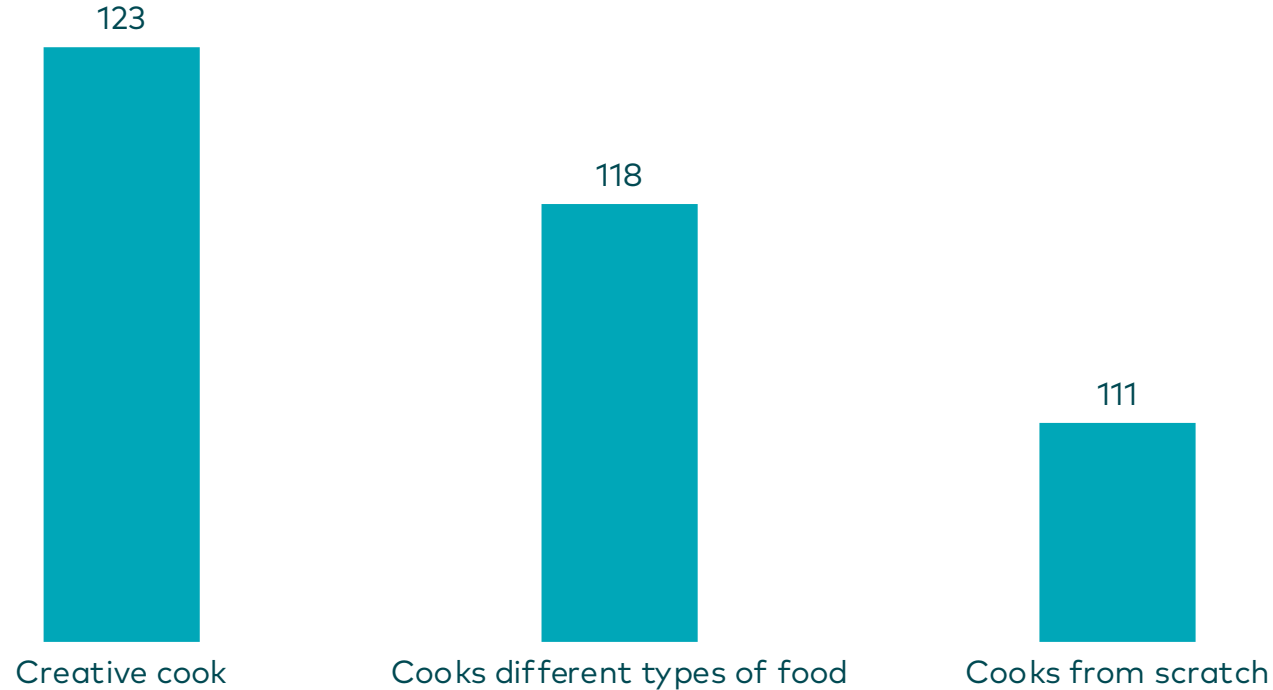


Sharing home cooked meals bring Black consumers together.

Black consumers showcase creativity when cooking at home. Sharing these meals with loved ones is an important way of showing appreciation and strengthening bonds, with a third of Black consumers eating a meal with friends or family every day.

COOKING SENTIMENT

Black consumers Index to All Shoppers



60%

Believe sharing a meal strengthens relationships

23%

Cook a meal at home every day

30%

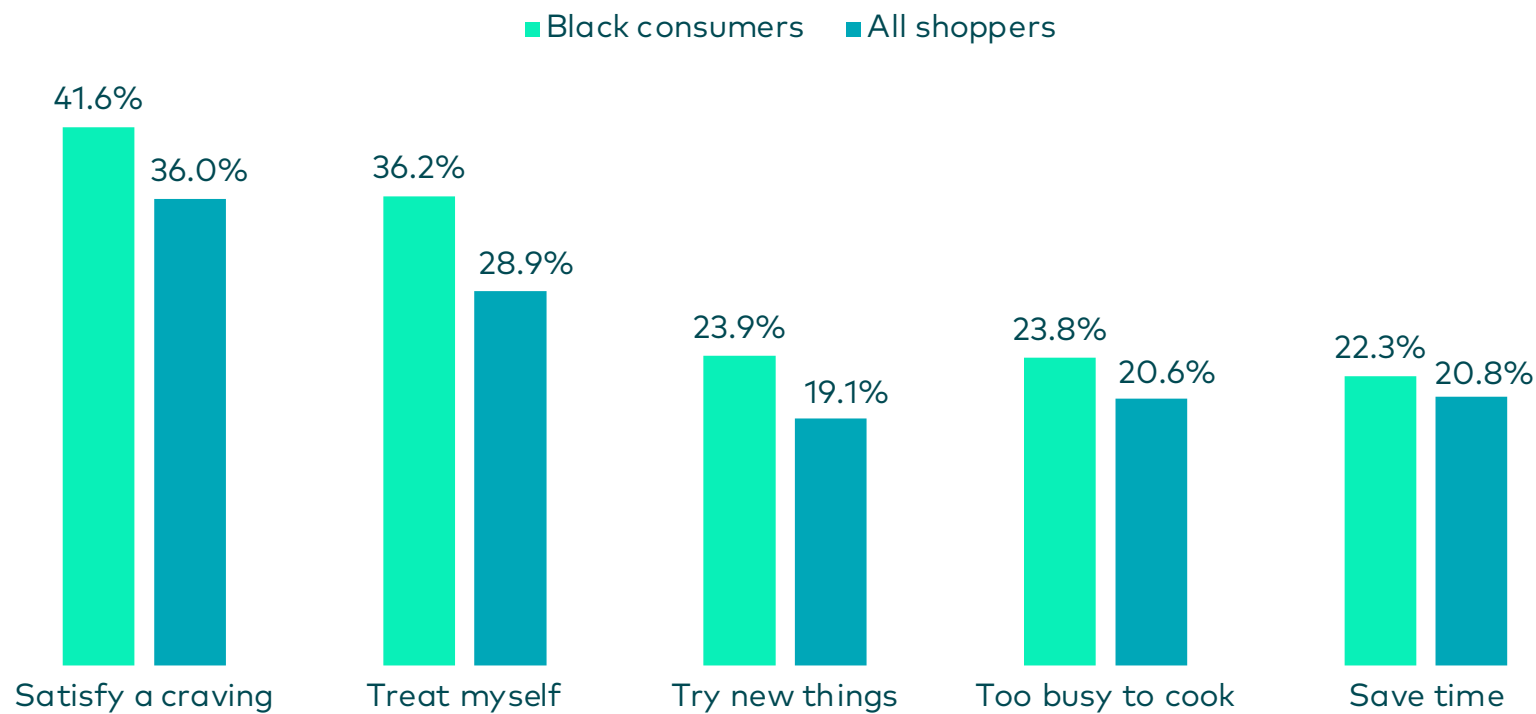
Eat a meal with friends or family every day

Dining out satisfies cravings while fitting busy schedules.

Black consumers often dine out with a specific craving in mind or the goal to treat themselves. But convenience also plays a large factor in dining out, with over a fifth of consumers being too busy to cook or needing to save time.

REASONS FOR DINING OUT

% of Black consumers | % All shoppers



Numerator Insights 12M ending 12/31/22

11%

Eat out 4+ times per week
(119 index)

22%

Eat out 2-3 times per week
(106 index)

Popular quick service restaurants reflect eating out preferences.

Three fourths of Black consumers say they are likely to choose restaurants that offer soul foods when eating out. They are more likely to be budget focused and convenience-oriented, preferences that are all reflected in their top QSRs.

DINING OUT ATTITUDES

% of Black consumers

75%

Likely to choose restaurants offering soul foods

32%

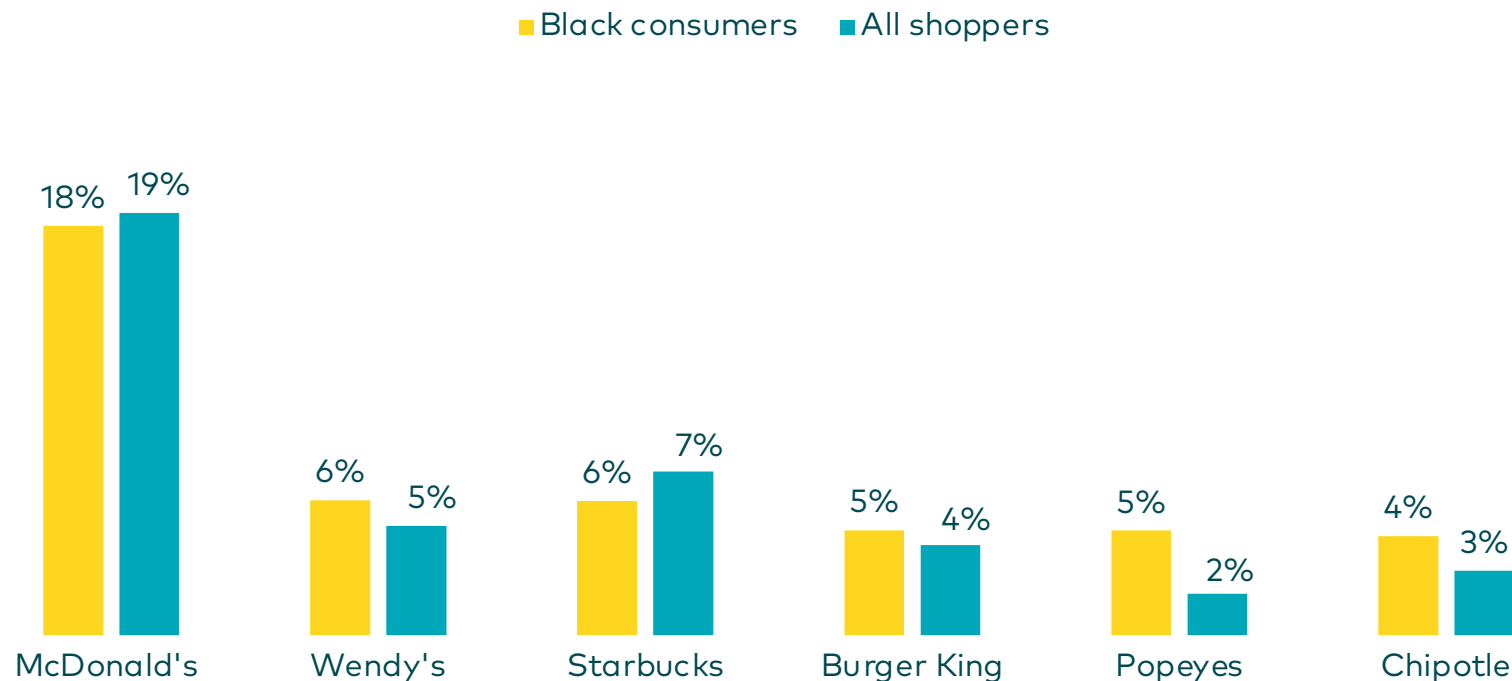
Budget-focused

20%

Will pay for convenience

POPULAR QSRS

% of QSR spend



Future Considerations and Trends

What trends and cultural impact may influence future of food choices among Black consumers?

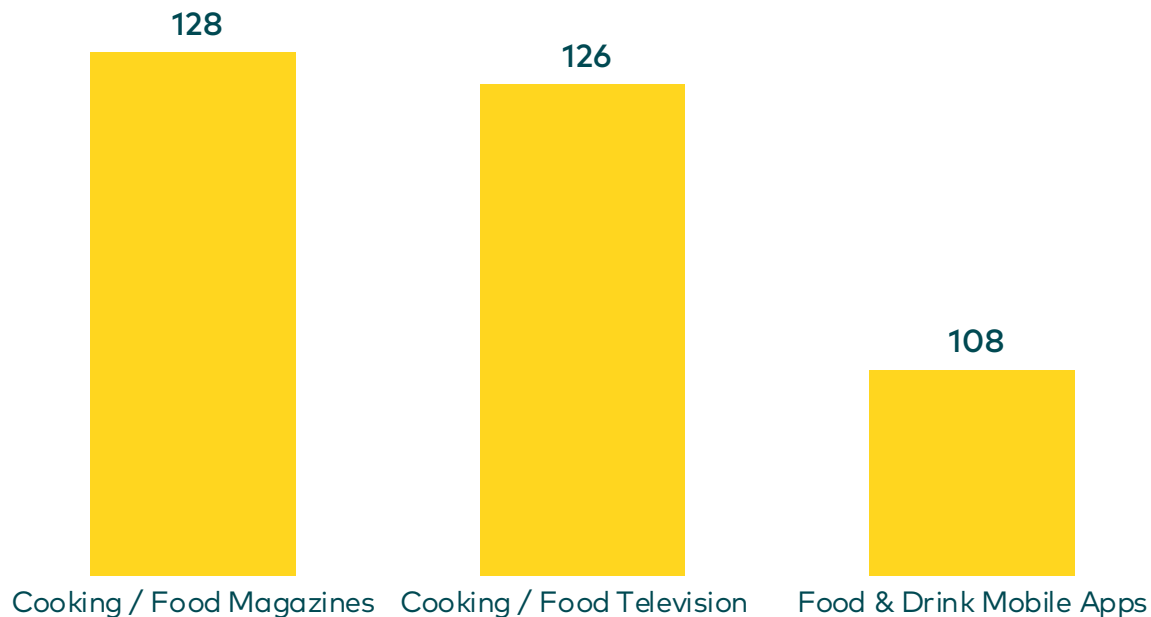


Food media and entertainment is more popular among Black consumers.

Black consumers over index on food-related magazines ,TV channels, and apps compared to all other shoppers. Learning about food and cooking during free time strengthens the role of food in Black consumers lives, even outside the kitchen.

FOOD-RELATED MEDIA CONSUMPTION

Black consumers Index to All Shoppers



SPECIFIC CONTENT CHANNEL

% of Black consumers | Index to All Shoppers



Food Network

21.1% | Index 122



Better Homes and Gardens Magazine

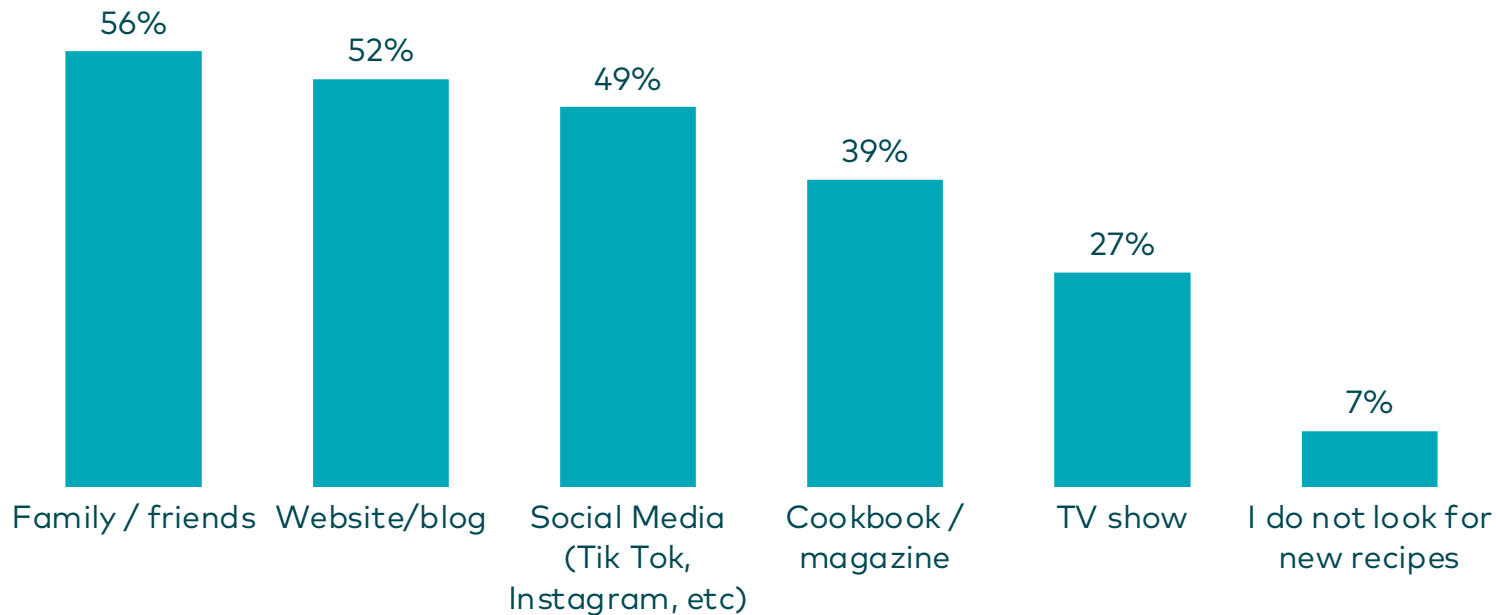
10.1% | Index 116

With modern technology, finding recipes is easier than ever.

Websites, blogs, and social media are quick and convenient ways for Black consumers to look for new recipes. Cultural significance also plays a role when looking for recipes and modern resources make finding these recipes easier.

TOP RECIPE SOURCES

% of Black consumers



68%

Say culturally significant recipes are either important or very important when cooking from home.

Grocery service technology satisfies a need for convenience.

Modern technology also plays a large role in Black consumers' grocery shopping habits. Grocery services like online ordering for delivery and in-store pick up are enjoyable ways to make grocery shopping more convenient.

SHOPPING TECHNOLOGY HABITS

% of Black consumers | Index vs. all shoppers

18%

Innovators or Early Adopters of new shopping services (121 Index)

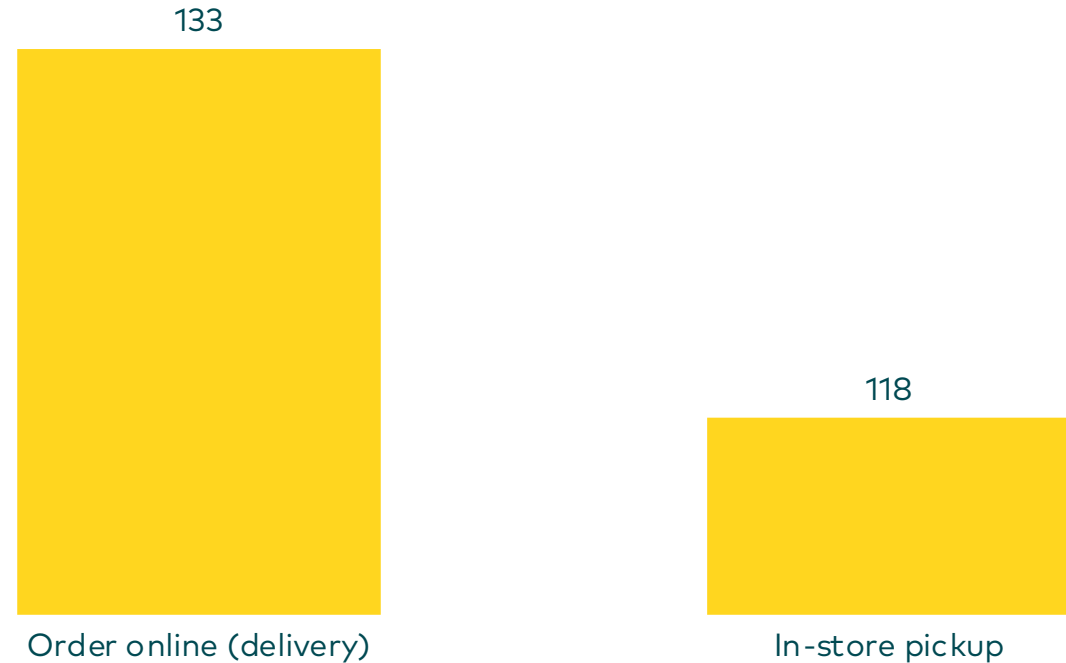
29%

Believe shopping online for everyday items is enjoyable (136 Index)

Numerator Insights 12M ending 12/31/22

GROCERY SERVICE USAGE

% of Black consumers indexed vs. all shoppers

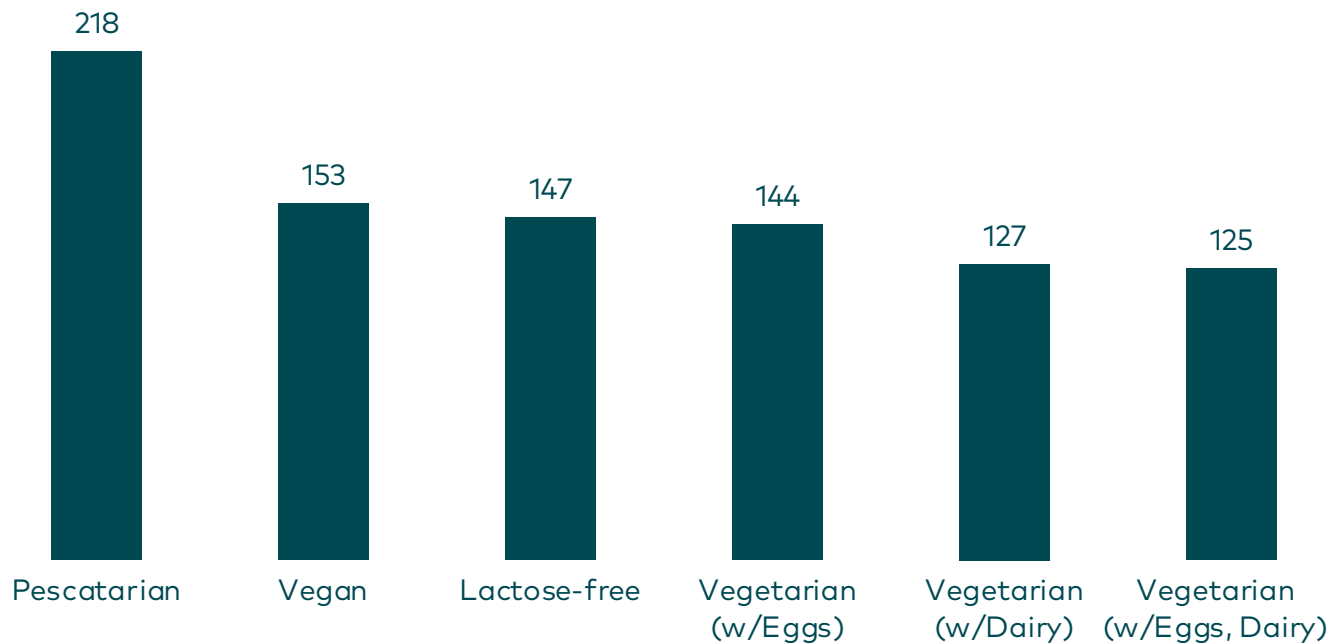


A focus on health showcases special diets and organic preferences.

Compared to the average US consumer, Black consumers are 54% more likely to be very concerned about eating healthy. A focus on organic foods and special diets help Black consumers stay health-focused.

SPECIAL DIETS

% of Black consumers indexed vs. All Shoppers



ORGANIC SENTIMENT

% of Black consumers | Index to All Shoppers

24%

Committed or very committed to organic (138 Index)

22%

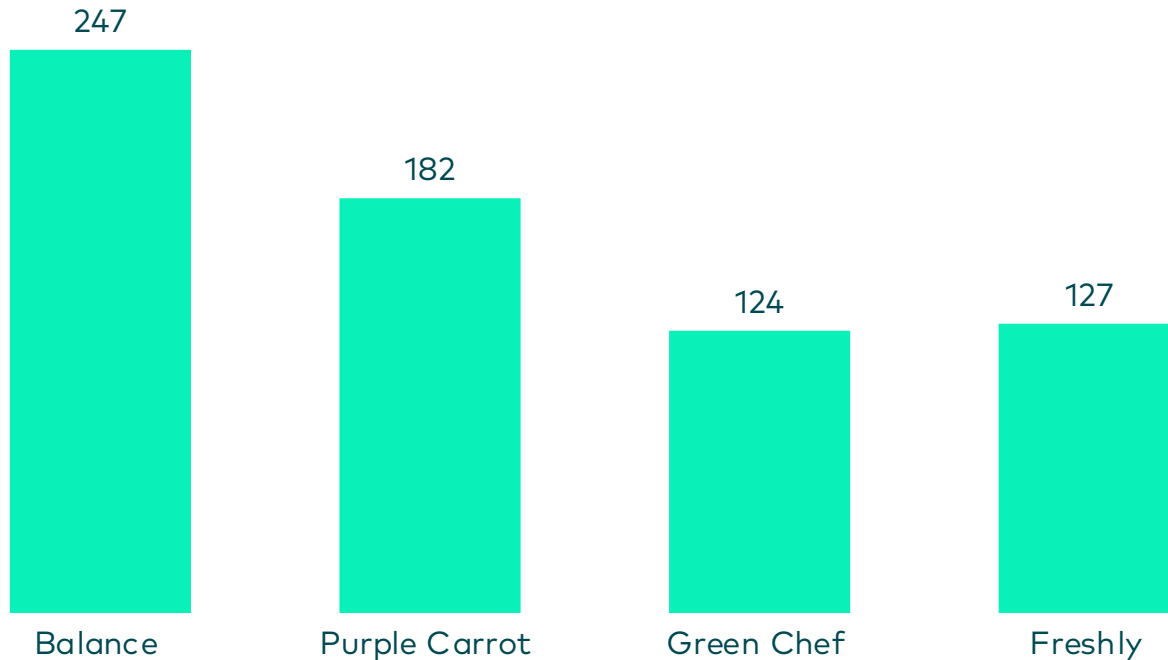
Would pay more for organic (139 Index)

Meal kits offer convenient and healthy food options.

The 10% of Black consumers using meal kits are more likely to consider kits that match their specific needs. Specialty meal kits that offer specific dietary options or organic produce are more popular with Black consumers.

SPECIALTY MEAL KITS

% of Black consumers | Index to All Shoppers



REASON FOR MEAL KIT

% of Black consumers | % All Shoppers

39%

Saves me time cooking

20%

Quality ingredients (120 index)

11%

Special dietary / allergy needs (120 index)

Key Takeaways

A SOULFUL HISTORY

- Soul foods are often purchased together and lead to higher spending— promoting culturally significant foods together in-store can help brands and retailers capture these valuable trips.
- Occasion-based dining is important to Black consumers— messaging around family meals, holiday gatherings and summer cookouts is a great way for brands to connect with Black shoppers.

ADAPTING TO MODERN DAY

- Convenience and value drive Black consumers' grocery store decisions, but variety and fresh product offerings are key for brands and retailers looking to capture the higher-spend soul food baskets.
- Restaurants that offer soul food hold the greatest appeal for many Black consumers, who are often looking for affordable and convenient restaurants that will satisfy a specific craving.

FUTURE CONSIDERATIONS AND TRENDS

- Black consumers are more engaged with a variety of food-related media, such as magazines, TV and social media— brands looking to connect with Black shoppers should leverage these established culinary channels.
- Special diets and organic preferences are important influences in the lives of Black consumers— meal kits offering these types dietary customizations are more likely to resonate with Black shoppers.



Know **your consumer** with certainty.

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

To dive deeper into the data outlined in this report, reach out to your Numerator representative or contact us at hello@numerator.com.