

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Although the recent recession did impact apparel expenditures, steady increases have been observed in the last two years. Black consumers tend to be style conscious and follow the latest fashion trends. This consumer loves to shop and shop a wide range of stores — brick and mortar as well as online."

- Tonya Roberts, Multicultural Analyst

This report looks at the following areas:

- Compared to 2010, how have Black consumers' attitudes and behaviors toward apparel and footwear changed?
- What influences Black consumers' decisions to buy clothing and apparel? Where are they shopping?
- What role does their image play in what they wear and what their children wear? What are some missed opportunities?

Black consumers love to shop and they spend a large amount of their disposable income on clothing and footwear. Style is very important to Black consumers and they see it as a way for to express their individuality. Many Black consumers also view themselves as trendsetters and feel that staying on top of the latest fashions is important in their lives. Therefore, there is a tremendous opportunity for retailers to reach out to this audience with fashion forward clothing and footwear that appeals to their sense of style.

BUY THIS <u>REPORT</u> NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Scopes and Themes

What you need to know

Definition

Data sources

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

Expenditure Data

Definition

Data sources

Terms

Executive Summary

Category expenditures

Figure 1: Average annual expenditures, Black consumers, by expenditure category, 2002-10

The consumer

Figure 2: Changes in Black spending on apparel and footwear in last year, 2010 vs 2013

Attitudes toward fashion

Figure 3: Attitudes toward personal appearance, all Black consumers, July 2013

Figure 4: Attitudes toward fashion and style, all Black consumers, July 2013

Shopping for adult apparel

Figure 5: Percentage of total apparel and footwear spend, by category among Black consumers, 2012

Shopping for adult shoes

Figure 6: Types of stores shopped for children's and adult footwear, all Black consumers, July 2013

Figure 7: Types of stores shopped for adult footwear, Black consumers by age, July 2013

Shopping for children's apparel and footwear

Figure 8: Attitudes toward style and fashion among kids aged 6-11, by race/ethnicity, 2012

Figure 9: Teen's attitudes toward style and fashion, by race/ethnicity, 2012

Attitudes toward shopping

Figure 10: Attitudes toward retail store sales and pricing, by race/ethnicity, 2013

The Black male shopper

Figure 11: Agreement with attitudes toward shopping, by gender, July 2013

Cluster Analysis

Figure 12: Black consumers target clusters, July 2013

What we think

Issues and Insights



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Compared to 2010, how have Black consumers' attitudes and behaviors toward apparel and footwear changed?

Attitudes toward shopping

Figure 13: Changes in Black spending on apparel and footwear, by household income and gender, 2010 vs 2013

Online shopping

Economic impact

Caring for clothes

What influences Black consumers' decisions to buy clothing and apparel? Where are they shopping?

What role does their image play in what they wear and what their children wear? What are some missed opportunities?

Trend Applications

Trend: Man in the Mirror Trend: The Real Thing

Futures trend: Access Anything, Anywhere

Clothing and Footwear Expenditures

Key points

Black consumers spent nearly \$2 billion on apparel and footwear in 2010

Figure 14: Average annual expenditures - Black CUs, by expenditure category, 2002-10

Figure 15: Average annual expenditures, non-Black CUs, by expenditure category, 2002-10

Blacks spend more than non-Blacks on footwear and children's apparel

Figure 16: Average expenditures for apparel and footwear, by segment and Black vs other races, at current prices, 10-year rolling averages, 2002-12

Footwear and women's clothing represent highest share of expenditures

Figure 17: Average expenditures by black households for apparel and footwear, by segment, at current prices, three-year rolling averages, 2007-17
Figure 18: Category market share by black households for apparel and footwear, by segment, at current prices, 2010-12

Attitudes Toward Fashion

Key points

Black consumers want to look their best and it's even more important the older they get

Figure 19: Attitudes toward personal appearance, all Black consumers, July 2013

Figure 20: Attitudes toward shopping and product preferences, July 2013

Blacks display a unique sense of style - staying on trend is a must

Figure 21: Attitudes toward fashion and style, July 2013

Black consumers dress for success

Figure 22: Attitudes toward fashion and style, July 2013

Style is more important to younger consumers than cost but they struggle finding clothes that fit

Figure 23: Agreement with attitudes toward fashion and style, by age, July 2013

Lower-income groups have a greater sense of style

Figure 24: Agreement with attitudes toward fashion and style, by household income, July 2013

Inspiration doesn't necessarily come from fashion magazines

Figure 25: Motivation for buying new clothes, by race and ethnicity, 2013

Black consumers prefer designer brands and buy them at discount stores

BUY THIS REPORT NOW



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 26: Attitudes toward clothing brands, by race and ethnicity, 2013

Shopping for Adult Apparel

Key points

Figure 27: Percentage of total sales by apparel/footwear category among Black consumers, 2012

Black consumers shop at mid-priced and discount department stores more than other types of stores

Figure 28: Type of stores shopped for adult and children's apparel, all Black consumers, July 2013

Younger Blacks significantly more likely to shop high-end stores, athletic stores and online stores

Figure 29: Case study: "My Adidas" by Run-DMC

Figure 30: Type of store shopped for adult apparel, by age, July 2013

Income drives where people shop, except athletic, specialty and online stores

Figure 31: Type of store shopped for adult apparel, by household income, July 2013

Shopping for Adult Shoes

Key points

Black consumers spend significantly more on shoes than other consumers

Blacks buy shoes from a wide variety of stores but children's shoes are purchased at athletic and discount department stores

Figure 32: Type of stores black consumers shop for children's and adult footwear, July 2013

Younger Blacks more likely to shop for shoes at athletic, online and high-end stores

Figure 33: Type of stores shopped for adult footwear, by age, July 2013

Higher-income Blacks more likely to have shopped for shoes in last year

Figure 34: Type of store shopped for adult footwear, by household income, July 2013

Shopping for Children's Apparel and Footwear

Key points

Black kids aged 6-11 love to shop and are far more fashion conscious than others

Figure 35: Attitudes toward style and fashion among kids aged 6-11, 2012

Black teens lead the pack when it comes to fashion

Figure 36: Teen's attitudes toward style and fashion, 2013

Younger Black consumers shop for kid's clothes at stores like babyGap and Babies "R" Us

Figure 37: Type of stores shopped for children's clothes, by age, July 2013 $\,$

Higher-income Blacks more likely to buy kid's clothes at mid-priced and high-end department stores

Figure 38: Types of stores shopped for children's clothes, by household income, July 2013

Black consumers shop a wide variety of stores for children's shoes

Figure 39: Type of stores shopped for children's footwear, by age, July 2013

High-income earners are more likely to buy children's shoes. Lower-income Blacks buy from stores like Walmart

Figure 40: Types of stores shopped for children's footwear, by household income, July 2013

Attitudes Toward Shopping

Key points

Figure 41: Frequency of visits to shopping malls in a typical month, by race/Hispanic origin, December 2012

Blacks enjoy browsing and make a social outing out of shopping at malls

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 42: Reasons for visiting a shopping mall, by race/Hispanic origin, December 2012

Black consumers are significantly more likely than White consumers to be impulse buyers

Figure 43: Attitudes/opinions toward shopping malls, by race/Hispanic origin, December 2012

Black consumers seek mall improvements that enhance their shopping experience

Figure 44: Innovations/improvements desired at shopping malls, by race/Hispanic origin, December 2012

Blacks prefer shopping at malls that are close to home

Figure 45: Attitudes toward shopping distance and use of public transportation, December 2012

Black consumers shop a variety of stores and are more receptive to shopping someplace new

Figure 46: Attitudes toward store selection and brands, by race/ethnic origin, 2013

Atmosphere and customer service help drive where Black consumers shop

Figure 47: Attitudes toward store atmosphere and customer service, by race/ethnic origin, 2013

Sales are important but are less likely than other factors to bring Blacks into stores

Figure 48: Attitudes toward store sales and pricing, by race/ethnic origin, 2013

Black consumers more likely to enjoy window shopping

Figure 49: Attitudes toward social aspect and enjoyment of shopping, by race/ethnic origin

Black consumers are willing to travel the distance to get what they want

Figure 50: Attitudes toward store location and distance traveled, by race/ethnic origin, 2013

Some wait for sales while others shop less expensive stores and outlets

Figure 51: Changes in shopping behavior for clothing and footwear, July 2013

Attitudes toward shopping and fashion varies by where Black consumers shop

Figure 52: Attitudes toward style and fashion, by type of store shopped, July 2013

Regardless of where Blacks shop, they consider themselves fashion forward

Figure 53: Attitudes toward style and fashion by type of store shopped, July 2013

Black consumers admit they spend more than they should on looking good

Figure 54: Attitudes toward brands and clothing by type of store shopped, July 2013

Black consumers make sacrifices for their kids and buy them what they want

Figure 55: Attitudes toward shopping for children's clothing by type of store shopped, July 2013

The Black Male Shopper

Key points

Black men like to shop

Figure 56: Agreement with attitudes toward shopping, by gender, July 2013

Black men make sacrifices for their kids to have what they want

Figure 57: Agreement with attitudes toward shopping, by gender, July 2013

Men are more likely to shop athletic stores, discount retailers, high-end stores and online

Figure 58: Type of stores shopped for adult footwear, by gender, July 2013

Black men are less like to shop stores like Target and Walmart

Figure 59: Types of stores shopped for adult clothing, by gender, July 2013

Style trumps cost among Black men

Figure 60: Agreement with attitudes toward fashion and style, by gender, July 2013

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Four out of 10 Black men wear a different cologne every day

Figure 61: Agreement with attitudes toward shopping and product preferences, by gender, July 2013

Cluster Analysis

Figure 62: Target clusters, July 2013

Cluster 1: Modest Matures

Demographics

Characteristics

Opportunity

Cluster 2: Fashion Gurus

Demographics

Characteristics

Opportunity

Cluster 3: Image Movers and Shakers

Demographics

Characteristics

Opportunity

Cluster demographic tables

Figure 63: Target clusters, by demographic, July 2013

Cluster characteristic tables

Figure 64: Agreement with attitudes toward shopping and product preferences, by target clusters, July 2013

Figure 65: Types of stores shopped for children's clothing, by target clusters, July 2013

Figure 66: Types of stores shopped for adult clothing, by target clusters, July 2013

Figure 67: Types of stores shopped for any type of clothing, by target clusters, July 2013

Figure 68: Types of stores shopped for children's footwear, by target clusters, July 2013

Figure 69: Types of stores shopped for adult footwear, by target clusters, July 2013

Figure 70: Type of stores shopped for any footwear, by target clusters, July 2013

Figure 71: Stores black consumer purchase from for clothing and footwear, by target clusters, July 2013

Figure 72: Agreement with attitudes toward fashion and style, by target clusters, July 2013

Figure 73: Agreement with attitudes toward shopping, by target clusters, July 2013

Figure 74: Changes in shopping behavior in last year - any clothing shopped, by target clusters, July 2013

Figure 75: Changes in shopping behavior in last year – any footwear shopped, by target clusters, July 2013

Figure 76: Changes in shopping behavior in last year - any store shopped, by target clusters, July 2013

Marketing Strategies

Overview of the brand landscape

Brand analysis: Adidas

Figure 77: Run-DMC's My Adidas song, Run-DMC gear by Adidas

Figure 78: Adidas, "Basketball is Everything"

Brand analysis: Nike

Figure 79: Nike ad "Calvin & Johnson" featuring Calvin Johnson and Sean "Puffy" Combs

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 80: Nike Ad, "Speed Delivered" featuring Victor Cruz and J. Cole

Brand analysis: Reebok

Figure 81: Alicia Keys for Reebok

Brand analysis: Macy's

Figure 82: Macy's "What's in Store? - Diddy Dash" featuring Sean "Puffy" Combs

Brand analysis: Walmart

US Black Population

Key points

US population by race/Hispanic origin

Figure 83: Population, by race/Hispanic origin, 2008-18 Figure 84: Population, by race/Hispanic origin, 1970-2020

Figure 85: Asian, Black, and Hispanic populations, 1970-2020

Age

Generations by race

Figure 86: US population by race, and by generation, 2011

Black population by age

Figure 87: US Black population, by age, 2008-18 Figure 88: US Population, by age, 2008-18

US Black geographic concentration

Figure 89: Black geographic concentration, by region, 2007

Black population by state

Figure 90: States with largest Black population, 2011

Figure 91: States with largest Black population, by distribution, 2008

Population by geographic concentration

Figure 92: States (including District of Columbia) ranked with the highest share of Black residents, 2011

Black metro areas

Figure 93: Metropolitan status of Black households, 2006 and 2011

Figure 94: Top 10 metropolitan areas with the largest number of Black residents, 2010

Black households

Figure 95: Average household size, by race/Hispanic origin/race of householder, 2001 and 2011

Figure 96: Presence and ages of children in the household, by race/Hispanic origin, 2011

Figure 97: Marital status, by race and Hispanic origin, 2011

Appendix - Additional Tables

Figure 98: Attitudes toward shopping, by gender, July 2013

Figure 99: Attitudes toward self-image, by age, July 2013

Figure 100: Stores shopped at for clothing in the last year, by gender, July 2013

Figure 101: Stores shopped at for clothing in the last year, by age, July 2013

Figure 102: Stores shopped at for footwear in the last year, by age, July 2013

Figure 103: Stores shopped at for clothing in the last year, by household income, July 2013

BUY THIS REPORT NOW VISIT: store.mintel.con

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 104: Attitudes toward shopping, July 2013

Figure 105: Attitudes toward shopping, by age, July 2013

Figure 106: Attitudes toward shopping, by household income, July 2013

Figure 107: Changes in shopping behavior for clothing, by age, July 2013

Figure 108: Changes in shopping behavior for clothing - Any clothing shopped, by household income, July 2013

Figure 109: Changes in shopping behavior for footwear, by age, July 2013

Figure 110: Changes in shopping behavior for footwear, by household income, July 2013

Figure 111: Changes in shopping behavior for clothing and footwear, by age, July 2013

Figure 112: Changes in shopping behavior for clothing, by household income, July 2013

Figure 113: Attitudes toward fashion and style by type of footwear store shopped in the last year, July 2013

Figure 114: Attitudes toward fashion and style by type of footwear store shopped in the last year, July 2013 (continued)

Figure 115: Attitudes toward shopping by type of footwear store shopped in the last year, July 2013

Figure 116: Attitudes toward shopping by type of footwear store shopped in the last year, July 2013 (continued)

Figure 117: Target clusters, by gender, July 2013

Figure 118: Target clusters, by age, July 2013

Figure 119: Target clusters, by household income, July 2013

Figure 120: Target clusters, by education, July 2013

Figure 121: Target clusters, by employment, July 2013

Appendix – Trade Associations