Claritas Consumer Spending Dynamix Release Notes

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OVERVIEW

Claritas Consumer Spending Dynamix contains household expenditure estimates for products and services in more than a dozen main categories, and numerous subcategories. Each product/service is represented by five different measures (aggregate spending by all households, average spending per household, and a comparison of average household spending versus average household spending on a national level, percent buyer within a spending period, and average household expenditures per buyer within a spending period) and five different household groups (Total, White race alone, Black race alone, Asian race alone, and Hispanic households), for a detailed multi-cultural view of consumer household expenditures.

DATA DESCRIPTION

Claritas Consumer Spending Dynamix includes five types of expenditure variables for each product/service: aggregate spending by all households, average spending per household, and a comparison of average household spending versus average household spending on a national level, percent buyer, and buyer average household expenditures.

The "Buyer" expenditures that represent the portion of households that purchase goods and services for each of the 500+ expenditure categories, and the average annual household expenditures for these "Buyer" households. This differs from the overall Average Household Expenditures, which use all households as the base, and does not make the distinction of whether each household does or does not purchase the specific category of goods or services.

Each household expenditure estimate is also provided for each of five household groups: Total (All Households), White race alone, Black race alone, Asian race alone, and Hispanic households. Each "race alone" group includes both the Hispanic and non-Hispanic households of that race group.

These estimates, useful for measuring market potential as well as other tasks, are projected into standard units of geography ranging from the micro-level to the macro-level.

Claritas strives to create and maintain the most accurate, up-to-date demographic estimates and projections available anywhere, including the multicultural datasets for which Claritas is known as the industry leader.

Data Sources

Claritas Consumer Spending Dynamix uses the following source data:

- Consumer Expenditure Survey (CEX) from the U.S. Bureau of Labor Statistics (BLS) for years 2015, 2016, 2017, 2018, 2019
- Bureau of the Census (U.S. Census Bureau) 2010 Census data
- National Oceanic and Atmospheric Administration climate data
- Claritas Pop-Facts® Demographics
- Claritas CultureCode® Supplement to Pop-Facts®

Expenditure Categories

Claritas Consumer Spending Dynamix offers estimates for the following categories:

- Average annual expenditures
- Food
- Alcoholic beverages
- Housing
- Apparel and services
- Transportation
- Healthcare
- Entertainment
- Personal care products and services
- Reading
- Education
- Tobacco products and smoking supplies
- Miscellaneous
- Cash contributions
- Personal insurance and pensions

Geographic Levels

Claritas Consumer Spending Dynamix is available in the latest standard Claritas cartographic boundaries for ease of implementation within platforms and analysis.

Census Geographies

- National (USA)
- State
- County
- Combined Statistical Area (CSA)
- Core Based Statistical Area (CBSA)
- Place
- Tract
- Block Group

Other Geographies

- Minor Civil Division
- Congressional District
- ZIP Code
- Nielsen Designated Market Area (DMA)

METHODOLOGY

Claritas Consumer Spending Dynamix data has been developed by applying advanced statistical modeling using Consumer Expenditure Survey (CEX) data combined with the latest geo-demographics.

Geo-demographics are from Pop-Facts Demographics and CultureCode® supplement and the U.S. Census Bureau.

Model Specification

Claritas Consumer Spending Dynamix is a modeled data set. Potential model inputs have been chosen from a comprehensive list of household-level information present on both the interview and diary portions of the Consumer Expenditure Survey.

Block Group Calculations

Block group estimates were implemented using the models created above. The models were then implemented using the 2024 current year Claritas demographic estimates and then the 5-year demographic projections (2029). These estimates are projected into standard units of geography ranging from the micro-level to the macro-level: block group, census tract, ZIP Code, county, metro area, Nielsen Designated Market Area, state, and nation.

Data Verification

Claritas is the leading expert in developing marketing information and applications based on geo-demographic and business information. Each year, Claritas completes their demographic update program—the industry benchmark for demographic estimation. The update includes current-year household and population counts for numerous demographic variables, including distinct household characteristics and population information. Claritas demographers and statisticians are among the industry leaders and represent decades of experience in the field of geography-based demographic estimation.

The Claritas Consumer Spending Dynamix production process leverages the renowned Claritas demographic update program by applying block group-level data elements to each household model developed from the Consumer Expenditure Survey. The result is a data set of estimated household market penetration and volume aggregated to the block group level of geography. These estimates are then aggregated to larger census, postal, and marketing geographies using proven, proprietary Claritas methodologies.

AVAILABLE DOCUMENTATION

Variable Rosters

The Claritas Consumer Spending Dynamix 2024 Variable Roster is available as a companion document. Note that the roster does not include all 33,900 variables, but rather listing of the 678 products listed by UCC/Category Code, along with some expanded definitions, the hierarchy structure of the included variables.

Variable Nomenclature

Each variable name is made up of three parts.

Part 1: The first 2 characters will tell you if the variable is a current year (CY) or five-year (FY) estimate.

Part 2: The middle (up to 7) characters are the Uniform Commercial Code (UCC) code.   If this item begins with an X, it indicates that it is a combination of more than one UCC code.

Part 3: the last two characters describe the household group, and the measure. There are 5 options for each, described in the two sections below.

Consider the example CY_FOODTO_TE. This tells you this is Current Year (Part 1), Total Food UCC (Part 2), and the total (all households) average annual household expenditure (Part 3). If receiving a flat file, your variable names will appear without the underscores, but using the same naming convention described above.

Household Group

There are 5 different household groups breakdowns for each variable.

HOUSEHOLD GROUPS	
FIRST LETTER	**DEFINITION**
T	Total (all) households
W	White race alone households
B	Black race alone households
A	Asian race alone households
H	Hispanic households

Please note that the W, B, A and H household groups do NOT add up to the total.

Household Expenditures Measures

There are 5 measures provided:

EXPENDITURES MEASURES	
SECOND LETTER	**DEFINITION**
E	Overall average annual household expenditure
A	Overall aggregate annual household expenditures
I	Index of average spending per household, par = 100
B	Average expenditure for the households who made a purchase in this category

P	% of households that made a purchase in this category

Buying Period

Buyer Average and Buyer Percent are estimated based on the time period for which data is collected. While it is possible a household is buying several products or services on a weekly (diary) or quarterly (interview) basis, it is not prudent to make assumptions to that effect. (This topic is covered at length in the separate Methodology document).

The roster notes a D, I or X to indicate the source of raw data and the time period for which our estimates are provided in the "Buying Period" column and Buyer Percent/Buyer Average variables will display these characters in the variable titles.

- D – Diary (weekly or period of 2 weeks)
- I – Interview (quarterly)
- X – combination/ not available – Note that for some parent category items, this data may not available

Level, Root

The level column is the hierarchical level of Claritas Consumer Spending Dynamix.

Related, the root column is the parent for the variable. This can be used in conjunction with the level column and assist with analysis of hierarchy.

Methodology

A more detailed version of methodology is included in the *Claritas Consumer Spending Dynamix 2024 Methodology* document. This document provides additional information on key topics, including data sources and data development.

MAJOR DIFFERENCES

Below are differences seen from previous versions of Claritas Consumer Spending Dynamix.

White, Asian, Black "Alone"

For the three population subgroups, all are for those who identify as one of those three races alone. Anyone who considers themselves to be two or more of these go into an unpublished "other" category. These "two or more" households are included in the Total (All HH) numbers.

Asian + Pacific Islander vs Asian Alone

In previous versions of Claritas Consumer Spending Dynamix, Asian and Pacific Islander households were combined. When it comes to household expenditures, the raw data for these two population groups shows distinct buying behaviors for Asians vs Pacific Islander households in many categories. Additionally, the relatively small size of Pacific Islanders leads to over-reliance of a few households for models.

Thus, having solely "Asian Alone" without the Pacific Islander portion provides better estimates for this population group.

Buyer Average, Buyer Percent

Buyer Average and Buyer Percent are estimated based on the time period for which data is collected, which may be different from previous versions of Claritas Consumer Spending Dynamix that present this as an annual figure. While it is possible a household is buying several products or services on a weekly (diary) or quarterly (interview) basis, it is not prudent to make assumptions to that effect. With this release, buyer averages and buyer percent for items from the Interview survey were annualized, to the greatest extent possible.

The buying period for each product is a separate column included on all variable rosters.

Personal Finance

Updates to the way Social Security is collected in the Consumer Expenditure Survey over time have changed raw input data in this category.

TECHNICAL SUPPORT

If you need further assistance, not provided in the release notes, please contact the Claritas Solution Center between 9:00 a.m. and 8:00 p.m. (Monday through Friday, EST) at 800.866.6511.

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