

EXECUTIVE SUMMARY

Situation Analysis

The prosperity of the United States and that of its Hispanic population are inextricably linked. With over \$1 trillion in buying power, an amount growing by \$90 billion per year, U.S. Latinos are among the most powerful consumer groups in the world. Latino-owned businesses are also a significant economic driver – from 2002 to 2007, combined revenue jumped 55 percent to nearly \$350 billion.

Latinos have a long history in the United States, are an integral part of our national fabric and strongly identify with the American Dream. Hard work and traditional family values are core traits among Latinos – Latinos make up millions of the teachers, nurses, doctors, police officers and firemen who serve and protect our communities every day.

From a cultural perspective, the traditional family and religious values of Latinos not only endure, but continue to set the highest standard, even evoking a nostalgia for America's "better days." This is not a culture that has merely assimilated; it is a strong community of service, pride and perseverance that has helped shape our understanding of what the American Dream is all about.

Yet despite the important contributions Latinos have made over generations and continue to make today to our culture and our communities, the national dialogue on illegal immigration has obscured and confused the public's perception of the Latino population. Pervasively negative media coverage and the proliferation of misrepresentations from politicians and activists alike have cast a long shadow over the public's understanding and appreciation for the Latino influence. Opinions are often shaped against a backdrop of mistrust and fear rather than one of receptivity and respect, perpetuating negative sentiment and undermining the numerous positive attributes Latinos bring to U.S. society.

The H+K Strategies team believes that the findings we have detailed in this report will help lay the foundation for addressing this challenge, correcting misperceptions about Hispanics in the United States, and rehabilitating the Latino "brand."



Project Overview

This report captures research conducted by H+K Strategies to provide the Latino Donor Collaborative (LDC) with an objective base of research from which it can develop a nonpartisan Latino agenda designed to positively influence perceptions of Hispanics and demonstrate that Latinos are successfully integrating into U.S. society.

Public Opinion Research

Our team conducted eight focus groups among Anglo-Americans in four cities to better understand the values and beliefs behind current public opinion about Latinos. The four cities selected —Phoenix, AZ; Charlotte, NC; Houston, TX; and, Chicago, IL — were chosen because they represent communities that have long-standing Hispanic populations (Phoenix and Houston) or have seen extensive growth in their Hispanic populations (Charlotte and Chicago) over the last decade. In each city, one group was comprised of lower- to middle-socioeconomic status Anglo-Americans and one group was comprised of middle- to upper-socioeconomic status Anglo-Americans.

We also conducted a national public opinion survey with 1,500 non-Hispanic U.S. adults representative of the greater population in terms of gender, age, education, region and other measures, which helped us measure attitudes and opinions about Latino issues, as well as quantify key focus group findings.

Media Analysis

Our team conducted in-depth analysis of media coverage spanning one year (February 1, 2011–January 31, 2012) to capture the primary messages related to Latinos and Latino issues evident in a broad range of media channels. We analyzed mainstream coverage (print and online), as well as social media (blogs, Twitter, Facebook, online forums and comments), broadcast television and talk radio, classifying coverage according to leading relevant topics, geography, focus on Hispanic-origin nationality, prevalence of positive and negative messengers, media channels and tonality of coverage.

In addition, we used our media analysis findings to compile a “message inventory” that identifies the most prevalent negative and positive messages, ranked in descending order of frequency.



Summary of Key Research Findings

In analyzing our full body of research, we have identified the following key findings, which synthesize all of the data streams. Each of these key findings is examined in greater detail in the subsequent sections of this report.

Americans Admire Hispanic Traits, but Misperceptions about the Magnitude and Impact of Illegal Immigration Distort the Story

Overall, Americans view Hispanics very warmly, particularly with respect to cultural, religious and family values as well as worth ethic. Focus group respondents clearly admired many Hispanic cultural traits, in some cases exhibiting nostalgia about Hispanic values, noting that they mirror American values of decades ago.

That said, views became more divisive when the issue of immigration was introduced, revealing fears about uncontrolled growth, unfair access to employment, overdependence on social services and a perceived lack of desire for assimilation. In many cases, we found non-Latinos to be of two minds about the Hispanic population; highly positive about personal and cultural attributes *and* extremely negative about illegal immigration and its perceived threat to their own way of life and security.

Our research found that these negative sentiments are being exacerbated by the current poor economic climate — for example, survey respondents who had a negative outlook about the economy were more likely to perceive Hispanics as doing a poor job of assimilating. However, many of the drivers of negative opinion existed prior to the economic downturn, and the economy is only one of many contributing factors.

CAMPAIGN TAKEAWAY

The positive sentiment that exists presents a real opportunity for any future public-facing efforts. Campaign efforts should build on areas where public admiration and evidence of similar values and goals can be used to foster a broader sense of assimilation and help quell existing negative messages.

Perceptions around Illegal Immigration Are Primary Drivers of Negative Opinion

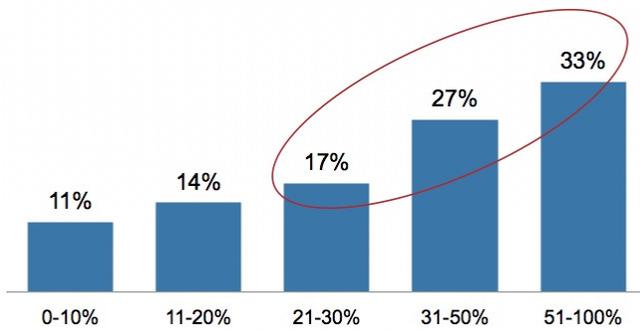
Public misunderstanding about the extent and impact of illegal immigration is the dominant factor that underlies much existing negative sentiment. This effect is



amplified by a disproportionate volume of media coverage on related issues such as immigration and drug smuggling.

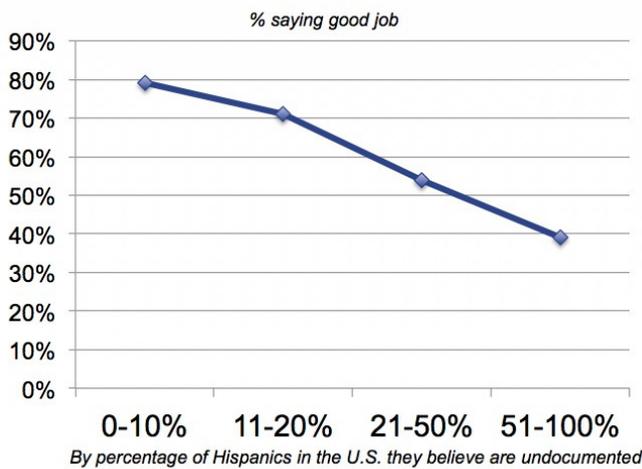
The public’s view of the percentage of undocumented Hispanics in the United States is greatly skewed – three-quarters of non-Hispanics Americans overestimate the proportion of Hispanics in the United States who are here illegally and 33 percent think that 51–100 percent of Hispanics in the United States are here illegally. These findings are explored in greater detail in the chart below:

What percentage of Hispanics do you think are undocumented or here illegally?



Equally important, our survey found that people who believe a higher proportion of Hispanics in the United States are undocumented are much less likely to believe Hispanics are doing a good job of assimilating, as shown in the below chart:

Do you think Hispanics do a good job or a poor job of assimilating or fitting into U.S. society?





Media coverage on topics that drive concerns about illegal immigration, such as immigration, the U.S.-Mexican border, population growth, English proficiency and drug smuggling, also had the highest volume among negative topics, and collectively generated more than twice the volume of leading positive topics. Illegal immigration was also the primary topic of leading negative messengers, including Glenn Beck and Joe Arpaio, with related topics mentioned at a far greater frequency by these individuals than any competing issues. The dominance of this topic within both traditional and social media clearly makes this issue appear far more significant than is warranted.

CAMPAIGN TAKEAWAY

Looking ahead to future LDC efforts, it will be critical to correct misperceptions concerning how many Hispanic immigrants living in the United States are here illegally by counteracting misinformation being perpetuated by the media, leading negative messengers and other sources. The recently released Pew Hispanic Center research showing that net migration flow from Mexico to the United States has stopped or even reversed could serve as an excellent resource to this end.

Importantly, while it will likely take years to correct this misperception, the research shows a sliding scale of correlation between perceptions about the percentage of Hispanics here illegally and the progress Hispanics are making in assimilating into U.S. society. So, any success the campaign can have in correcting this misperception will have a positive impact.

Equally critical will be sharing accurate data with partners and organizations who can in turn disseminate it to key audiences. Examples include the Congressional Hispanic Leadership Institute, the Congressional Hispanic Caucus and leading media outlets.

The U.S. Public Perceives Hispanics as “Takers;” Has Insufficient Knowledge of Economic and Community Contributions

Our survey found that the public is likely to associate negative attributes such as “take jobs away from Americans,” “are a burden on the healthcare system,” and “are a burden on the education system” with undocumented immigrants. But significant numbers also believe these attributes apply to both undocumented immigrants and Hispanic citizens.



Focus group respondents echoed these sentiments, with most participants citing examples of ways, in their view, that Hispanic immigrants benefit from unfair advantages and access. Perhaps most disturbingly, many appeared to be quite misinformed, suggesting that illegal immigrants had unfettered access to welfare and were unfairly granted admission and financial aid at local colleges.

In the message inventory developed from our media analysis, the most prominent negative message was “Mexican immigrants are expensive and a burden on the system, and American taxpayers unfairly have to foot the bill,” with related coverage capturing the sentiment that Mexican immigrants don’t pay taxes and send much of the money they earn to their families in Mexico.

CAMPAIGN TAKEAWAY

There is a multitude of data that could be leveraged in public campaign efforts to demonstrate the critical role Hispanics play in bolstering the U.S. economy and directly contributing to their local communities. Examples include that each year Hispanics spend more than \$1 trillion helping build the U.S. economy, and that with three million small business owners and counting, Hispanics are driving job growth and boosting the economic recovery, benefitting not just themselves but the country as a whole.

Perceptions around English Proficiency Drive Negative Public Opinion

The widely held belief that Hispanic immigrants have not learned to speak English is one of the most powerful drivers of negative opinion. Our survey showed that more than 80 percent of non-Hispanics associate Hispanics with NOT having learned to speak English, and the public sees this as an indicator that Hispanics don’t wish to assimilate into U.S. society and are not making an effort.

Focus group respondents echoed this sentiment, with many citing having been inconvenienced by the language barrier in their daily lives and a general sense that they should not have to “press 1 for English.”

Within media coverage researched, English proficiency was the 13th highest topic by overall volume but the 3rd highest negative topic by volume, indicating that it is a leading point of friction and frustration when the populations interact.



CAMPAIGN TAKEAWAY

Communicating facts around current and increasing levels of English proficiency within the Hispanic immigrant population will be critical to convincing the U.S. public that this demographic is invested for the long term in fully assimilating and being part of the fabric of America.

Direct and Indirect Messages Regarding Hispanic Population Growth Are Not Well-Received

Among the messages deemed least effective, and even potentially damaging, were those related to population growth. Even those that on the surface appear positive — such as increasing home ownership rates — can play into perceptions that Hispanic immigration is overwhelming and unstoppable, and that incoming immigrant populations are a burden on society.

Our media analysis found that the large volume of coverage related to population growth is likely feeding into, or possibly reinforcing, exaggerated perceptions of illegal immigration. “Population growth” was by far the leading topic by media volume and in many cases was tied into the larger discussion around immigration.

CAMPAIGN TAKEAWAY

While there is a strong argument to be made that the growing U.S. Hispanic population will help meet needs related to military enlistment, revenue shortfalls and funding of Social Security, our research finds that, with the general public, this message theme is counterproductive.

“Illegal Immigrant” Is a Preferred Term as Compared to “Undocumented Worker/Immigrant” or “Economic Refugee”

When tested in focus groups, it was clear that participants preferred the term “illegal immigrant” to “undocumented worker,” “undocumented immigrant” or “economic refugee.” This preference is likely in large part due to the prevalence of the term “illegal immigrant” in media coverage and other forums, but the participants’ aversion to the term “economic refugee” seems to be derived from a lack of understanding or sympathy around the hardships immigrants face in native countries such as Mexico. Most importantly, the research suggests that using “undocumented” can also have the unintended effect of creating suspicion about the motives of the person or organization using the term.



In mainstream media coverage, the volume of mentions of these terms was consistent with focus group findings. In the year’s worth of mainstream coverage we analyzed, the term “illegal immigrant” had 5,929 mentions, “illegal alien” had 2,031 mentions, “undocumented immigrant” had 1,225 mentions, “undocumented worker” had 202 mentions and “economic refugee” had seven mentions.

CAMPAIGN TAKEAWAY

While there has been discussion among the LDC board and membership around attempting to change the public vernacular to move away from the term “illegal immigrant” and toward an alternative, our findings indicate that this would not be fruitful based on the prevalence of the term and the current public opinion environment.

Increased Interaction with Latinos Is a Primary Driver of Positive Opinion

Public opinion research showed that people who have more exposure to Latinos have a more positive perception of the broader Latino population. In analyzing survey responses, 62 percent of respondents who indicated that they have Hispanic friends provided answers that put them in the segment of the population that is most favorable toward Hispanics. Conversely, only 21 percent of the respondents who indicated that they rarely interact with Hispanics were in the favorable segment of the population.

CAMPAIGN TAKEAWAY

While additional discussion should occur around what type of messenger might be most effective in future public communication efforts, this finding seems to support including Latino messengers who could interact with public audiences, thereby improving both familiarity and overall perceptions. As we touch on later in the summary, our research finds that Hispanic professionals such as nurses, police officers or small business owners are particularly credible messengers with non-Hispanics.

The Most Effective Message Themes Are Not Prominent in Media Coverage

Based on public opinion research, we have identified the following message themes as most critical and effective for building the Latino brand and combatting misperceptions:



Reinforcing Positive Sentiments

- Hispanics have strong family and religious values
- Hispanics have a strong work ethic

Countering Misperceptions

- Most Hispanics are U.S. citizens
- Hispanics are proud Americans and are increasingly assimilated into U.S. society
- Hispanics have authentic and inspiring stories of academic, professional and personal success
- Hispanics are a critical part of the U.S. economy in purchasing power and as business owners

These message themes do exist in media coverage, but they are not prominent parts of the universe of coverage on Hispanic issues. Education (both the desire for and achievement of educational goals) had the greatest volume of any positive topic, followed by economic contribution, hard work, faith/religion and the American Dream. Perhaps most notably, the combined volume of these five topics was roughly equivalent to the negative topic with the highest volume, immigration/border issues.

CAMPAIGN TAKEAWAY

Our research points to a foundation of positive opinion that can serve as an integral part of a larger communications framework designed to build the Latino brand and combat misperceptions. These existing positive sentiments should be complemented by messaging that “level sets” with the broader U.S. public by providing hard data and real life examples to show that the majority of Hispanics are here legally, speak English fluently and are fully integrated into U.S. society.

The Most Effective Messengers Are Successful Hispanics

In evaluating source credibility, our survey found that Hispanic/Latino professionals and Hispanic/Latino small business owners are viewed as most credible on Hispanic issues, with 28 percent viewing them as “very credible,” followed by Hispanic/Latino college students (23 percent) and Hispanic/Latino leaders who sit on the boards of major corporations (22 percent). Prominent non-Hispanic leaders including military leaders, former U.S. presidents and wealthy philanthropists were viewed as less credible on these issues.



Importantly, during the course of focus groups, participants were not able to identify any specific Latino leaders they admired or viewed as credible, seeming to indicate that enlisting “big names” might not be as important as identifying real-life, relatable examples of success. Respondents also indicated that, on specific issues such as immigration, to be credible, a source would need to have expertise in that subject area (e.g. could be linked to the U.S. Census, Pew Research Center, etc.).

Members of the LDC board were also interviewed in the course of our research and many pointed to prominent non-Hispanic political, business and military leaders as being established, credible messengers who they believe could use their influence and reputation to truly move the needle on public opinion.

CAMPAIGN TAKEAWAY

Our research found that “everyday” Hispanic professionals such as firefighters, police officers, teachers, small business owners, doctors and nurses are the most credible messengers, as they are real-life evidence of Hispanics successfully assimilating into U.S. society.

The perpetuation of negative themes in coverage shown in the media analysis further emphasizes the need for successful Hispanic messengers. In particular, individuals who have limited daily interactions with Hispanics depend on media coverage and other sources for information, much of which is skewed negatively. Introducing a broader range of successful Hispanics into the national dialogue and media landscape could go a long way toward correcting this.

That said, non-Hispanic leaders, as well as established third party experts on issues like immigration, will also play a critical role in future communications efforts.

Segmentation of Results Shows Many Americans Are Persuadable

Segmentation analysis shows that nearly half of Americans are persuadable when it comes to opinions about whether Latinos are doing a good or poor job of assimilating into U.S. society. Among that group, the profile of the most persuadable group is males who lean Democratic, have Hispanic friends, live in counties that are less than 10 percent Hispanic and watch national network news, local news and tend to fit a CNN viewer profile. This group represents 21 percent of the non-Latino U.S. population. The profile of the more challenging of the persuadable groups is males who lean



Republican, have limited interaction with Hispanics, live in counties that have seen growth of 24,000 or more Hispanics over the past 10 years and watch national network news, local news and tend to fit a Fox viewer profile. This group represents 24 percent of the non-Latino U.S. population.

Note that segmentation findings are explored in greater detail in the Public Opinion Research section of the final report on pages 12-13.

CAMPAIGN TAKEAWAY

It is clear from the research that correcting widely held misperceptions will require a broader approach, particularly for the early phases of a public campaign. The more specific segmentation findings could be leveraged in the later stages of a campaign, when efforts become more targeted.

Conclusion and Next Steps

As captured in this summary and in the detailed report findings that follow, our research indicates that a successful future LDC campaign should at a minimum include the following elements:

- Correcting misperceptions around the percentage of illegal Hispanic immigrants living in the United States
- Utilizing data points and messaging that reinforce positive perceptions about Hispanics related to work ethic, strong family and religious values and contributions to the economy, but deemphasize any focus on population growth
- Highlighting the fact that the majority of Hispanic immigrants have strong English language skills
- Engaging everyday Hispanic messengers such as firefighters, police officers, teachers, doctors and small business owners

H+K Strategies looks forward to continuing to work with LDC in using this foundation of research to develop a detailed campaign plan with specific, actionable recommendations, a corresponding timeline and metrics for success. As a critical component to developing a campaign plan, we will work with LDC to more clearly define its purpose and, as needed, its pitch for potential donors and supporters.