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Summary Report of Phases 1 and 2

**Estimating the Value of the U.S. Multicultural Shopper  
in the Independent Retail Channel:  
An In-Culture Analysis™**

By:

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<sup>1</sup> Supported Phase 1

<sup>2</sup> Supported Phase 2

## About the Authors

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Isabel Valdés is recognized as one of the nation's leading multicultural marketing experts and researchers. A former CEO, she developed the In-Culture Marketing™ methodology, which continues to be the gold standard in multicultural marketing today.

For over two decades, Isabel Valdés has consulted in virtually every business category for Fortune 100 and 1000 companies in the U.S. and abroad. She has collaborated with a number of syndicated research companies, including AC Nielsen for whom she developed the Hispanic Panel (Los Angeles) in the 1990s.<sup>3</sup> Presently, she heads Isabel Valdés Consulting (IVC), advising corporations on a broad range of business- and marketing-related issues.

Presently, Isabel is the Chairperson at the Center for Multicultural Science, Vice President of the Chile California Council, and a member of the Board of Trustees at the San Francisco Symphony. Previous board affiliations include: the National Council of La Raza (NCLR – Washington D.C.); National Hispana Leadership Institute (NHLI – Washington D.C.); the Tomás Rivera Policy Institute (Los Angeles –TRPI) and Latino Community Foundation (LCF – San Francisco).

Isabel is the published author of five best-selling books in Hispanic marketing and multiple articles. A frequent speaker at conferences and TEDx, she is the recipient of numerous awards; amongst these, she was named “ahead of the wave in multicultural research” by American Demographics Magazine.

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<sup>3</sup> Valdés, M.I. (2002), Marketing to American Latinos: A Guide to the In-Culture Approach – Part II, pp. 143-177, PMP, Ithaca, NY

## Jake Beniflah

Dr. Jake Beniflah is the founder and Executive Director of the Center for Multicultural Science, the first non-partisan, non-profit think tank in the U.S. dedicated to bridge the gap between corporations and academic researchers in multicultural marketing.

Over the last 25-years, Jake has held a number of senior-level positions in the advertising industry, working with leading corporations to drive ROI for Hispanic and mainstream consumers. His areas of expertise include consumer insights, acculturation, market research, and brand strategy.

Jake is the founding editor of the *Journal of Cultural Marketing Strategy* published by Henry Stewart Publications, and guest editor of a Special Issue in multicultural marketing under the *Journal of Brand Strategy*. The *Journal of Cultural Marketing Strategy* is the first bi-annual journal in multicultural marketing journal, providing leading corporations with cutting-edge multicultural marketing research in the U.S. and abroad. <http://www.henrystewartpublications.com/jcms>

Jake studied under a number of research pioneers who had a significant impact on Hispanic marketing strategy and acculturation measurement. He earned his Doctorate in Business Administration from Golden Gate University in 2010.

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## Executive Summary

This is the first study that attempts to estimate the economic contribution of the U.S. Multicultural population (i.e., Hispanic, African American, and Asian) in the independent retail grocery channel.<sup>4</sup>

This study was conducted in two phases. Phase 1 analyzed the retail expenditures of U.S. Hispanics, which was published in 2014, while African American and Asian spend data was analyzed earlier this year (2015) in Phase 2. The study was based on data collected for *The Economic Impact of Independent Grocers: 2012* study,<sup>5</sup> published by the National Grocers Association (NGA).

This report also provides suppliers and retailers with an analysis of the NGA data based on a unique marketing research methodology - In-Culture Marketing™ - a gold standard applied by leading corporations. This research methodology uncovers customer insights and shopping patterns that are significant for the retailer and marketer to devise actionable multicultural marketing strategies at the hyper-local level—across merchandizing, product assortment, grassroots, community relations, media, and the like.

Data presented herein reflects annual estimated sales of the independent retail grocery channel in 2012. The data in this report was analyzed by multicultural segment and the non-Hispanic White population; by state, city, grocery retail categories, and five neighborhood clusters, which this report refers to as In-Culture™ Zones (1-5).<sup>6</sup>

### KEY FINDINGS

- *The Economic Impact of Independent Grocers: 2012* study estimated the total value of the independent retail grocery channel in the United States at **\$131.2b**. (Table 1)
- The total retail expenditures by multicultural group are as follows: **\$86.8b** (non-Hispanic White), **\$22.9b** (Hispanic), **\$14.8b** (African American), and **\$6.7b** (Asian). (Tables 1-3)

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<sup>4</sup> This study used the National Grocers Association's definition of Independent Grocer: It includes all privately owned or controlled grocery stores with annual sales between \$2 million and \$5 billion.

<sup>5</sup> *The Economic Impact of Independent Grocers: 2012*, Prepared for the National Grocers Association by John Dunham and Associates, April 2013, on-line at: [www.nationalgrocers.org/economic-impact/](http://www.nationalgrocers.org/economic-impact/)

<sup>6</sup> In-Culture Zones: Zone 1: 1-19% (ethnic) population density; Zone 2: 20-39% (ethnic) population density; Zone 3: 40-59% (ethnic) population density; Zone 4: 60-79% (ethnic) population density; and Zone 5: 80-100% (ethnic) population density.

## Top Categories

- “Groceries” was the largest category for all consumers, representing **73%** of the total non-Hispanic White annual sales or **\$63.1b**; approximately **79%** of the total Hispanic annual sales or **\$18.1b**; **71%** of the total African American annual sales or **\$10.5b**, and **82%** of the total Asian annual sales or **\$5.4b**.
- The second largest category in annual sales was “Drugs, beauty aids, health aids, and cosmetics” African American (**\$1.4b**) and Hispanic (**\$1.2b**) consumers. “Packaged liquor, wine and beer” represented the second largest category in total sales for Asians (**\$307m**).

(Tables 1-3)

## Top States and Cities

- The study quantified the number of states, which generated a billion dollars or more in annual sales in the independent retail channel. Below are the number of “billion dollar plus” states by consumer group.
  - Non-Hispanic Whites: 30 states generating **\$76.7b** or 90% of total
  - Hispanic: 4 states generating a total of **\$14.1b** or 61% of total
  - African American: 3 states generating a total of **\$3.6b** or 24% of total
  - Asian: 1 state generating a total of **\$3.0b** or 45% of total

(See Tables 4-8)

- The top 5 states which generate the highest annual sales by group:
  - NHW:\* CA, TX, PA, NY, OH generate a total of **\$50.4b** (58% of total)
  - Hispanic: CA, TX, NY, FL, IL generate a total of **\$15.1b** (66% of total)
  - AA:\*\* GA, TX, SC, FL, AL generate a total of **\$5.5b** (37% of total)
  - Asian: CA, NY, HI, NJ, WA generates a total of **\$4.9b** (74% of total)

\*NHW = Non-Hispanic White

\*\*AA = African American

(See Tables 4-8)

Abbreviations were used due to spacing limitations in this section.

- The top 10 cities which generate the highest annual sales by multicultural group compared to “All Other”:
- Hispanics generate **\$4.1b** vs. **\$6.3b** (All Other)
- African Americans generate a total of **\$2.3b** vs. **\$7.3b** (All Other)
- Asians generates a total of **\$1.5b** vs. **\$7.7b** (All Other)

(See Tables 9-11)

### Hyper-Local Sales in Select Cities

A hyper-local In-Culture™ analysis was conducted to understand the annual sales from independent retail locations in highly ethnic population density neighborhoods across the Top 10 cities. The cities below ranked #1 in annual sales with the respective multicultural population segments.

- **Hispanic (Los Angeles):** Zone 4 (60-79%) and Zone 5 (80-100% Hispanic population density)—generated an estimated **\$874m** or **68%** of Hispanic annual sales.
- **African American (Detroit):** Zone 4 (60-79%) and Zone 5 (80%+ African American population density)—generated an estimated **\$459m** or **94%** of Hispanic annual sales.
- **Asian (Los Angeles):** Zone 2 (20-39%) and Zone 3 (40-59% Asian population density)—generated an estimated **\$247m** or **67%** of Asian annual sales.

(See Tables 12-14)

## **IMPLICATIONS**

The findings of this study validate that multicultural consumers are key drivers for growth for independent retail grocers and suppliers:

1. The multicultural populations contribute greatly to the independent retail grocery channel at the national level, and in particular in cities where their populations are concentrated.

Based on the current and projected growth of the multicultural population (i.e., the U.S. is projected to be a “minority-majority” country by 2043), suppliers and independent retailers should accelerate their efforts to develop on-going strategies and programs to effectively target the multicultural shopper.

2. The In-Culture™ analysis uncovered shopper insights and demographic differences not only between the ethnic and non-ethnic shoppers, but also between ethnic consumers across different population density neighborhoods.

The In-Culture™ analysis provided granular intelligence and shopper insights that can significantly aid suppliers and retailers to target and merchandize to the multicultural shopper, successfully.

3. While there is a trend towards creating “total market” strategies, this study underscores the need to strategically support and invest in brand activation at a local level.

Findings from the In-Culture™ marketing analysis reinforce the need for hyper-local marketing and retail sales strategies, and on-going, robust, community-based retail programs.

## **FUTURE CONSIDERATIONS**

It is important to note that this study examined the economic contribution of the U.S. multicultural population at independent retail grocers with annual sales between \$2 million and \$5 billion, and reported sales data across the Top 10 Cities (not DMAs or MSAs). For this reason, future research is needed to estimate the full value of the U.S. independent retail grocery channel for all U.S. multicultural consumers.

As more In-Culture™ studies are conducted, and more shopper insights are gained, retailers and suppliers will have additional market intelligence to devise strategies to effectively target multicultural consumers, drive ROI, track sales—and win with the multicultural customer “for life.” The Center for Multicultural Science invites you to join us in this effort.

## Background:

# Addressing the Multicultural Retail Sales Undercount

### KEY ISSUES

The U.S. multicultural population makes up almost 40% of the total U.S. population<sup>7</sup> and is projected to transform the United States into a “minority majority” by 2043.<sup>8</sup> At the same time, the Selig Center for Economic Growth reported that the estimated total purchasing power of U.S. multicultural consumers surpassed \$3.8 trillion<sup>9</sup> in 2013. And approximately 85 million Millennials in the U.S.—44% of which are multicultural—are contributing much of today’s and tomorrow’s corporate growth.

Despite these gains, U.S. multicultural population remain disproportionately under-represented as key contributors in almost every sector of the economy. More specifically, Isabel Valdés Consulting (IVC) analyzed the *2012 Multicultural Economy Report* published by the Selig Center for Economic Growth and concluded that almost 50% of the \$1.2 trillion in Hispanic purchases could not be accounted for. That is close to \$600 billion!<sup>10</sup> The “retail undercount” problem applies to all multicultural consumers.

In addition, multicultural consumer purchasing data is often incomplete or inaccurate, posing a major challenge for corporations to develop effective business and marketing strategies, and measure the true contribution of the U.S. multicultural market to their ROI. Presently, this data gap is driven partly by the fact that U.S. multicultural syndicated retail data significantly undercounts the purchases made by ethnic consumers (depending on the category).

This study aims to address the multicultural consumer purchasing data gap. Analyzed through the In-Culture™ methodology, this study will help retailers and suppliers better understand the rapidly evolving market place, and its shifting socio-cultural landscape. The study also provides insights that show how retailers and suppliers can leverage the full economic potential of the multicultural population for growth, today and in the future.

For further information on this topic, we recommend reading *WIN! The Hispanic Market: Strategies for Business Growth*, (M. Isabel Valdés, Editor, 2012, PMP Publishers, Ithaca, NY).

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<sup>7</sup> The Bureau of the U.S. Census, 2010

<sup>8</sup> <http://www.pewresearch.org/fact-tank/2014/06/04/are-minority-births-the-majority-yet/>

<sup>9</sup> *The 2013 Multicultural Economy Report*, Selig Center for Economic Growth, University of Georgia

<sup>10</sup> IVC estimates based on Selig Center’s *2012 Multicultural Economy Report* and U.S. Census, 2010

Data part of “Where’s the Beef” presentation made at Hispanic Retail 360 Conference, Los Angeles, August 2012

\* Not including 3.7 million Puerto Rican islanders

## Purpose and Scope of the Study

The purpose of this study was two-fold:

- (1) To estimate the economic contribution of the multicultural population (i.e., Hispanic, African American, and Asian) in the independent retail grocery channel, based on the parameters defined by the National Grocers Association (NGA), a leader and authority in the independent retail grocery industry, and
- (2) To conduct an In-Culture™ analysis of the NGA data to uncover key shopper insights and purchasing patterns among multicultural consumers, which provides retailers and suppliers with actionable strategies.

The Center for Multicultural Science formed a strategic partnership with the National Grocers Association and John Dunham & Associates. The present study is based on data collected for *The Economic Impact of Independent Grocers: 2012*<sup>11</sup> study, published by the National Grocers Association. John Dunham and Associates developed the methodology of the report, and adapted it for the present study. The Center for Multicultural Science directed the study, providing in-culture directions and parameters, as well as methodological recommendations.

To our knowledge, the current study may be the first to estimate the economic contribution of the multicultural population across the independent retail grocery channel. The Center for Multicultural Science recognizes that this channel is fragmented and highly challenging to measure, and further research is needed. Hence, this study is considered the first step to accurately measure the total value of the multicultural independent retail grocery channel.

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<sup>11</sup> See: *The Economic Impact of Independent Grocers: 2012*, prepared for the National Grocers Association by John Dunham and Associates, April 2013, on-line at: [www.nationalgrocers.org/economic-impact/](http://www.nationalgrocers.org/economic-impact/)

## In-Culture™ Research Findings

The In-Culture Marketing™ methodology<sup>12</sup> is based on two main pillars:

- (1) The cultural background of consumers defines their values, attitudes, and behaviors. Different cultures have unique ways of perceiving, organizing, and interacting with society. Several cultures can and do co-exist in a country (e.g., Mainstream American culture and Traditionally ethnic culture).
- (2) Marketing “in-culture” recognizes, capitalizes, and builds upon the cultural differences and similarities of consumers. This approach engages them from a culturally relevant perspective, significantly increasing the effectiveness of marketing communication and retailing strategies and tactics.

The following section presents the research data based on the In-Culture™ marketing methodology. This data yielded key retail marketing insights, as well as significant shopper differences across ethnic market segments between high- and low-density Hispanic population zones in the independent retail grocery channel.

The In-Culture™ analysis examined the following variables—ethnic and non-ethnic sales (national, state, city) and a number of demographic variables (household size, language use, household income and country of origin). These variables were examined in aggregate and by different ethnic population density neighborhoods or In-Culture™ Zones (Zones 1-5).

### National

- Based on the National Grocers Association’s study, *The Economic Impact of Independent Grocers: 2012*, and the findings of the present study, it has been estimated that the independent retail channel is worth **\$131.2 billion**, including Hispanic and non-Hispanic purchases to the independent retail grocery channel. (Table 1)
- The total retail expenditures by multicultural group are as follows: **\$86.8b** (non-Hispanic White), **\$22.9b** (Hispanic), **\$14.8b** (African American), and **\$6.7b** (Asian). (Tables 1-3)

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<sup>12</sup> Valdés, M.I. and Seone, M.H. PhD. (1992), *Hispanic Marketing Handbook*, Gale Research Inc., Detroit, Michigan  
 Valdés, M.I. (2000), *Marketing to American Latinos: A Guide to the In-Culture Approach – Part I*, PMP, Ithaca, NY  
 ----- (2002), *Marketing to American Latinos: A Guide to the In-Culture Approach – Part II*, PMP, Ithaca, NY  
 ----- (2008), *Hispanic Customers for Life: A Fresh Look at Acculturation*, PMP, Ithaca, NY  
 ----- (2012), *WIN! The Hispanic Market: Strategies for Business Growth*, PMP, Ithaca, NY

- **\$86.9b** represents an estimated **66.2%** of all purchases made at independent grocers, which is in line with the U.S. non-Hispanic White population of **74.8%** or **\$231**.<sup>13</sup> (Table 1)
- **\$22.9b** represents an estimated **17.4%** of all purchases made at independent grocers, which is in line with the U.S. Hispanic population of **16.3%** or **\$50.4m**.<sup>14</sup> (Table 2)
- **\$14.8b** represents an estimated **11.3%** of all purchases made at independent grocers, which is in line with the African American population of **13.6%** or **\$42m**.<sup>15</sup> (Table 3)
- **\$6.6b** represents an estimated **5.1%** of all purchases made at independent grocers, which is in line with the U.S. Asian population of **5.6%** or **\$17.3m**.<sup>16</sup>

“Groceries” was the largest category for all consumers, representing **73%** of the total non-Hispanic White annual sales or **\$63.1b**; approximately **79%** of the total Hispanic annual sales or **\$18.1b**; **71%** of the total African American annual sales or **\$10.5b**, and **82%** of the total Asian annual sales or **\$5.4b**. (Tables 1-3)

- The second largest category in annual sales was “Drugs, beauty aids, health aids, and cosmetics” African American (**\$1.4b**) and Hispanic (**\$1.2b**) consumers. “Packaged liquor, wine and beer” represented the second largest category in total sales for Asians (**\$307m**). (Tables 1-3)

## States

### Hispanic Shopper

- The Hispanic population is highly concentrated in the following 10 states—CA, TX, NY, AZ, FL, IL NJ, NM, WA and CO—with **36 million** or **72%** of the total U.S. Hispanic population.<sup>17</sup>
- These top 10 Hispanic states generate an estimated **\$16.7b** in annual sales, accounting for approximately **73%** of total U.S. Hispanic sales in this retail channel.
- California, the largest Hispanic state, leads all states in Hispanic sales across the independent grocer channel with **\$7.5b** in estimated annual sales.

<sup>13</sup> <http://www.census.gov/prod/cen2010/briefs/c2010br-05.pdf>

<sup>14</sup> <http://www.census.gov/prod/cen2010/briefs/c2010br-04.pdf>

<sup>15</sup> <https://www.census.gov/prod/cen2010/briefs/c2010br-06.pdf>

<sup>16</sup> <https://www.census.gov/prod/cen2010/briefs/c2010br-11.pdf>

<sup>17</sup> <http://www.census.gov/prod/cen2010/briefs/c2010br-04.pdf>

- Three other states generated over a billion dollars each: Texas (**\$4.2b**), New York (**\$1.3b**), and Arizona (**\$1.1b**).
- The remaining **43 states** accounted for **27%** of the total Hispanic retail grocery channel, generating an estimated **\$6b** in annual sales.

(Table 6)

### African American Shopper

- The African American population is highly concentrated in the following 10 states— NY, TX, FL, GA, CA, NC, IL, MD, VA and PA—with **26 million** or **63%** of the total U.S. African American population.<sup>18</sup>
- These Top 10 African American states generate an estimated **\$9.3b** in annual sales, accounting for approximately **63%** of total Hispanic sales in this retail channel.
- Georgia, the fourth most populated African American state, leads all states in African American sales across the independent grocer channel with **\$1.2b** in estimated annual sales.
- Two other states generated over a billion dollars each: Texas (**\$1.2b**) and South Carolina (**\$1.1b**).
- The remaining **47 states**, accounted for **37%** of the total African American retail grocery channel, generating an estimated **\$5.5b** in annual sales.

(Table 7)

### Asian Shopper

- The Asian population is highly concentrated in the following 10 states—CA, NY, TX, NJ, HI, IL, WA, FL, VA, PA—with **12 million**, representing **69%** of the total U.S. Asian population.<sup>19</sup>
- These top 10 Asian states generate an estimated **\$5.8b** in annual sales, accounting for approximately **88%** of total U.S. Asian sales in the independent retail grocery channel.
- California, the most populous Asian state, generates **\$3b** in annual sales, representing **45%** of the total Asian sales in the independent retail grocery channel.

<sup>18</sup> <https://www.census.gov/prod/cen2010/briefs/c2010br-06.pdf>

<sup>19</sup> <https://www.census.gov/prod/cen2010/briefs/c2010br-11.pdf>

- The remaining **49 states** generate an estimated **\$3.6b** or **55%** of the total U.S. Asian retail grocery channel.

(Table 8)

In sum, this study shows that multicultural annual sales in the independent retail grocery channel are highly concentrated in the top 10 states, which vary by ethnic group. These findings underscore the importance for suppliers and retailers to develop effective strategies to win with different multicultural consumers—at the state and local levels.

**Table 15**  
**Total U.S. and Hispanic Population and Percentage**  
**By Top 10 Hispanic Cities**

<b>Rank</b>	<b>City</b>	<b>Total Population</b>	<b>Hispanic Population</b>	<b>Hispanic Population %</b>
1	<b>New York</b>	8,175,133	2,336,076	28.5%
2	<b>Los Angeles</b>	3,792,621	1,838,822	48.5%
3	<b>Houston</b>	2,099,451	919,668	43.8%
4	<b>San Antonio</b>	1,327,407	838,952	63.2%
5	<b>Chicago</b>	2,695,598	778,862	28.9%
6	<b>Phoenix</b>	1,445,632	589,877	40.8%
7	<b>El Paso</b>	649,121	523,721	80.5%
8	<b>Dallas</b>	1,197,816	507,309	42.4%
9	<b>San Diego</b>	1,307,402	376,020	28.8%
10	<b>San Jose</b>	945,942	313,636	33.2%
	<b>Top 5 Cities</b>	<b>18,090,210</b>	<b>6,712,380</b>	<b>37.1%</b>
	<b>Top 10 Cities</b>	<b>23,636,123</b>	<b>9,022,943</b>	<b>38.1%</b>

Source: Census, 2010; [www.census.gov/prod/cen2010/doc/sf1.pdf](http://www.census.gov/prod/cen2010/doc/sf1.pdf) Please note that cities tend to be much smaller geographic units compared to Designated Metropolitan Areas (DMAs) or Metropolitan Statistical Areas (MSAs).

**Table 16**  
**Total U.S. and African American Population and Percentage**  
**By Top 10 African American Cities**

<b>Rank</b>	<b>City</b>	<b>Total Population</b>	<b>African American Population</b>	<b>African American Population %</b>
1	New York	8,175,133	2,228,145	27.2%
2	Chicago	2,695,598	913,009	33.8%
3	Philadelphia	1,526,006	686,870	43.8%
4	Detroit	713,777	601,988	84.2%
5	Houston	2,099,451	514,217	24.4%
6	Memphis	646,889	414,928	64.0%
7	Baltimore	620,961	403,998	80.5%
8	Los Angeles	3,792,621	402,448	10.6%
9	Washington DC	601,723	314,352	52.2%
10	Dallas	1,197,816	308,087	25.7%
	<b>Top 5 Cities</b>	<b>15,209,965</b>	<b>4,944,229</b>	<b>32.5%</b>
	<b>Top 10 Cities</b>	<b>22,069,975</b>	<b>6,788,042</b>	<b>30.7%</b>

Source: Census, 2010; [www.census.gov/prod/cen2010/doc/pl94-171.pdf](http://www.census.gov/prod/cen2010/doc/pl94-171.pdf) Please note that cities tend to be much smaller geographic units compared to Designated Metropolitan Areas (DMAs) or Metropolitan Statistical Areas (MSAs).

**Table 17**  
**Total U.S. and Asian Population and Percentage**  
**By Top 10 Asian Cities**

<b>Rank</b>	<b>City</b>	<b>Total Population</b>	<b>Asian Population</b>	<b>Asian Population %</b>
1	New York	8,175,133	1,038,388	28.5%
2	Los Angeles	3,792,621	426,959	48.5%
3	San Jose	945,942	303,138	43.8%
4	San Francisco	805,235	267,915	63.2%
5	San Diego	1,307,402	207,944	28.9%
6	Honolulu	337,256	184,950	40.8%
7	Chicago	2,695,598	147,164	80.5%
8	Houston	2,099,451	126,378	42.4%
9	Fremont	214,089	108,332	28.8%
10	Philadelphia	1,526,006	96,405	33.2%
	<b>Top 5 Cities</b>	<b>15,026,333</b>	<b>2,244,344</b>	<b>14.9%</b>
	<b>Top 10 Cities</b>	<b>21,898,733</b>	<b>2,907,573</b>	<b>13.2%</b>

Source: Census, 2010; [www.census.gov/prod/cen2010/doc/pl94-171.pdf](http://www.census.gov/prod/cen2010/doc/pl94-171.pdf) Please note that cities tend to be much smaller geographic units compared to Designated Metropolitan Areas (DMAs) or Metropolitan Statistical Areas (MSAs).

## Cities (Hyperlocal)

The data in this section is analyzed by the top 10 cities in the U.S. (As previously stated, cities tend to be much smaller geographical units compared to DMAs or MSAs.)

### Top 10 Hispanic Cities

- The Top 10 Hispanic cities are: New York, Los Angeles, Houston, San Antonio, Chicago, Phoenix, El Paso, Dallas, San Diego, and San Jose; and account for **23.6 million** Hispanics or **38%** of all Hispanics in the top 10 cities. (Table 15)
- The Top 10 Hispanic cities generated **\$4.2b** in Hispanic annual sales. Retail stores located in higher density Hispanic Zones 4 (60%-79%) and Zone 5 (80-100%) account for an estimated **\$2.6b**, representing **62%** of the total Hispanic annual sales in this channel. (Table 12)

### Top 10 African American Cities

- The Top 10 African American cities are: New York, Chicago, Philadelphia, Detroit, Houston, Memphis, Baltimore, Los Angeles, Washington DC, and Dallas; and account for **6.7 million** African American consumers or **30.7%** of all African Americans in the top 10 cities. (Table 16)
- The Top 10 African American cities generated **\$2.3b** in Hispanic annual sales. Retail stores located in higher density African American Zones 4 (60%-79%) and Zone 5 (80-100%) account for an estimated **\$1.7b**, representing **76%** of the total African American annual sales in this channel. (Table 13)

### Top 10 Asian Cities

- The Top 10 Asian cities are: New York, Los Angeles, San Jose, San Francisco, San Diego, Honolulu, Chicago, Houston, Fremont, and Philadelphia; and account for **2.9 million** Asians or **13.2%** of all Asians in the top 10 cities. (Table 17)
- The top 10 Asian cities generated **\$1.5b** in Hispanic annual sales. Retail stores located in higher density Asian Zones 2 (20%-39%) and Zone 3 (40-59%) account for an estimated **\$1.0b**, representing **67%** of the total Asian annual sales in this channel. (Table 14)

The Asian population, based on its small size, is less concentrated than other segments of the US population. For this reason, our geo-demographic analysis showed that Asian population “peak” in Zones 2 and 3, as does retail sales in the independent retail channel. This pattern is different from the Hispanic and Asian populations across the country.

## City of Los Angeles Analysis (city example)

The In-Culture™ analysis examined the following variables—ethnic sales (i.e., Hispanic, African American and Asian) and All Other for the city of Los Angeles and a number of demographic variables, including household size, language use, household income, and country-of-origin. These variables were examined in aggregate and by different In-Culture™ Zones.

Important Note: It is estimated that additional sales to Hispanics, African American and Asian shoppers in the city of Los Angeles (and other cities) take place in micro-independent retail stores with annual sales are under \$2 million. These micro-retailers were not included in the NGA sample in the 2012 study.

In addition, this study examined Hispanic retail grocery sales across “cities,” which are smaller geographic units compared to DMAs or MSAs. For this reason, sales figures may vary based on the unit of analysis.

## Demographics

### City of Los Angeles - Household Size

[NOTE: Please refer to the **Appendix 1-4** for a summary of the demographic data for the Multicultural population in the city of Los Angeles, as outlined in this section.]

Independent retailers are interested in understanding the household size of its consumers. Simply put, the larger the household, the larger the shopping basket, which translates into higher sales. The section below outlines household size by ethnic and racial group in the city of Los Angeles.

- This study found that the household size for non-Hispanic whites (2.96) in the city of Los Angeles was the second largest compared to any of the ethnic and racial groups in that city (Hispanic: 3.48; African American: 2.36; and Asian: 2.69).
- Table 18 shows the differences in household size between Hispanic and non-Hispanic shoppers across the different Hispanic population density zones in Los Angeles. Even in moderately dense Hispanic areas (40-59%, i.e., Zone 3), Hispanic households are significantly larger than their non-Hispanic White counterparts (3.65 vs. 2.45). Consequently, retailers are likely to see larger shopping baskets for Hispanic shoppers than for non-Hispanic shoppers in Zone 3.

- Table 19 shows the differences in household size between African American and non-Hispanic Whites across the different African American population density zones. The household size between these two groups in Zones 4 and 5 did not differ significantly (unlike the Hispanic group). Consequently, retailers may find “cultural” differences in what each of these consumer groups purchase in independent grocery retailers, but the size of their shopping baskets are not likely to vary due to the differences in household size.
- Table 20 shows the differences in household size between Asian and non-Hispanic Whites across the different Zones. Because the Asian population is relatively small in Los Angeles compared to other ethnic groups (i.e., Hispanic), Asian households are not significantly different from non-Hispanic Whites in Zones 4 and 5, and in some case are smaller (i.e., Zones 1 and 2). For retailers and manufacturers, the opportunity is to understand the psychographic needs of Asian shoppers in Los Angeles—and integrate this segment into their overall shopper strategy.

**Table 18**  
**City of Los Angeles**  
**Hispanic and Non-Hispanic White Population**  
**Average Household Size by In-Culture™ Zone**

<b>In-Culture™ Zone</b>	<b>Population Density</b>	<b>Hispanic</b>	<b>Non-Hispanic White</b>
Zone 1	1-19%	2.50	3.55
Zone 2	20-39%	3.14	3.58
Zone 3	40-59%	3.65	2.45
Zone 4	60-79%	4.12	2.29
Zone 5	80-100%+	4.36	2.21
<b>Total</b>		<b>3.48</b>	<b>2.96</b>

Source: Demographic data provided by Geoscape, Inc. Data analyzed by the Center for Multicultural Science, 2015.

**Table 19**  
**City of Los Angeles**  
**African American and Non-Hispanic White Population**  
**Average Household Size by In-Culture™ Zone**

<b>In-Culture™ Zone</b>	<b>Population Density</b>	<b>African American</b>	<b>Non-Hispanic White</b>
Zone 1	1-19%	2.33	3.55
Zone 2	20-39%	2.47	3.58
Zone 3	40-59%	2.39	2.45
Zone 4	60-79%	2.44	2.29
Zone 5	80-100%+	2.33	2.21
<b>Total</b>		<b>2.36</b>	<b>2.96</b>

Source: Demographic data provided by Geoscape, Inc. Data analyzed by the Center for Multicultural Science, 2015.

**Table 20**  
**City of Los Angeles**  
**Asian and Non-Hispanic White Population**  
**Average Household Size by In-Culture™ Zone**

<b>In-Culture™ Zone</b>	<b>Population Density</b>	<b>Asian</b>	<b>Non-Hispanic White</b>
Zone 1	1-19%	2.67	3.55
Zone 2	20-39%	2.80	3.58
Zone 3	40-59%	2.53	2.45
Zone 4	60-79%	2.02	2.29
Zone 5	80-100%+	2.65	2.21
<b>Total</b>		<b>2.69</b>	<b>2.96</b>

Source: Demographic data provided by Geoscape, Inc. Data analyzed by the Center for Multicultural Science, 2015.

## City of Los Angeles - Household Income

Historically, multicultural household income trails behind non-Hispanic White household income in the U.S. Income disparity is generally observed between lower and higher density ethnic population neighborhoods. High-density ethnic areas tend to also have lower household income levels than low-density ethnic areas, as shown in this study.

- The In-Culture™ analysis showed an average Hispanic household income level of **\$35,870** in high-density Hispanic population areas in Los Angeles City (Zone 5) versus **\$86,242** in low-density Hispanic population areas (Zone 1).
- The In-Culture™ analysis showed an average African American household income level of **\$56,383** in high-density African American population areas in Los Angeles City (Zone 5) versus **\$57,044** in low-density Hispanic population areas (Zone 1).
- The In-Culture™ analysis showed an average Asian household income level of **\$58,168** in high-density Asian population areas in Los Angeles City (Zone 5) versus **\$77,718** in low-density Hispanic population areas (Zone 1).

(Appendix 1-4)

**Table 21**  
**City of Los Angeles**  
**Hispanic and Non-Hispanic White Population**  
**Average Household Income by In-Culture™ Zone**

<b>In-Culture™ Zone</b>	<b>Population Density</b>	<b>Hispanic</b>	<b>Non-Hispanic White</b>
Zone 1	1-19%	\$86,242	\$43,892
Zone 2	20-39%	\$55,093	\$38,762
Zone 3	40-59%	\$42,488	\$55,674
Zone 4	60-79%	\$37,436	\$81,148
Zone 5	80-100%+	\$35,870	\$109,594
<b>Total</b>		<b>\$53,391</b>	<b>\$58,061</b>

Source: Demographic data provided by Geoscape, Inc. Data analyzed by the Center for Multicultural Science, 2015.

**Table 22**  
**City of Los Angeles**  
**African American and Non-Hispanic White Population**  
**Average Household Income by In-Culture™ Zone**

<b>In-Culture™ Zone</b>	<b>Population Density</b>	<b>African American</b>	<b>Non-Hispanic White</b>
Zone 1	1-19%	\$57,044	\$43,892
Zone 2	20-39%	\$28,413	\$38,762
Zone 3	40-59%	\$27,716	55,674
Zone 4	60-79%	\$41,712	\$81,148
Zone 5	80-100%+	\$56,383	\$109,594
<b>Total</b>		<b>\$53,831</b>	<b>\$58,061</b>

Source: Demographic data provided by Geoscape, Inc. Data analyzed by the Center for Multicultural Science, 2015.

**Table 23**  
**City of Los Angeles**  
**Asian and Non-Hispanic White Population**  
**Average Household Income by In-Culture™ Zone**

<b>In-Culture™ Zone</b>	<b>Population Density</b>	<b>Asian</b>	<b>Non-Hispanic White</b>
Zone 1	1-19%	\$77,718	\$43,892
Zone 2	20-39%	\$74,841	\$38,762
Zone 3	40-59%	\$55,640	\$55,674
Zone 4	60-79%	\$33,486	\$81,148
Zone 5	80-100%+	\$58,168	\$109,594
<b>Total</b>		<b>\$71,645</b>	<b>\$58,061</b>

Source: Demographic data provided by Geoscape, Inc. Data analyzed by the Center for Multicultural Science, 2015.

## City of Los Angeles - Language Use

### Hispanic

Given the diversity within the Hispanic population, it is key for retailers and suppliers to understand the dynamics of language usage and differences with Hispanic customers—Spanish, English and/or bilingual. The In-Culture™ analysis showed a consistent pattern: the more densely populated the Hispanic neighborhood, the greater the use of the Spanish language.

- An estimated 75 percent of Hispanic shoppers in Zones 4 and 5 (high density Hispanic neighborhoods) prefer communicating in “Spanish Mostly / More Spanish than English.” An estimated 45 percent of Hispanic shoppers in Zones 4 and 5 prefer to communicate in English Only. This suggests that retailers and suppliers should consider bilingual communications strategies, using both Spanish and English in these respective areas.
- In contrast, an estimated 38 percent of Hispanic shoppers in Zones 1 and 2 (low density Hispanic neighborhoods) prefer to communicate in English Only, suggesting that English should be considered in targeting Hispanics in these areas.

The fact that the Hispanic market today communicates in both languages should reinforce the need for suppliers to develop integrated communication strategies in targeting all Hispanics at retail.

(Table 24)

**Table 24**  
**City of Los Angeles**  
**Hispanic Population – Language Use by In-Culture™ Zone\***

<b>In-Culture™ Zone</b>	<b>Eng Dom</b>	<b>Eng Pref</b>	<b>Bilingual</b>	<b>Span Pref</b>	<b>Span Dom</b>
Zone 1	17.3%	21.4%	15.9%	21.5%	23.7%
Zone 2	6.9%	13.3%	17.7%	29.8%	32.1%
Zone 3	5.6%	11.9%	17.8%	31.3%	33.2%
Zone 4	4.2%	10.2%	17.7%	32.9%	34.8%
Zone 5	1.6%	6.7%	15.7%	35.2%	40.6%

\* **IN-CULTURE™ ZONES:** Zone 1 = 1-19% Hispanic; Zone 2 = 20-39% Hispanic; Zone 3 = 40-59% Hispanic; Zone 4 = 60-79% Hispanic; and Zone 5 = 80-100% Hispanic.

**LANGUAGE USE SEGMENTS:** Eng Dom = English Dominant (Mostly English); Eng Pref = English Preference (More English than Spanish); Bilingual = Equal Use of Spanish and English; Span Pref = Spanish Preference (More Spanish than English); Span Dom = Spanish Dominant (Only Spanish).

*Source:* Demographic data provided by Geoscape, Inc. Data analyzed and language definitions by the Center for Multicultural Science, 2015.

## Asian

This study examined six Asian cultural groups (i.e., Japanese, Chinese, Filipino, Korean, Indian, and Vietnamese) by language across the five In-Culture™ Zones in the city of Los Angeles. Table 25 below outlines language usage for the Japanese shopper in the city of Los Angeles across the five In-Culture™ Zones.

- Given that the Japanese population is concentrated in Zones 1, 2 and 3 in the city of Los Angeles, 75 percent of Japanese shoppers in Zones 1 and 2 were found to prefer communicating in Japanese Mostly and Only (“Japanese Preferred” and “Japanese Dominant”).
- This suggests that retailers and suppliers should concentrate its efforts with an ‘in-culture language’ approach to reach the lucrative Japanese (and other Asian) shoppers in Los Angeles—leveraging linguistic and cultural differences from non-Japanese shoppers.

**Table 25**  
**City of Los Angeles**  
**Japanese Population – Language Use by In-Culture™ Zone\***

<b>In-Culture™ Zone</b>	<b>English Dom</b>	<b>English Pref</b>	<b>Bilingual</b>	<b>Japanese Pref</b>	<b>Japanese Dom</b>
Zone 1	68.2%	7.3%	0.3%	0%	0%
Zone 2	73.4%	14.2%	7.1%	0.5%	0.5%
Zone 3	70.3%	21.1%	5.5%	0.7%	0.3%
Zone 4	72.8%	17.0%	7.2%	0.8%	0%
Zone 5	56.4%	30.7%	7.6%	5.1%	0%

\* **IN-CULTURE™ ZONES:** Zone 1 = 1-19% Japanese; Zone 2 = 20-39% Japanese; Zone 3 = 40-59% Japanese; Zone 4 = 60-79% Japanese; and Zone 5 = 80-100% Japanese.

**LANGUAGE USE SEGMENTS:** Eng Dom = English Dominant (Only English); Eng Pref = English Preference (More English than Japanese); Bilingual = Equal Use of Japanese and English; Japanese Pref = Japanese Preference (More Japanese than English); Japanese Dom = Japanese Dominant (Only Japanese).

Source: Demographic data provided by Geoscape, Inc. Data analyzed and language definitions by the Center for Multicultural Science, 2015.

## Cities of Los Angeles, Dallas, and New York – Country of Origin

The study also examined the country of origin (i.e., nationalities) across a select number of cities for the Hispanic shopper. This type of “In-culture” analysis could be conducted for any ethnic segment across any city in the United States. Interesting results are likely to be found.

### Findings

- According to the 2010 U.S. Census, Hispanics of Mexican (63%), Puerto Rican (9.2%), and Cuban (3.5%) descent make up the nation’s three largest Hispanic country-of-origin groups.
- The In-Culture™ analysis showed that the patterns of country of origin varied across key Hispanic cities—Los Angeles, New York, Miami and Dallas.

84% of Hispanics in Dallas are of Mexican descent

67% of Hispanics in Los Angeles are of Mexican descent

66% of Hispanics in New York are of Puerto Rican and Dominican descent

45% of Hispanics in Miami are of Cuban descent

Figure 26 shows the variety of country of origin that can be found in key Hispanic cities. The large differences in country of origin across key cities underscore the fact that the U.S. Hispanic market is not culturally homogeneous. For suppliers and retailers, this means including different product assortment, innovation and product development streams to account for the Hispanic country of origin nuances.

In addition, retailers should consider having merchandising and signage in the high-density Hispanic neighborhoods (Zones 4 and 5) in cities where there is a high concentration of Hispanic shoppers. To address the large number of Spanish-speaking customers in Zones 4 and 5, retailers may want to hire Spanish-speaking or bilingual employees to communicate to all of its customers in a way that is culturally-relevant.

**Table 26**  
**Hispanic Population – Cities of Los Angeles, New York, Miami, and Dallas**  
**By Country of Origin and by In-Culture™ Zone\***

Cities	Total Hispanic %	Zone 2	Zone 3	Zone 4	Zone 5
<b>Los Angeles</b>					
Mexican	67%	2.6%	6.6%	17.0%	40.1%
Cuban	0%	0.1%	0.1%	0.1%	0.1%
Puerto Rican	1%	0.1%	0.2%	0.2%	0.2%
Dominican	0%	0.0%	0.1%	0.1%	0.1%
Salvadoran	17%	0.4%	1.5%	6.2%	8.5%
Other	16%	1.0%	2.0%	5.3%	7.3%
<b>Total Hispanic</b>	<b>100%</b>	<b>4.2%</b>	<b>10.5%</b>	<b>28.9%</b>	<b>56.3%</b>
<b>New York</b>					
Mexican	10%	1.7%	2.1%	3.4%	2.6%
Cuban	1%	0.5%	0.3%	0.3%	0.2%
Puerto Rican	31%	4.3%	7.3%	12.1%	6.8%
Dominican	35%	1.7%	4.6%	12.4%	16.5%
Salvadoran	3%	0.5%	1.0%	1.0%	0.4%
Other	20%	4.6%	5.6%	6.2%	3.9%
<b>Total Hispanic</b>	<b>100%</b>	<b>13.3%</b>	<b>20.9%</b>	<b>35.4%</b>	<b>30.4%</b>
<b>Miami</b>					
Mexican	4%	0.1%	0.4%	1.0%	2.6%
Cuban	45%	0.4%	1.1%	4.8%	38.8%
Puerto Rican	5%	0.2%	0.6%	1.1%	2.6%
Dominican	6%	0.0%	0.5%	0.7%	4.2%
Salvadoran	3%	0.0%	0.2%	0.4%	2.6%
Other	38%	0.4%	2.1%	6.5%	28.7%
<b>Total Hispanic</b>	<b>100%</b>	<b>1.1%</b>	<b>4.9%</b>	<b>14.5%</b>	<b>79.5%</b>
<b>Dallas</b>					
Mexican	84%	4.4%	16.5%	29.4%	32.4%
Cuban	1%	0.5%	0.2%	0.2%	0.1%
Puerto Rican	1%	0.3%	0.5%	0.4%	0.1%
Dominican	0%	0.5%	0.1%	0.1%	0.0%
Salvadoran	7%	0.3%	1.0%	2.6%	2.9%
Other	7%	1.0%	2.4%	2.7%	1.4%
<b>Total Hispanic</b>	<b>100%</b>	<b>7.0%</b>	<b>20.7%</b>	<b>35.4%</b>	<b>36.9%</b>

\* **IN-CULTURE™ ZONES:** Zone 1 = 1-19% Hispanic; Zone 2 = 20-39% Hispanic; Zone 3 = 40-59% Hispanic; Zone 4 = 60-79% Hispanic; and Zone 5 = 80-100% Hispanic. Source: Demographic data provided by Geoscape, Inc. Data analyzed by the Center for Multicultural Science, 2015.

## City of Los Angeles Analysis (continued)

### Overall Sales

#### Hispanic

- The total independent retail grocery channel in the city of Los Angeles represents a **\$2.7 billion** in annual sales opportunity; Hispanic annual sales reached an estimated **\$1.2 billion** in 2012, accounting for **44%** of the total purchases in this channel.
- Retail stores located in high density Hispanic neighborhoods, Zones 4 (60-79% Hispanic population density) and 5 (80-100%) generated an estimated **\$874 million** in Hispanic annual sales, representing **68%** of total Hispanic sales for the city of Los Angeles.
- Conversely, retail stores in low-density Hispanic neighborhoods, Zones 2 (20-39%) and 3 (40%-59%), accounted for an estimated **\$317 million** in annual sales or approximately **25%** of the total Hispanic independent retail channel in the city of Los Angeles.

(See Table 12)

#### African American

- As stated above, the total independent retail grocery channel in the city of Los Angeles represents a **\$2.7 billion** in annual sales opportunity; African American annual sales reached an estimated **\$105 million** in 2012, accounting for **4%** of the total purchases in this channel.
- Retail stores located in high density African American neighborhoods, Zones 4 (60-79% African American population density) and 5 (80-100%) generated an estimated **\$60 million** in Hispanic annual sales, representing **57%** of total African American sales for the city of Los Angeles.
- The in-culture analysis can be conducted in any city for any population segment. For example, retail stores in Detroit, the fourth largest African American city in the U.S., ranks first in African American annual sales in the independent retail channel with **\$488 million** or **72%** of the total channel in Detroit.
  - In addition, retail stores located in high density African American neighborhoods, Zones 4 (60-79% African American population density) and 5 (80-100%) generated an estimated **\$460 million** in African American annual sales, representing **94%** of total African American sales for the city of Detroit.

(Table 13)

### Asian

- The total independent retail grocery channel in the city of Los Angeles represents a **\$2.7 billion** in annual sales opportunity; Asian annual sales reached an estimated **\$370 million** in 2012, accounting for **14%** of the total purchases in this channel.
- Retail stores located in moderately concentrated Asian neighborhoods, Zone 2 (20-39%) and Zone 3 (40-59%) generated an estimated **\$247million** in Asian annual sales, representing **67%** of total Asian sales for the city of Los Angeles.
- Given that the Asian population is relatively small and less concentrated in Los Angeles compared to other ethnic groups, retail stores in low-density Asian neighborhoods, Zones 1 (1-19%) accounted for an estimated **\$95 million** in annual sales or approximately **26%** of the total Asian independent retail channel in the city of Los Angeles.

For the Asian population, 26% may seem small, but generating a little over a quarter of the sales in one Zone is significant. Point of comparison: Zone 1 for the Hispanic population represented **\$83 million** or approximately **7%** of the channel in the city of Los Angeles.

(Table 14)

### **Category-Level Sales**

#### Hispanic

- In the city of Los Angeles, total annual sales for "Groceries and other foods" represent a **\$2 billion** total opportunity, approximately **50%** of which is driven by Hispanics (**\$1.0 billion**).
- "Groceries and other foods" make up **83%** of total grocery retail sales in the city of Los Angeles for the Hispanic population.
- In the city of Los Angeles, the top five Hispanic categories are:
  - Groceries (**\$1.0 billion**)
  - Drugs, health aids, beauty aids, including cosmetics (**\$53.9 million**)
  - Packaged liquor, wine, and beer (**\$42.5 million**)
  - Soaps, detergents, and household cleaners (**\$41.5 million**)
  - Meals, snacks, and nonalcoholic beverages (**\$30.6 million**)

(Table 27)

### African American

- In the city of Los Angeles, total annual sales for "Groceries and other foods" represent a **\$2 billion** total opportunity, **4%** of which is driven by African Americans (**\$71 million**).
- "Groceries and other foods" make up **68%** of total grocery retail sales in the city of Los Angeles.
- In the city of Los Angeles, the top five African American categories are:
  - Groceries (**\$71.6 million**)
  - Drugs, health aids, beauty aids, including cosmetics (**\$10.5 million**)
  - Packaged liquor, wine, and beer (**\$7.6 million**)
  - Cigars etc. (**\$3.5 million**)
  - Meals, snacks, and nonalcoholic beverages (**\$2.9 million**)

(Table 27)

### Asian

- In the city of Los Angeles, total annual sales for "Groceries and other foods" represent a **\$2 billion** total opportunity, **14%** of which is driven by Asians (**\$279 million**).
- "Groceries and other foods" make up **75%** of total grocery retail sales in the city of Los Angeles.
- In the city of Los Angeles, the top five Asians categories are:
  - Groceries (**\$279.6 million**)
  - Packaged liquor, wine, and beer (**\$24.6 million**)
  - Drugs, health aids, beauty aids, including cosmetics (**\$24.4 million**)
  - Meals, snacks, and nonalcoholic beverages (**\$10.4 million**)
  - Cigars etc. (**\$9.5 million**)

(Table 27)

## Study Methodology

This analysis is based on data initially developed by John Dunham and Associates (JDA) for the National Grocers Association (NGA) in 2012.<sup>20</sup> These data came out of a model of the Economic Impact of the independent grocery industry, which was estimated to account for over **\$131 billion** in overall sales. In developing these data, independent grocers were defined as all privately owned or controlled grocery stores with annual sales between roughly \$2 million and \$5 billion. This definition is inclusive of grocery stores that are publicly traded but have controlling shares held by a family, and employee-owned cooperatives. The study excludes those large retailers with annual sales of over \$5 billion with the exception of members of the NGA. This reflects the fact that, according to the NGA, “the meaning of ‘independent retailer’ is more a question of ownership and philosophy of operation, rather than number of stores or type of format.”

### Calculating the Number of Stores

As defined, the industry contributes about \$142.1 billion in total to the US Economy, and encompasses about 20,880 independent grocery stores employing 902,260 people. These store counts are based on data provided to JDA by the NGA, Hoovers subsidiary of D & B, Inc.,<sup>21</sup> Chain Store Guide,<sup>22</sup> the US Department of Labor, the US Census Bureau, the Nielsen Company’s TDLinx and the US Department of Agriculture. Grocery store size is based on employment figures, which come from both Hoovers and TDLinx, as well as from the NGA.

Initially data were gathered on approximately 61,000 retail store locations, entered into a database, and physically located in a geographic analysis system. These data were then culled down to include only independent grocers of the size classification identified as members of the industry.<sup>23</sup> All told, there were over 20,880 stores included in the analysis. These data provided the number of retail operations and the physical location as well as certain employment data.

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<sup>20</sup> See: *The Economic Impact of Independent Grocers: 2012*, Prepared for the National Grocers Association by John Dunham and Associates, April 2013, on-line at: [www.nationalgrocers.org/economic-impact/](http://www.nationalgrocers.org/economic-impact/) The National Grocers Association has generously donated these data to the Center for Multicultural Science for use in this project.

<sup>21</sup> Data purchased by subscription from Hoovers, a subsidiary of D&B. The D&B information database updates over 1 million times a day, over 350 million payment experiences are processed annually, and over 110 million phone calls are made to businesses. In addition, D&B uses a patented matching technology and over 2,000 information computer validations to ensure a high standard of data quality.

<sup>22</sup> For more information on Chain Store Guide data see: [www.chainstoreguide.com/default.aspx](http://www.chainstoreguide.com/default.aspx)

<sup>23</sup> Independent grocers are defined as all privately owned or controlled grocery stores with annual sales between \$2 million and roughly \$5 billion. This definition is inclusive of grocery stores that are publicly traded but have controlling shares held by a family, and employee-owned cooperatives. The study excludes those large retailers with annual sales of over \$5 billion with the exception of NGA members. This reflects the fact that, according to the National Grocers Association, “the meaning of ‘independent retailer’ is more a question of ownership and philosophy of operation, rather than number of stores or type of format.” See: National Grocers Association, *Who We Are*. Available at <http://www.nationalgrocers.org/who-we-are>

To identify all retail grocery stores in the United States and determine if they were independent according to the parameters of the study, a variety of sources were utilized. The base data came from the member list of the NGA and the list of those stores qualifying for the USDA's Supplemental Nutrition Assistance Program (SNAP).<sup>24</sup> The Nielsen Company's TDLinx retail trade channel data was merged with the SNAP data and all companies identified by Nielsen as having less than \$2 million or more than \$5 billion in sales were removed from the list.<sup>25</sup> Then, using both the TDLinx and Hoovers as sources, all grocery stores and grocery store chains that did not fall under the definition of independent were removed from the list. TDLinx was utilized to determine the number of FTEs (full time equivalent jobs) at each location. For those establishments where no employment numbers were available, a median figure for similar type firms in similar locations was used.

Each establishment was then mapped to its physical location based on its address using Caliper Corporation's Maptitude geo-analytical mapping system. For stores where physical addresses were not available (for example post office boxes or road crossings), the stores were manually located using Google Earth as a guide. This physical mapping of establishments allows for the calculation of state, city and regional level statistics (see below).

### Calculating Overall Sales

Total sales in each state is tied to the number of and type of retail outlets. Data on overall sales by store type and trade class by state were gathered from the U.S. Bureau of the Census, *Census of Retail Trade for 2007*.<sup>26</sup> This is the latest year for which detailed data by product category are available. Total sales by store in each state, class and for each product line were calculated by dividing the product line sales data by store counts in the Census data series. These sales were then inflated (or deflated) to 2012 dollars using data from the US Department of Labor, Bureau of Labor Statistics for each product line type.<sup>27</sup>

The Census of Retail Trade provides data on hundreds of product types, 69 of which are generally sold in grocery stores. These categories include a number of roll-up classifications. For example, the data contain sales figures for *Drugs, health aids, beauty aids, including cosmetics*. It also contains figures for six sub-classifications.<sup>28</sup>

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<sup>24</sup> Data provided by the US Department of Agriculture. Data on SNAP eligible retailers is available on-line at: [www.fns.usda.gov/snap/retailerlocator](http://www.fns.usda.gov/snap/retailerlocator)

<sup>25</sup> Nielsen TDLinx data were provided by special arrangement through the National Grocers Association

<sup>26</sup> See 2007 Economic Census, *Retail Trade: Subject Series - Product Lines: Product Lines Statistics by Kind of Business for the United States and States: 2007*, at: [http://factfinder2.census.gov/faces/tableservices/jsf/pages/productview.xhtml?pid=ECN\\_2007\\_US\\_44SLLS1&prodType=table](http://factfinder2.census.gov/faces/tableservices/jsf/pages/productview.xhtml?pid=ECN_2007_US_44SLLS1&prodType=table)

<sup>27</sup> US Department of Labor, Bureau of Labor Statistics, Consumer Price Index at: [www.bls.gov/cpi/](http://www.bls.gov/cpi/)

<sup>28</sup> Prescriptions; Nonprescription medicine; Vitamins, minerals, & other dietary supplements; Health aids, including first-aid prod, foot prod, ortho. equip, etc; Cosmetics, including face cream, make-up, perfumes & colognes etc; and Other hygiene needs, including deodorants; hair & shaving products, etc.

Interestingly the sub-level data do not always add up to the roll-up classifications. In some states they add up to more than the larger roll-up figure, while in some cases, they are smaller. While this does not make logical sense, it is an anomaly in the data that needs to be statistically managed so that all of the sub-categories add up to the roll-up amounts.

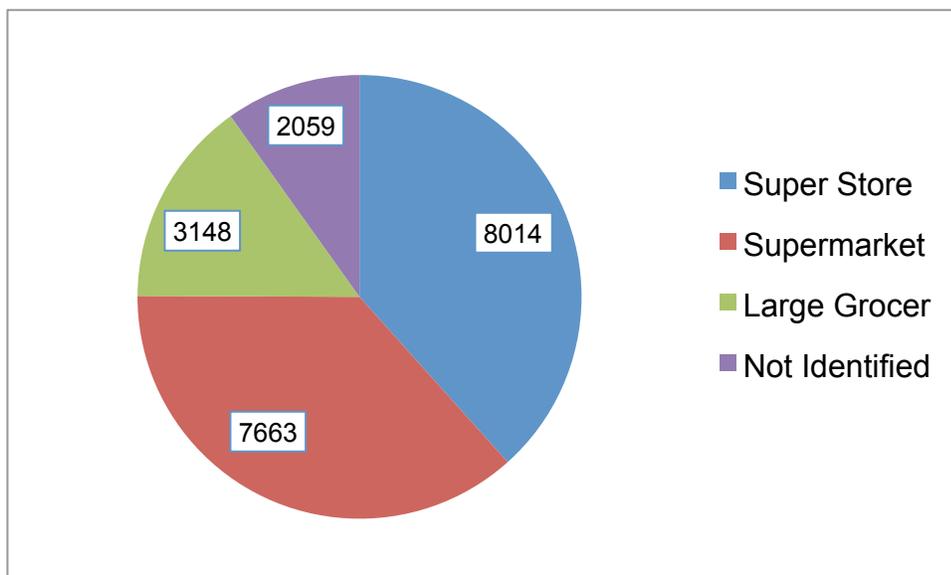
In order to ensure that all of the data add up correctly, JDA assumes that where roll-up category results are larger than the sum of the sub-categories, the difference is due to products not being reported. In these cases, an “Other” category is added and the amount equal to the difference between the roll-up category and the sum of the sub-categories is assigned to “Other.” In the stranger case, where the amount reported in the roll-up category is smaller than the sum of the sub-categories, JDA adjusts each of the sub-categories downward so that they sum to the roll-up category. The magnitude of the adjustment is equal to the initial percentage of each sub-category to the total. For example, there are three sub-categories contained in “Meals, snacks & nonalcoholic beverages prepared for immediate consumption.” These are: Soup and salad bars; all other meals & snacks, and meals, snacks & nonalcoholic beverages prepared for catered event. If soup and salad bars accounts for 20 percent of the total of these three categories, then 20 percent of the reduction was applied to soup and salad bars.

In addition to adjusting for the inconsistencies in the data, Census reports grocery sales of beverage alcohol products in some states where this is illegal. For example, in Pennsylvania, some grocery stores can sell malt beverages but only state controlled package stores can sell wine and spirits. Beverage alcohol sales figures were eliminated in those states where particular products cannot be sold.

Once these adjustments were made, the data was calibrated to the total sales figures developed for the NGA (an estimated \$131.6 billion in overall retail sales). These sales are calculated at the state level and are allocated to each of the 20,880 individual retail outlets based on product level sales per employee in each of four store type classifications: Superstores, Supermarkets, Large Grocery Stores and Unclassified, where the unclassified stores were assigned numbers equal to supermarkets (the median figure).

Once this process is complete each of the 20,880 stores is tagged with data on overall estimated 2012 sales for each of the 68 product classifications.

**Table 27**  
**Number of Stores by Type**



### Calculating the Ethnic Markets

The main purpose of this study is to differentiate grocery sales by product type and by the racial classification of purchaser. In order to do this, the population in each store's market area must be segmented into Black, Asian Hispanic and Other persons. This is done based on census tract level data from the 2010 Census. The US Department of Commerce, Bureau of the Census divides the country into approximately 73,800 small, subdivisions with populations ranging between about 1,200 and 8,000 people (with an optimum size of 4,000 people). Census tracts usually cover contiguous areas within individual counties. While tracts in rural areas can be large, boundaries are designed to follow city, state and county boundaries as well as those of other geographical entities like American Indian reservations.

All data from the US Census is developed at the census tract level.<sup>29</sup> In this case, population counts for people of each grouping are assumed to be constant across the entire census tract.

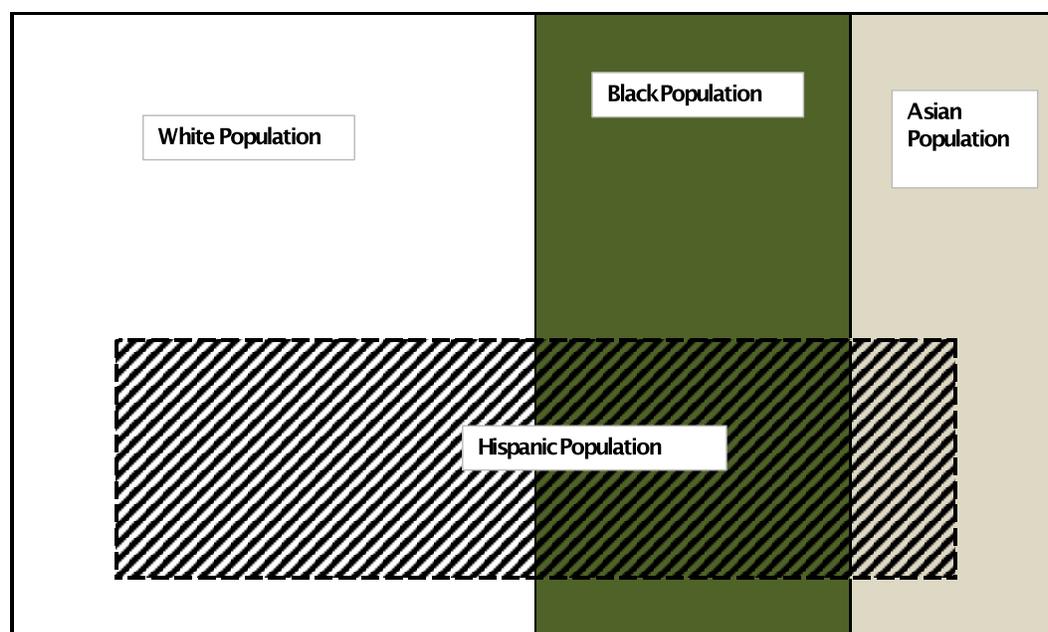
In order to determine the market for each individual retailer, the stores are overlain with the census tracts. A boundary is placed around each individual store, with the band around large grocery stores being one-mile and the band around larger stores being a mile and a half. In other words, the catchment area of each of the independent grocery stores is a circle with a circumference of either a mile or a mile and a half. By overlaying this band with each of the census tracts, the percentage of the population in that store's neighborhood that is of each racial category can be determined.

<sup>29</sup> US Department of Commerce, Bureau of the Census, *2010 Census Summary File 2*, documentation available at: <http://www.census.gov/prod/cen2010/doc/sf2.pdf>

When this analysis was first conducted in 2013 the data were segmented into just two classifications, Hispanic and Non-Hispanic and overall figures for Hispanic sales were calculated. When the analysis was expanded to the different racial groupings in 2015, the Hispanic calculation was fixed, and the remaining sales were then split across the other three racial groupings.

In the 2000 Census, Hispanic was removed from the racial classification variable, and included as its own variable. In other words, beginning in 2000, the Federal government no longer considered Hispanic to be a race, and the category overlapped all of the other racial classifications. People would be classified as White and Hispanic, or Black and Hispanic or Asian and Hispanic but not as Hispanic alone. This means that when the analysis was expanded in 2015, only 82.6 percent of sales remained to be split across the Black, Asian and “White plus other population” classes. Figure 2 below provides a graphic example of how the anomaly in the data occurred.

**Table 28**  
**Breakdown of Racial Classifications**



This was not considered when the analysis was performed and as such, many stores, particularly those in neighborhoods with a high concentration of Hispanics, had negative sales in some commodity classifications for the other racial groups – particularly for White Non-Hispanics as this was a smaller group in many of the high Hispanic density neighborhoods.

Rather than changing the initial 2014 analysis, the analysis was modified to ensure that individual product category sales would not turn negative for any store or racial group. Rather sales across racial groups were reduced in proportion to their expected sales to a point where no negatives (except for small rounding amounts) were contained in the dataset. This meant that the figures were reduced across the board for all categories except Hispanic, so if a person is Black and Hispanic, or White and Hispanic their sales would be classified solely as Hispanic.

### Calculating the Hispanic Market

The study was first conducted in 2014 to differentiate grocery sales by product type and by the racial classification of purchaser, either Hispanic or Non-Hispanic. In order to do this, the population in each store's market area must be segmented into Hispanic and Non-Hispanic persons. This was done based on census tract level data from the 2010 Census. The US Department of Commerce, Bureau of the Census divides the country into approximately 73,800 small, subdivisions with populations ranging between about 1,200 and 8,000 people (with an optimum size of 4,000 people). Census tracts usually cover contiguous areas within individual counties. While tracts in rural areas can be large, boundaries are designed to follow city, state and county boundaries as well as those of other geographical entities like Indian reservations.

All data from the US Census is developed at the census tract level. In this case, population counts for people of Hispanic Origin, Non-Hispanic Origin, and the sub-groupings of: Hispanic Mexican, Hispanic Puerto Rican, and Hispanic Cuban are used in the analysis.<sup>30</sup> The percent of the population that is Hispanic was assumed to be constant across the entire census tract.

In order to determine the market for each individual retailer in terms of both Hispanic and Non-Hispanic individuals, the stores were overlain with the census tracts. A boundary was placed around each individual store, with the band around large grocery stores being one-mile and the band around larger stores being a mile and a half. In other words, the catchment area of each of the independent grocery stores was determined to be a circle with a circumference of either a mile or a mile and a half. By overlaying this band with each of the census tracts, the percentage of the population in that store's neighborhood that is Hispanic was determined. The breakdown of stores by the Hispanic character of their neighborhoods is shown in Table 28 on the following page.

Even though a store may be in a neighborhood with a large Hispanic population, Hispanics and Non-Hispanics generally have different grocery purchasing proclivities. As such, sales to Hispanics are not simply total sales multiplied by the percentage of Hispanics visiting the retail outlet. Further analysis is necessary in order to incorporate these demographic and ethnic differences into the model.

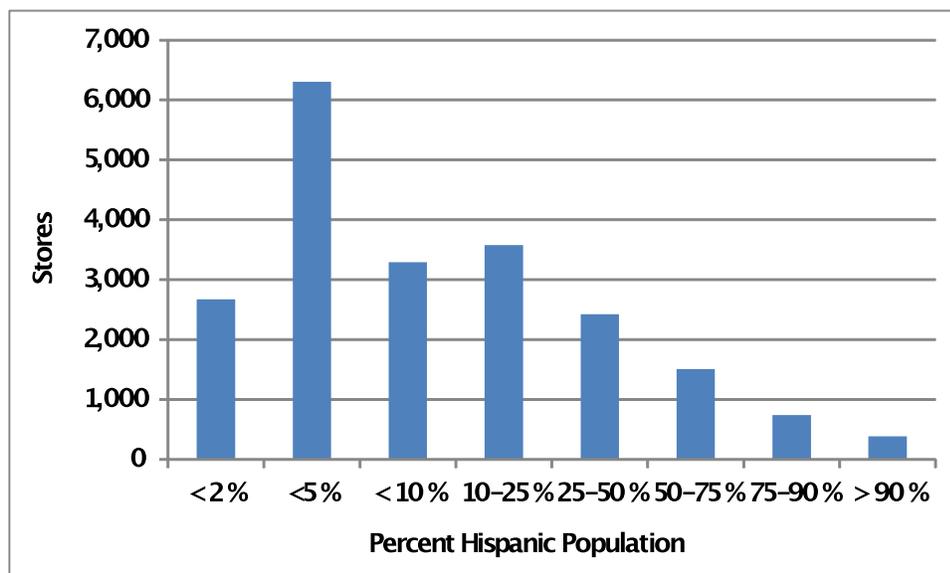
<sup>30</sup> US Department of Commerce, Bureau of the Census, *2010 Census Summary File 2*, documentation available at: <http://www.census.gov/prod/cen2010/doc/sf2.pdf>

## Calculating Hispanic Sales

In its Consumer Expenditure Survey, the Bureau of Labor Statistics provides data on consumer purchases of a wide range of grocery store type items. Sales data are provided for all consumer units and for those of Hispanic origin.<sup>31</sup> Using these data a ratio of sales for Hispanic versus Non-Hispanic consumers was developed. These ratios were calculated for each of the 69 product categories outlined in the *Census of Retail Trade* data and the overall figures across each store were then adjusted by the Hispanic share of the population and the Hispanic to Non-Hispanic purchase ratio. This created a break in each category for each store for Hispanic sales and Non-Hispanic sales. Aggregating these across states produced a 51 by 138 matrix that provides an initial estimate of Hispanic and Non-Hispanic sales by state and by product type.

Due to the fact that different data sources were used, and that state and national level data were allocated across individual store types, the overall figures do not add up once the calculations are made. As such, an adjustment factor was applied to each of the roughly 7,000 cells in the sales matrix. The adjustments were generally minor and were applied to the Hispanic sales data, with the inverse adjustment applied to the Non-Hispanic sales. By doing this, if Hispanic sales in a given cell are pulled down, the Non-Hispanic sales were simultaneously pushed up making each individual adjustment smaller.

**Table 29**  
**Number of Stores By Hispanic Population**



<sup>31</sup> US Department of Labor, Bureau of Labor Statistics, *Consumer Expenditure Survey 2012*, available on-line at: [www.bls.gov/cex/2012/combined/hispanic.pdf](http://www.bls.gov/cex/2012/combined/hispanic.pdf)

A non-linear programming model (or a solver model) was used to adjust the cells such that:

- The total sales for each product category across all states added to the national product sales number
- The total sales for all products across each state added to the state sales figure
- Total national sales added to the initial estimate of \$131.6 billion.

The result of the programming model was a matrix showing Hispanic and Non-Hispanic sales by state and by product category.

### **Calculating Other Sales Breaks**

Breaks for each of the other racial categories were completed in 2014, with the base data being the non-Hispanic share of sales from the earlier analysis. Each racial break was calculated in the same manner as described above, and they were calculated sequentially. First the sales to Black consumers as a share of the Non-Hispanic sales were calculated. Asian sales were then calculated, leaving a remainder for White and other racial groups.

As was described above, since the Hispanic demographic crosses over all of the racial breakdowns sales made to persons classifying themselves as Caucasian and Hispanic, or Asian and Hispanic or Black and Hispanic will already be contained in the Hispanic data. This ensures that – particularly in largely Hispanic catchment areas – there will not be enough sales remaining in a given store to meet the calculate demand in the other ethnic groups. For those stores where individual product sales were negative for the White shoppers, overall sales across categories were recalculated sales across racial groups were reduced in proportion to their expected sales to a point where no negatives (except for small rounding amounts) were contained in the dataset. This meant that the figures were reduced across the board for all categories except Hispanic, so if a person is Black and Hispanic, or White and Hispanic their sales would be classified solely as Hispanic.

Once the stores are selected, their overall sales by category for each of the demographic shoppers are simply aggregated and minor rounding adjustments are made to ensure that sales across categories properly add up.

## Final Thoughts

To our knowledge, the current study is the first that attempts to estimate the economic contribution of the multicultural (Hispanic, African American and Asian) population across the independent retail grocery channel. We are grateful to Peter Larkin, President and CEO of the National Grocers Association, for his leadership and support of the current study. We are also thankful to all of the sponsors, without whom this report would not have been possible.

This report is expected to generate significant interest by retailers and suppliers, alike. But it is a first step, and we invite you to unite with us on this issue and the journey that lies ahead. In closing, the American demographic landscape has changed and the multicultural population is a source for growth for the independent retail grocer. We owe it to all of the communities and constituencies to which we serve—to better understand the multicultural shopper and drive unprecedented value for organizations, today and in the future.

**Table 1**  
**Independent Retail Sales - Total and by Category**  
**Hispanic and All Other (National)**

Rank	Total Sales	Grand Total	Hispanic Total	% Hispanic	All Other Total	% All Other
		\$ 131,163,892,734.38	\$ 22,874,215,979.26	17.4%	\$ 108,289,676,755.12	82.6%
1	Groceries & other foods for human consumption off the premises	\$ 97,316,310,346.24	\$ 18,189,882,031.77	18.7%	\$ 79,126,428,314.47	81.3%
2	Drugs, health aids, beauty aids, including cosmetics	\$ 11,415,002,653.24	\$ 1,251,128,002.95	11.0%	\$ 10,163,874,650.29	89.0%
3	Soaps, detergents, & household cleaners	\$ 2,945,802,602.26	\$ 696,088,154.58	23.6%	\$ 2,249,714,447.68	76.4%
4	Packaged liquor, wine, & beer	\$ 4,039,906,402.57	\$ 595,861,480.31	14.7%	\$ 3,444,044,922.26	85.3%
5	Automotive fuels	\$ 2,231,700,447.25	\$ 509,464,326.64	22.8%	\$ 1,722,236,120.61	77.2%
6	Paper & related prod, incl paper towels, toilet tissue, wraps,etc	\$ 2,979,881,722.27	\$ 484,157,317.40	16.2%	\$ 2,495,724,404.86	83.8%
7	Meals, snacks & nonalcoholic bvg prepared for immediate cons	\$ 2,434,471,878.91	\$ 444,032,989.72	18.2%	\$ 1,990,438,889.19	81.8%
8	Cigars, etc & smokers' access, excl sls from vending op by others	\$ 3,309,395,124.15	\$ 222,924,374.82	6.7%	\$ 3,086,470,749.33	93.3%
9	All nonmerchandise receipts	\$ 619,431,651.43	\$ 88,401,403.85	14.3%	\$ 531,030,247.58	85.7%
10	All other merchandise	\$ 850,012,805.90	\$ 79,707,547.59	9.4%	\$ 770,305,258.30	90.6%
11	All other General merchandise	\$ 850,221,872.76	\$ 75,623,107.86	8.9%	\$ 774,598,764.90	91.1%
12	Lawn, garden, & farm equipment & supplies	\$ 637,932,125.36	\$ 71,882,963.56	11.3%	\$ 566,049,161.79	88.7%
13	Pets, pet foods, & pet supplies	\$ 829,130,079.85	\$ 70,895,967.65	8.6%	\$ 758,234,112.20	91.4%
14	Kitchenware & home furnishings	\$ 325,330,425.57	\$ 45,623,040.57	14.0%	\$ 279,707,385.00	86.0%
15	Meals, snacks & nonalcoholic bvg prepared for catered event	\$ 85,921,694.15	\$ 10,838,640.80	12.6%	\$ 75,083,053.35	87.4%
16	Audio equip, musical instr, radios, stereos, CDs, records, etc	\$ 34,571,358.01	\$ 4,516,771.00	13.1%	\$ 30,054,587.02	86.9%
17	Automotive lubricants, including oil, greases, etc	\$ 22,899,956.87	\$ 4,394,853.71	19.2%	\$ 18,505,103.17	80.8%
18	Toys, hobby goods, & games	\$ 41,513,613.06	\$ 4,269,126.78	10.3%	\$ 37,244,486.28	89.7%
19	Children's wear, incl boys', girls', infants' & toddlers'	\$ 22,789,544.44	\$ 3,890,023.26	17.1%	\$ 18,899,521.18	82.9%
20	Small electric appliances & personal care appliances	\$ 18,568,938.11	\$ 3,507,642.62	18.9%	\$ 15,061,295.49	81.1%
21	Women's, juniors', and misses' wear, including accessories	\$ 12,953,742.88	\$ 3,438,572.97	26.5%	\$ 9,515,169.90	73.5%
22	Hardware, tools, & plumbing & electrical supplies	\$ 41,223,852.59	\$ 3,376,985.02	8.2%	\$ 37,846,867.57	91.8%
23	Footwear, including accessories	\$ 7,078,861.13	\$ 1,976,561.80	27.9%	\$ 5,102,299.33	72.1%
24	Books	\$ 35,294,920.41	\$ 1,971,085.39	5.6%	\$ 33,323,835.01	94.4%
25	Household fuels, including oil, LP gas, wood, coal	\$ 19,388,113.07	\$ 1,905,036.76	9.8%	\$ 17,483,076.31	90.2%
26	Photographic equipment & supplies	\$ 10,179,459.81	\$ 900,245.01	8.8%	\$ 9,279,214.80	91.2%
27	Sporting goods	\$ 8,129,142.00	\$ 786,466.48	9.7%	\$ 7,342,675.51	90.3%
28	Men's wear, including accessories	\$ 4,702,862.66	\$ 778,883.86	16.6%	\$ 3,923,978.80	83.4%
29	Alcoholic beverages served for immediate consumption	\$ 6,384,798.00	\$ 679,200.45	10.6%	\$ 5,705,597.55	89.4%
30	Automotive tires, tubes, batteries, parts, accessories	\$ 3,360,810.00	\$ 570,396.52	17.0%	\$ 2,790,413.48	83.0%
31	Jewelry, incl watches, watch attach, novelty jewelry, etc	\$ 2,275,617.00	\$ 328,748.47	14.4%	\$ 1,946,868.53	85.6%
32	Sewing, knitting materials & supplies, needlework goods, etc	\$ 1,196,772.73	\$ 221,431.02	18.5%	\$ 975,341.71	81.5%
33	Curtains, draperies, blinds, slipcovers, bed & table coverings	\$ 854,379.00	\$ 190,954.41	22.4%	\$ 663,424.59	77.6%
34	TVs, video recorders, video cameras, video tapes, DVDs, etc	\$ 74,160.72	\$ 1,643.66	2.2%	\$ 72,517.06	97.8%

Sources: Analyzed by the Center for Multicultural Science, 2015.  
 Data based on The Economic Impact of Independent Grocers: 2012 study, published by the National Grocers Association.

**Table 2**  
**Independent Retail Sales - Total and by Category**  
**African American and All Other (National)**

Rank	Total Sales	Grand Total	AA Total	% AA	All Other Total	% All Other
		\$ 131,163,892,734.38	\$ 14,814,431,613.00	11.3%	\$ 116,349,461,121.38	88.7%
1	Groceries & other foods for human consumption off the premises	\$ 97,316,310,346.24	\$ 10,549,554,111.79	10.8%	\$ 86,766,756,234.44	89.2%
2	Drugs, health aids, beauty aids, including cosmetics	\$ 11,415,002,653.24	\$ 1,481,074,088.34	13.0%	\$ 9,933,928,564.91	87.0%
3	Cigars, etc & smokers' access, excl sls from vending op by others	\$ 3,309,395,124.15	\$ 510,167,801.32	15.4%	\$ 2,799,227,322.83	84.6%
4	Packaged liquor, wine, & beer	\$ 4,039,906,402.57	\$ 454,561,242.08	11.3%	\$ 3,585,345,160.49	88.7%
5	Paper & related prod, incl paper towels, toilet tissue, wraps,etc	\$ 2,979,881,722.27	\$ 386,942,953.49	13.0%	\$ 2,592,938,768.78	87.0%
6	Soaps, detergents, & household cleaners	\$ 2,945,802,602.26	\$ 363,494,760.66	12.3%	\$ 2,582,307,841.60	87.7%
7	Meals, snacks & nonalcoholic bvgs prepared for immediate cons	\$ 2,434,471,878.91	\$ 250,391,520.87	10.3%	\$ 2,184,080,358.04	89.7%
8	Automotive fuels	\$ 2,231,700,447.25	\$ 189,624,245.07	8.5%	\$ 2,042,076,202.18	91.5%
9	Pets, pet foods, & pet supplies	\$ 829,130,079.85	\$ 130,575,254.04	15.7%	\$ 698,554,825.81	84.3%
10	All other merchandise	\$ 850,012,805.90	\$ 123,877,328.43	14.6%	\$ 726,135,477.47	85.4%
11	All other General merchandise	\$ 850,221,872.76	\$ 121,630,532.04	14.3%	\$ 728,591,340.72	85.7%
12	All nonmerchandise receipts	\$ 619,431,651.43	\$ 105,465,186.11	17.0%	\$ 513,966,465.32	83.0%
13	Lawn, garden, & farm equipment & supplies	\$ 637,932,125.36	\$ 71,405,010.35	11.2%	\$ 566,527,115.00	88.8%
14	Kitchenware & home furnishings	\$ 325,330,425.57	\$ 34,611,719.09	10.6%	\$ 290,718,706.48	89.4%
15	Meals, snacks & nonalcoholic bvgs prepared for catered event	\$ 85,921,694.15	\$ 9,746,930.24	11.3%	\$ 76,174,763.90	88.7%
16	Toys, hobby goods, & games	\$ 41,513,613.06	\$ 4,675,977.62	11.3%	\$ 36,837,635.45	88.7%
17	Books	\$ 35,294,920.41	\$ 3,834,011.68	10.9%	\$ 31,460,908.73	89.1%
18	Hardware, tools, & plumbing & electrical supplies	\$ 41,223,852.59	\$ 3,446,852.70	8.4%	\$ 37,776,999.89	91.6%
19	Automotive lubricants, including oil, greases, etc	\$ 22,899,956.87	\$ 3,138,849.55	13.7%	\$ 19,761,107.32	86.3%
20	Audio equip, musical instr, radios, stereos, CDs, records, etc	\$ 34,571,358.01	\$ 3,046,040.22	8.8%	\$ 31,525,317.80	91.2%
21	Children's wear, incl boys', girls', infants' & toddlers'	\$ 22,789,544.44	\$ 2,758,854.40	12.1%	\$ 20,030,690.03	87.9%
22	Household fuels, including oil, LP gas, wood, coal	\$ 19,388,113.07	\$ 2,619,777.91	13.5%	\$ 16,768,335.16	86.5%
23	Small electric appliances & personal care appliances	\$ 18,568,938.11	\$ 1,675,211.14	9.0%	\$ 16,893,726.97	91.0%
24	Sporting goods	\$ 8,129,142.00	\$ 1,255,726.31	15.4%	\$ 6,873,415.69	84.6%
25	Alcoholic beverages served for immediate consumption	\$ 6,384,798.00	\$ 1,251,842.46	19.6%	\$ 5,132,955.54	80.4%
26	Women's, juniors', and misses' wear, including accessories	\$ 12,953,742.88	\$ 1,147,414.09	8.9%	\$ 11,806,328.78	91.1%
27	Photographic equipment & supplies	\$ 10,179,459.81	\$ 1,049,015.21	10.3%	\$ 9,130,444.61	89.7%
28	Footwear, including accessories	\$ 7,078,861.13	\$ 445,839.22	6.3%	\$ 6,633,021.91	93.7%
29	Jewelry, incl watches, watch attach, novelty jewelry, etc	\$ 2,275,617.00	\$ 272,355.31	12.0%	\$ 2,003,261.69	88.0%
30	Automotive tires, tubes, batteries, parts, accessories	\$ 3,360,810.00	\$ 257,859.32	7.7%	\$ 3,102,950.68	92.3%
31	Men's wear, including accessories	\$ 4,702,862.66	\$ 246,355.53	5.2%	\$ 4,456,507.13	94.8%
32	Sewing, knitting materials & supplies, needlework goods, etc	\$ 1,196,772.73	\$ 125,157.49	10.5%	\$ 1,071,615.24	89.5%
33	Curtains, draperies, blinds, slipcovers, bed & table coverings	\$ 854,379.00	\$ 61,736.61	7.2%	\$ 792,642.39	92.8%
34	TVs, video recorders, video cameras, video tapes, DVDs, etc	\$ 74,160.72	\$ 52.31	0.1%	\$ 74,108.41	99.9%

Sources: Analyzed by the Center for Multicultural Science, 2015.  
 Data based on The Economic Impact of Independent Grocers: 2012 study, published by the National Grocers Association.

AA=African American

**Table 3**  
**Independent Retail Sales - Total and by Category**  
**Asian and All Other (National)**

Rank	Total Sales	Grand Total	Asian Total	% Asian	All Other Total	% All Other
		<b>\$ 131,163,892,734.38</b>	<b>\$ 6,653,568,956.00</b>	<b>5.1%</b>	<b>\$ 124,510,323,778.38</b>	<b>94.9%</b>
1	Groceries & other foods for human consumption off the premises	\$ 97,316,310,346.24	\$ 5,434,867,635.68	5.6%	\$ 91,881,442,710.56	94.4%
2	Packaged liquor, wine, & beer	\$ 4,039,906,402.57	\$ 307,330,816.80	7.6%	\$ 3,732,575,585.76	92.4%
3	Drugs, health aids, beauty aids, including cosmetics	\$ 11,415,002,653.24	\$ 260,886,661.87	2.3%	\$ 11,154,115,991.37	97.7%
4	Meals, snacks & nonalcoholic bvg prepared for immediate cons	\$ 2,434,471,878.91	\$ 171,138,458.16	7.0%	\$ 2,263,333,420.75	93.0%
5	Cigars, etc & smokers' access, excl sls from vending op by others	\$ 3,309,395,124.15	\$ 159,021,121.95	4.8%	\$ 3,150,374,002.20	95.2%
6	Paper & related prod, incl paper towels, toilet tissue, wraps,etc	\$ 2,979,881,722.27	\$ 68,041,443.28	2.3%	\$ 2,911,840,278.99	97.7%
7	Soaps, detergents, & household cleaners	\$ 2,945,802,602.26	\$ 64,149,887.61	2.2%	\$ 2,881,652,714.66	97.8%
8	Automotive fuels	\$ 2,231,700,447.25	\$ 40,495,851.24	1.8%	\$ 2,191,204,596.02	98.2%
9	All other General merchandise	\$ 850,221,872.76	\$ 37,714,057.45	4.4%	\$ 812,507,815.31	95.6%
10	All other merchandise	\$ 850,012,805.90	\$ 36,400,493.45	4.3%	\$ 813,612,312.45	95.7%
11	All nonmerchandise receipts	\$ 619,431,651.43	\$ 32,789,215.41	5.3%	\$ 586,642,436.02	94.7%
12	Lawn, garden, & farm equipment & supplies	\$ 637,932,125.36	\$ 18,226,400.47	2.9%	\$ 619,705,724.89	97.1%
13	Pets, pet foods, & pet supplies	\$ 829,130,079.85	\$ 6,084,693.48	0.7%	\$ 823,045,386.37	99.3%
14	Kitchenware & home furnishings	\$ 325,330,425.57	\$ 6,017,990.54	1.8%	\$ 319,312,435.03	98.2%
15	Meals, snacks & nonalcoholic bvg prepared for catered event	\$ 85,921,694.15	\$ 5,631,724.39	6.6%	\$ 80,289,969.75	93.4%
16	Toys, hobby goods, & games	\$ 41,513,613.06	\$ 728,789.64	1.8%	\$ 40,784,823.42	98.2%
17	Books	\$ 35,294,920.41	\$ 594,591.74	1.7%	\$ 34,700,328.67	98.3%
18	Small electric appliances & personal care appliances	\$ 18,568,938.11	\$ 564,890.60	3.0%	\$ 18,004,047.51	97.0%
19	Hardware, tools, & plumbing & electrical supplies	\$ 41,223,852.59	\$ 496,476.11	1.2%	\$ 40,727,376.48	98.8%
20	Audio equip, musical instr, radios, stereos, CDs, records, etc	\$ 34,571,358.01	\$ 359,683.29	1.0%	\$ 34,211,674.72	99.0%
21	Women's, juniors', and misses' wear, including accessories	\$ 12,953,742.88	\$ 329,021.36	2.5%	\$ 12,624,721.51	97.5%
22	Automotive lubricants, including oil, greases, etc	\$ 22,899,956.87	\$ 308,227.63	1.3%	\$ 22,591,729.24	98.7%
23	Footwear, including accessories	\$ 7,078,861.13	\$ 274,120.45	3.9%	\$ 6,804,740.68	96.1%
24	Alcoholic beverages served for immediate consumption	\$ 6,384,798.00	\$ 236,017.91	3.7%	\$ 6,148,780.09	96.3%
25	Household fuels, including oil, LP gas, wood, coal	\$ 19,388,113.07	\$ 213,447.65	1.1%	\$ 19,174,665.42	98.9%
26	Children's wear, incl boys', girls', infants' & toddlers'	\$ 22,789,544.44	\$ 191,517.02	0.8%	\$ 22,598,027.42	99.2%
27	Men's wear, including accessories	\$ 4,702,862.66	\$ 167,338.75	3.6%	\$ 4,535,523.90	96.4%
28	Sporting goods	\$ 8,129,142.00	\$ 160,107.82	2.0%	\$ 7,969,034.17	98.0%
29	Photographic equipment & supplies	\$ 10,179,459.81	\$ 79,159.48	0.8%	\$ 10,100,300.33	99.2%
30	Automotive tires, tubes, batteries, parts, accessories	\$ 3,360,810.00	\$ 30,675.77	0.9%	\$ 3,330,134.23	99.1%
31	Curtains, draperies, blinds, slipcovers, bed & table coverings	\$ 854,379.00	\$ 19,627.42	2.3%	\$ 834,751.58	97.7%
32	Jewelry, incl watches, watch attach, novelty jewelry, etc	\$ 2,275,617.00	\$ 7,529.26	0.3%	\$ 2,268,087.74	99.7%
33	Sewing, knitting materials & supplies, needlework goods, etc	\$ 1,196,772.73	\$ 7,299.69	0.6%	\$ 1,189,473.04	99.4%
34	TVs, video recorders, video cameras, video tapes, DVDs, etc	\$ 74,160.72	\$ 3,982.64	5.4%	\$ 70,178.08	94.6%

Sources: Analyzed by the Center for Multicultural Science, 2015.  
 Data based on The Economic Impact of Independent Grocers: 2012 study, published by the National Grocers Association.

**Table 4**  
**50 States Ranked by Total Sales in Independent Retail Grocery Channel**

<b>Total Sales</b>				
<b>\$1 Billion</b>	<b>CA</b>	<b>TX</b>	<b>PA</b>	<b>NY</b>
	\$19,564,871,351	\$11,498,222,257	\$6,885,742,307	\$6,878,271,545
	<b>OH</b>	<b>IL</b>	<b>NJ</b>	<b>AZ</b>
	\$5,582,156,691	\$5,297,819,556	\$4,263,748,356	\$3,546,948,266
	<b>FL</b>	<b>MI</b>	<b>WA</b>	<b>WI</b>
	\$3,526,174,131	\$3,215,263,683	\$3,192,009,350	\$3,092,807,978
	<b>MO</b>	<b>NC</b>	<b>GA</b>	<b>MA</b>
	\$3,047,520,151	\$2,945,796,504	\$2,904,526,489	\$2,793,837,834
	<b>IN</b>	<b>TN</b>	<b>SC</b>	<b>MD</b>
	\$2,757,345,653	\$2,730,628,799	\$2,518,573,490	\$2,319,279,930
<b>AL</b>	<b>MN</b>	<b>CO</b>	<b>KY</b>	
\$2,271,066,053	\$2,153,322,476	\$2,064,540,246	\$2,061,540,021	
<b>OR</b>	<b>CT</b>	<b>UT</b>	<b>LA</b>	
\$2,024,555,049	\$1,898,216,491	\$1,737,090,853	\$1,694,048,808	
<b>IA</b>	<b>VA</b>	<b>NV</b>	<b>KS</b>	
\$1,420,895,786	\$1,406,084,715	\$1,318,243,652	\$1,298,637,771	
<b>OK</b>	<b>AR</b>	<b>NM</b>	<b>MS</b>	
\$1,221,300,891	\$1,152,345,516	\$1,053,617,254	\$1,009,712,462	
<b>\$500-999 Million</b>	<b>HI</b>	<b>ID</b>	<b>NH</b>	<b>WV</b>
	\$906,395,219	\$823,137,152	\$790,682,087	\$656,400,434
	<b>ME</b>	<b>NE</b>		
	\$615,993,663	\$592,304,706		
<b>\$100-499 Million</b>	<b>DE</b>	<b>MT</b>	<b>RI</b>	<b>AK</b>
	\$356,944,338	\$356,582,570	\$356,482,977	\$293,558,400
	<b>WY</b>	<b>ND</b>	<b>VT</b>	<b>SD</b>
	\$275,592,456	\$264,498,703	\$239,528,679	\$212,845,877
<b>&lt; \$100 Million</b>	<b>DC</b>			
	\$76,183,109			

Source: The Economic Impact of Independent Grocers: 2012 study.  
 Data analyzed by the Center for Multicultural Science, 2015.

**Table 5**  
**50 States Ranked by Total White Independent Retail Sales**

<b>Total Sales</b>				
<b>\$1 Billion</b>	<b>AL</b>	<b>AZ</b>	<b>CA</b>	<b>CO</b>
	\$1,234,619,832	\$2,327,144,139	\$8,761,046,556	\$1,618,430,460
	<b>CT</b>	<b>FL</b>	<b>GA</b>	<b>IA</b>
	\$1,495,773,594	\$1,606,193,691	\$1,290,482,845	\$1,325,579,902
	<b>IL</b>	<b>IN</b>	<b>KS</b>	<b>KY</b>
	\$3,563,766,497	\$2,201,784,880	\$1,137,604,337	\$1,863,963,357
	<b>MA</b>	<b>MD</b>	<b>MI</b>	<b>MN</b>
	\$2,266,891,068	\$1,400,835,770	\$2,306,455,827	\$1,978,131,583
	<b>MO</b>	<b>NC</b>	<b>NJ</b>	<b>NY</b>
	\$2,546,236,074	\$1,771,054,612	\$2,719,231,382	\$4,079,560,256
	<b>OH</b>	<b>OK</b>	<b>OR</b>	<b>PA</b>
	\$4,773,724,813	\$1,013,478,928	\$1,710,020,351	\$5,770,140,604
	<b>SC</b>	<b>TN</b>	<b>TX</b>	<b>UT</b>
	\$1,274,819,246	\$2,084,641,199	\$5,872,623,742	\$1,474,398,743
<b>WA</b>	<b>WI</b>			
\$2,515,732,688	\$2,715,242,680			
<b>\$500-999 Million</b>	<b>AR</b>	<b>ID</b>	<b>LA</b>	<b>ME</b>
	\$798,539,803	\$735,755,117	\$873,568,716	\$604,830,440
	<b>NE</b>	<b>NH</b>	<b>NM</b>	<b>NV</b>
	\$532,788,940	\$744,284,738	\$598,156,580	\$843,143,823
	<b>VA</b>	<b>WV</b>		
	\$996,028,969	\$620,152,574		
<b>\$100-499 Million</b>	<b>AK</b>	<b>DE</b>	<b>HI</b>	<b>MS</b>
	\$268,780,331	\$227,833,586	\$313,312,740	\$344,471,981
	<b>MT</b>	<b>ND</b>	<b>RI</b>	<b>SD</b>
	\$347,235,552	\$246,991,076	\$300,625,472	\$208,759,108
	<b>VT</b>	<b>WY</b>		
	\$233,218,164	\$257,645,078		
<b>&lt; \$100 Million</b>	<b>DC</b>			
\$25,943,743				

Source: The Economic Impact of Independent Grocers: 2012 study.  
 Data analyzed by the Center for Multicultural Science, 2015.

**Table 6**  
**50 States Ranked by Total Hispanic Independent Retail Sales**

<b>Total Sales</b>				
<b>\$1 Billion</b>	<b>CA</b> \$7,537,753,442	<b>TX</b> \$4,210,044,845	<b>NY</b> \$1,288,911,291	<b>AZ</b> \$1,140,975,591
<b>\$500-999 Million</b>	<b>FL</b> \$948,201,303	<b>IL</b> \$843,302,756	<b>NJ</b> \$765,415,398	
<b>\$100-499 Million</b>	<b>NM</b> \$447,437,556	<b>WA</b> \$417,685,158	<b>CO</b> \$407,739,745	<b>NV</b> \$406,245,271
	<b>PA</b> \$372,085,027	<b>GA</b> \$319,883,914	<b>MA</b> \$289,726,797	<b>NC</b> \$260,092,998
	<b>CT</b> \$254,275,361	<b>OR</b> \$243,738,827	<b>UT</b> \$240,353,116	<b>IN</b> \$213,735,952
	<b>MD</b> \$206,860,200	<b>WI</b> \$182,051,456	<b>OH</b> \$170,322,489	<b>MI</b> \$161,994,977
	<b>TN</b> \$121,316,074	<b>OK</b> \$121,249,048	<b>SC</b> \$115,212,604	<b>KS</b> \$114,922,805
	<b>VA</b> \$114,439,089	<b>MO</b> \$102,983,854		
<b>&lt; \$100 Million</b>	<b>MN</b> \$94,453,601	<b>AR</b> \$84,117,784	<b>ID</b> \$84,034,209	<b>AL</b> \$82,359,440
	<b>HI</b> \$72,625,864	<b>IA</b> \$69,676,177	<b>LA</b> \$66,770,254	<b>KY</b> \$48,137,634
	<b>NE</b> \$47,452,314	<b>RI</b> \$42,231,722	<b>DE</b> \$33,065,064	<b>MS</b> \$27,824,348
	<b>NH</b> \$23,359,434	<b>WY</b> \$16,787,316	<b>ND</b> \$16,342,327	<b>MT</b> \$9,007,151
	<b>AK</b> \$8,384,832	<b>WV</b> \$7,462,692	<b>ME</b> \$7,125,584	<b>DC</b> \$6,822,089
	<b>VT</b> \$3,794,089	<b>SD</b> \$3,425,108		

Source: The Economic Impact of Independent Grocers: 2012 study.  
 Data analyzed by the Center for Multicultural Science, 2015.

**Table 7**  
**50 States Ranked by Total African American Independent Retail Sales**

<b>Total Sales</b>				
<b>\$1 Billion</b>	<b>GA</b> \$1,263,214,764	<b>TX</b> \$1,216,541,812	<b>SC</b> \$1,123,126,457	
<b>\$500-999 Million</b>	<b>FL</b> \$956,823,107	<b>AL</b> \$952,994,115	<b>NC</b> \$895,260,823	<b>NY</b> \$816,082,953
	<b>LA</b> \$749,264,889	<b>MI</b> \$702,991,575	<b>IL</b> \$694,577,142	<b>MS</b> \$637,251,543
	<b>MD</b> \$626,024,420	<b>OH</b> \$564,288,845	<b>PA</b> \$559,632,998	<b>TN</b> \$516,995,606
<b>\$100-499 Million</b>	<b>MO</b> \$378,872,143	<b>NJ</b> \$322,834,006	<b>IN</b> \$314,081,035	<b>AR</b> \$267,179,863
	<b>VA</b> \$237,693,515	<b>CA</b> \$208,370,696	<b>KY</b> \$144,816,575	<b>WI</b> \$126,329,138
<b>&lt; \$100 Million</b>	<b>DE</b> \$92,352,851	<b>CT</b> \$74,049,427	<b>OK</b> \$71,942,376	<b>MA</b> \$57,396,058
	<b>DC</b> \$42,496,480	<b>KS</b> \$34,314,975	<b>WV</b> \$26,718,535	<b>MN</b> \$24,735,199
	<b>WA</b> \$23,098,117	<b>AZ</b> \$22,862,300	<b>NV</b> \$20,355,554	<b>CO</b> \$14,770,811
	<b>IA</b> \$10,762,059	<b>NE</b> \$7,403,523	<b>RI</b> \$6,047,917	<b>NM</b> \$3,404,220
	<b>ME</b> \$2,239,458	<b>UT</b> \$1,525,406	<b>OR</b> \$1,140,477	<b>NH</b> \$392,030
	<b>VT</b> \$310,825	<b>ND</b> \$277,004	<b>WY</b> \$221,057	<b>SD</b> \$204,813
	<b>AK</b> \$67,527	<b>ID</b> \$64,702	<b>MT</b> \$26,349	<b>HI</b> \$3,544

Source: The Economic Impact of Independent Grocers: 2012 study.  
 Data analyzed by the Center for Multicultural Science, 2015.

**Table 8**  
**50 States Ranked by Total Asian Independent Retail Sales**

<b>Total Sales</b>				
<b>\$1 Billion</b>	<b>CA</b> \$3,057,700,656			
<b>\$500-999 Million</b>	<b>NY</b> \$693,717,045	<b>HI</b> \$520,453,072		
<b>\$100-499 Million</b>	<b>NJ</b> \$456,267,570	<b>WA</b> \$235,493,386	<b>TX</b> \$199,011,858	<b>IL</b> \$196,173,162
	<b>PA</b> \$183,883,678	<b>MA</b> \$179,823,911		
<b>&lt; \$100 Million</b>	<b>MD</b> \$85,559,540	<b>CT</b> \$74,118,109	<b>OH</b> \$73,820,544	<b>OR</b> \$69,655,393
	<b>WI</b> \$69,184,705	<b>VA</b> \$57,923,142	<b>MN</b> \$56,002,093	<b>AZ</b> \$55,966,236
	<b>NV</b> \$48,499,005	<b>MI</b> \$43,821,304	<b>GA</b> \$30,944,965	<b>IN</b> \$27,743,785
	<b>CO</b> \$23,599,231	<b>NH</b> \$22,645,885	<b>UT</b> \$20,813,589	<b>MO</b> \$19,428,079
	<b>NC</b> \$19,388,071	<b>AK</b> \$16,325,710	<b>FL</b> \$14,956,030	<b>IA</b> \$14,877,648
	<b>OK</b> \$14,630,539	<b>KS</b> \$11,795,654	<b>TN</b> \$7,675,921	<b>RI</b> \$7,577,866
	<b>SC</b> \$5,415,183	<b>NE</b> \$4,659,929	<b>KY</b> \$4,622,455	<b>NM</b> \$4,618,898
	<b>LA</b> \$4,444,949	<b>DE</b> \$3,692,837	<b>ID</b> \$3,283,124	<b>AR</b> \$2,508,066
	<b>VT</b> \$2,205,601	<b>WV</b> \$2,066,632	<b>ME</b> \$1,798,180	<b>AL</b> \$1,092,666
	<b>WY</b> \$939,006	<b>DC</b> \$920,797	<b>ND</b> \$888,296	<b>SD</b> \$456,848
	<b>MT</b> \$313,517	<b>MS</b> \$164,589		

Source: The Economic Impact of Independent Grocers: 2012 study.  
 Data analyzed by the Center for Multicultural Science, 2015.

**Table 9**  
**Total Hispanic and All Other - Independent Retail Grocery Sales**  
**By Top 10 Hispanic Cities**

<b>City</b>	<b>Total Hispanic Sales</b>	<b>Total All Other Sales</b>	<b>Total Sales</b>
Los Angeles	\$1,276,695,378	\$1,458,604,844	\$2,735,300,222
Houston	\$893,002,648	\$1,064,815,660	\$1,957,818,308
Dallas	\$463,236,410	\$741,574,700	\$1,204,811,110
Phoenix	\$428,007,885	\$646,172,342	\$1,074,180,227
Chicago	\$424,087,772	\$998,830,199	\$1,422,917,971
San Diego	\$329,053,559	\$479,256,958	\$808,310,517
San Jose	\$186,278,339	\$463,644,759	\$649,923,098
San Antonio	\$133,786,248	\$86,471,517	\$220,257,765
San Francisco	\$58,801,387	\$352,427,933	\$411,229,320
New York	\$3,809,513	\$12,613,225	\$16,422,738
<b>Total Sales - Top 10 Cities</b>	<b>\$4,196,759,139</b>	<b>\$6,304,412,137</b>	<b>\$10,501,171,276</b>

Source: *The Economic Impact of Independent Grocers: 2012* study, NGA, 2012.  
 Data analyzed by Center for Multicultural Science, 2015.

Please note that cities tend to be much smaller geographical units compared to Designated Metropolitan Areas (DMAs) or Metropolitan Statistical Areas (MSAs).

**Table 10**  
**Total African American and All Other - Independent Retail Grocery Sales**  
**By Top 10 African American Cities**

City	Total African American Sales	Total All Other Sales	Total Sales
Detroit	\$488,368,241	\$187,166,499	\$675,534,740
Philadelphia	\$392,573,866	\$528,698,806	\$921,272,672
Chicago	\$358,223,782	\$1,064,694,189	\$1,422,917,971
Houston	\$354,263,725	\$1,603,554,583	\$1,957,818,308
Baltimore	\$217,524,120	\$129,852,467	\$347,376,587
Memphis	\$179,753,337	\$71,421,211	\$251,174,548
Dallas	\$177,550,027	\$1,027,261,083	\$1,204,811,110
Los Angeles	\$105,499,232	\$2,629,800,989	\$2,735,300,222
Wash dc	\$77,256,907	\$77,181,047	\$154,437,954
New York	\$621,565	\$15,801,173	\$16,422,738
<b>Total Sales - Top 10 Cities</b>	<b>\$2,351,634,802</b>	<b>\$7,335,432,048</b>	<b>\$9,687,066,850</b>

Source: *The Economic Impact of Independent Grocers: 2012* study, NGA, 2012.  
 Data analyzed by Center for Multicultural Science, 2015.

Please note that cities tend to be much smaller geographical units compared to Designated Metropolitan Areas (DMAs) or Metropolitan Statistical Areas (MSAs).

**Table 11**  
**Total Asian and All Other - Independent Retail Grocery Sales**  
**By Top 10 Asian Cities**

City	Total Asian Sales	Total All Other Sales	Total Sales
Los Angeles	\$370,986,926	\$2,364,313,296	\$2,735,300,222
San Jose	\$310,814,895	\$339,108,203	\$649,923,098
San Francisco	\$202,609,511	\$208,619,809	\$411,229,320
Honolulu	\$198,947,740	\$41,160,752	\$240,108,492
Fremont	\$153,614,961	\$65,915,059	\$219,530,020
San Diego	\$139,359,850	\$668,950,667	\$808,310,517
Chicago	\$78,674,809	\$1,344,243,162	\$1,422,917,971
Philadelphia	\$70,192,477	\$851,080,195	\$921,272,672
Houston	\$63,560,698	\$1,894,257,610	\$1,957,818,308
New York	\$2,240,649	\$14,182,089	\$16,422,738
<b>Total Sales - Top 10 Cities</b>	<b>\$1,591,002,515</b>	<b>\$7,791,830,842</b>	<b>\$9,382,833,357</b>

Source: *The Economic Impact of Independent Grocers: 2012* study, NGA, 2012.  
 Data analyzed by Center for Multicultural Science, 2015.

Please note that cities tend to be much smaller geographical units compared to Designated Metropolitan Areas (DMAs) or Metropolitan Statistical Areas (MSAs).

APPENDIX 1  
LOS ANGELES  
WHITE GEO-DEMOGRAPHIC DESCRIPTION

Total Population	Total	4,680,761	
	Male	2,327,664	49.73%
	Female	2,353,097	50.27%

Education Level	Ed < 9th Grade	425,163	13.61%
	Ed 9-12 grade	277,020	8.87%
	Ed HS	600,345	19.21%
	Ed Some Coll	498,257	15.95%
	Ed Ass Deg	327,302	10.48%
	Ed BA Deg	640,627	20.50%
	Ed Grad Deg	315,594	10.10%
	Ed Doc Deg	40,157	1.29%

Av HH Income \$ 58,061

Av HH Size 2.96

Pop 0-18 1,050,612 22.45%

IN-CULTURE ZONES

	ZONE 1		ZONE 2		ZONE 3		ZONE 4		ZONE 5	
	1-19%		20-39%		40-59%		60-79%		80-100%	
Population	41,299	1.72%	825,068	34.40%	589,917	24.59%	578,739	24.13%	363,625	15.16%
HH Income	\$ 43,892	13.34%	\$ 38,762	11.78%	\$ 55,674	16.92%	\$ 81,148	24.66%	\$ 109,594	33.30%
HH Size	3.55	25.20%	3.58	25.41%	2.45	17.42%	2.29	16.26%	2.21	15.72%

Source: Demographic data provided by Geoscape, Inc. Data analyzed and language definitions by the Center for Multicultural Science, 2015.