

A man and a woman are standing in a grocery store, smiling at the camera. They are both holding white trays filled with various cuts of meat. The woman is on the left, wearing a dark patterned top and jeans. The man is on the right, wearing a plaid shirt. The background is slightly blurred, showing shelves in the store. The entire image has a blue tint and is framed by an orange border.

MULTICULTURAL Meat Consumers

2021

MIDAN MARKETING
Customer Insights Team
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Executive Summary

How are consumer demographics changing and what does the meat industry need to do to keep pace? How do Black, Asian and Hispanic consumers approach meat shopping differently and why?

- The U.S. is constantly becoming more diverse with an ever-growing population of Black, Hispanic and Asian Americans. Because of their backgrounds and cultures, each of these segments approaches grocery shopping – and shopping for meat specifically – differently.
- Black meat consumers' choice on cuts can be directly tied to African American culture dating back to the 1600s. The soul food that parts of the Deep South are now known for comes directly from food ingredients available from scrap animal parts or what today we call variety meats.
- Pork is an important part of Hispanic cuisine, particularly around holidays and other traditions. The freshness of meat is important to this consumer as well as the conditions under which the animals were raised. This will often lead these consumers to choose claims like “All-Natural” because they perceive the meat to be fresher and healthier.
- Asia, having the largest, most diverse population of anywhere in the world, doesn't have a single culture or cuisine to reference. Asian American immigrants are equally diverse, coming from a variety of different backgrounds and having varying religious views. Since many Asians identify as Muslim or Hindu (which both have strict religious laws concerning meat), there is a wider variety of different proteins consumed by this group.

Changing Demographics

With each new generation, consumers are getting more racially and ethnically diverse. In 2020, the U.S. population was estimated around 332.6 million people and is expected to reach 355 million by 2030. Currently, it is forecasted that in 2030, U.S. population makeup will be **13.8% Black, 21.1% Hispanic, 6.9% Asian** and **55.8% White**. In the following 30 years, the percentage of White Americans will decrease further to 44.3% with other ethnicities continuing to become more prominent.¹

Culture. It encompasses all the knowledge, beliefs, customs, habits and art of a group of people. Food is an integral piece of many cultures around the world. In the same way that food can help define a population, it can also serve to bring people together.

Midan Marketing recently surveyed Black, White, Asian and Hispanic meat consumers to find how they differ in their approach to grocery shopping and the meat case. Differences were evident throughout the shopping process – from whether they create a shopping list to where they shop to what claims and cuts of meat they purchase.





The Black Meat Consumer

1

Black meat consumers are significantly more likely than others to be solo in making grocery decisions. Thirty-six percent of black meat consumers report being the sole grocery decision maker for their household.²

- Black men and women are overrepresented in jobs that have nonstandard hours of employment and tend to have less secure employment than other groups. This likely leads to having a single member of the household taking responsibility for care tasks, such as grocery shopping.³
- Despite cohabitating at a rate similar to women from other racial groups, the percentage of Black adult women who have been married is lower, at **37%**. Some of the theories for this include a lack of solid employment opportunities for Black men (resulting in Black women having a higher earning potential than their male counterparts).³

2

Around half of Black meat consumers have used an online method to purchase meat in the last month – around the same number as the general U.S. consumer. However, they're significantly more likely than White, Hispanic or Asian consumers to have used a meat-specific delivery service like ButcherBox or Omaha Steaks.²

- The meat-specific grocery service is the least frequented method of online meat purchasing for all ethnicities except Black consumers. One explanation for this could be related to food deserts. Food deserts are areas that have limited access to affordable and nutritious foods. Factors such as income, distance to supermarkets, vehicle ownership and public transit all play into whether an area is defined as a food desert. Only **8%** of Black Americans live in a Census region with a supermarket (compared to **31%** of White consumers). Additionally, low-income zip codes (which skew toward having more Black residents) have **30%** more convenience stores, which tend to lack healthy items and fresh foods like meat, than middle-income zip codes.⁴ These limitations likely lead Black meat consumers to look for online methods to purchase fresh meat.



When it comes to specific cuts, Black shoppers often make use of cuts other customers don't even consider. These consumers are much more likely to buy pork hocks, shanks and offal than White or Asian shoppers.²

- “Soul food” refers to an ethnic cuisine traditionally prepared and eaten by African Americans, originating in the Southern United States. It fuses together culinary traditions of West Africa, Western Europe and the Americas. Ingredients like pork hocks, shanks and offal are typical in this cuisine. Due to the historical presence of African Americans in the region, soul food is closely associated with the cuisine of the American South although today it has become an easily identifiable and celebrated aspect of mainstream American food culture.²
- Examples of soul food that features these cuts are black-eyed peas and/or cabbage, cooked slowly with a pork hock for flavor and chitlins. These dishes and many others have remained comfort food staples in the diets of Black meat consumers.
- Whether by choice or by circumstance, Black consumers have significantly smaller average annual food expenditures than other consumers. The average (mean) annual food expenditure in the U.S. is \$7,700. For Black Americans, this number is \$5,800 – a difference of almost \$2,000 per year.⁵ This likely plays a part in Black shoppers purchasing less expensive cuts of meat, like hocks, shanks and offal, to add meat to their menu at a lower cost.



The Hispanic Meat Consumer



The Hispanic Meat Consumer is currently dominating the e-commerce space. More than **60%** of Hispanic shoppers have used an online method to purchase meat in the last 30 days – significantly higher than any other group.²

- Before COVID-19, Hispanic consumers had not been high adopters of online grocery platforms. One of the top reasons for this is being sensitive to price. In fact, over three-quarters of Hispanic grocery shoppers report knowing which stores have the best prices on the products they buy.⁶
- The pandemic led many local grocery retailers to waive or eliminate any fees they were charging for curbside pickup or click and collect services. Because one of the main barriers to Hispanic adoption pre-pandemic was price, compounded with COVID's disproportionate affects on people of color, the pandemic brought a spike in Hispanic meat consumers' use of online shopping platforms.
- Over **30%** of Hispanic meat consumers report shopping at a local grocery retailer for pickup and for delivery in the last month. For delivery, this is significantly higher than all other ethnic groups; for pickup, it is significantly higher than both Asian and White consumers.²



Pork claims are an area of interest for Hispanic shoppers. More than a quarter of Hispanic meat consumers purchase pork with All-Natural and No Antibiotics Ever claims at least once per month. They're also the demographic most likely to be searching for and purchasing Imported Pork.²

- Health features are top of mind for many Hispanic customers. About **90%** of first-generation Hispanics, **82%** of Millennials and **80%** of second-generation Hispanics agree that “When I cook dinner, it is important that it be healthy.” While their definitions of “healthy eating” differ, most Hispanics associate freshness with food quality and health. Claims like All-Natural are seen as healthier and fresher, which are especially important to bicultural and unacculturated Hispanics.⁷
- Pork is important to many Hispanic traditions and celebrations. However, it's not uncommon for the cuts used in Hispanic dishes to be unavailable at traditional U.S. grocery stores. That can lead them to shopping at butcher shops and ethnic grocers more often, as well as purchasing Imported Pork if it is cut in a way that's more familiar to the consumer.⁷

3

All multicultural meat consumers, especially Hispanics, think a “great deal” about whether animals were raised sustainably and/or humanely when making meat purchase decisions. About **40%** of Hispanic meat consumers take these ideas into consideration.²

- Across all generations of Hispanics, pork animal welfare is a factor in how much pork they buy. Specifically, the majority say the cleanliness of pigs, what pigs are fed and how pigs are raised are factors in how much pork they buy.⁷
- Concern about animal welfare increases as consumers age. Two-thirds of Hispanics 55 and older report that how pigs are raised influences purchasing decisions while only **60%** of 18- to 34-year-olds do.⁷ This is the inverse of how we typically see welfare and sustainability resonate more with younger generations.



The Asian Meat Consumer

1

The assortment of stores visited by the Asian meat consumer differs significantly from other cohorts. While other demographic segments are most likely to visit traditional supermarkets or supercenters, **50%** of Asian shoppers have visited a warehouse club store in the last month. Nearly **40%** have shopped at a health, natural or organic food store and over a quarter have visited an ethnic grocery.²

- Asian consumers face a similar quandary to the other multicultural segments – where to buy the foods their culture centers around. Ethnic grocery stores are sometimes the only place to find certain ingredients commonly found in Asian cuisines. Other times, the ingredients are significantly cheaper at an ethnic grocer than they would be at a traditional grocery store.
- Shopping at natural, organic or health food stores is also a more uniquely Asian idea. This could have multiple factors behind it. First, **70%** of Asian meat consumers report that they are “constantly looking for ways to improve” their health – this is higher than any of the other racial groups and significantly higher than White meat consumers.² Secondly, this type of store is more likely than a traditional supermarket to carry items and ingredients often associated with Eastern medicine, which are likely more important to Asian consumers than other demographics.



Asian consumers have the largest mix of proteins in their diet, as well as having the most experience with plant-based proteins. The portion of Asian consumers who say poultry is the main dish at most of their meals is in the same range as other ethnic groups, while beef is their main dish far less often. Most interestingly, though, are pork, vegetarian options and seafood – about **10%** of Asian consumers consider each of these the protein most likely to be their main dish. This is closer to **5%** for other groups.²

- Asian culture and cuisine can vary greatly depending on region, which likely plays into the large mix of proteins purchased by Asian-identifying consumers. China is the world's leading pork producing country, making it a popular protein in the surrounding parts of Asia. However, there are also countries like Saudi Arabia that are part of Asia where pork is strictly forbidden under Islamic law. This diversity in what constitutes "Asian" makes it more difficult to pinpoint a specific cuisine that affects what proteins these consumers purchase.
- Less than **20%** of Asian meat consumers report that beef is the main dish at most of their meals. This is significantly less than White or Hispanic consumers.² There are multiple reasons why this group's beef consumption is low:
 - Cows are more difficult to raise than pigs or chicken as they require more space and cannot be fed scraps. In communities where cows have not been raised, the cuisine is less likely to include beef.
 - More than **25%** of people in Asian Pacific countries consider themselves Hindu and a similar number are Muslim.⁸ Hinduism reveres cows and typically practicing Hindus will not eat beef. Similarly, Muslims will only eat beef that is halal. With **50%** of the population facing religious rules against beef, it is understandable why American immigrants from these areas also eat less beef than other groups.



At the meat case, Asian shoppers are buying pork belly much more often than other groups. In fact, **43%** of Asian meat consumers report buying pork belly at least once a month – **15%** are buying it multiple times per month. Additionally, about half of Asian shoppers are buying ground pork – a protein only about a third of White consumers purchase.²

- Pork belly is a particularly popular cut in Chinese, Korean, Thai and Filipino cuisine, among others. It is revered for its flavorful fat as well as its skin side, which can provide a crispy or crunchy element to a dish.
 - In Chinese cuisine, pork belly is most often prepared by dicing and slowly braising with skin on, marination, or being cooked in its entirety. Pork belly is used to make red braised pork belly and Dongpo pork.
 - A 2006 survey by National Agricultural Cooperative Federation found that **85%** of South Korean adults stated their favorite cut of pork is the belly.⁹ Pork belly is consumed both at restaurants and at home, grilled at Korean barbecue, or used as an ingredient for many Korean dishes, such as bossam (boiled pork wraps) and kimchi-jjigae (kimchi stew).
 - In Filipino cuisine, pork belly is marinated in a mixture of crushed garlic, vinegar, salt and pepper before being grilled. It is then served with soy sauce and vinegar with garlic. This method of preparing pork is called inihaw in Filipino and sinugba in Cebuano. Being seasoned, deep-fried, and served by being chopped into pieces is called lechon kawali.
 - In Thai cuisine, pork belly is called mu sam chan, referring to rind, fat and meat. It is often used to make Khao mu daeng and Khao mu krop or fried with kale.

¹In the Midan Marketing multicultural meat consumer research survey, "Black or African American" was one category for race/ethnicity. This research uses "Black" throughout the report to identify this group. For secondary research sources, this report uses whichever terminology was present in the secondary findings.

Sources

- ¹ U.S. Census Bureau, Demographic Turning Points for the United States: Population Projections for 2020 to 2060, February 2020.
- ² Midan Marketing, Multicultural Meat Consumer Survey, March 2021.
- ³ Child Trends, Family, Economic, and Geographic Characteristics of Black Families with Children, March 2021.
- ⁴ USDA Economic Research Service, Access to Affordable and Nutritious Food – Measuring and Understanding Food Deserts and Their Consequences: Report to Congress, June 2009.
- ⁵ U.S. Bureau of Labor Statistics, Consumer Expenditure by Race, 2019.
- ⁶ Mintel, Hispanics and Shopping for Groceries – US, January 2020.
- ⁷ U.S. Pork Board, Time to Tango: Latinos are Pork's Future, October 2019.
- ⁸ Pew Research Center, Religious Composition by Country, 2020.
- ⁹ USDA Foreign Agriculture Service, Korea, Republic of Livestock and Products, October 2007.

A photograph of a smiling man and woman in a grocery store. The man is wearing a striped shirt and the woman is wearing a dark sweater. They are standing behind a shopping basket filled with various fruits and vegetables, including pumpkins, avocados, and leafy greens. The background shows shelves stocked with various grocery items.

Thank you for your interest in Midan Marketing's Multicultural Meat Consumers Insights Report.

For more information or to purchase a more in-depth report on the Black, Hispanic and/or Asian Meat Consumer, contact **Bridget Wasser** at b.wasser@midan.com.

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