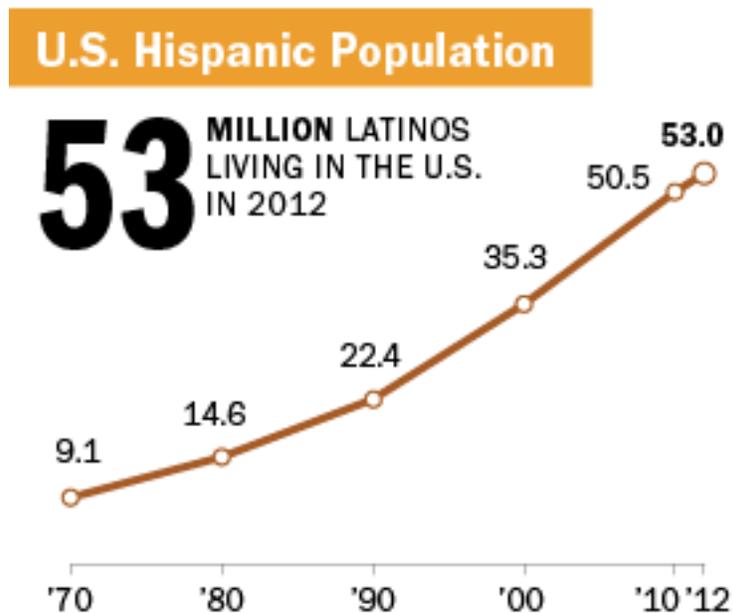


The U.S. Hispanic Audience, by Univision

Executive Summary

While we have always been part of the American fabric, the Decennial Census only began tracking the Hispanic population in 1970. Since then, the number of Latinos living in the United States has increased sixfold, growing from 9.1 million people to 53 million in 2012.



Source: <http://www.pewresearch.org/fact-tank/2014/02/26/the-u-s-hispanic-population-has-increased-sixfold-since-1970/>

With increased presence, comes increased power and the 2012 Presidential elections demonstrated that the Latino vote will be critical to every election cycle going forward, and we will soon see how it influences the upcoming midterm elections.

What is undeniable is the effect Latinos are having on this country. They influence everything from food to fashion trends and are fueling the economy with job growth and homeownership. Bottom line, Latinos are becoming a force to be reckoned with as they become the backbone of America's middle class and increase their buying power to over \$2 trillion by 2025.

The US Hispanic Audience

According to the Pew Hispanic Center, Latinos are the nation's largest minority group and among its fastest growing populations. The latest figures from the U.S. Census Bureau (2013) indicate that the Latino population in 2012 was just over 53 million, making up 17% of the U.S. population.¹

The Latino Population in the United States grows by over 1.5 million people a year. Census data shows that over 64% of the Latino Population growth in the past decade came from nativity or births in the U.S., while foreign-born Latinos accounted for little more than one third of the total, at 35.5%. This shift from foreign-born to US-born was first noticed in the 2000 Census and continues to change the profile of Latinos in the United States.

Table 4

STATISTICAL PORTRAIT OF HISPANICS IN THE UNITED STATES, 2012

Hispanic Population, by Nativity: 2000 and 2012

Universe: 2000 and 2012 Hispanic resident population

	2012 population	2000 population	Percent, 2012	Percent, 2000
Native born	34,118,237	21,072,230	64.5	59.9
Foreign born	18,814,246	14,132,250	35.5	40.1
Citizen	6,032,710	3,917,885	11.4	11.1
Non-citizen	12,781,536	10,214,365	24.1	29.0
Total	52,932,483	35,204,480	100.0	100.0

Source: Pew Research Center's Hispanic Trends Project tabulations of 2000 Census (5% IPUMS) and 2012 American Community Survey (1% IPUMS)

PewResearchCenter

Another big shift that has been tracked both in the 2000 and 2010 Census is the dispersion of the Hispanic population across the United States. While still highly concentrated in eight states, the fact is that growth of Latinos in non-traditional areas has exploded over the past 15 years.

¹ Pew Research Center, August 29, 2013. Mapping the Latino Population, By State, County and City

Hispanic population growth

According to the 2010 census, the Hispanic population accounted for 56% of the total population growth in the United States, growing from 35.6 million in 2000 to 52 million in 2012. The Latino growth rate from 2000 to 2010 was 47%, which is four times the growth rate for the total U.S. population, which was only 5% during the same period.

In terms of share of population, Hispanics accounted for 16.3% of the total U.S. population in 2010, up four percentage points from 2000. The Census projects that the Latino community will continue to grow at a much faster rate than any other group in the United States for the next several decades and is expected to reach 66 million by 2020 and 108 million by 2040.²

When analyzing the 2010 census data, it is interesting to note that the three main country groups -- Mexicans, Puerto Ricans and Cubans -- actually increased in size from 2000 to 2010, in spite of the fact the immigration nearly came to halt during the Great Recession (2007-2009). That just speaks to the power of the Latino baby boom, which accounts for one in every four babies born in the United States today.

Hispanic population distribution

Perhaps one of the most fascinating trends demographers have noticed since the year 2000 is both how the Latino population continues to be concentrated in certain key states, while also growing very quickly in what has up until now been considered non-traditional areas to find Latinos living.

The eight U.S. states with the largest Hispanic population – California, Texas, Florida, Arizona, New Jersey, Colorado, New York and Illinois – contain nearly three-quarters of all U.S. Hispanics³. In fact, in a number of major markets (DMA's) there are more Hispanics than any other ethnic group, including Los Angeles (45% Hispanic) and Miami (47% Hispanic). Hispanics also make up a sizeable part of the population in

² Cartagena, Chiqui, "Latino Boom II, Catch the Biggest Demographic Wave Since the Baby Boom" © Copyright 2013, Hispanic Population Growth 1970-2050, pg. 35

³ Pew Research Center, August 29, 2013. Mapping the Latino Population, By State, County and City

many northern cities including New York (21% Hispanic) and Chicago (20% Hispanic). But the growth of the Hispanic population is happening across the country, not just in these traditional Latino markets.

According to the Pew Hispanic Center, over the last decade, some of the fastest growing areas for the Latino population are located in the southeastern U.S., which experienced triple digit growth from 2000 to 2011. See Table 1 and the map of growth by state below.

Table 1
Growth in Hispanic Population among
10 Fastest Growing Hispanic States,
2000-2011

State	Population in 2000	Population in 2011	% Change, 2000-2011
Alabama	72,152	186,209	158
South Carolina	94,652	240,884	154
Tennessee	116,692	296,266	154
Kentucky	56,922	132,267	132
South Dakota	10,101	23,158	129
Arkansas	85,303	190,192	123
North Carolina	377,084	828,210	120
Mississippi	37,301	81,088	117
Maryland	230,992	488,943	112
Georgia	434,375	879,858	103

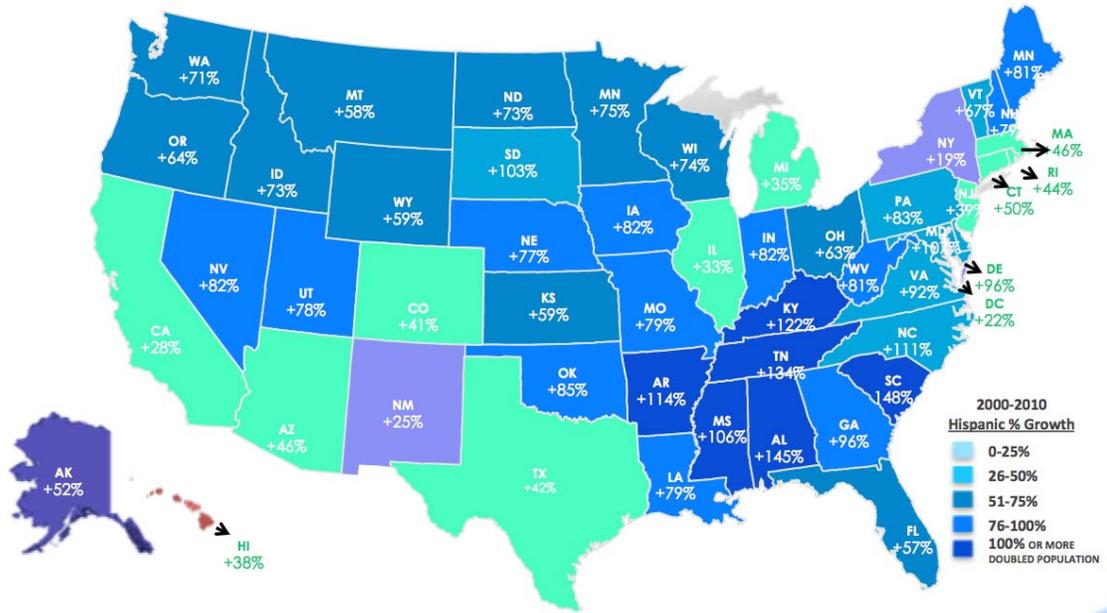
Notes: The states shown are the 10 largest by percent change in Hispanic population from 2000 to 2011. The overall U.S. Hispanic population grew 47.5% from 2000 to 2011.

Source: Pew Research Center tabulations of the 2000 Census (5% IPUMS) and 2011 ACS (1% IPUMS)

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In The Last Decade Non-Traditional Hispanic States Grew Aggressively

2000 Census – 2010 Census Hispanic % Growth

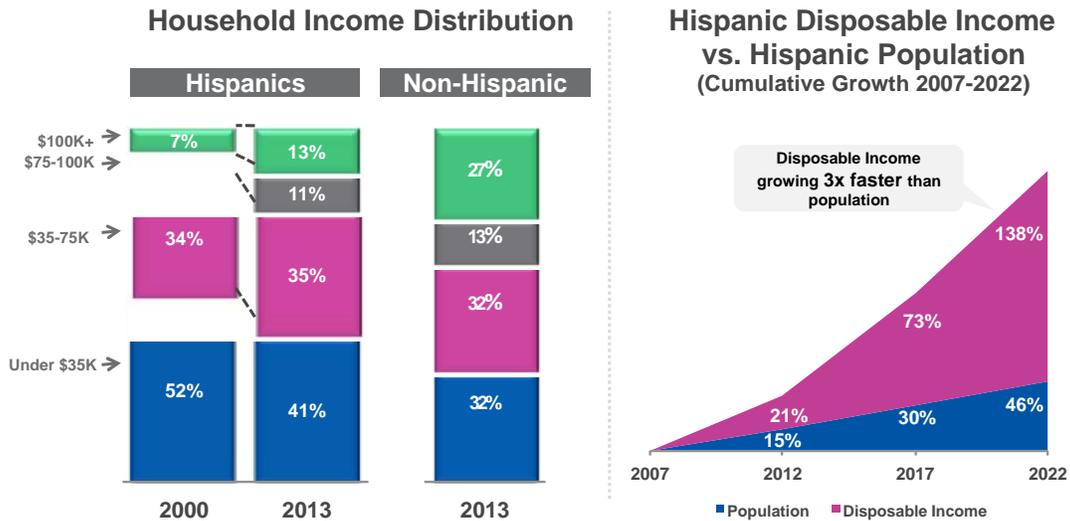


Of course, Hispanics of Mexican origin continue to be the group with the largest presence in the U.S., accounting for 65% of the total Hispanic population. “However in 11 states—Florida, New York, New Jersey, Connecticut, District of Columbia, Hawaii, Maryland, New Hampshire, Pennsylvania, Massachusetts and Rhode Island—Mexicans are not the dominant Hispanic group,” says the Pew Hispanic Center in its report Mapping the Latino Population, By State, County and City, published in 2013.

Hispanic buying power

The Hispanic community is largely seen today as part of America’s emerging middle class with spending power. The Household income distribution since 2000 shows that the percentage of Hispanic Households earning more than \$100,000 had almost doubled by 2013, while the percentage of homes earning less than \$35,000 had declined 11 percentage points, see chart below.

An Emerging Middle Class with Spending Power



Source: Geoscape, American MarketScape DataStream 2013 Series. Produced by the Geoscape® Intelligence System (GIS) The data herein contained will be used exclusively for advertising/media decisions related to Univision. Any other use must be explicitly licensed from Geoscape®, IHS Global Insight – 2013 Hispanic Market Monitor. Based on Hispanic disposable income vs. Hispanic population growth

Hispanic buying power had reached \$1.4 Trillion in 2012 which represents 2.2% of the U.S.'s total wealth, but according to a 2014 Study conducted by the Saint Louis Federal reserve Bank estimates that Hispanic families will own between 2.6% (\$2.5 trillion) and 3.2% (\$4.4 trillion) of U.S. wealth by 2025.⁴ This increase in disposable income correlates to the fact that Hispanics are fueling 74% of the employment growth from 2010-2020 when they will represent almost 20% of the nation's total labor force, up from 15% in 2011; and the fact that Hispanics are also driving homeownership across the United States, representing 17% of projected new homeowners from 2012 to 2017.

Hispanic youth/families

⁴ Emmons, William, and Noeth, Bryan, In The Balance, Issue 8, 2014. "Hispanic Population's Share of Wealth Likely to Increase by 2025" Federal Reserve Bank of Saint Louis

In 2012, for the first time, the total number of births from racial and ethnic minorities surpassed the total number of births from Whites in the United States. This fact made headlines and put in perspective the changing face of America.

The numbers tell the story better than anything else. In 2010, whites made up 56% of young people and 80% of seniors. So while the overall U.S. population is graying, over 65% of Latinos are under the age of 35, and 75% are under the age of 45. In fact, although Latinos overall represent 17% of the total population today, when you look at the percentages they represent in every age group from birth through thirty-five years of age, the Latino share per age group is above 20% and in the birth to five age group, we represent 25% already, according to Ad Age's 2012 Edition of the Hispanic Fact Pack, which analyzed Bureau of the Census data from the 2010 American Community Survey (ACS).

Share of 2010 Hispanic Population by Age		
Age	<i>U.S. Hispanic Population in Millions</i>	<i>Hispanics as % of U.S. Population</i>
Under 5	5.1	25.3%
5-9	4.8	23.8
10-14	4.6	22.1
15-19	4.5	20.6
20-24	4.4	20.2
25-29	4.3	20.3
30-34	4.1	20.7
35-44	7.4	17.9
45-54	5.5	12.2
55-64	3.2	8.9
65-74	1.7	7.7
75-84	0.9	6.6
85+	0.3	5.2
Total	50.5	16.3

Source: *Advertising Age's Hispanic Fact Pack 2012*, Published July 2012

Hispanic millennials, Culture and Language

Among younger generations, Latino Millennials (aged 21-34) comprise nearly 20% of the U.S. youth. Of those Millennials, an increasing subset identify as bilingual – in the past decade alone, the number of bilingual speakers has increased 73%, beating out English-dominant speakers to become the largest Hispanic subgroup. With size comes influence – as the demographic profile of Hispanics evolves, language is an important cultural attribute that nobody can ignore.

The Nielsen Company breaks down the language usage among Hispanic adults by tracking the language in which Hispanics consume media. Their 2012 report shows that a majority of Latinos, 56%, still consume media only or mostly in Spanish, but also acknowledges the emergence of English-language viewing amongst Latinos, with 44% watching mostly or only in English.

According to *The Culture Connection, How Hispanic Identity Influences Millennials*, based on primary research conducted by Burke for Univision Communications, Inc. and published by *Advertising Age* in May 2012, Spanish is a social “glue” Hispanic millennials use to cement their social relationships, with 74% of “high culturally connected” Hispanic millennials saying “most of my friends can at least understand some Spanish.”

The study goes on to say that a widely held hypothesis that American-born Hispanic Millennials may have lost their cultural roots, habits, and practices is not true. In fact, according to the study, 65% of U.S. born millennials have a high Cultural Connection. What this means is that Millennial Hispanics retain their Hispanic cultural identity and live in a bi-cultural world. Another point is that younger Millennials (18-24 year olds) also have a strong connection to culture with half of the 18-24 year old Hispanics scoring high or medium on the Cultural Connection Index.

But it is not only about identity, what this study shows is that Hispanic Millennials are also keeping their culture alive. Sixty-one percent of Hispanic Millennials agree that passing on Latino traditions and customs to children is important and more than 50% agree that observing Latino traditions, customs and holidays through parties, events and celebrations is important. This suggests that Hispanic culture gets passed across generations and continues to run deep in the population.

Hispanics and education

While high school graduation rates for Latino students have increased steadily over the past couple of years— increasing a stunning 10% from 2008 to 2010 alone—only 73% of Latino students received a high school diploma in the graduating class of 2010, the latest for which statistics are available, compared to 79% of white students and 81 percent of Asian American students. The fact is that bridging the educational gap of Latino students is now seen as a demographic imperative for this country.

The irony is that both young Latinos and their parents believe that education is very important for success in life. In fact, nine in ten (89 percent) Latinos believe that in order to get ahead in life these days, it is necessary to get a college degree. That is 15% higher than the general population (74%). However, in 2009, only 48% of Latinos planned to go to college versus 60% of the general population, according to a study published by the Pew Hispanic Center.⁵

The good news is that more and more people in schools, government, and business are aware of the educational gaps and are starting to work on solutions to help Latino students and families overcome some very real obstacles they face when trying to accomplish this part of their American Dream.

Hispanic influence on mainstream

From food to fashion to financial services, the rapidly growing Latino population will have a huge and positive impact in the United States not only in the next five years, but for decades to come.

A study by Experian Marketing Services, in collaboration with the Hispanic agency Wing, set out specifically to determine just how much Latinos are influencing non-Latinos in the United States and how the

⁵ Lopez, Mark Hugo, Latinos and Education: Explaining the Attainment Gap, Copyright © 2009. Published by the Pew Hispanic Center, October 7, 2009.

influence is expressed in actual consumer behavior of non-Latinos. The Latino Influence Project, which was published in November 2012, shows just how much Latinos are influencing their non-Hispanic neighbors in a wide array of consumer areas, such as technology, fashion, food, beverages, sports, music, and travel.

Hispanic influence on politics

“Defying predictions that their participation would be lackluster, Latinos turned out in record numbers on Tuesday and voted for President Obama by broad margins, tipping the balance in at least three swing states and securing their position as an organized force in American politics with the power to move national elections,” wrote Julia Preston and Fernanda Santos on November 7, 2012 in *The New York Times*. “Overall, according to exit polls not yet finalized by Edison Research, Mr. Obama won 7% of the Hispanic vote while Mitt Romney won 27%. The gap of 44 percentage points was even greater than Mr. Obama’s 36-point advantage over John McCain in 2008,” they added.

When you analyze the data on how the Latino vote helped Obama win key swing states, you realize the real power of the Latino vote. As we all know by now, in the key states of Florida, Ohio, Colorado, Nevada, and New Mexico, the Latino electorate overwhelmingly helped Obama win. Obama took Florida with 58% of the Hispanic vote, which raised quite a few eyebrows since much of the pro-Obama vote came from younger Cubans, a community that has traditionally been staunchly Republican. In Ohio, a state in which Latinos only represent 3% of the total electorate, 82% of Hispanics voted for Obama. According to data from the ImpreMedia-Latino Decisions election night exit poll, the number of votes Obama needed to win Ohio was 103,175 and the number of votes he got from Latinos in Ohio was 103,481.

But many experts say 2012 was only the tip of the iceberg. According to Pew Hispanic Center projections, Hispanics will account for 40% of the growth in the eligible electorate in the U.S. between now and 2030, at which time forty million Hispanics will be eligible to vote, up from 23.7 million now. The Pew study, *An Awakened Giant: The Hispanic Electorate is Likely to Double by 2030*, published the week after the 2012 election, went on to say that “if Hispanics’ relatively low voter participation and naturalization rates were to increase to the levels of other groups, the

number of votes that Hispanics actually cast in future elections would easily double within two decades.”⁶

What the Future Holds

Since colonial times, this country has been shaped by successive groups of immigrants. But no group has had the ability to influence the country as much as the Hispanic population does today. The size of the Hispanic population; the concentration in key markets such as Los Angeles, Miami and New York; Hispanic economic power; growing numbers of voters; and the enabling powers of travel and technology, all contribute to a future in which the Latino impact will be strongly felt. The exact shape of that impact is difficult to predict. Changing patterns of immigration mean that more and more of the Hispanic population will be U.S. born. Yet, more than perhaps any group before them, American Latinos are demonstrating a commitment to their language, culture and traditions. Whether the metaphor is “melting pot” or “salad bowl,” Hispanics will be a significant ingredient.

⁶ Taylor, Paul, Ana Gonzalez-Barrera, Jeffrey S. Passel and Mark Hugo Lopez, *An Awakened Giant: The Hispanic Electorate Is Likely to Double by 2030*, Copyright ~ 2012. Published by the Pew Hispanic Center, November 14, 2012.