



Leveraging the Rise of Hispanics and America's New Mainstream

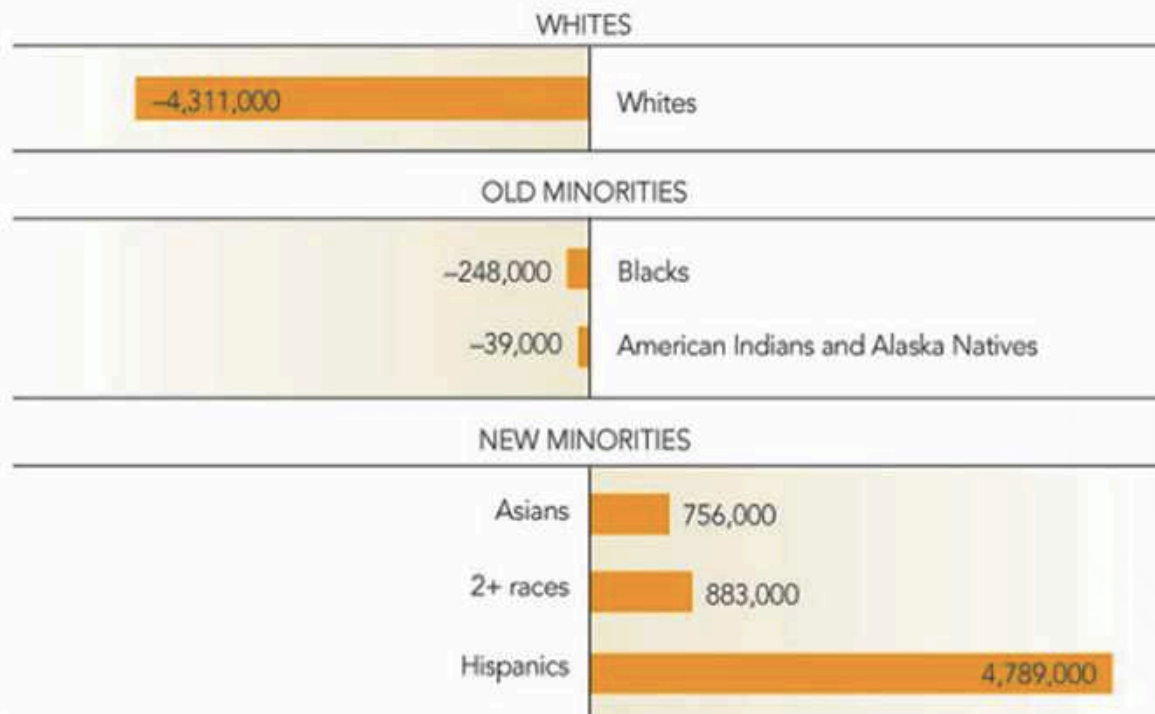


The New Mainstream A Profile



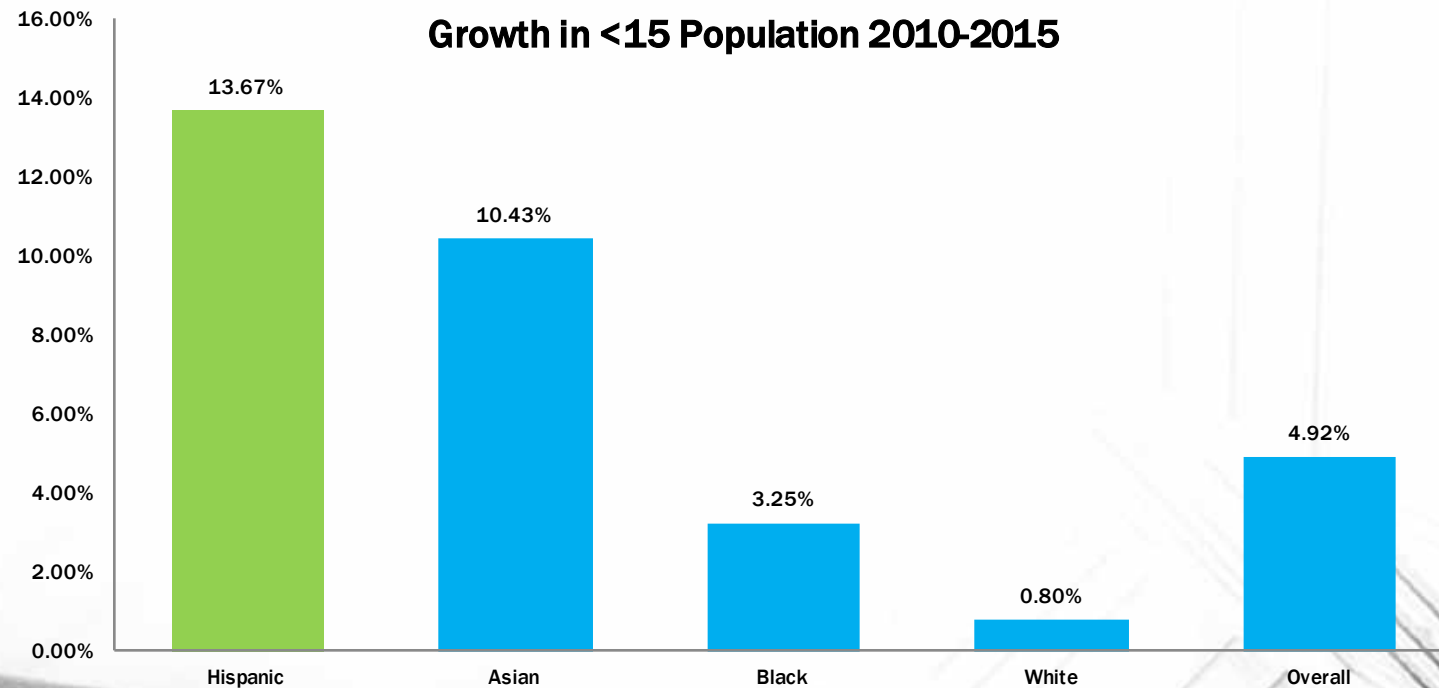
Hispanics & Asians Lead America's New Mainstream

Change in Under 18 Population, 2000–10



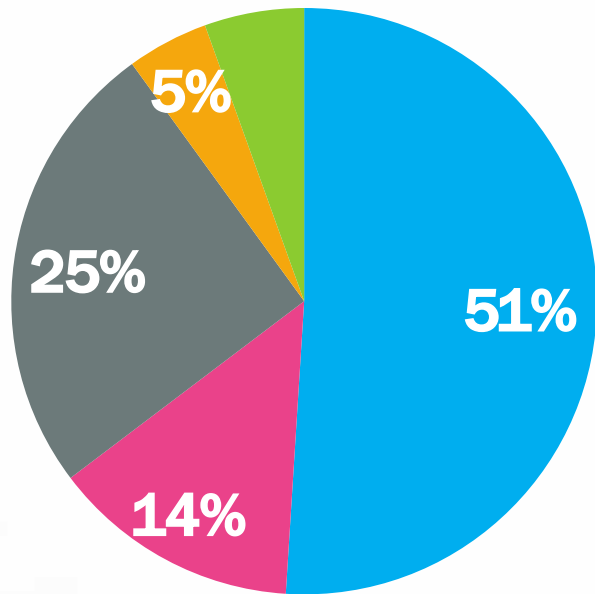
Growth in the New Mainstream Outstrips Non-Hispanic Whites

Hispanics lead growth in the under-15 youth population since 2010

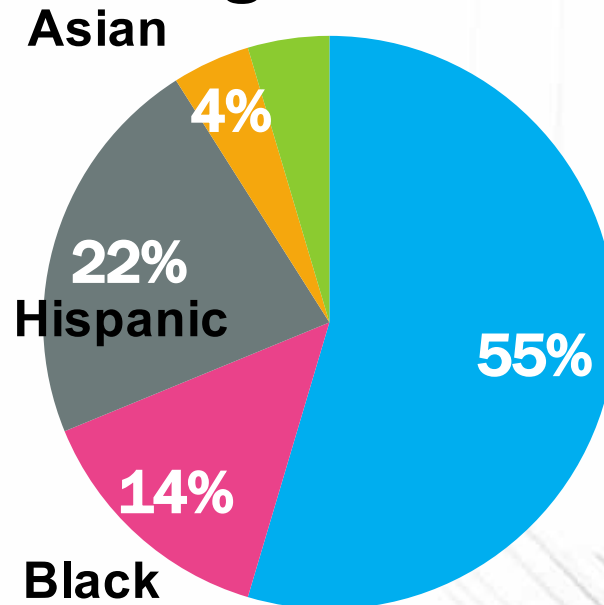


The New Face of America

Ages 0-5

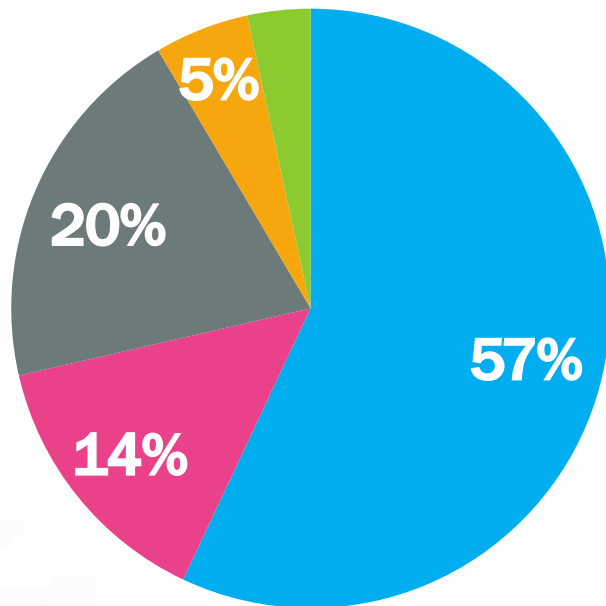


Ages 6-17

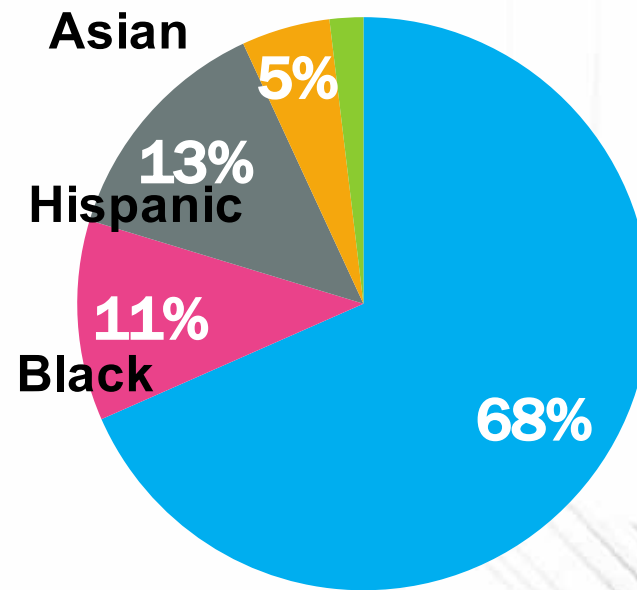


The New Face of America

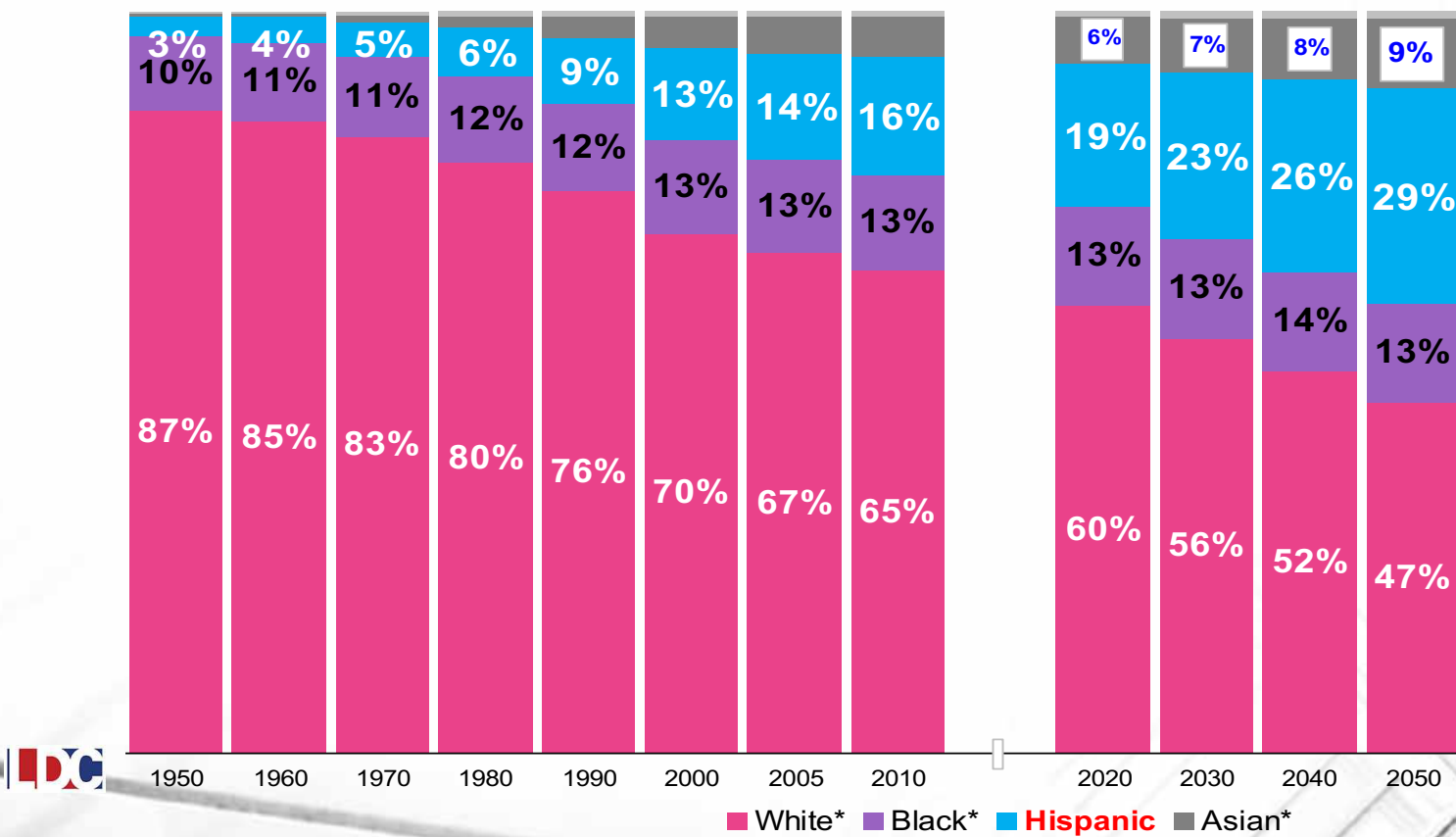
Ages 18-24



Ages 25 or older

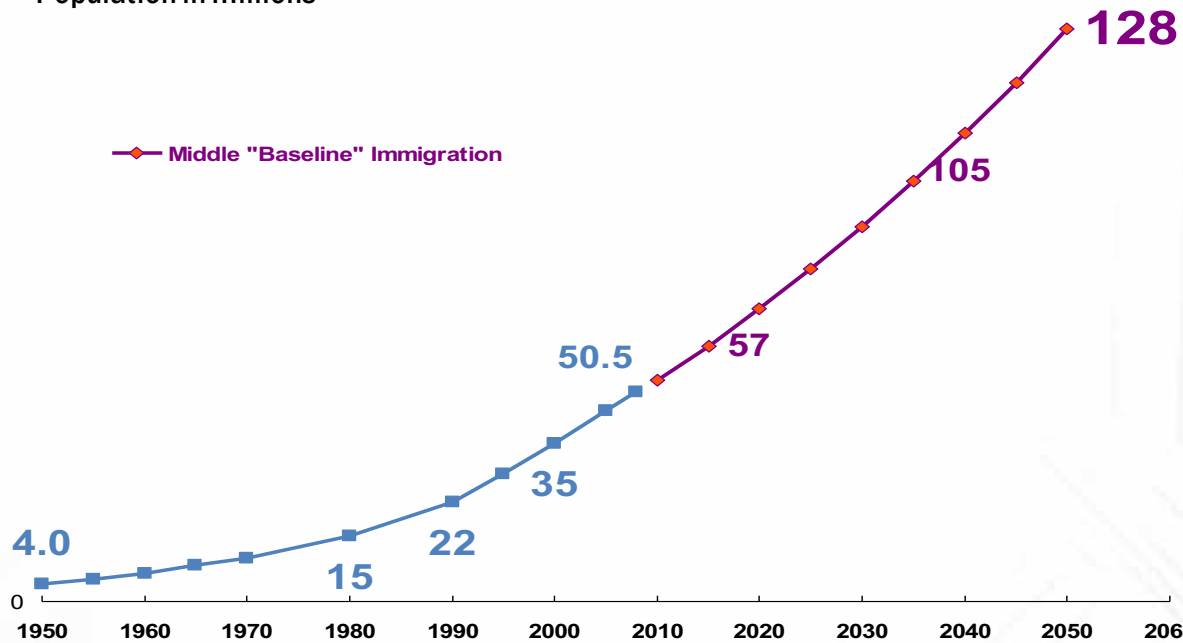


Hispanic Share Rises to 29% by 2050



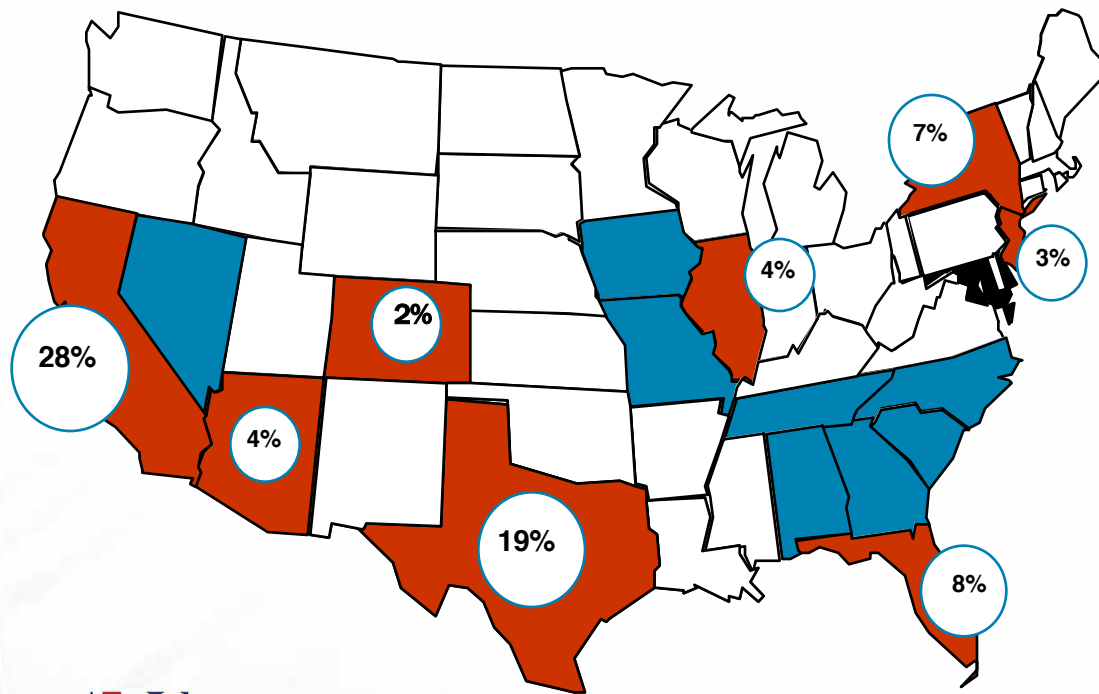
Hispanic Growth Likely to Continue (Largest "Minority" Since ~2001)

Population in millions



Hispanics are expanding nationwide

While **75%** of all US Hispanics reside in **8** U.S. States...



...the Hispanic population is growing fastest in 10 states not previously considered "Hispanic."

1. Arkansas **69.3%**
2. Tennessee **60.9%**
3. Georgia **60.1%**
4. South Carolina **58.4%**
5. North Carolina **57.9%**
6. Nevada **53.8%**
7. Alabama **51.5%**
8. Iowa **49.7%**
9. Maryland **47.7%**
10. Delaware **47.0%**



Today

America's 60 million Hispanics are

- **nearly equal** to the population of the United Kingdom (64 million),
- **almost twice** the number of Canadians, and
- nearly **three times** the population of Australia.

In the next 35 years...

The U.S. Census projects Hispanics

- will number **118 million by the year 2050** and
- will account for almost **one in three Americans**.

Nebraska, our 37th largest state, has a population of 1.9 million -- imagine 35 more Nebraska-size states full of Hispanics, all over the U.S.

2015



2050



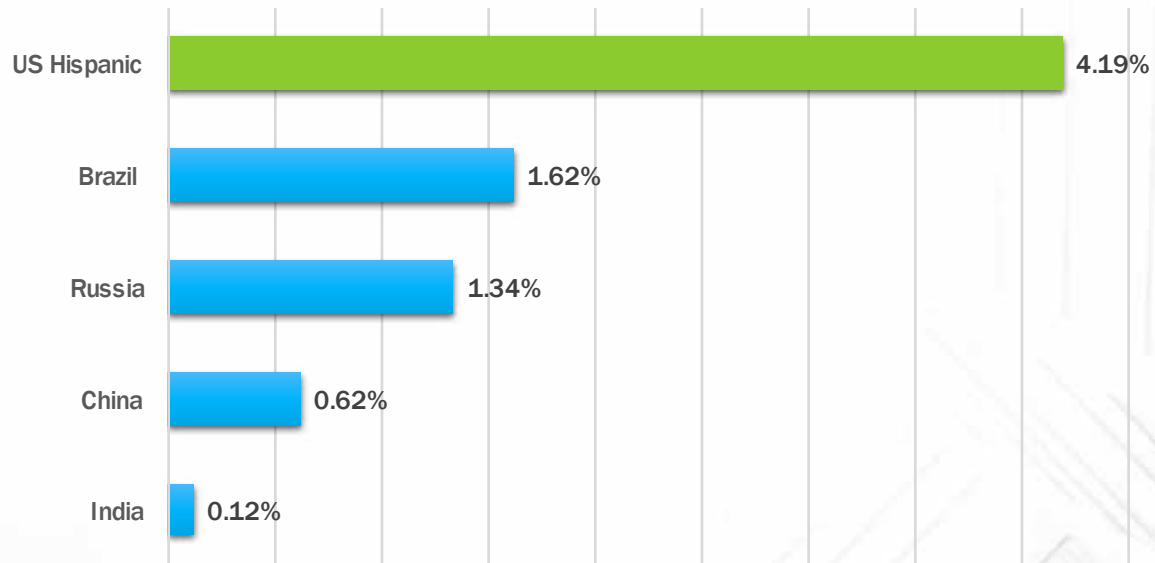
Latinos' Growing Wealth & Purchasing Power



US Hispanic Growth Rate Beats BRICs

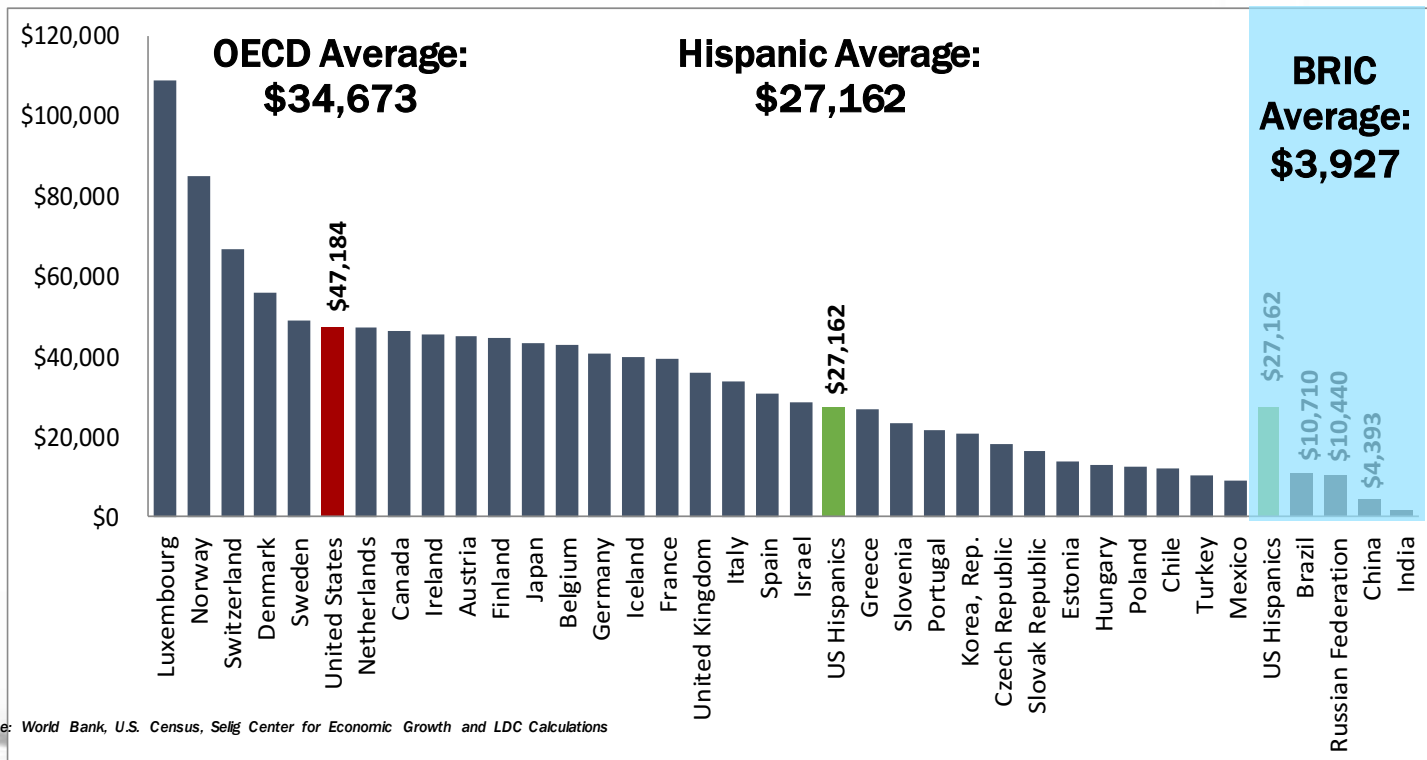
The US Hispanic population is growing faster than *all* the BRIC countries *combined*

Average Population Growth per Year



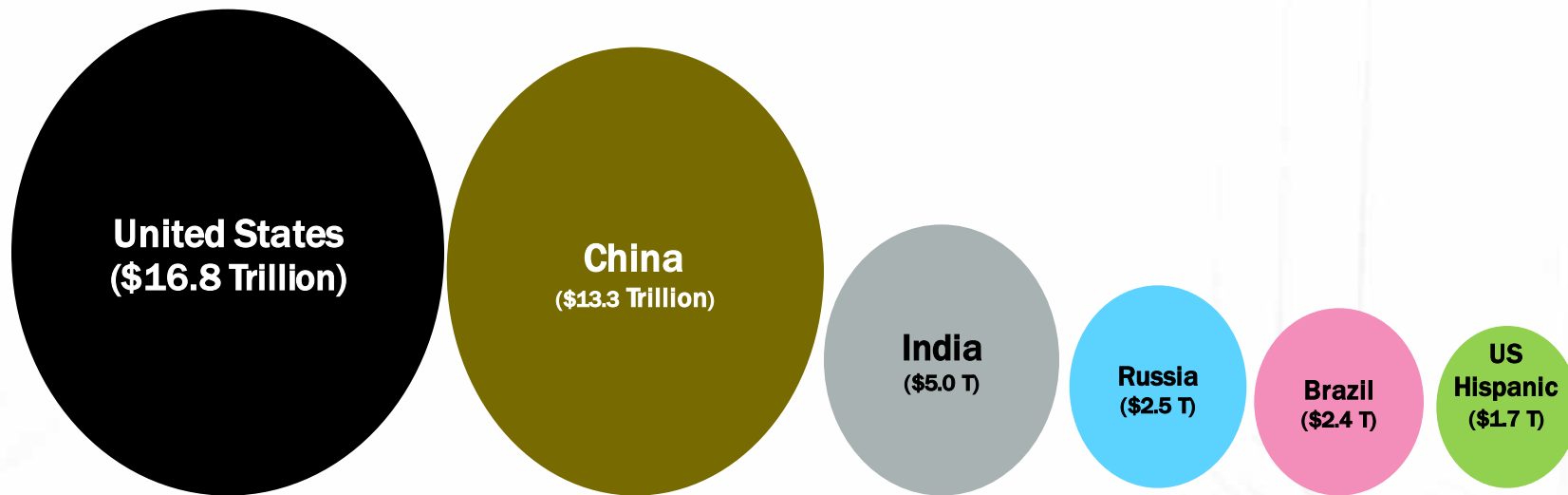
Hispanic Wealth in a Global Context

GDP per capita as of 2010 (est.)



US Hispanic Purchasing Power in a Global Context

(IMF, 2013)



Hispanics Lead New Mainstream Buying Power

What Drives Hispanic Buying Power?

Rapid Population Growth

Younger Hispanics
Now Entering Workforce

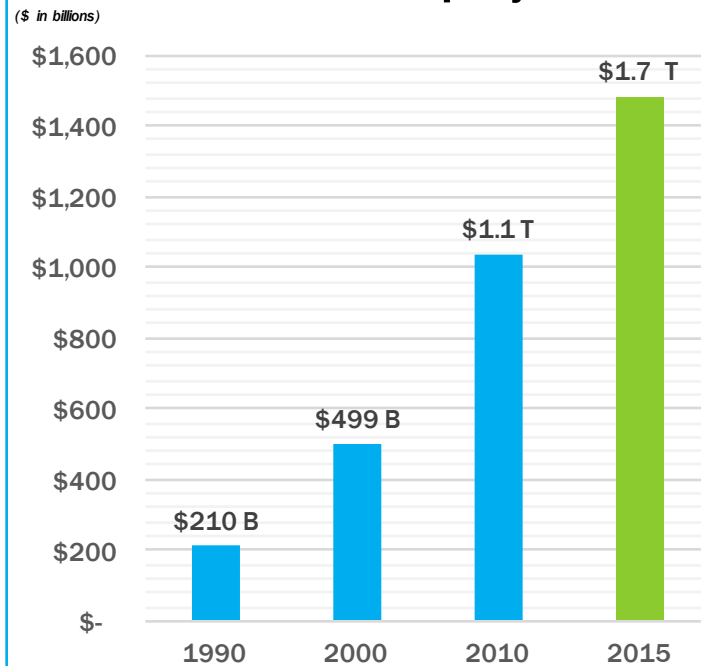
High Level of Entrepreneurial Activity
Strong Work Ethic

Increasing Educational Attainment
Growing Per Capita Wealth



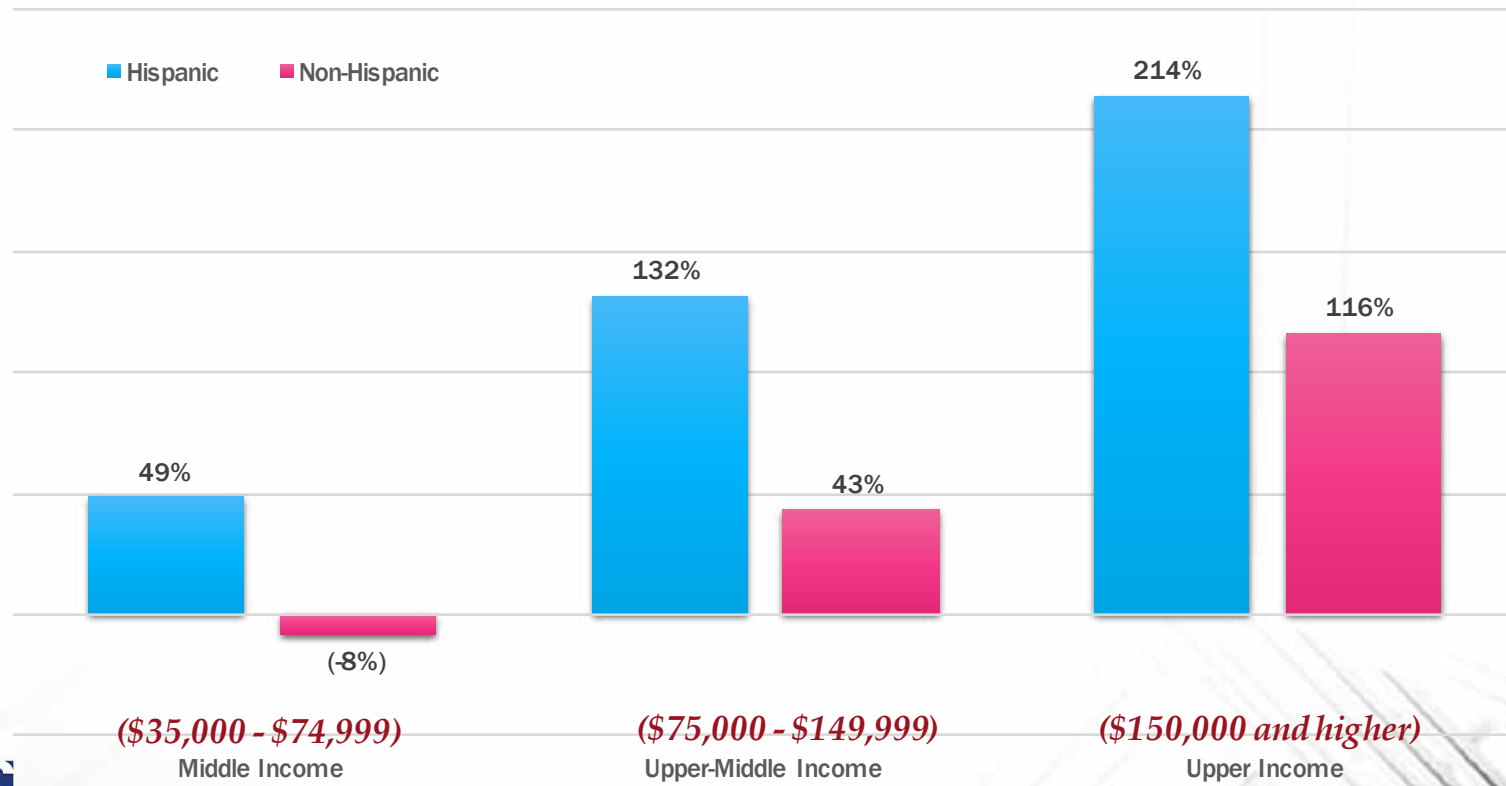
Source: Selig Center for Economic Growth, 2010

Hispanic Buying Power growing at the rate of \$90 B per year...



Hispanics Define the New Rich

Household Growth by Ethnicity (2000-2012)

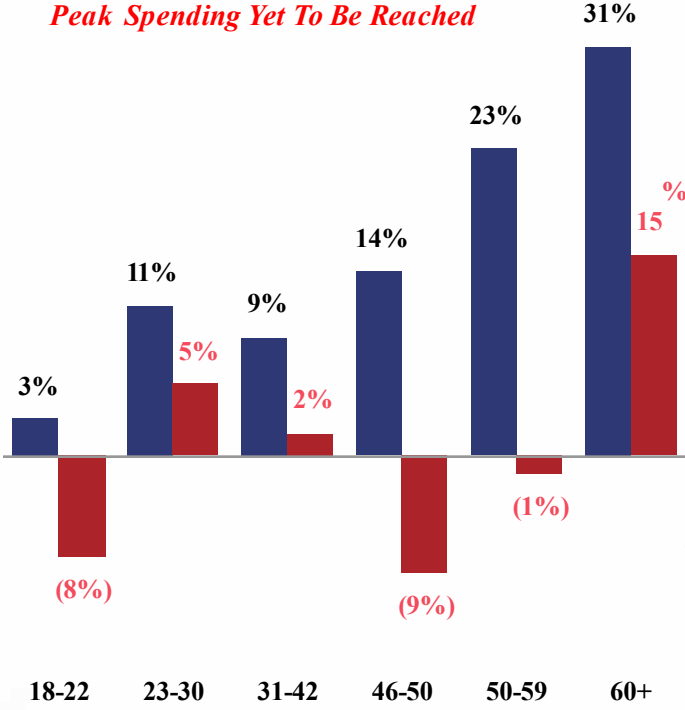


Source: U.S. Census Bureau

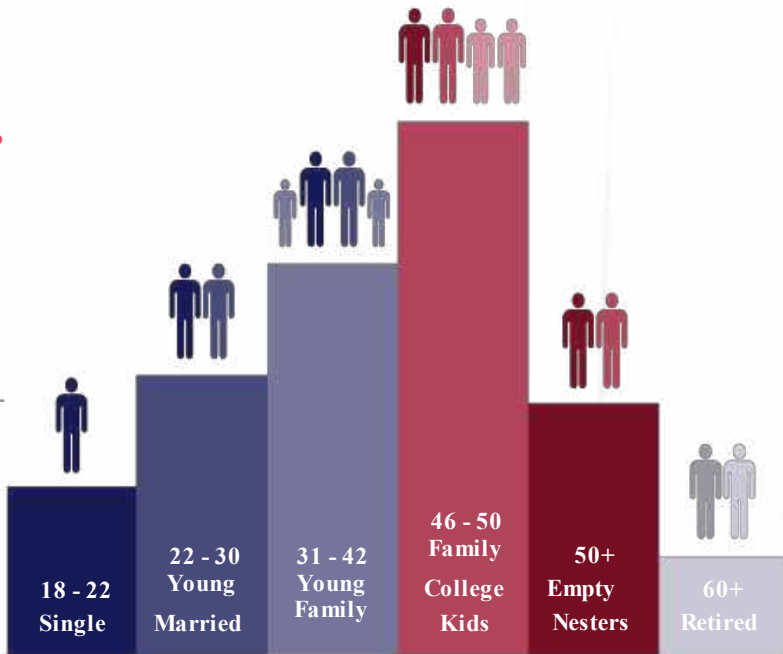
Growing Wealth is a Magnet

Projected Growth by Age Group (2012-2017)

Peak Spending Yet To Be Reached



Change in Spending at each Age & Stage of Life

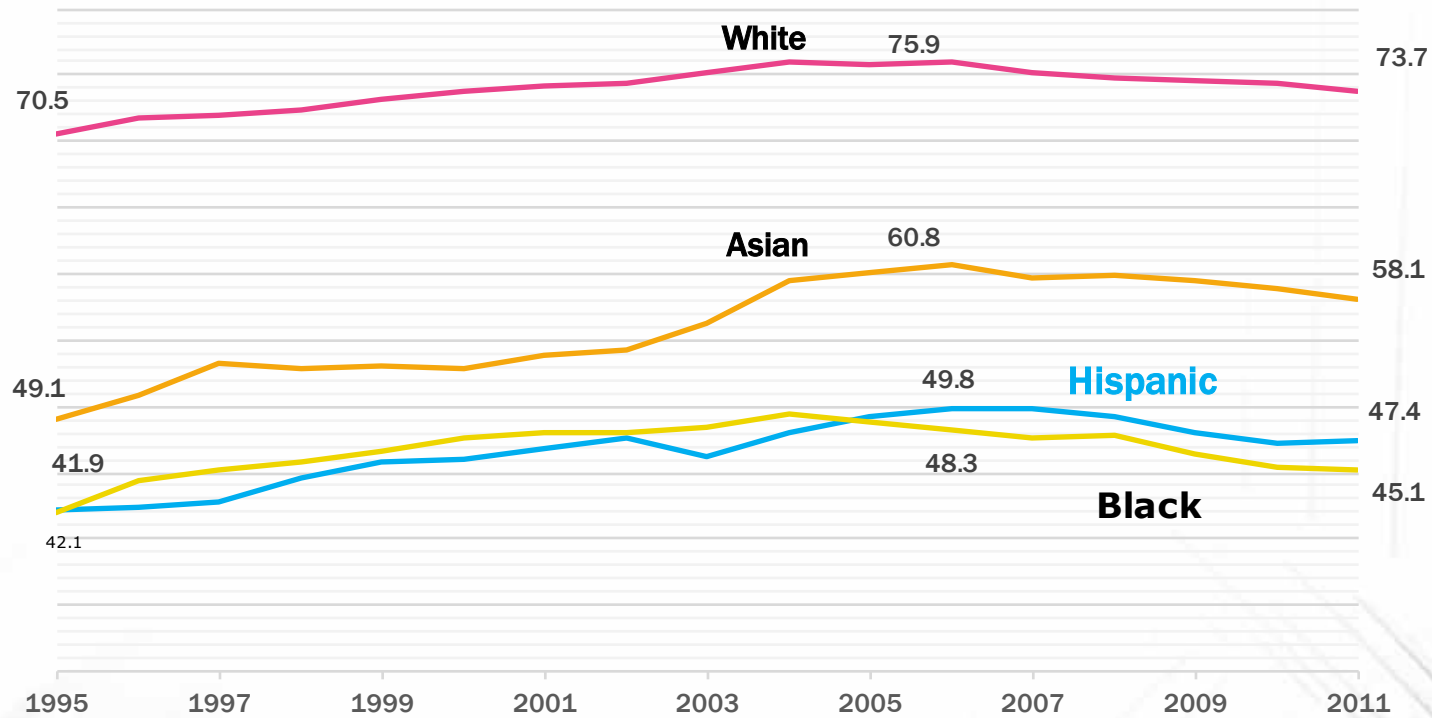


■ Hispanic ■ Non-Hispanic



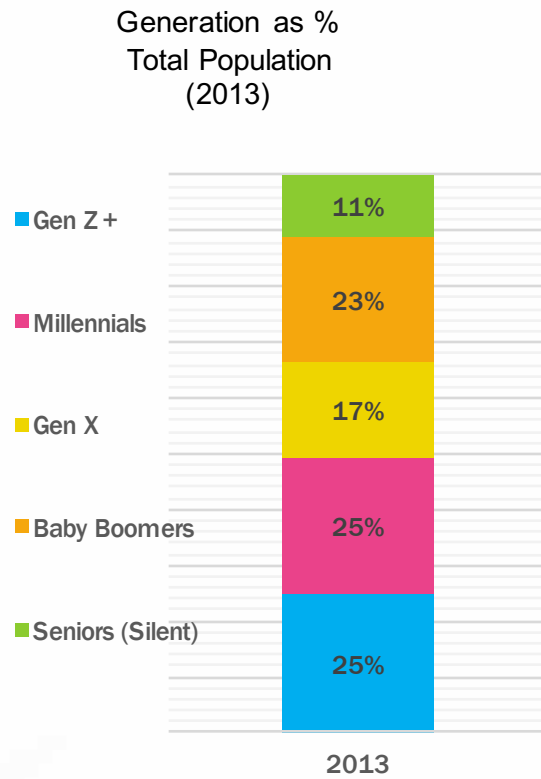
Source: Harry S. Dent, Jr., author of *The Great Crash Ahead* and editor of *Boom & Bust* and U.S. Census Bureau, *Projections of the National Population, 2012*

Homeownership Rates, 1995-2011



Source: Pew Hispanic Center analysis of Current Population Survey (CPS) data, 1995-2011.

Millennials Will Sustain the Momentum



Millennials – Demographic Realities



**of all
Millennials
are
Hispanics**



**of all
Hispanics
are
Millennials**



Empowering Latino Leaders

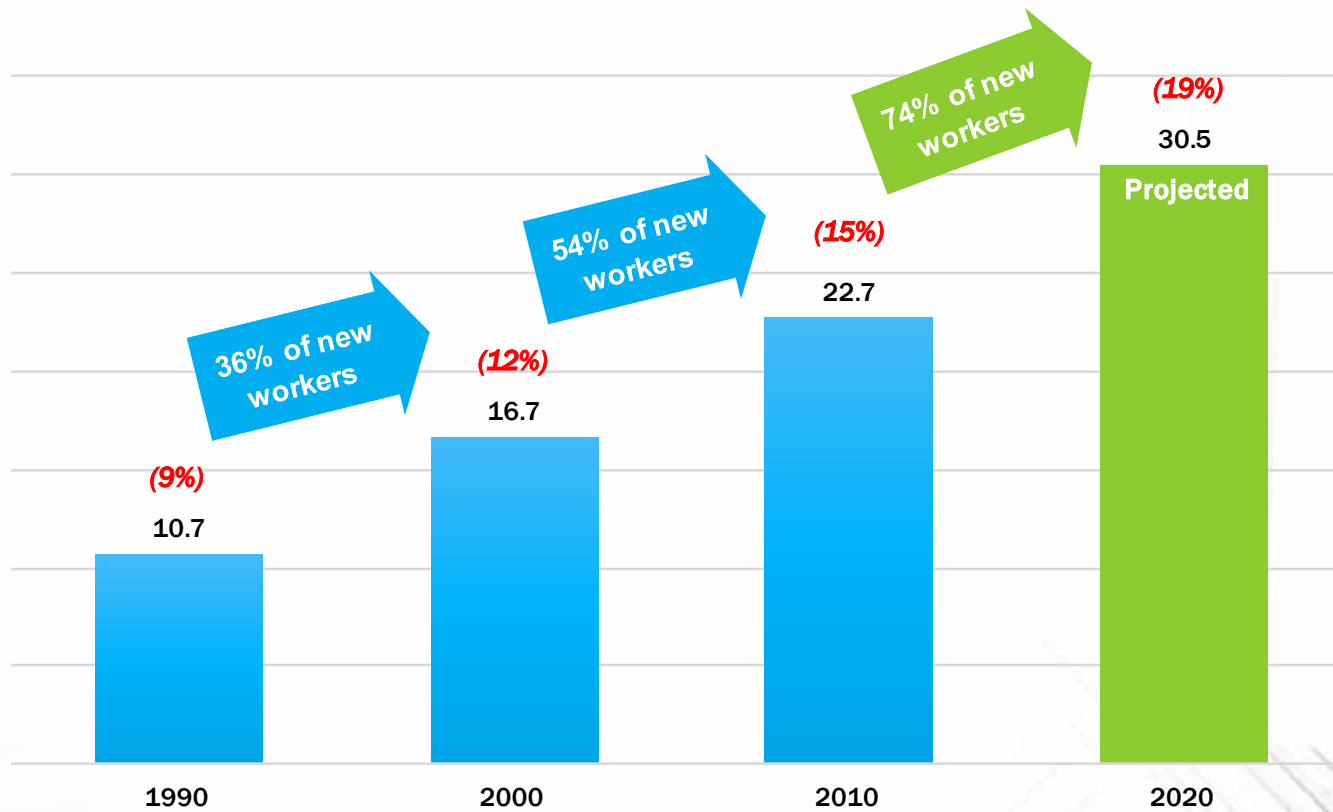
Source: U.S. Census Bureau 2012, GCA analysis

Latinos Spark America's Growing Workforce



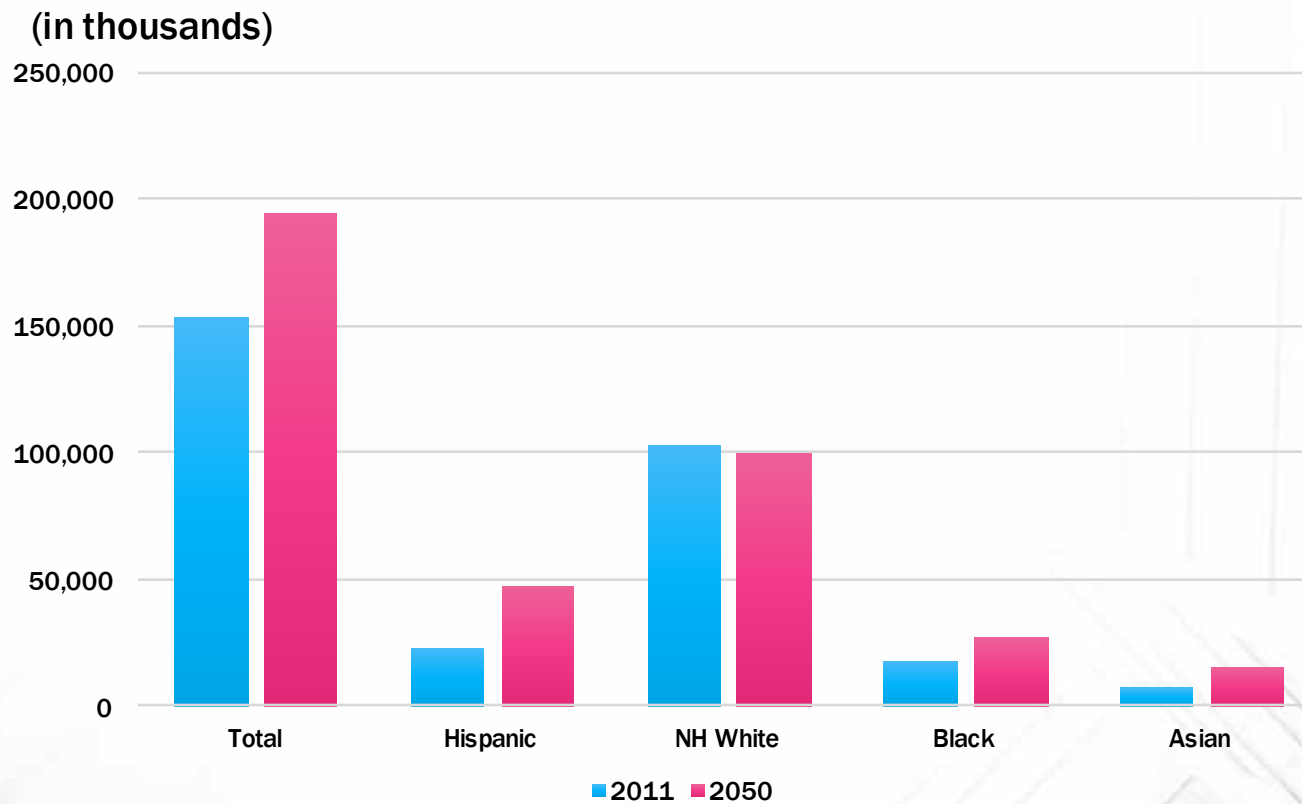
Hispanics are the Future Workforce

(in millions)



Source: U.S. Bureau of Labor Statistics. Employment Projections. 2010-20

Civilian Labor Force 2011 and Projected 2050



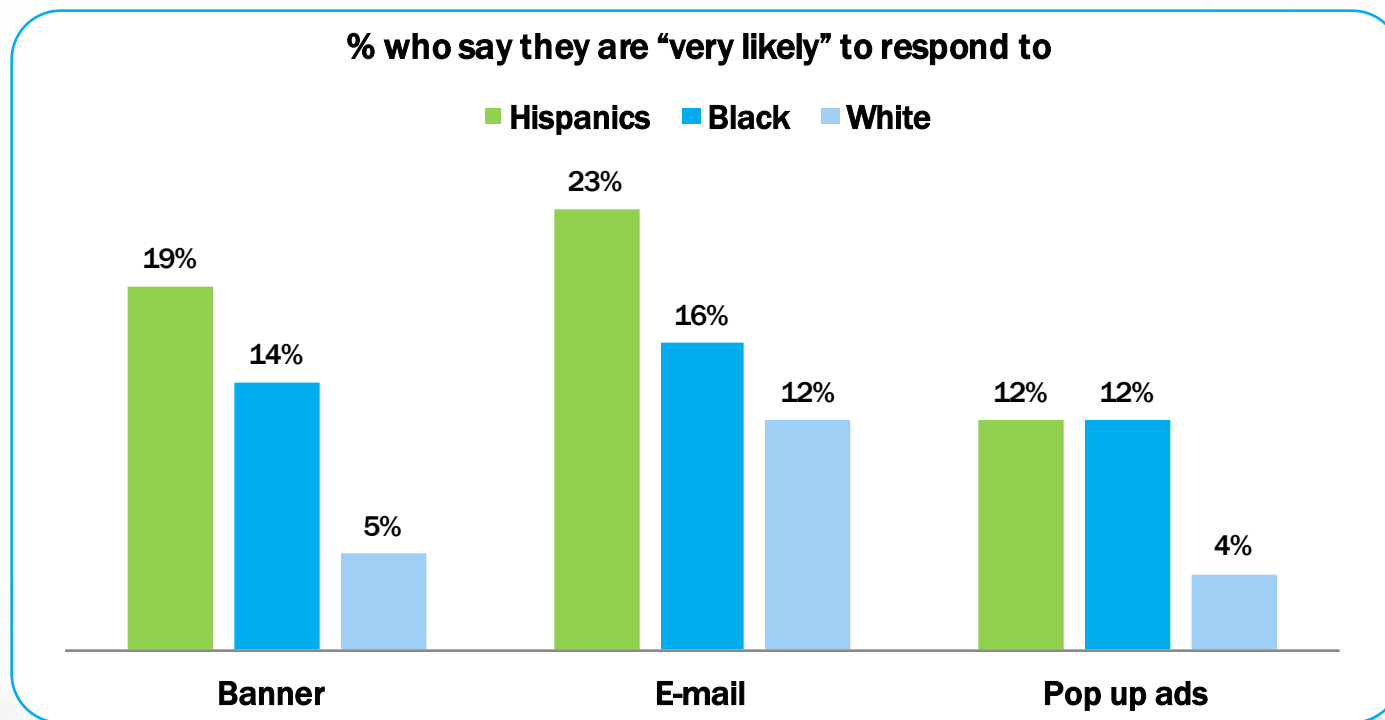
Source: Bureau of Labor Statistics, *Labor Force Characteristics by Race and Ethnicity, 2011 and A New Look at Long-term Labor Force Projections to 2050*

Latinos Like Digital Media

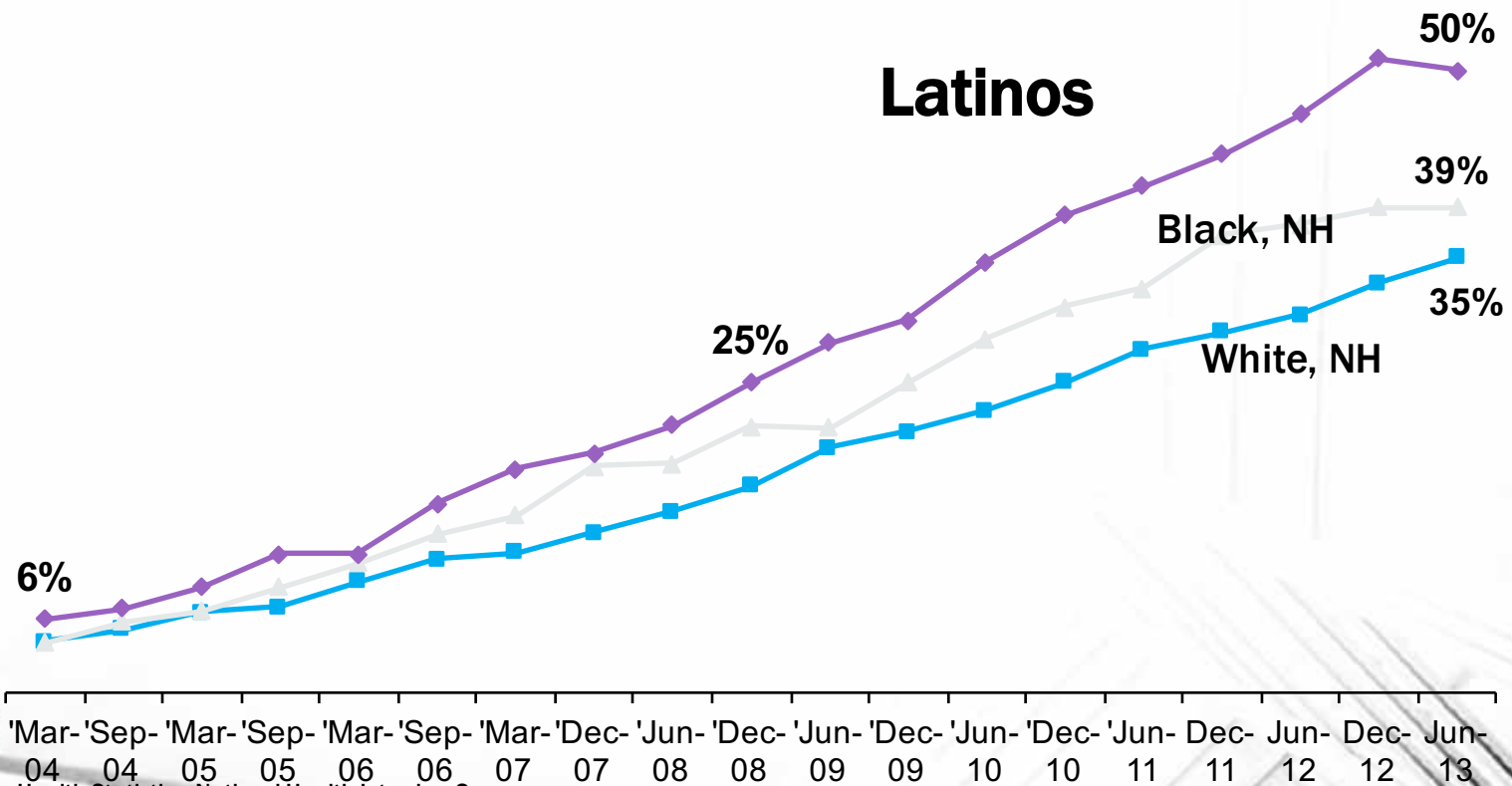


New Mainstream Uses and Responds to Digital Platforms & Media

Hispanics respond most to new forms of digital marketing media



Share of Adults who Reside in Cellphone-Only Households, 2004-2013



Source: National Center for Health Statistics, National Health Interview Survey

The Economist
Cover Story, March 14, 2015



Still, Challenges Persist Especially in the Leadership Pipeline



3.7%

Fortune 100 board seats are held by Hispanics

3.0%

Fortune 500

1.0%

Fortune 1000



Progress is Slow Despite Room at the Top

	Metric	Example	Value (2015)	Current Value
Banking	Chairman or CEO, Top 10 banks by assets	N/A	0	0
Academic Institutions	President, top 50 undergraduate institutions	N/A	0	0
Hollywood Studios	Chief / Head top 10 studios by box office revenue	N/A	none	none
Top Foundations	President and Trustees, top 10 foundations by assets	N/A	0	0
Silicon Valley	Chairman or CEO, Top 10 tech companies by revenue	N/A	0	0
Fortune 100	CEO of Fortune 100 companies	Oscar Muñoz (United Airlines)	1 CEO	1 CEO



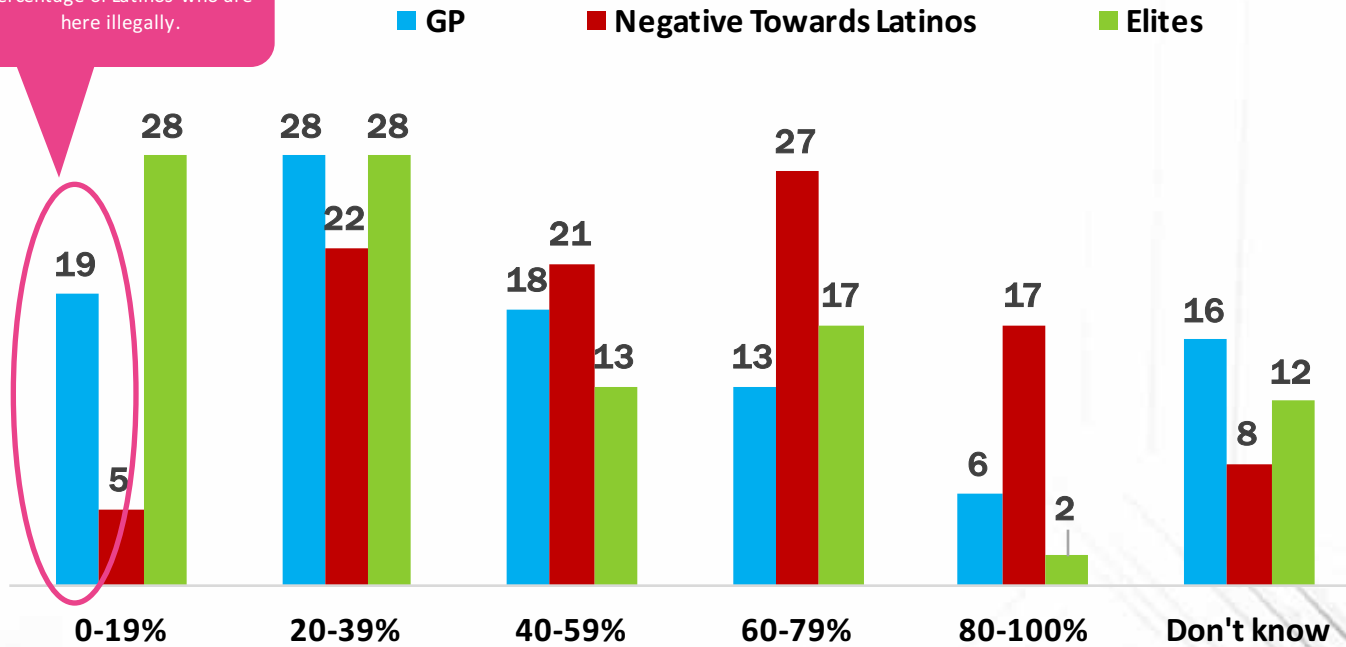
Source: Federal Reserve, U.S. News and World Report, School websites, Box Office Mojo, Studio websites, The Foundation Center, various Foundation websites, Fortune and The Wall Street Journal

Myths About Latinos Persist in Media, Political Discourse

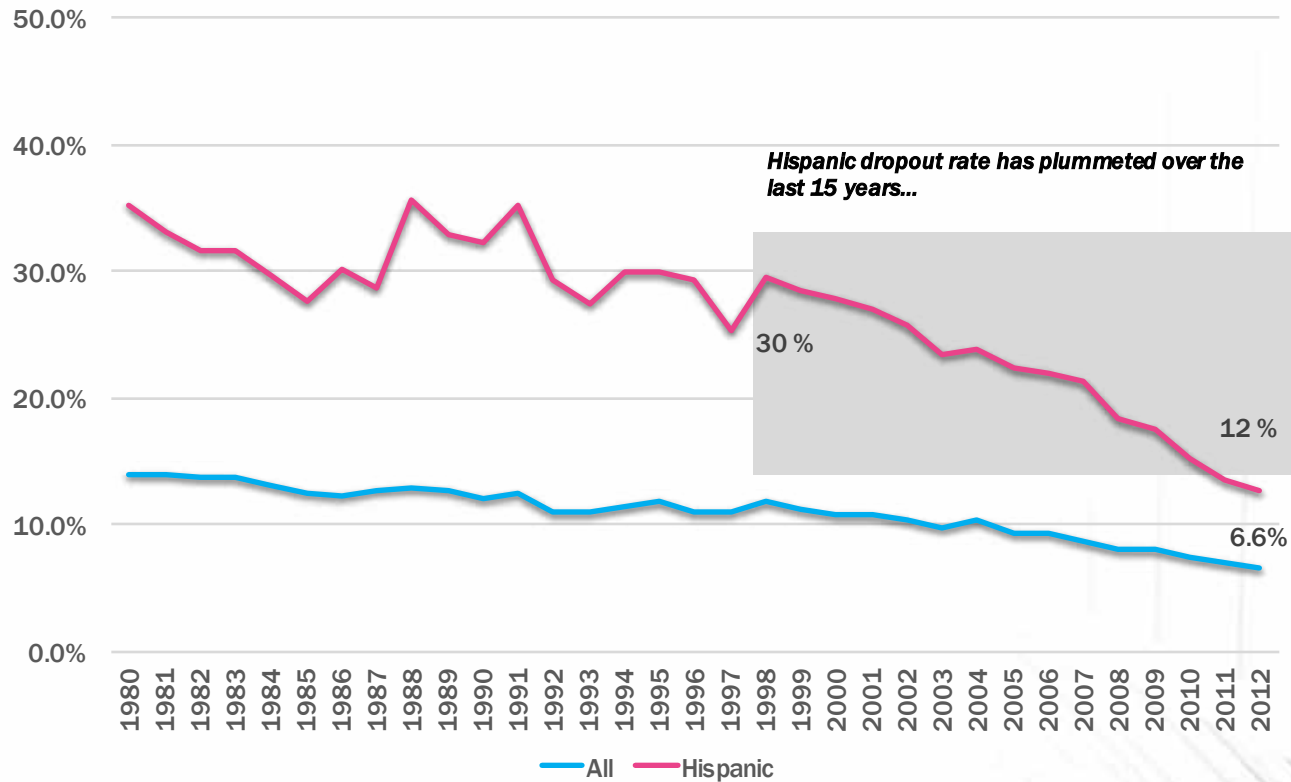
- 1. Latinos are taking our jobs.**
- 2. Unauthorized workers don't pay taxes.**
- 3. Unauthorized workers are a burden on society.**
- 4. Latinos are "different" from "regular Americans."**
- 5. Latino immigrants don't want to learn or speak English.**
- 6. Latinos succeed in personal services, and in sports and entertainment, but not as entrepreneurs – or in business and professional services.**

Undocumented Latinos Number Under 19%. But more than one-third of Americans believe, incorrectly, that the number exceeds 60%

Only 1 in 5 knows the correct percentage of Latinos who are here illegally.



Latino Dropout Rate Plummet

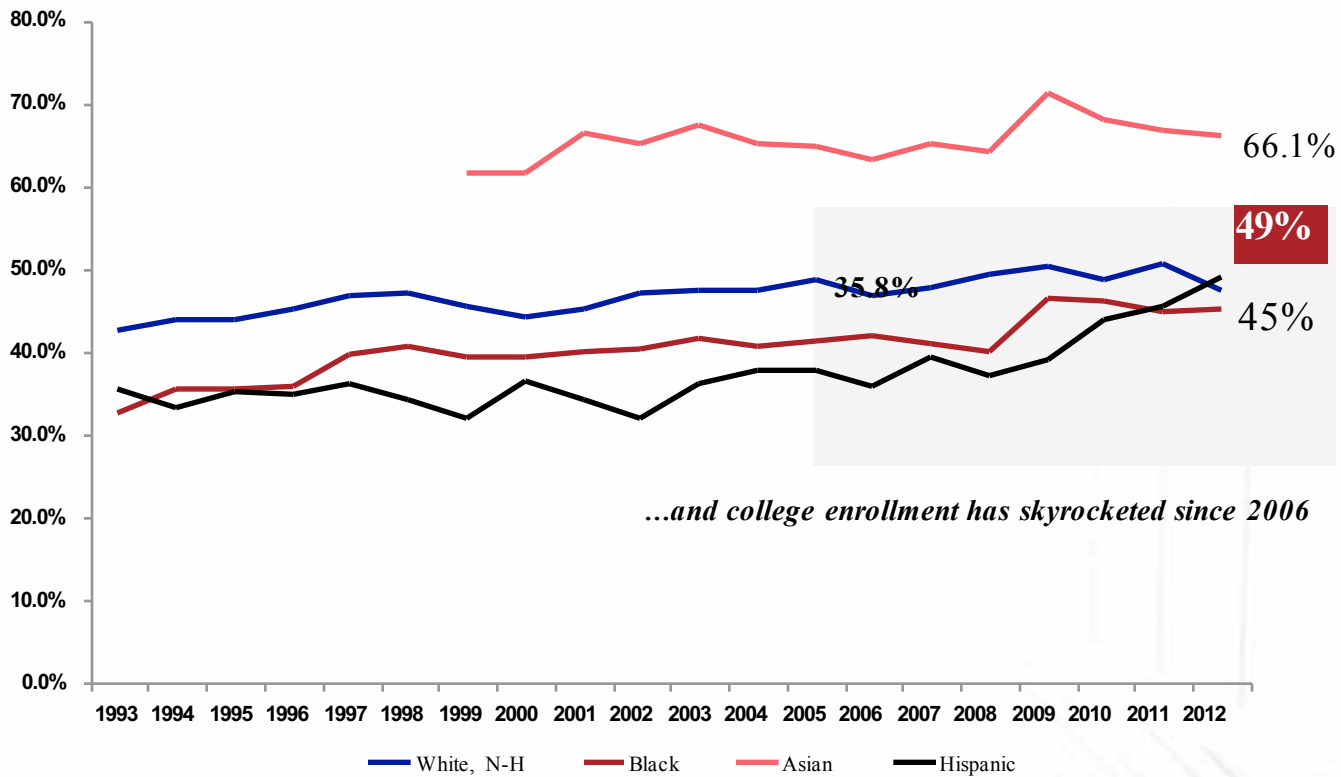


It is often quoted that 50% of Latinos drop out of high school but that figure is wildly overstated – and the trend has been improving dramatically



Source: U.S. Department of Commerce, U.S. Census Bureau, Current Population Survey (CPS), October 1967 through 2012, prepared May 2013

Hispanic College Enrollment Passes Whites



...and college enrollment has skyrocketed since 2006

Hispanic college enrollment has doubled since 2006 and grown more than 1.5x the rate of Hispanic population growth



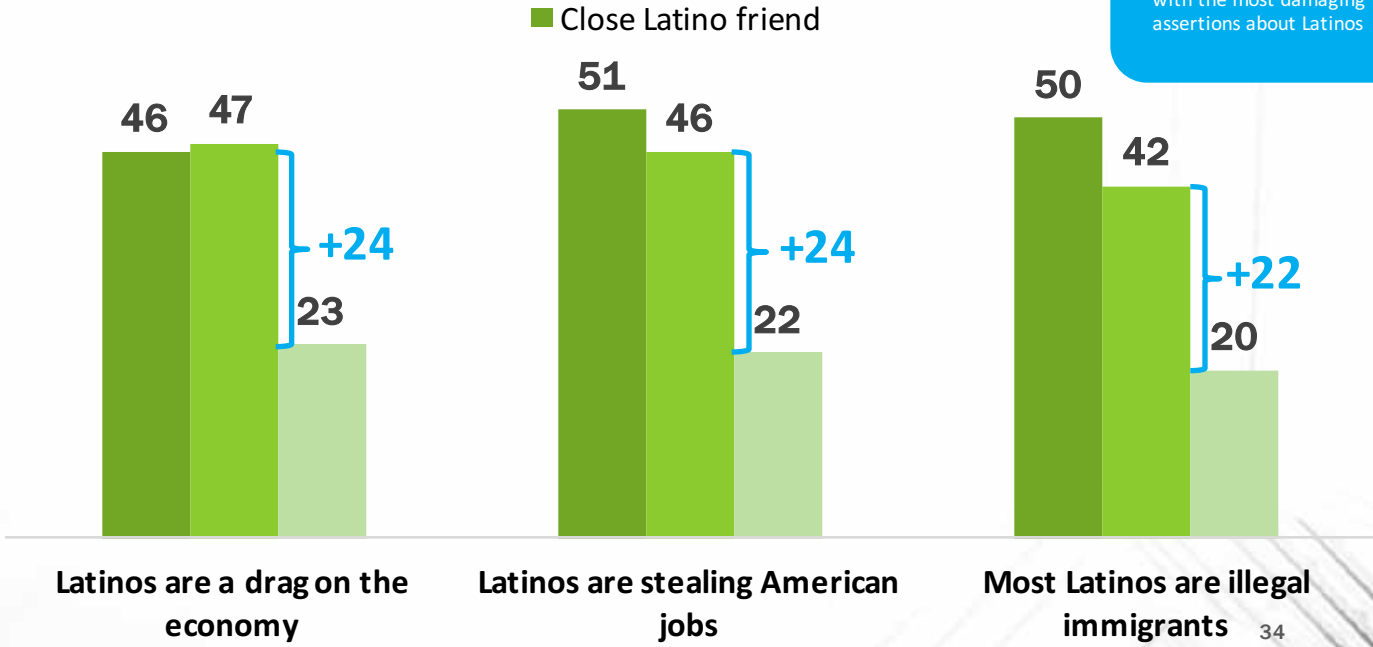
Source: U.S. Census Bureau, Current Population Survey, 1967 to 2012. Data for the "Asian" category shown prior to 2003 consists of those identifying themselves as "Asian or Pacific Islanders"

Familiarity Breeds Respect

Having Latino acquaintances reduces the power of negative attributes

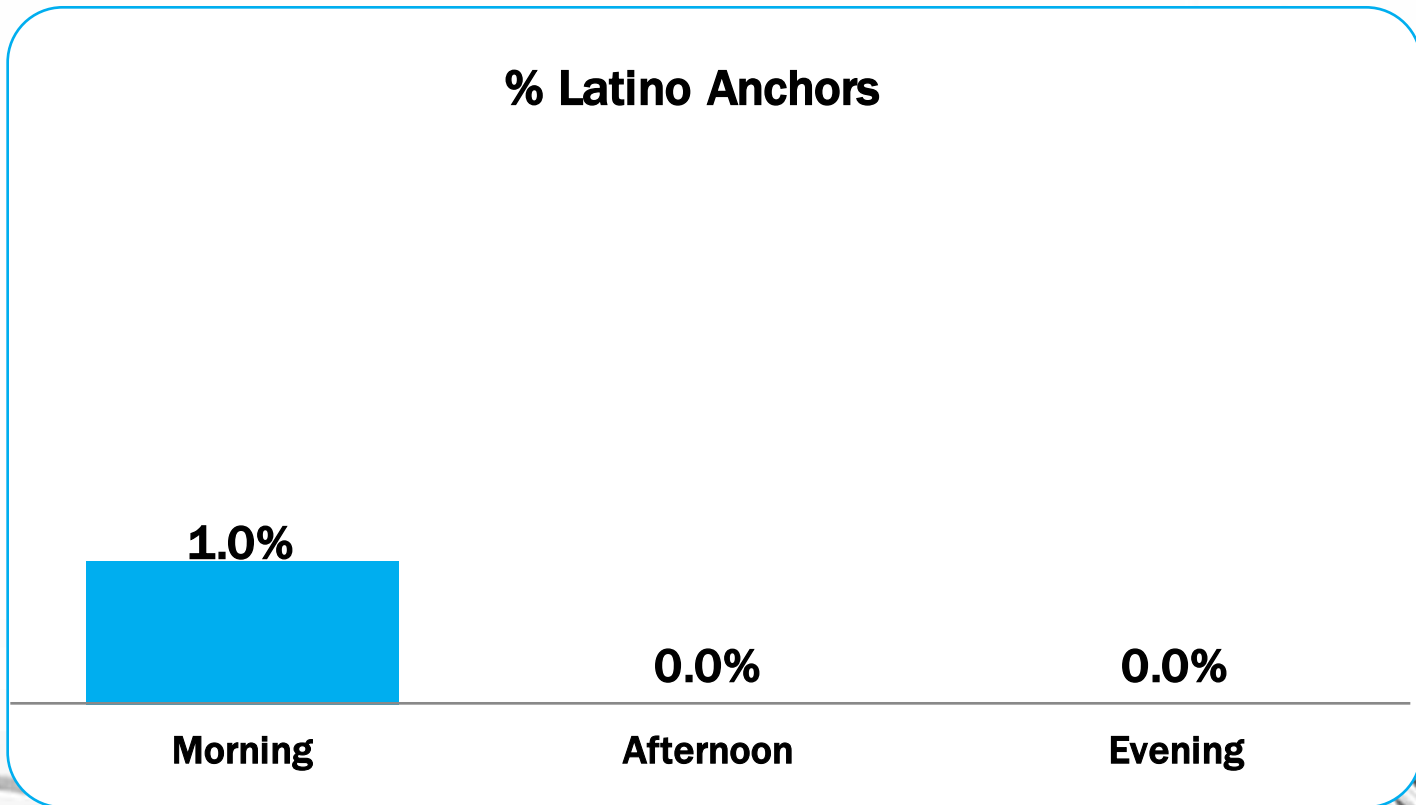
Disagreement with Negative Attributes
Showing those who "strongly disagree" with top negative attributes about Latinos,

Having Latino acquaintances more than doubles the likelihood of disagreeing with the most damaging assertions about Latinos



Hispanics in Network News

Latinos largely absent as network news anchors



Conclusions

- 1. The Assets of the New American Mainstream are Huge and Growing.**
- 2. Latino Assets Soar, Leading the New American Mainstream.**
- 3. Latinos Reframing & Repositioning a Brand Tarnished by Entertainment Media and Politics, especially the run-up to the 2016 election.**
- 4. Latinos Now Working to Cultivate and Grow Brand Equity.**

Thank You

