

# Leverage Hispanic Media Insights for Brand Impact

Victor Paredes, Executive Director of Cultural Strategy

Jack Mackinnon, Senior Director, Cultural Insights

*A Special Presentation for the Hispanic Marketing Council*

*January 30, 2024*

# Today's Presenters



## **Victor Paredes**

### Executive Director of Cultural Strategy

Victor Paredes leverages his expertise in inclusive marketing and advertising in combination with Collage's proprietary data and insights, to support clients. He is a successful marketing and advertising executive with proven experience in building practices that drive brand equity, sales, traffic, and qualified leads. His marketing experience spans sectors such as entertainment, hospitality, healthcare, consumer packaged goods, retail, and direct to consumer services.



## **Jack Mackinnon**

### Senior Director, Cultural Insights

Jack offers deep expertise in Multicultural, Generational, LGBTQ+ consumers, and their intersection. Jack's research extends into exploring culture-at-large, investigating broader societal trends not easily categorized into typical areas of research.

# Brands Must Speak to the Hispanic Segment's Rich Cultural Identity and Their Change-Oriented

## The Big Picture

Hispanics celebrate the multitude of influences that form their **unique identities**.



The segment's embrace of heritage and tradition propels their **enthusiasm for the future**.

# Multiple Terms Are Used to Group Americans from the Latin-American Diaspora Together

Collage Identifies the Segment as Hispanic and Defines the Audience as People from Spanish-Speaking Latin American Countries

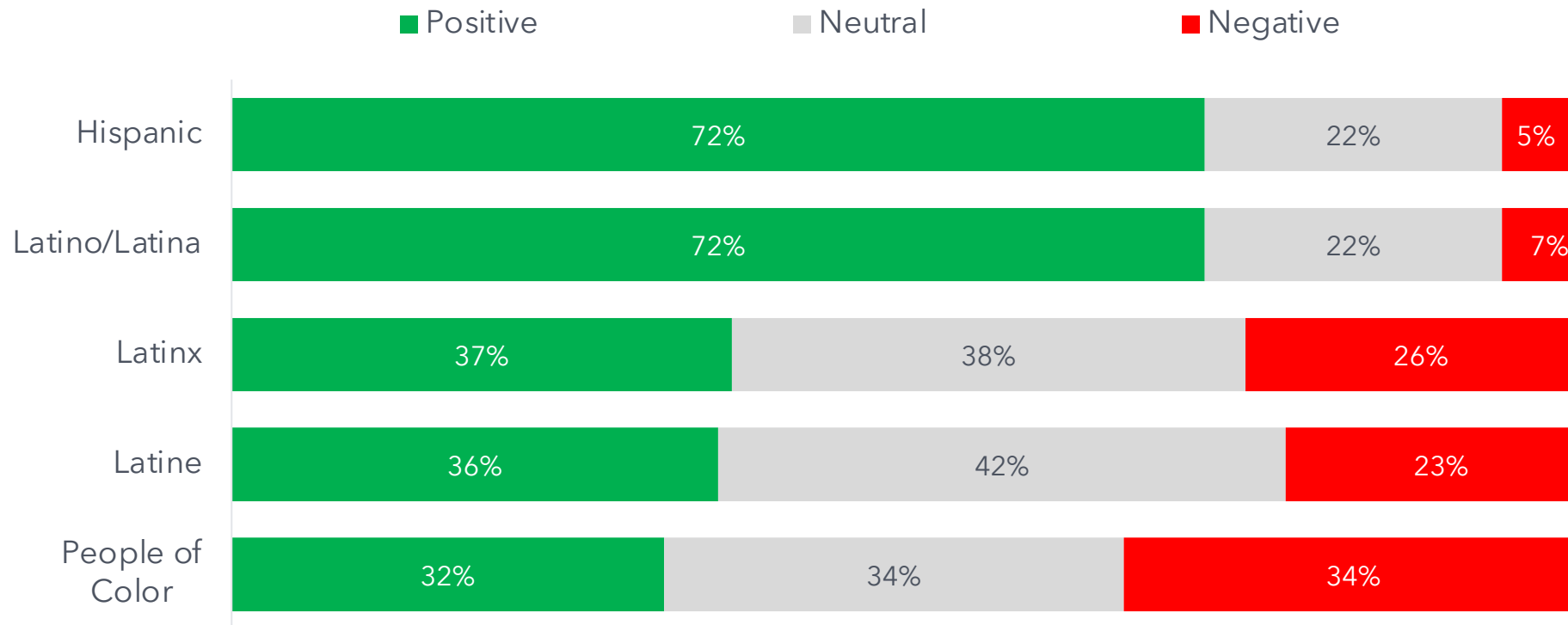
| Terminology     | Meaning and Context   |
|-----------------|---|
| Hispanic        | <p>Hispanic is focused on <b>language</b> and refers to anyone with heritage from Spanish-speaking countries. The term rose to prominence in the 1980s in the United States to develop a larger collective identity among those from different countries of origin.</p> <p>This term includes those with family from Spain and Spanish-speaking Latin American countries.</p> |
| Latino/a        | <p>Latino/a is focused on <b>geography</b> and refers to individuals with heritage from Latin America or the Caribbean, regardless of language.</p> <p>This term includes those with family from Brazil and other non-Spanish speaking countries in Latin America.</p>  |
| Latinx/Latine   | <p>Its emergence coincides with a global movement to introduce gender-neutral nouns and pronouns into romance languages whose grammar uses male or female constructions.</p> <p>Spanish-speaking countries often use the term <i>Latine</i> instead, as it is also gender-neutral and more closely adheres to Spanish grammar.</p>  |
| Person of Color | <p>Emphasizes the experiences of being “not white” in modern society.</p> <p>In recent decades, this term has evolved to include Hispanic and the AAPI communities.</p>   |

# Hispanics Continue to Feel Most Positive towards *Hispanic* and *Latino/Latina* as General Descriptors

Across Terms, Acculturated Hispanics Exhibit Greater Neutrality and Unacculturated Greater Positivity

How do you feel when the following terms are used to describe the **Hispanic/Latino** population?<sup>1</sup>

**Hispanic respondents only**



In 2020, 69% of all Hispanics were positive to *Hispanic* and 71% were positive to *Latino/Latina*<sup>2</sup>

Older Hispanic Americans are less positive to *Latinx*, *Latine*, and *Person of color* than younger Americans



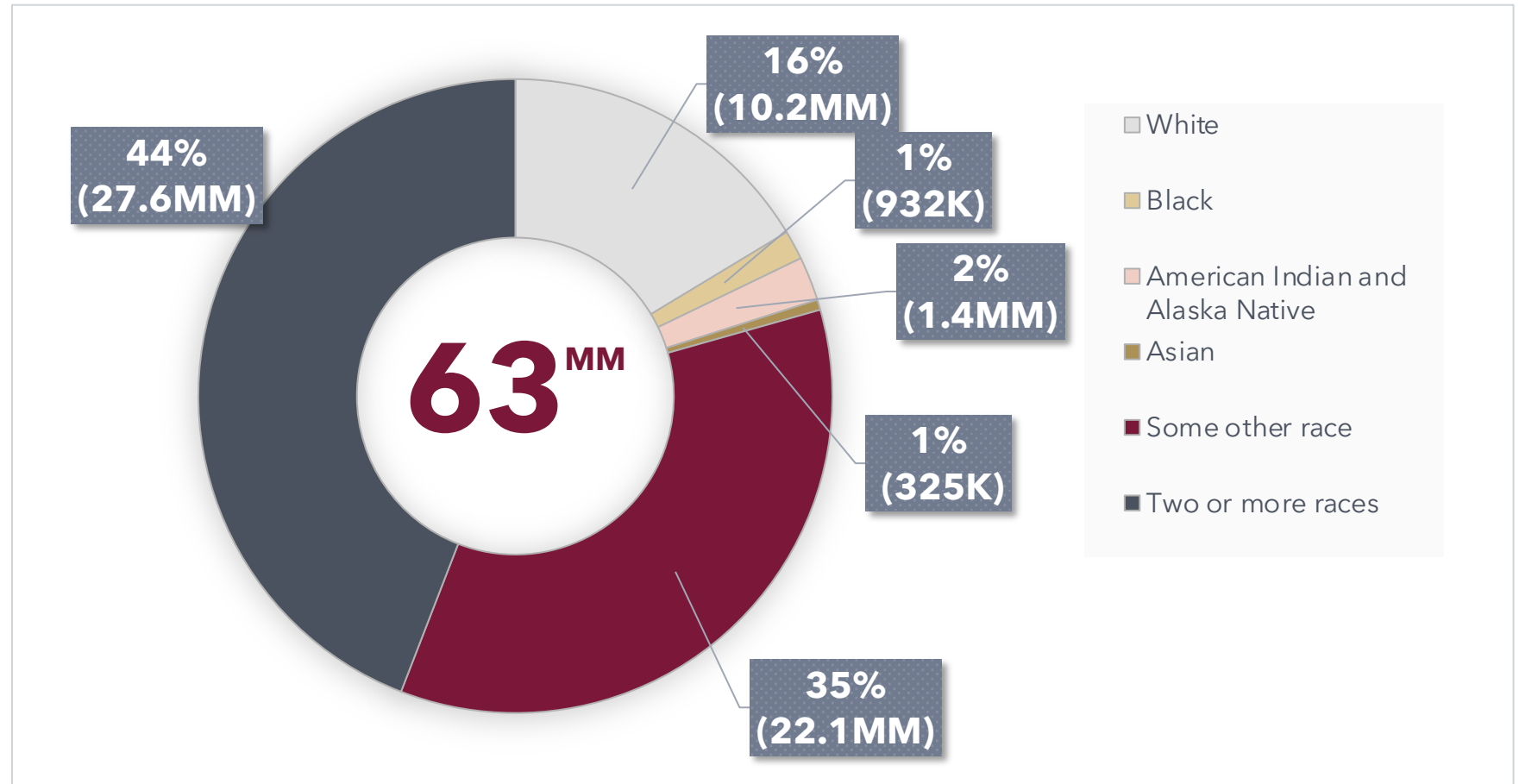
Source: <sup>1</sup> Collage Group Passion Points Survey 2, June 2022 (18-76 population), weighted data  
<sup>2</sup> Collage Group Hispanic Acculturation Study, January 2020  
 Single select 5-pt positive/negative sentiment scale, Hispanic respondents only  
 68% Hispanic men positive to Latino, 74% Hispanic women positive to Latina

# The Hispanic Population Is Sized at 63 Million and Includes a Large Multiracial Population

22.1 Million Identify as Some Other Race Because They See Their Hispanicity as Their Race

Hispanic by Race, 2021

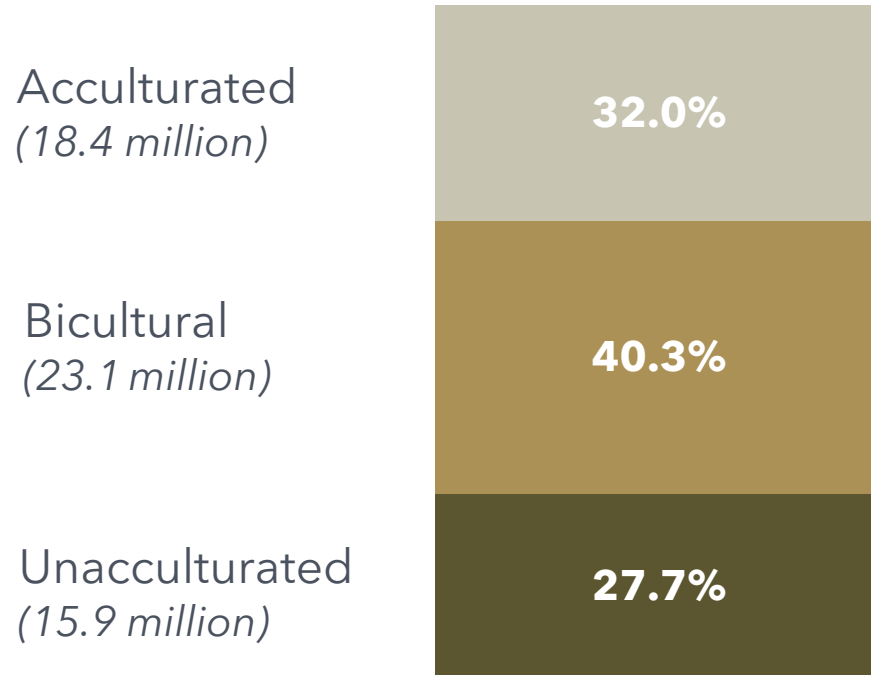
Hispanics make up **19%** of the total U.S. population



# The Plurality of Hispanics Today Are Bicultural

## And the Share of Acculturated Hispanics Is Growing

Hispanic Population by Acculturation (2021)



### Hispanic Cultural Identity

\*Acculturation does **not** equal assimilation!



**Acculturated:**

Favor speaking English and identify mostly with their life in the U.S.

**Bicultural:**

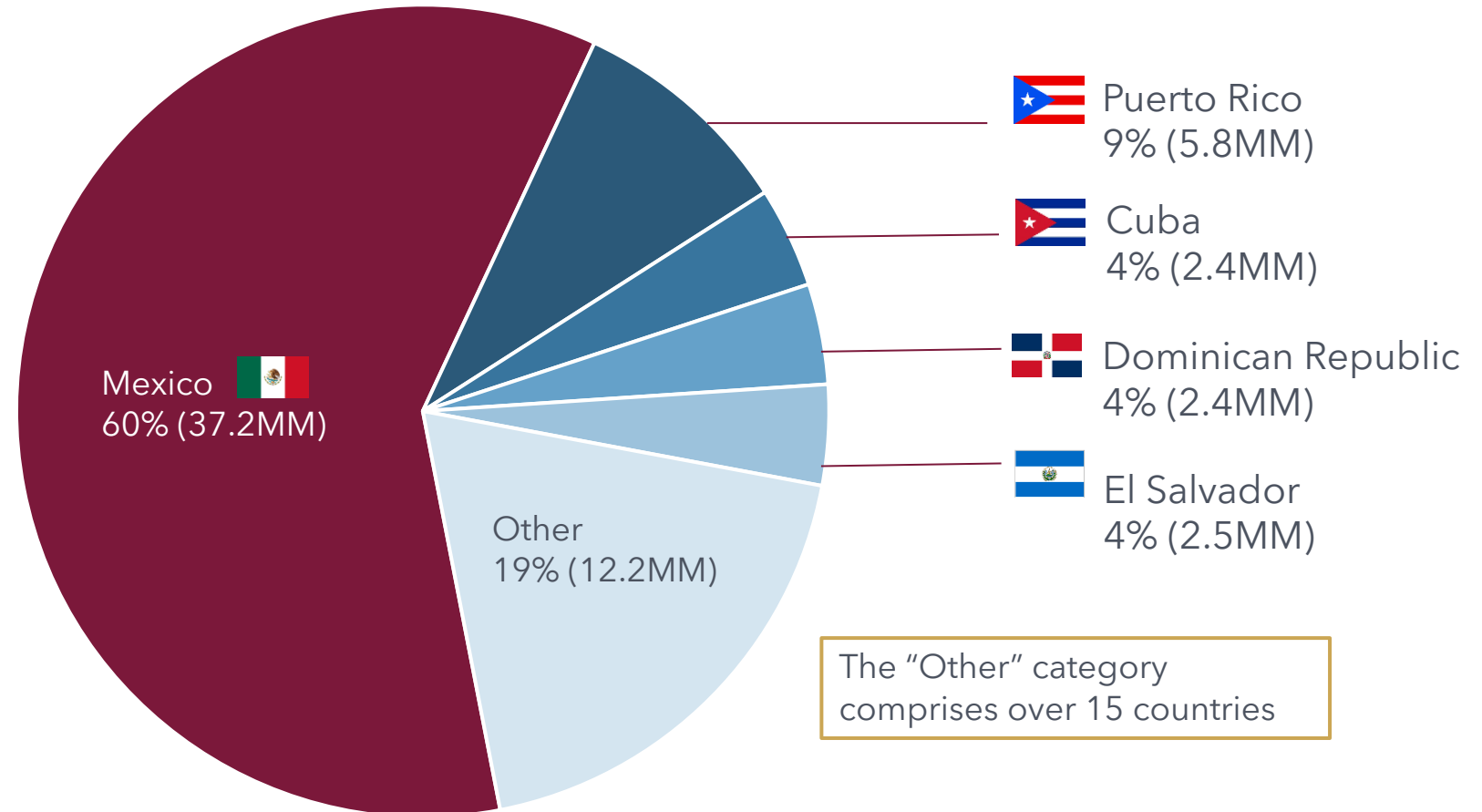
Fluidly speak both English and Spanish and identify equally with their heritage and their U.S. life

**Unacculturated:**

Favor speaking Spanish y mostly with their heritage

# While the Hispanic Population Is Very Diverse, Mexican Americans Account for the Majority of the Hispanic Population in the U.S.

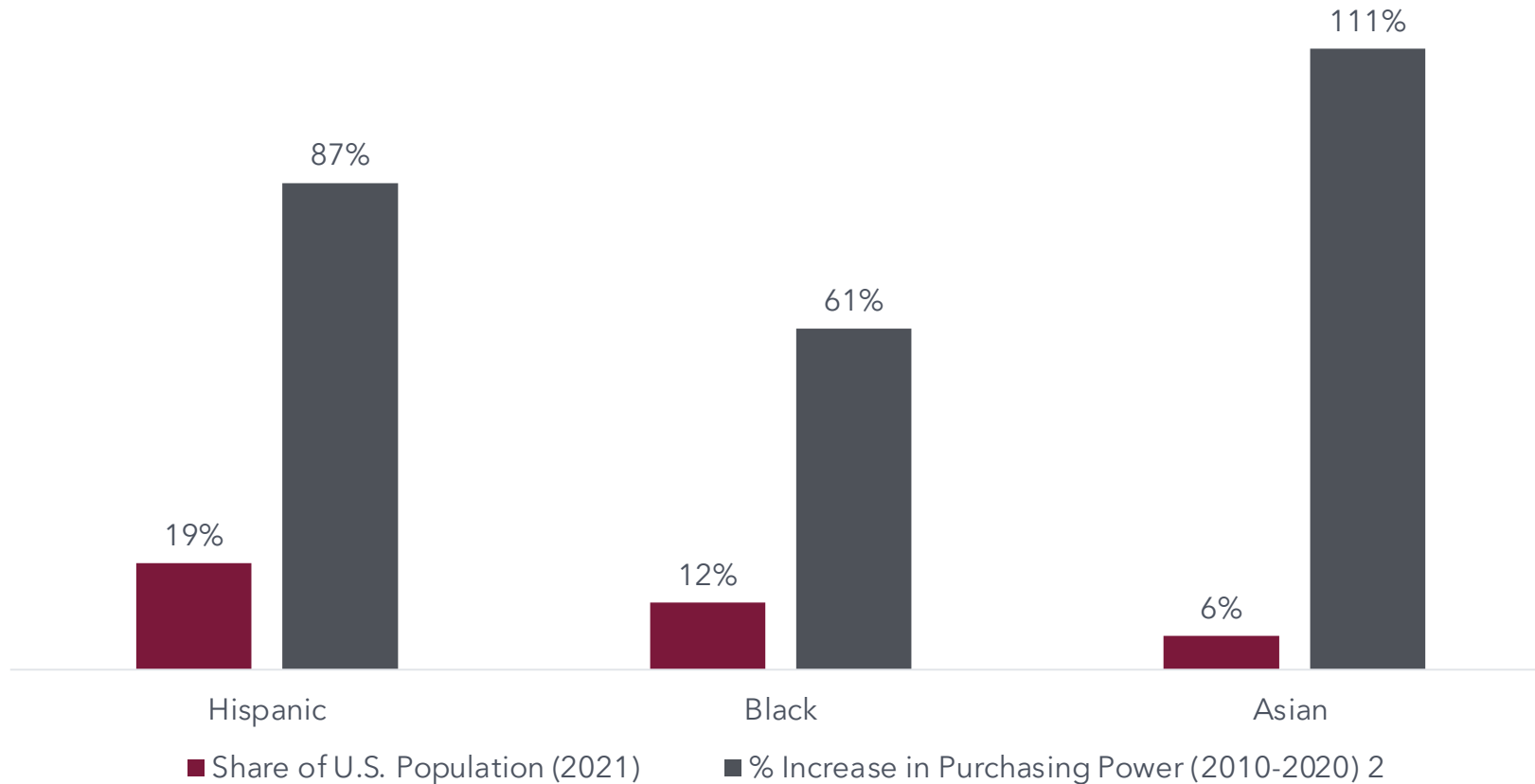
Hispanic Countries of Origin in the United States (2021)



The "Other" category comprises over 15 countries



# The Hispanic Segment Has Had a Large Growth in Purchasing Power in the Past Decade


















| Purchasing Power <sup>1</sup> (2020) |                       |
|--------------------------------------|-----------------------|
| <b>Hispanic</b>                      | <b>\$1.9 Trillion</b> |
| Black                                | \$1.6 Trillion        |
| Asian                                | \$1.3 Trillion        |

# Hispanics Primarily Identify with Their Hispanic or Latino Heritage

## A Quarter Also Use Country of Origin to Describe Themselves

Which 3 aspects of your identity would you most likely use to describe yourself?






|   | Total Pop.  | Hispanic   | Black  | Asian   | White  |
|---|---|--|--|---|--|
| 1 | <br>Race (40%)             | <br>Hispanic/Latino Heritage (66%▲) | <br>Race (82%▲)             | <br>Race (59%▲)              | <br>Personality (39%▲)      |
| 2 | <br>Personality (36%)      | <br>Personality (32%▼)              | <br>Personality (32%▼)      | <br>Personality (35%)        | <br>Race (36%▼)             |
| 3 | <br>Where I Grew Up (28%) | <br>Country of Origin (25%▲)       | <br>Where I Grew Up (24%▼) | <br>Where I Live Now (28%▲) | <br>Where I Grew Up (30%▲) |



Source: Collage Group America Now Survey, September 2022, (18-76 population)  
 Multiselect, max. 3  
 Significance test: Confidence level 95%. ▲ ▼ over/under Total Pop.

# Hispanics Are More Likely than White Americans to Say Different Aspects of Their Identity Have Become Increasingly Important

% who feel the following have become an increasingly important part of their identity over the past few years

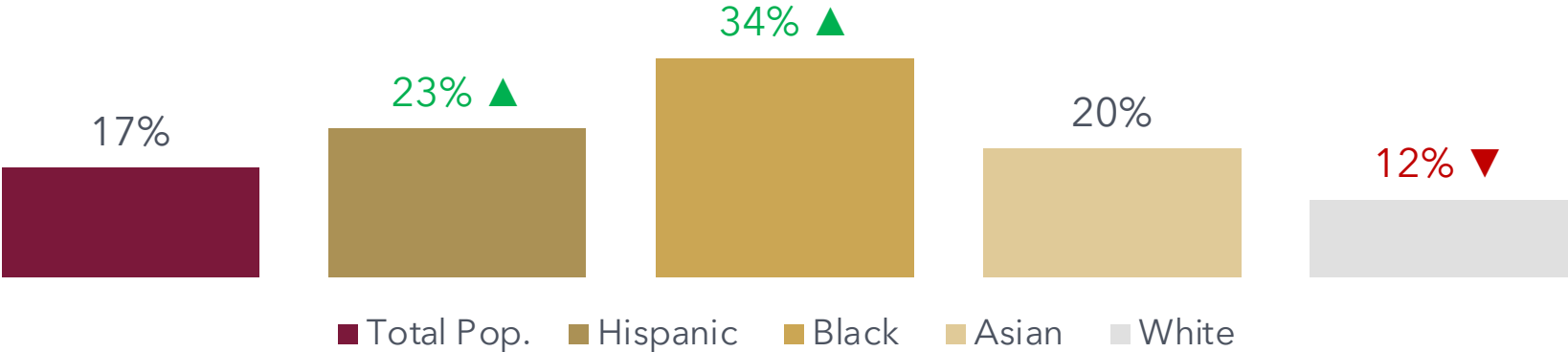
|   | Total Pop. | Hispanic | Black | Asian | White |
|---|------------|----------|-------|-------|-------|
|  My <b>race</b>        | 40%        | 56% ▲    | 69% ▲ | 54% ▲ | 28% ▼ |
|  My <b>ethnicity</b>   | 40%        | 56% ▲    | 67% ▲ | 55% ▲ | 29% ▼ |
|  My <b>age</b>         | 56%        | 56%      | 62% ▲ | 56%   | 55%   |
|  My <b>gender</b>    | 40%        | 49% ▲    | 49% ▲ | 41%   | 36% ▼ |
|  My <b>sexuality</b> | 32%        | 41% ▲    | 43% ▲ | 35%   | 28% ▼ |



Source: Collage Group America Now Survey, September 2022, (18-76 population)  
 % agree (other answer options included "disagree" and "not sure")  
 Significance test: Confidence level 95%. ▲ ▼ over/under Total Pop.

# Brands Will Experience Backlash from Hispanics If They Ignore Their Desire for Diversity

% of each segment that would **stop using or buying** a brand whose **advertising lacks racial and ethnic diversity**



Source: Collage Group America Now Survey, September 2022, (18-76 population)  
Multiselect answer option  
Significance test: Confidence level 95%. ▲ ▼ over/under Total Pop.

# Diversity and Representation Matter to the Hispanic Consumer

I'm more likely to buy products or services from brands/companies that do the following in their advertisements...

|   | Total Pop. | Hispanic | Black | Asian | White |
|---|------------|----------|-------|-------|-------|
| <b>Show people...</b>   |            |          |       |       |       |
| with their natural skin<br><i>(wrinkles, acne, skin conditions, etc.)</i> | 27%        | 31% ▲    | 31% ▲ | 31% ▲ | 25% ▼ |
| without retouching or photoshopping                                       | 25%        | 30% ▲    | 24%   | 27%   | 24%   |
| with their natural hair   | 20%        | 24% ▲    | 28% ▲ | 22%   | 17% ▼ |
| <b>Challenge _____ stereotypes.</b>                                       |            |          |       |       |       |
| racial and ethnic   | 24%        | 28% ▲    | 39% ▲ | 29% ▲ | 19% ▼ |
| age and generational  | 22%        | 25% ▲    | 28% ▲ | 22%   | 20% ▼ |
| gender  | 19%        | 23% ▲    | 24% ▲ | 23% ▲ | 16% ▼ |

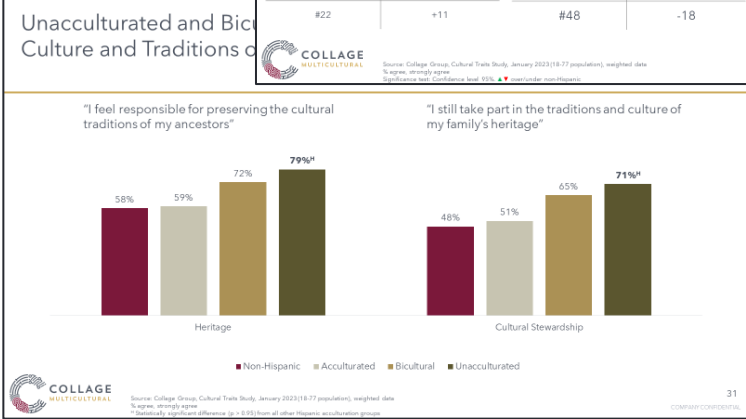
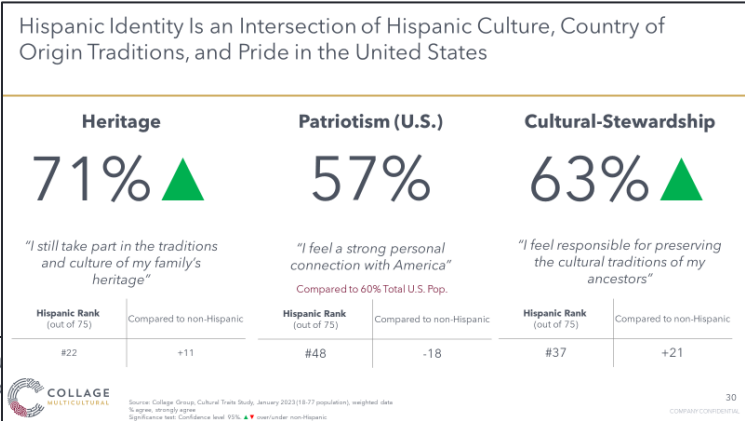


Source: Collage Group America Now Survey, September 2022, (18-76 population)  
 Multiselect  
 Significance test: Confidence level 95%. ▲ ▼ over/under Total Pop.

# Group Traits Provide Nuanced Understanding of Segments to Deepen Connection

## What Are Group Traits?

- 75 focused culturally significant agreement scale questions are fielded to targeted sample survey (~4,000 consumers)
- Data is analyzed based on agreement, rank, and differentiation for a target consumer group versus the appropriate comparison group
- Uniquely resonant cultural statements are grouped based on data and contextual importance.





## CULTURAL DUALITY

Although Hispanics firmly believe in maintaining their cultural **heritage**, they are still **patriotic** and proud of their achievements in the United States. They feel responsible for acting as **cultural stewards** by preserving their ancestors' cultural traditions while participating in American culture, seamlessly navigating both worlds with cultural fluidity.

# Hispanic Identity Is an Intersection of Hispanic Culture, Country of Origin Traditions, and Pride in the United States

## Heritage

71% ▲

*"I still take part in the traditions and culture of my family's heritage"*

**Hispanic Rank**  
(out of 75)

Compared to non-Hispanic

#22

+11

## Cultural-Stewardship

63% ▲

*"I feel responsible for preserving the cultural traditions of my ancestors"*

**Hispanic Rank**  
(out of 75)

Compared to non-Hispanic

#37

+21

## Patriotic (U.S.)

57%

*"I feel a strong personal connection with America"*

Compared to 59% Total U.S. Pop.

**Hispanic Rank**  
(out of 75)

Compared to non-Hispanic

#48

-18



Source: Collage Group, Cultural Traits Study, January 2023 (18-77 population), weighted data  
% agree, strongly agree  
Significance test: Confidence level 95%. ▲ ▼ over/under non-Hispanic



# Hispanics in the U.S. Connect with Their Heritage through Traditional Foods and Celebrating Important Holidays Like Día de Los Muertos

35% ▲

of Hispanic Americans say they **cook** or bake to help them **connect** with their family's culture<sup>1</sup>

Compared to 27% Total Pop.

52% ▲

of Hispanic Americans report celebrating **Día de Los Muertos**<sup>2</sup>

Compared to 15% Total Pop.



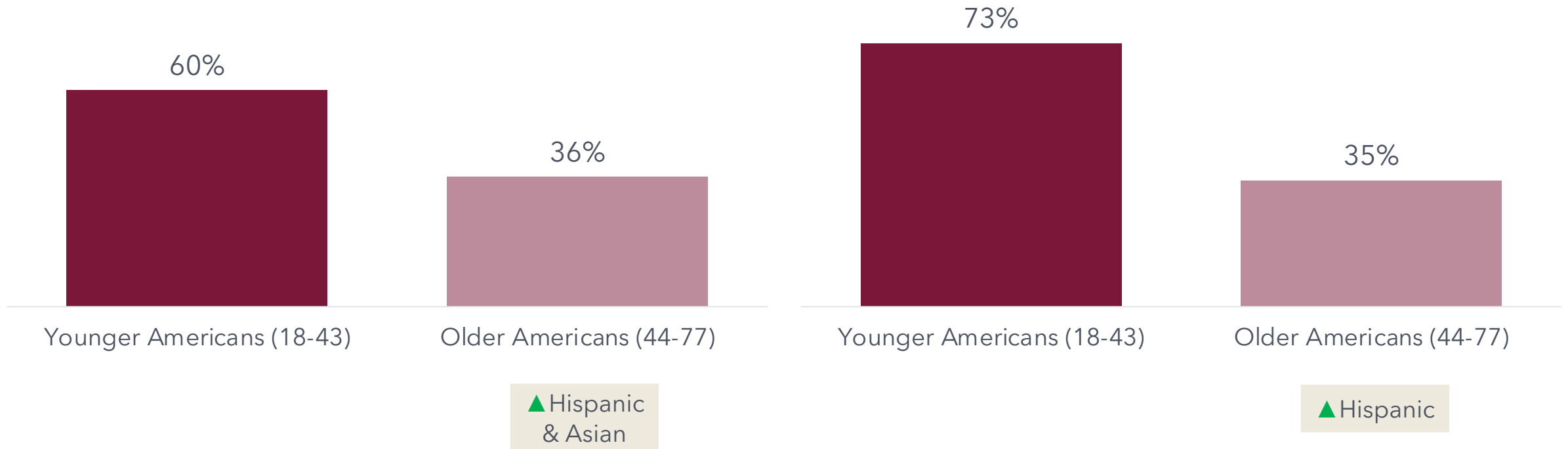
Source: <sup>1</sup>Collage Group Passion Points May 2022, 18-76 population, unweighted data  
Multiselect answer option  
<sup>2</sup> Collage Group Holidays & Occasions Survey, May 2021 (18-75 population) weighted data  
% agree, Single select  
Significance test: Confidence level 95%. ▲ ▼ over/under Total Pop.

# Younger Americans Are Highly Engaged on Social Media

## Older Hispanics Are More Active on Social Media than Other Older Americans

% of Americans who are on social media for 3 hours or longer a day.<sup>1</sup>

% of respondents that follow any influencers, celebrities, or other popular accounts on social media.<sup>2</sup>








# YouTube Is the Most Popular Social Media Platform among Younger Americans, Especially Asian Americans

## And TikTok Stands Out with Younger Hispanics

Do you use any of these social media platforms? Top 5 Platforms.

### Younger Americans (18-43)

|  | Total Pop. | Hispanic | Black  | Asian  | White |
|--|------------|----------|--------|--------|-------|
|  YouTube    | 78%        | 1 79%    | 1 81%  | 1 86%▲ | 1 75% |
|  Facebook   | 73%        | 2 72%    | 69%    | 67%▼   | 2 75% |
|  Instagram | 64%        | 69%▲     | 2 71%▲ | 2 69%  | 60%▼  |
|  TikTok   | 58%        | 66%▲     | 60%    | 48%▼   | 56%   |
|  Snapchat | 45%        | 47%      | 41%    | 37%▼   | 47%   |

# TikTok Is a Successful Launchpad for Hispanics that Have Been Underrepresented in Media Coverage



*Katia Ramirez posted a video on TikTok asking people to come to her family's struggling restaurant, Catrina Grill. The Hispanic family-owned restaurant quickly became flooded with support by those who saw the TikTok. The local restaurant chain has reportedly increased sales by over 60%.*



*TikTok is helping regional Mexican artists make it to the Billboard charts. Peso Pluma, a 23-year-old singer, is leading the push with over 4.6 million TikTok followers and some of the year's biggest hits "PRC" and "Ella Baila Sola."*

# Younger Hispanics and Asian Americans Stand Out in Their Trust of WhatsApp and Black Americans in Their Trust of Twitter

For the Most Used Social Media Platforms, There Is Universal Trust across Racial and Ethnic Segments

How **trustworthy** do you find the following platforms?



The majority of Americans, across race and ethnicity, trust the 5 most popular social media platforms

## Younger Americans (18-43)

|  |           | Total Pop. | Hispanic | Black | Asian | White |
|--|-----------|------------|----------|-------|-------|-------|
|  | Pinterest | 62%        | 54% ▼    | 63%   | 66%   | 65%   |
|  | Twitter   | 49%        | 48%      | 59% ▲ | 53%   | 47%   |
|  | WhatsApp  | 47%        | 59% ▲    | 46%   | 56% ▲ | 42% ▼ |

Our secret weapon for reaching Latino voters? WhatsApp

Using WhatsApp to Reach Hispanic Prospective Students

CDC Launches Spanish WhatsApp Chat to Encourage More Latino COVID-19 Vaccinations



Source: Collage Group Media Survey, July 2023 (18-77 population), weighted data  
 % somewhat trustworthy, trustworthy  
 Significance test: Confidence level 95%. ▲ ▼ over/under Total



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