

thinknow

Latino Consumers Under Pressure

Brand Impact of Immigration Raids

Hispanic Marketing Council Webinar Series

May 2026

Study Overview & Methodology

ThinkNow conducted three national surveys in August & December of '25 and March of '26 with the objective of understanding how immigration enforcement is shaping consumer sentiment, brand trust, and expectations of corporate behavior. Of particular interest was how the current climate is changing brand perceptions among the 70 million U.S. Hispanics.

Areas covered:

- Brand Trust and Perception
- Expectations of Brands
- Brand Messaging
- Brand Risk
- Purchase Behavior

SURVEY METHOD

Online Survey

SCREENING

18+ Years of Age

COVERAGE

National

FIELD TIMING

Mar 13–25, 2026

N=500

Hispanics

N=526

Non-Hispanics

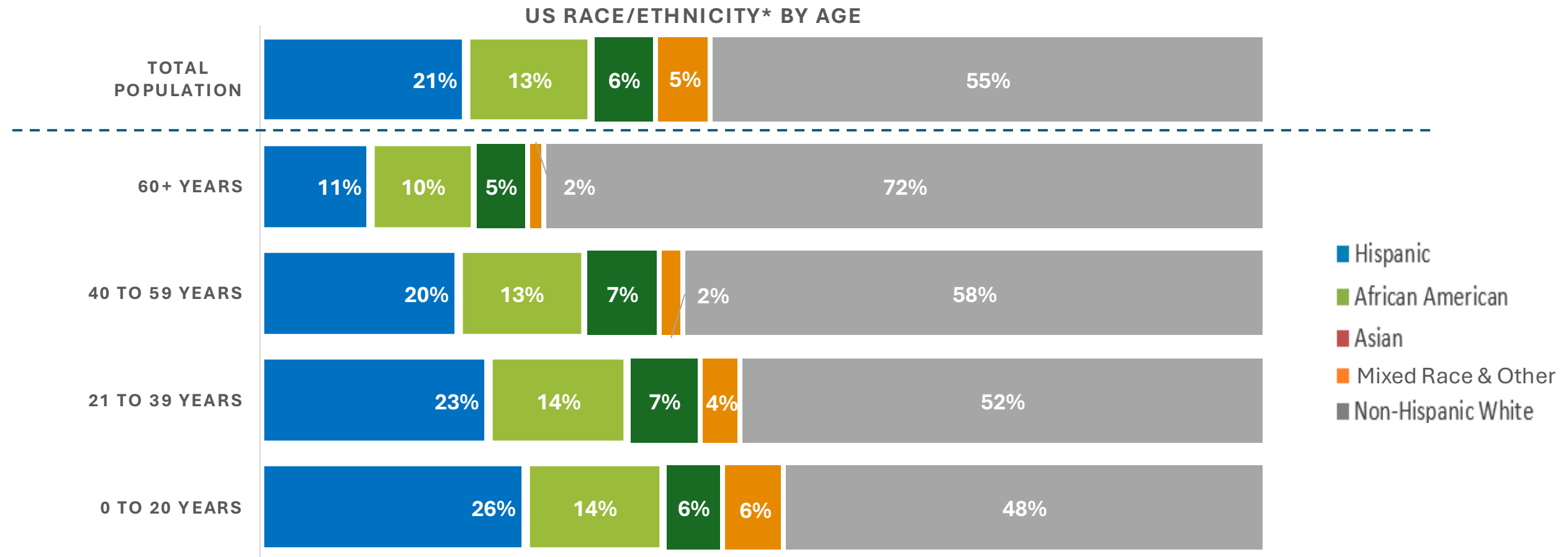
THE HISPANIC GROWTH ENGINE



43% of U.S. Population is Multicultural

Younger Americans are more likely to be Multicultural, and half of those are Hispanic.

The future growth of the U.S. population will come from communities of color.

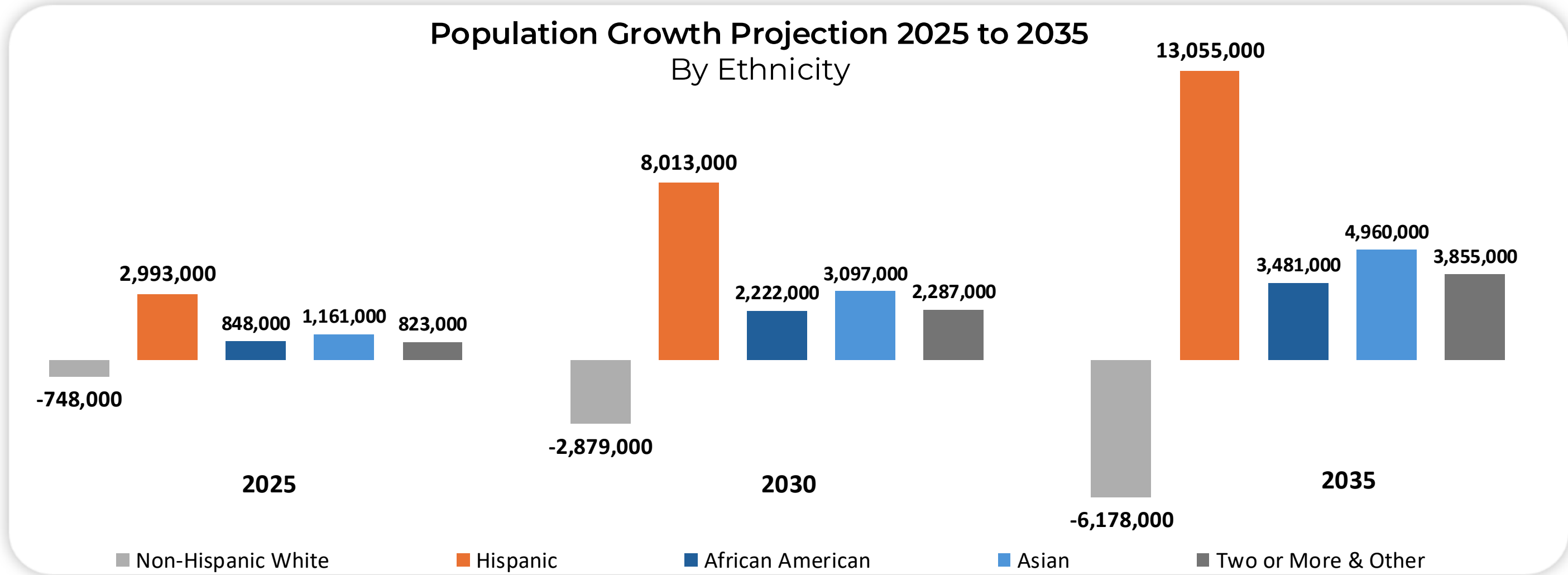


Even if undocumented immigrants, were not present, Latinos would still be the fastest-growing demographic in America. 79% of U.S. Latinos are already citizens, and 32% of all U.S. infants born in 2024 had a Hispanic parent.

Source: U.S. Census Bureau, 2023 National Population Projections (Main Series), NP2023_D1 (2026 projection). *AA, Asian, Mixed and White exclude Hispanic.

Latino Growth Is Native-Born

Latino population growth — driven by births, not immigration — cannot be deported. 94% of Latinos under 18 are U.S.-born or children of naturalized citizens.



Sources: U.S. Census Bureau Population Projections 2023-2060, Pew Research Center, Key Facts About U.S. Latinos (Oct. 2025); CDC 2024 Birth Data

Hispanic Buying Power Is Outpacing U.S. Market Growth

Hispanic Spending Now Rivals the GDP of Major Economies — and Growing

78%

Of all new U.S. workers 2020-2030 are Latino

5.66M

Latino –owned businesses 2.5x faster than avg.

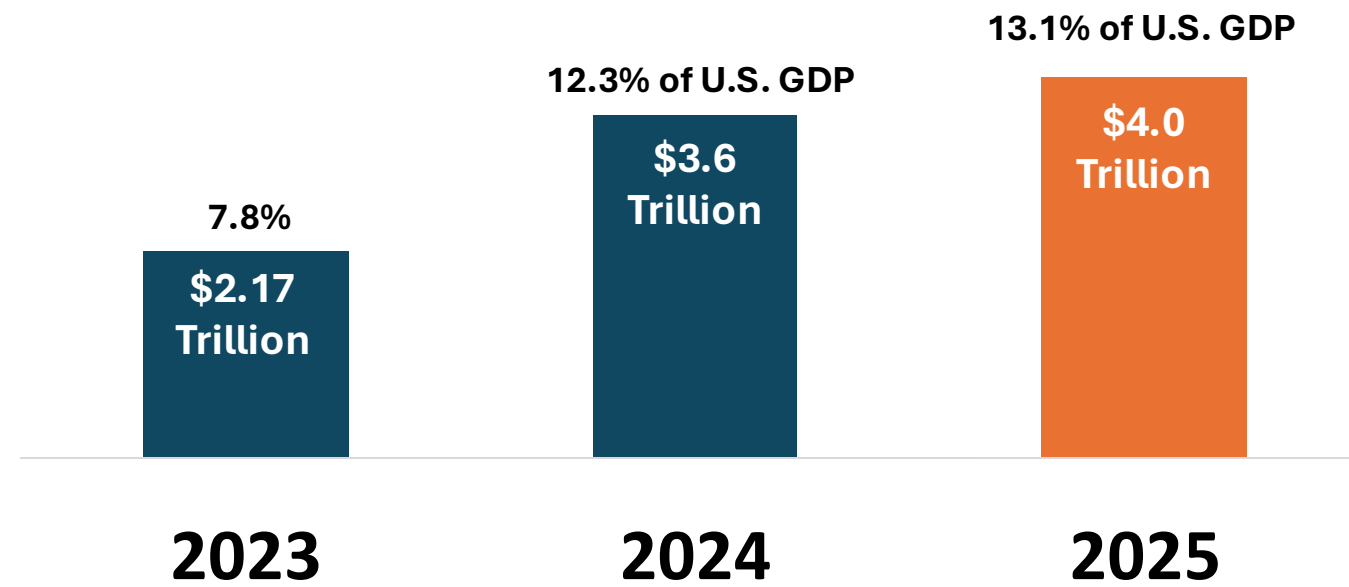
\$62,800

median HH income

820K

new workers added in 2023, offsetting a decline of 560K among non-Latinos

Hispanic Buying Power 2023-2025
And % of Total U.S.



Hispanic spend growth rate 8.6%
U.S. spend growth rate 5.5%

Source: Nielsen Hispanic Consumer Report 2023

Source: Arizona State University Latino GDP Report 2025

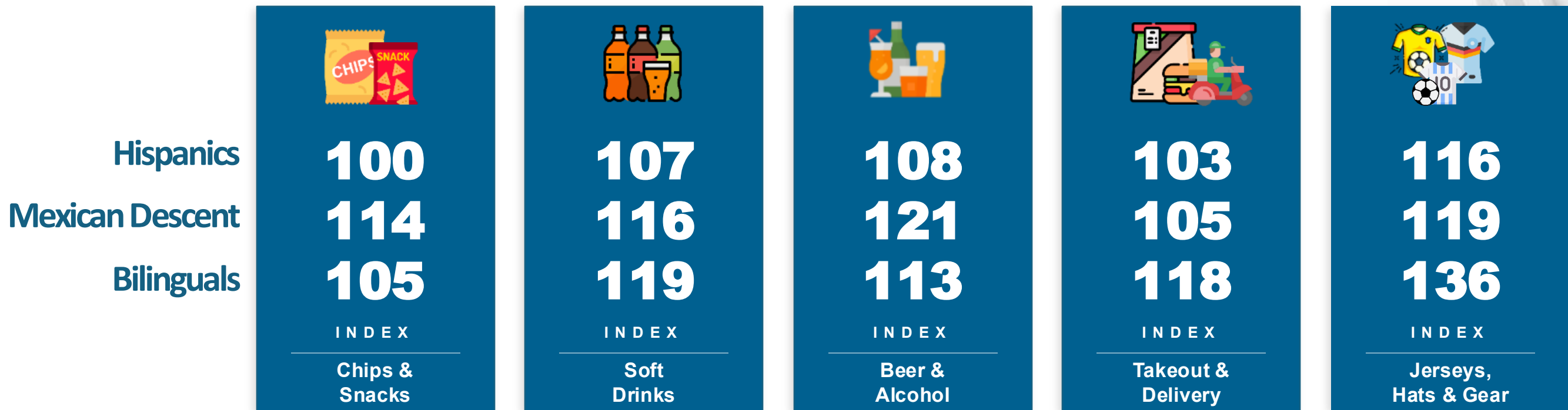
Hispanics Over-Index in World Cup Related Spending

Index vs. General Market — Hispanic Consumers Lead in Every Category



Which of the following do you expect to buy during the World Cup?

Hispanics
(Index over Total Market)



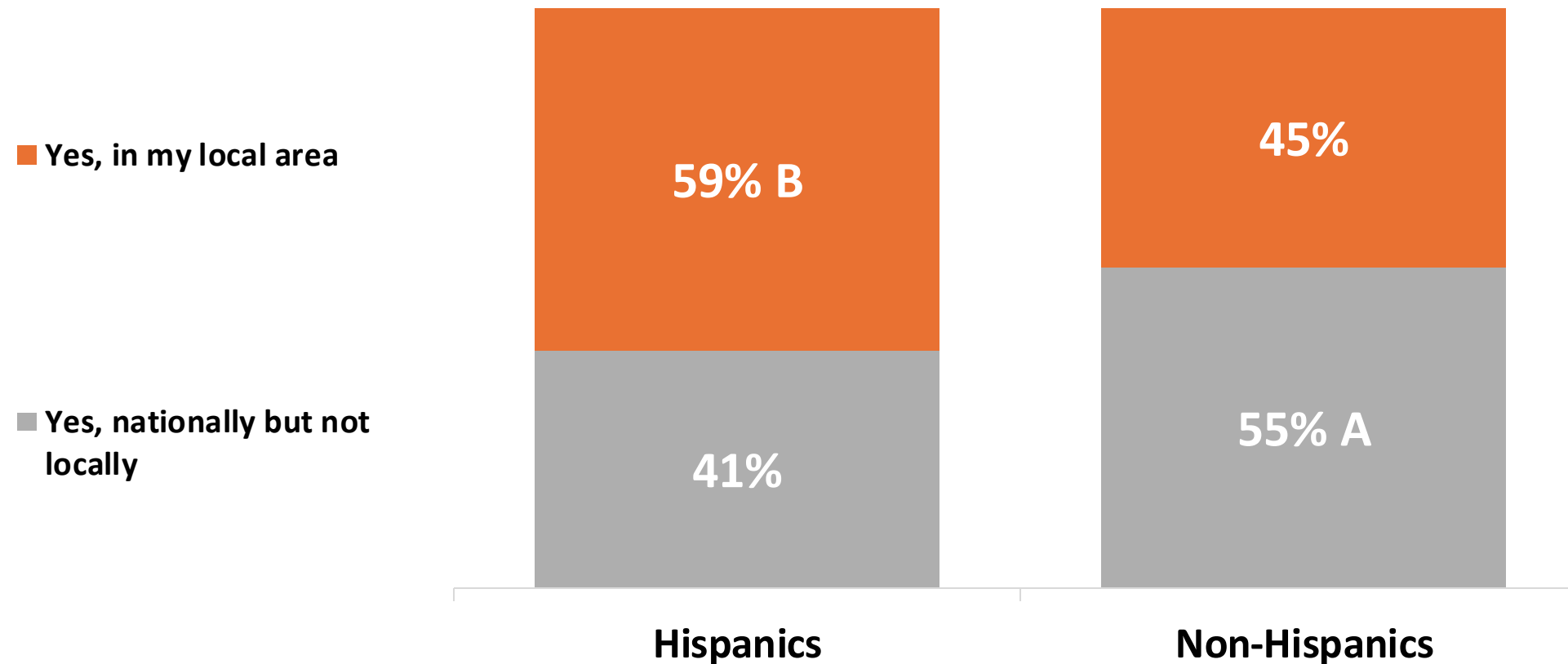
DETAILED FINDINGS

Sponsored by

Immigration Enforcement Is Highly Visible

With Strong Local Awareness Among Hispanics

Have you recently heard or seen news about increased immigration enforcement (e.g., ICE raids or checkpoints, deportations)?

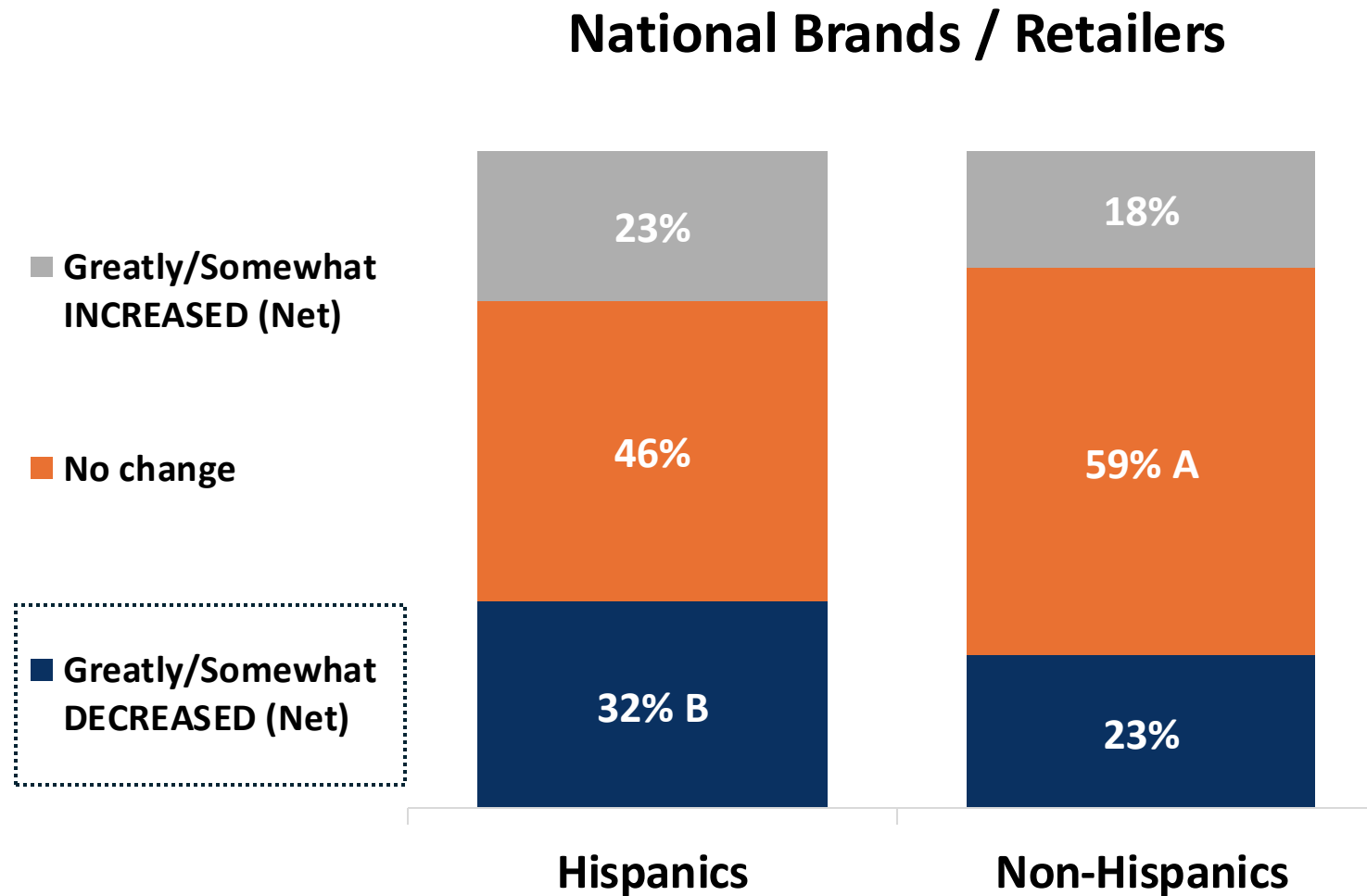


YES (Net): 100% both groups

Brand Trust Is Shifting

Hispanics Show Greater Sensitivity to Immigration Enforcement

How has the news about immigration enforcement affected your trust in the following?

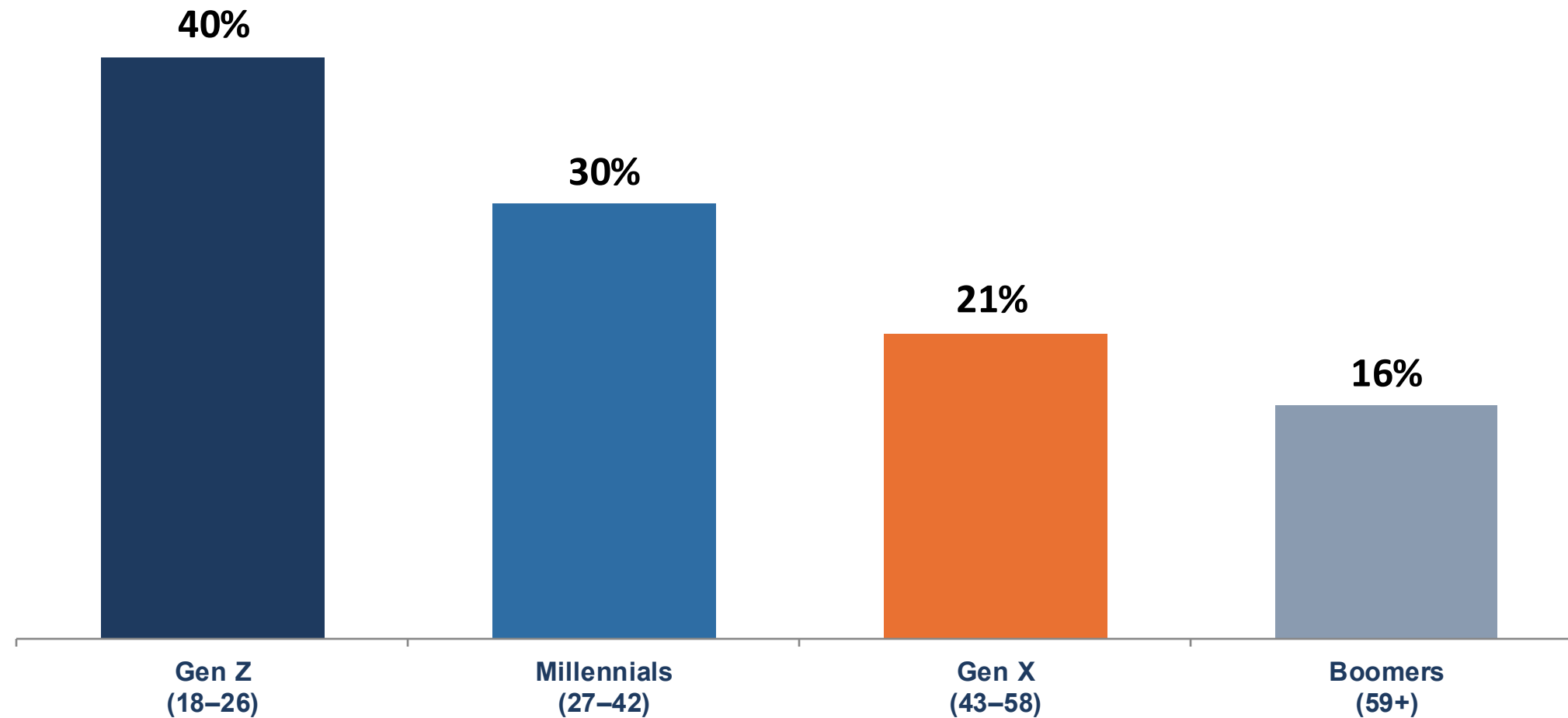


+9 pts
Hispanic gap
"Decreased"

Younger Consumers Feel It Most

Gen Z and Millennials, Regardless of Ethnicity, Show Higher Brand Trust Erosion

How has news about immigration enforcement affected your trust in national brands / retailers? — % Decreased (Net)



KL: Gen Z significantly higher than Gen X and Boomers

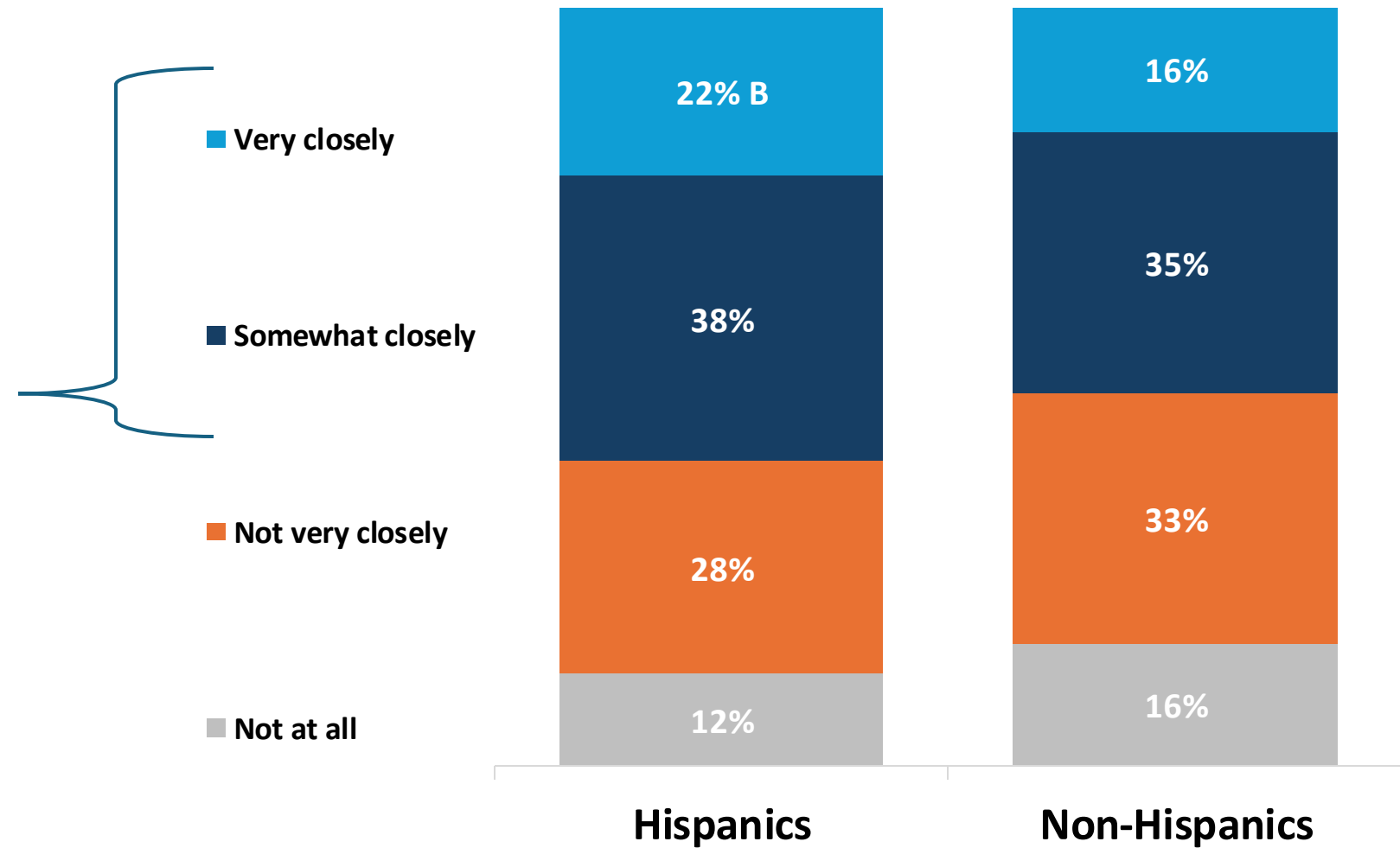
Total Market. Base: Gen Z n=108 | Millennials n=181 | Gen X n=157 | Boomers n=204 | Sig. at 95% CI

Hispanics Are Actively Watching Brand Behavior

How closely are you paying attention to how brands or retailers respond to immigration enforcement news?

60%
Hispanics watching very/somewhat closely

51%
Non-Hispanics watching very/somewhat closely

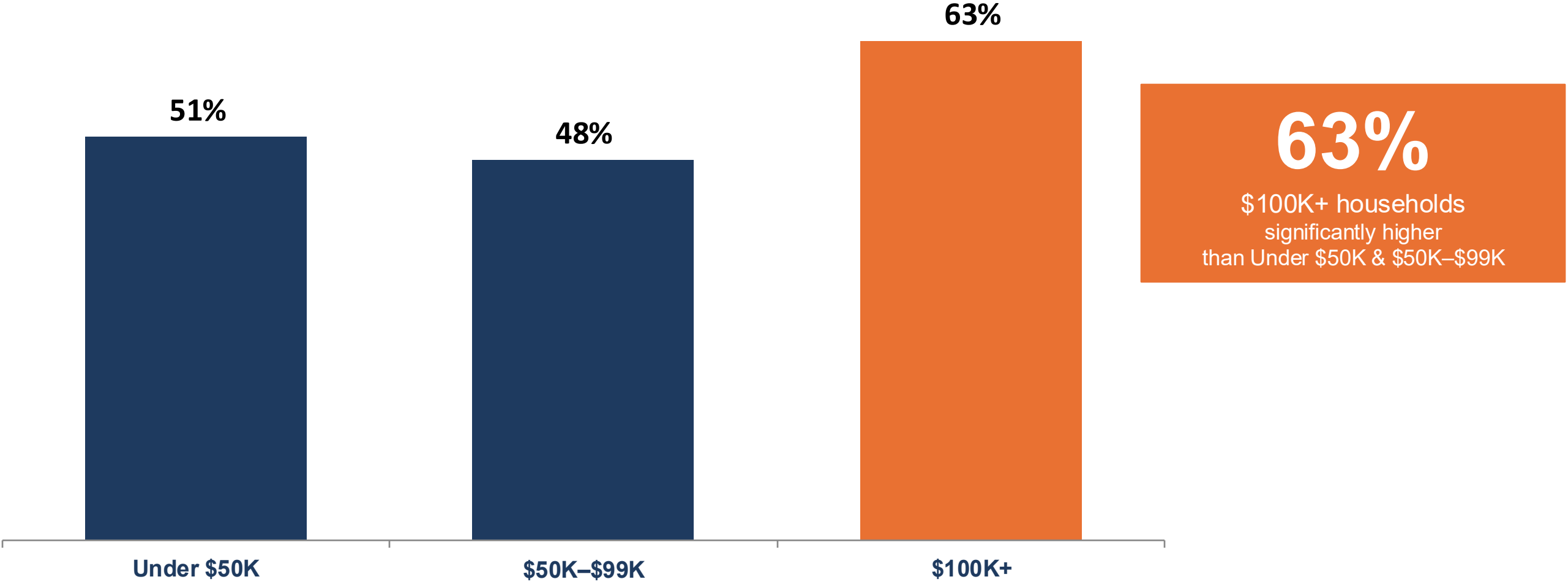


*'Not sure' excluded. Base: Hispanics n=500 | Non-Hispanics n=526 | Letters indicate significance at 95% CI

Higher Earners Are Watching Most Closely

\$100K+ Households Pay Significantly More Attention to Brand Behavior

How closely are you paying attention to how brands or retailers respond to immigration enforcement news? — %
Very/Somewhat Closely (Net)

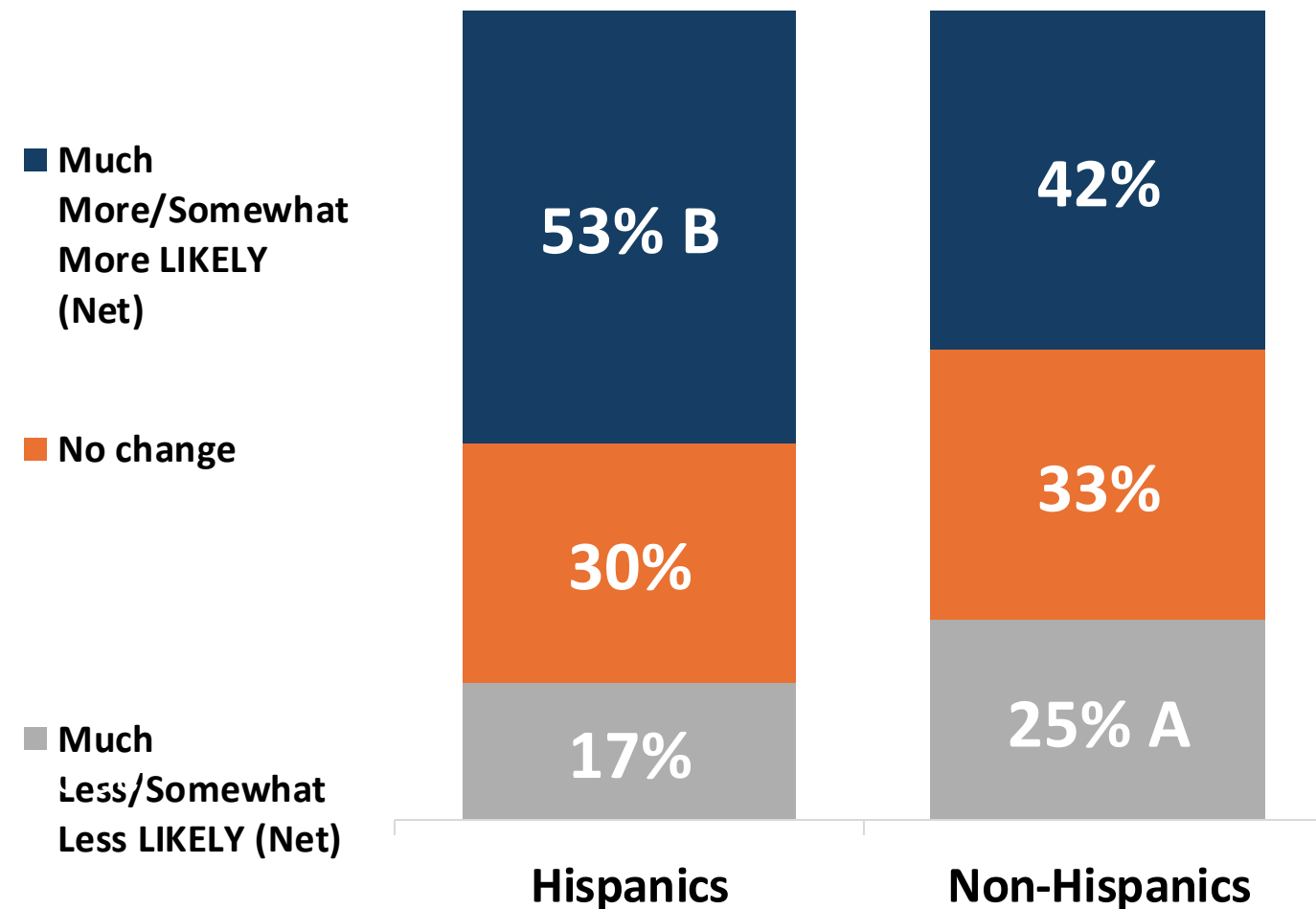


Total Market. Base: Under \$50K n=269 | \$50K-\$99K n=207 | \$100K+ n=132 | Letters indicate significance at 95% CI

Brand Advocacy Drives Hispanic Loyalty

Silence or Opposition Carries Downside Risk

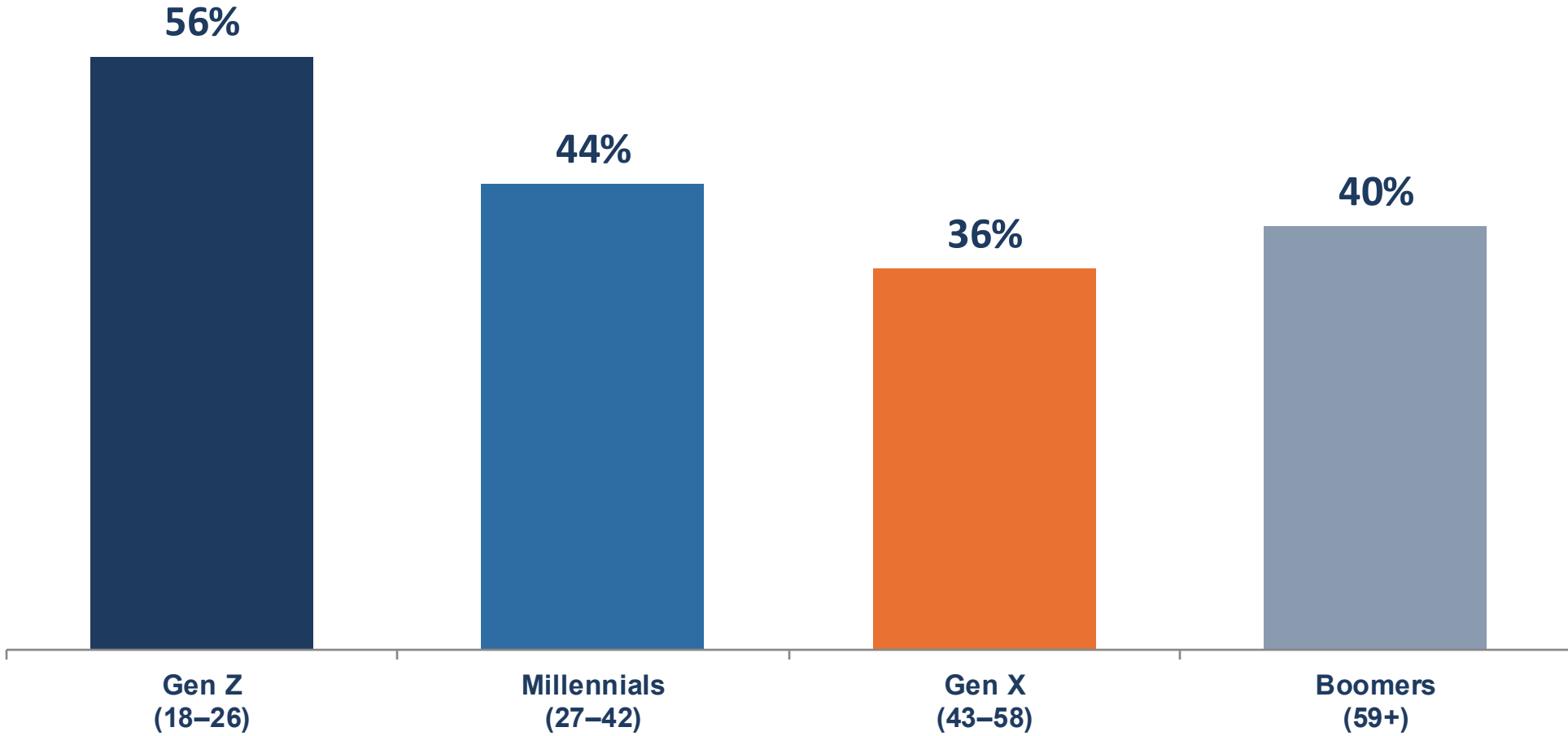
If a brand publicly expresses support for immigrant communities, how would that affect your likelihood of supporting that brand?



Gen Z Most Likely to Reward Brand Advocacy

Support Likelihood Declines With Age

If a brand publicly expresses support for immigrant communities, how would that affect your likelihood of supporting that brand? — % Much/Somewhat More Likely (Top 2 Box)

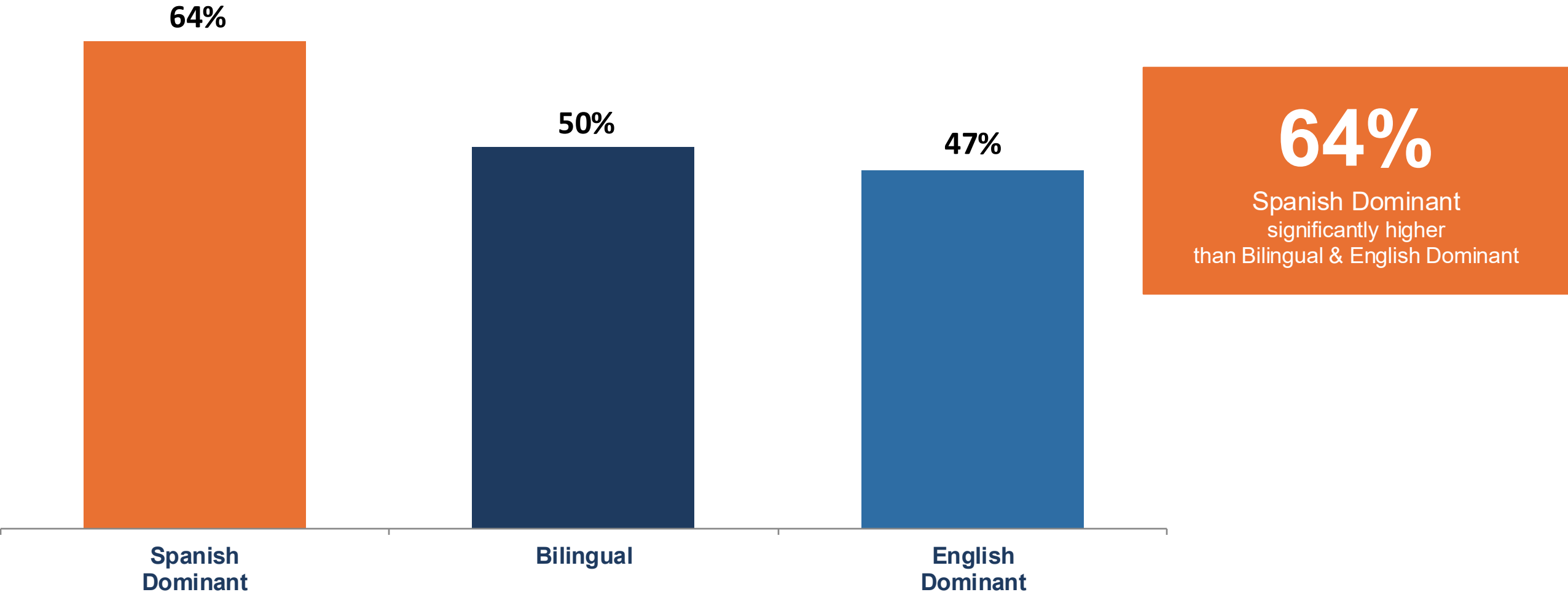


Total Market. Base: Gen Z n=108 | Millennials n=181 | Gen X n=157 | Boomers n=204 | Sig. at 95% CI, Gen Z significantly higher than Gen X and Boomers

Spanish-Dominant Hispanics Respond Most to Brand Advocacy

Brand Support Likelihood Drops as English Dominance Increases

If a brand publicly expresses support for immigrant communities, how would that affect your likelihood of supporting that brand? — Hispanics % Much/Somewhat More Likely (Net)

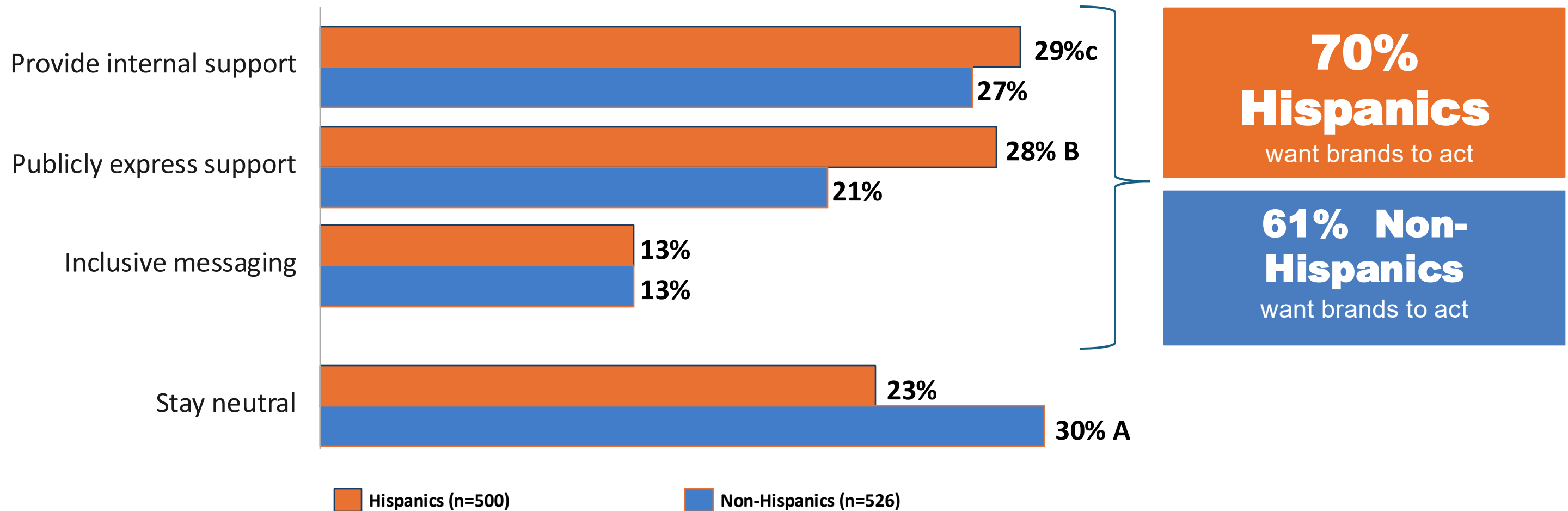


Hispanics only. Base: Spanish Dominant n=158 | Bilingual n=182 | English Dominant n=160 | Sig. at 95% CI

Hispanics Expect Brands to Take Action

Neutrality Is Not Aligned With Expectations

What role, if any, should brands play during times when immigration enforcement is affecting communities?



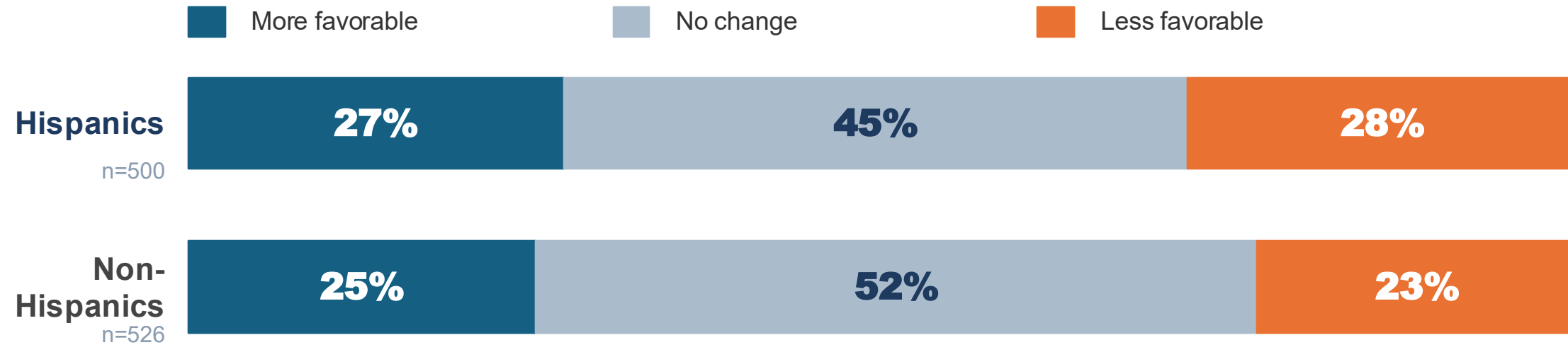
*'Not sure' excluded. Base: Hispanics n=500 | Non-Hispanics n=526

Letters indicate significant difference at 95% confidence level

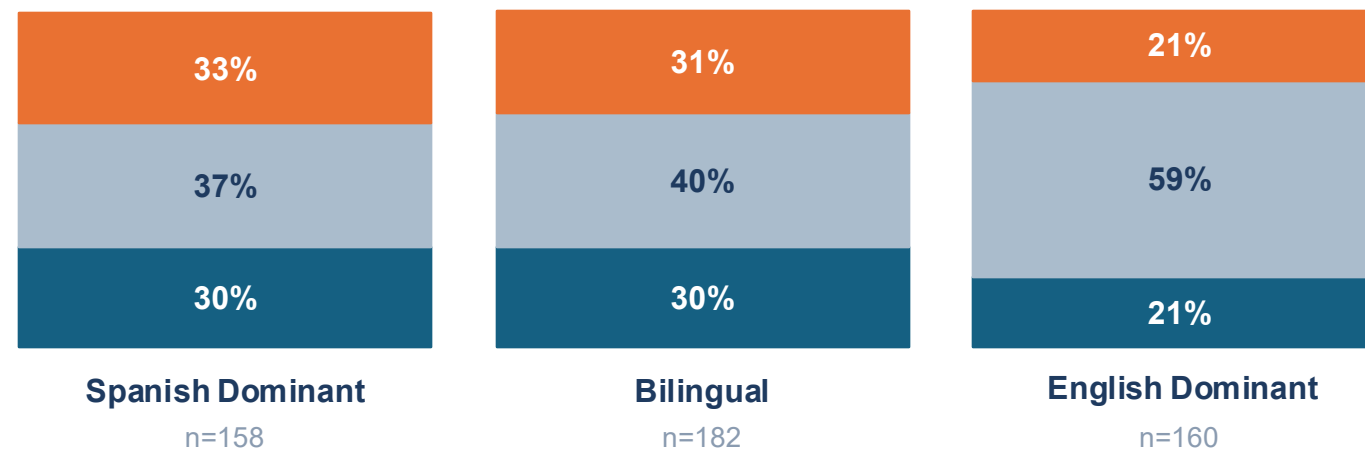
'Stay Quiet and Market Inclusively' Is Not a Safe Strategy

For Hispanics, the Fallback Creates Nearly as Much Backlash as It Does Good Will

If a brand avoids commenting publicly and focuses on inclusive marketing instead, how would that affect your perception of the brand?



Among Hispanics — The Skepticism Is Concentrated in the Spanish Dominant



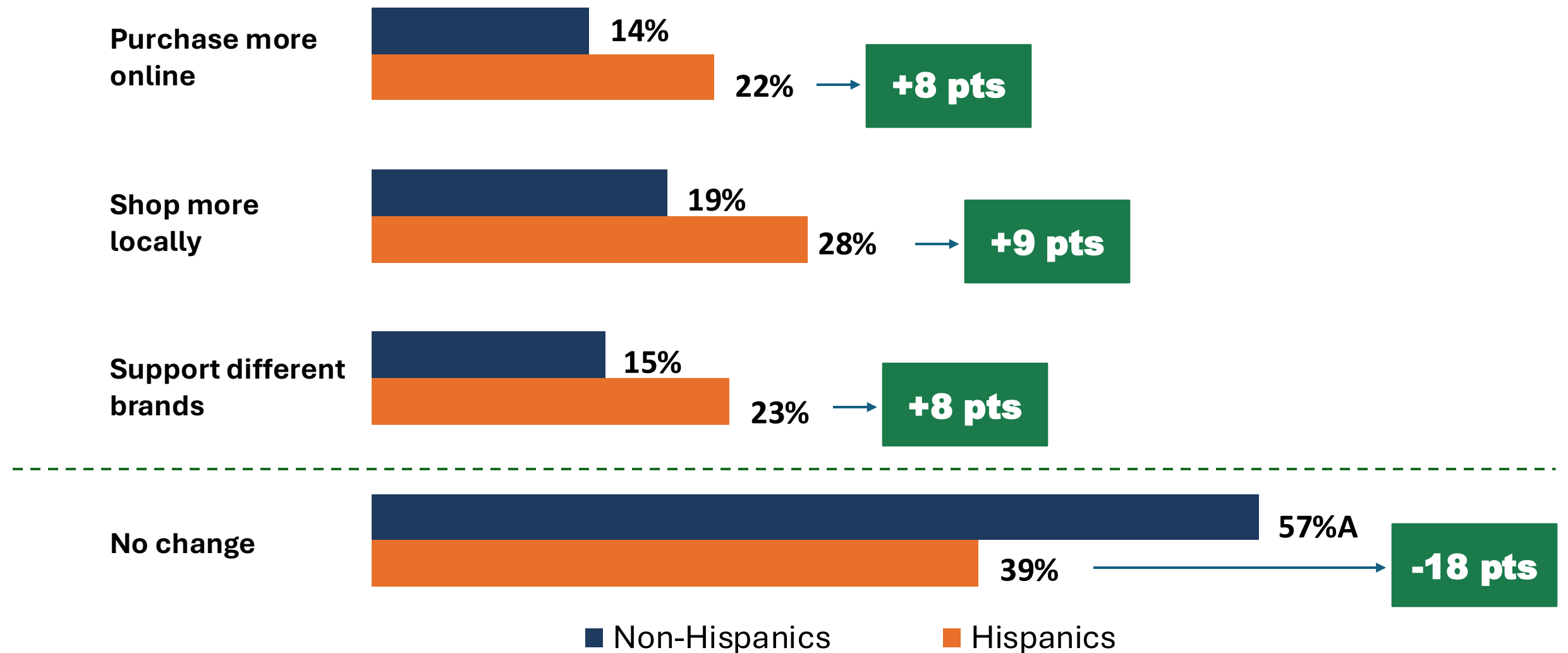
The takeaway: Among Hispanics, staying quiet while running inclusive ads earns no credit — unfavorable perception matches favorable. For Spanish-dominant and less acculturated consumers, it creates as much downside as upside.

57% of Hispanics Have Already Changed Where They Shop or Which Brands They Support

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vs. 38% of Non-Hispanics

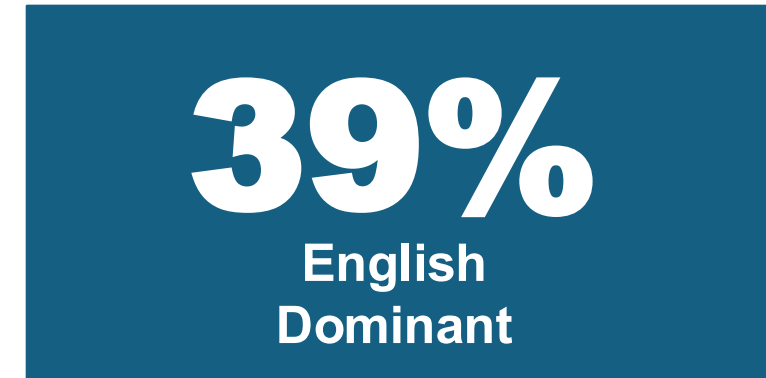
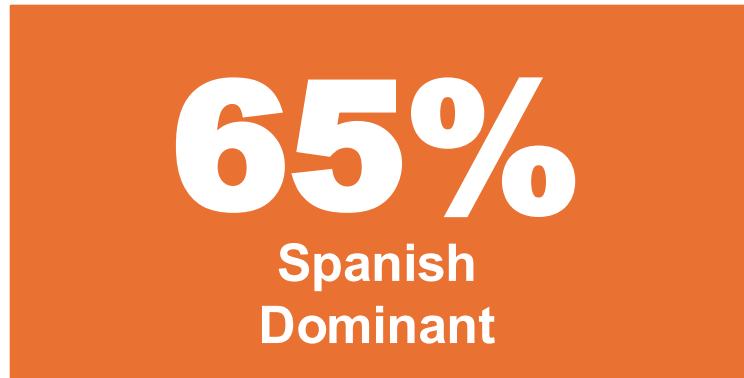
Have recent news events related to immigration enforcement changed where you shop or which brands you support?



Language Drives Shopping Behavior Change

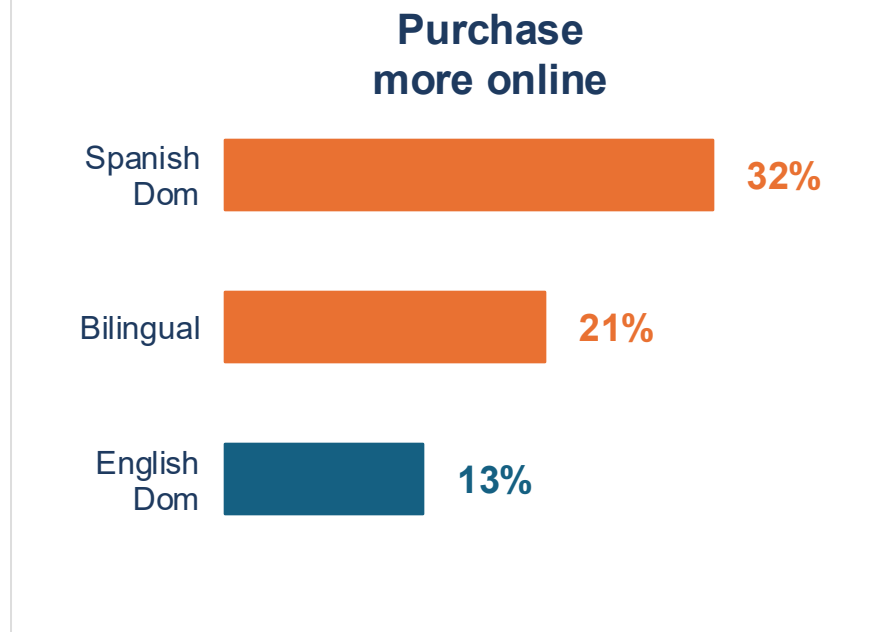
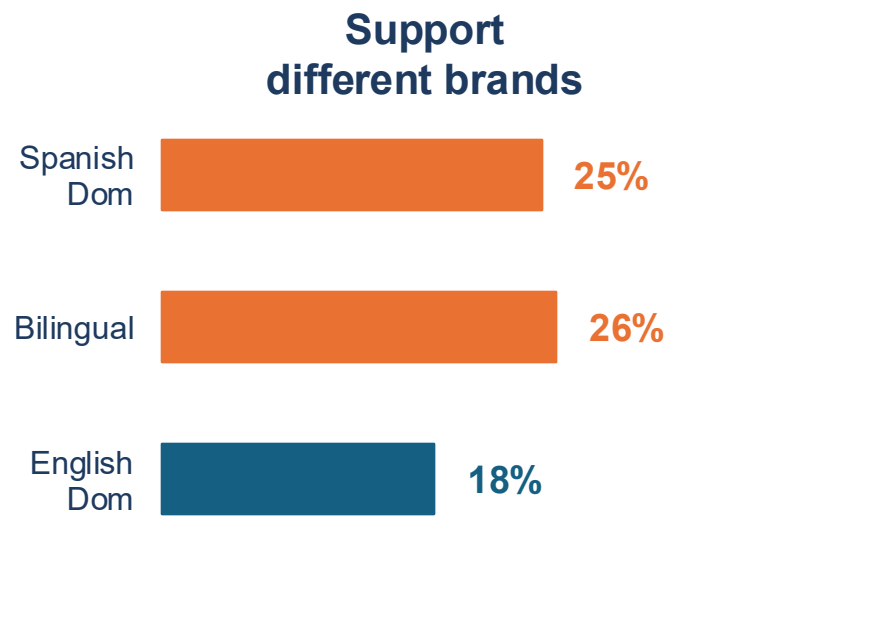
Spanish-Dominant and Bilingual Hispanics Shift Behavior at Nearly 2x the Rate of English-Dominant

Have recent news events related to immigration enforcement changed where you shop or which brands you support?



How Behavior Is Changing — by Language Group

Spanish Dom & Bilingual significantly higher than English Dominant at 95% CI



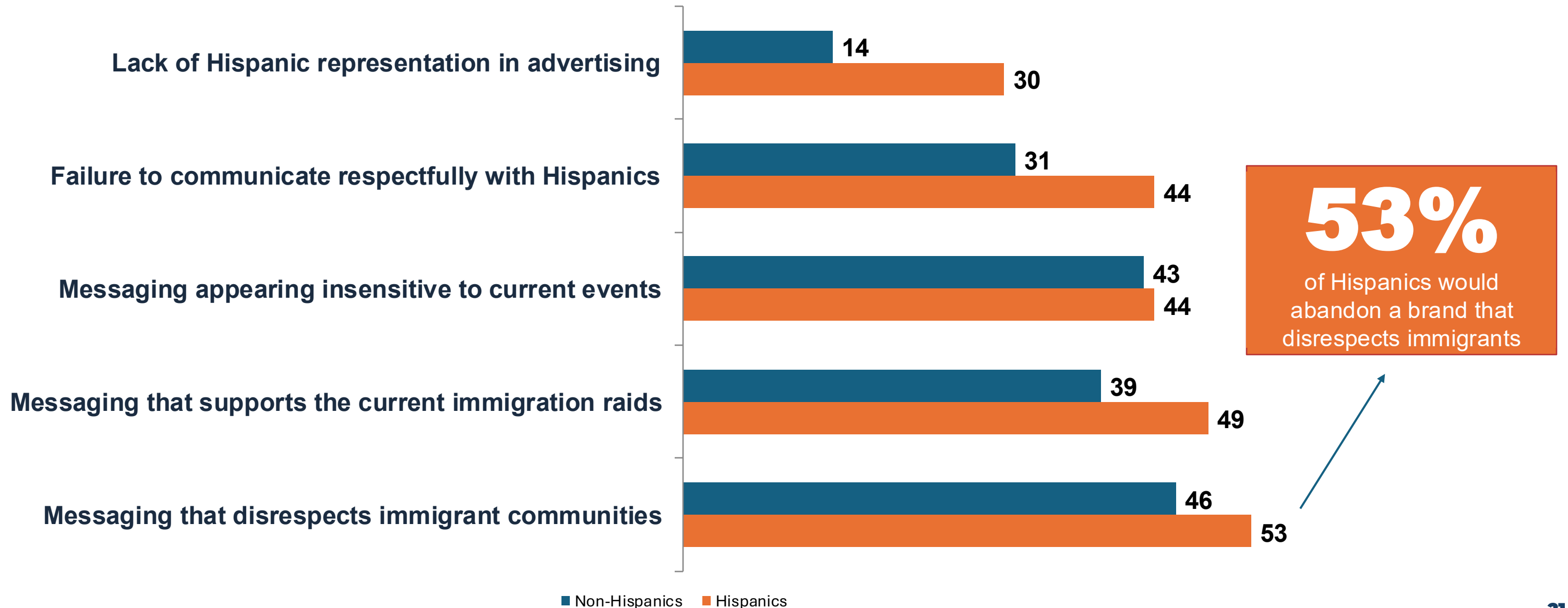
Overall: 57% of Hispanics have changed shopping behavior vs. **38% of Non-Hispanics** — *The language gradient shows where the urgency is concentrated*

*'Not sure' excluded. Base: Hispanics n=500 | Spanish Dominant n=158 | Bilingual n=182 | English Dominant n=160 | Letters indicate significance at 95% CI

High Risk of Backlash: What Triggers Brand Rejection

Disrespect, Insensitivity, or Pro-Enforcement Messaging Can Drive Hispanics Away

Which of the following brand behaviors would make you stop supporting a brand?

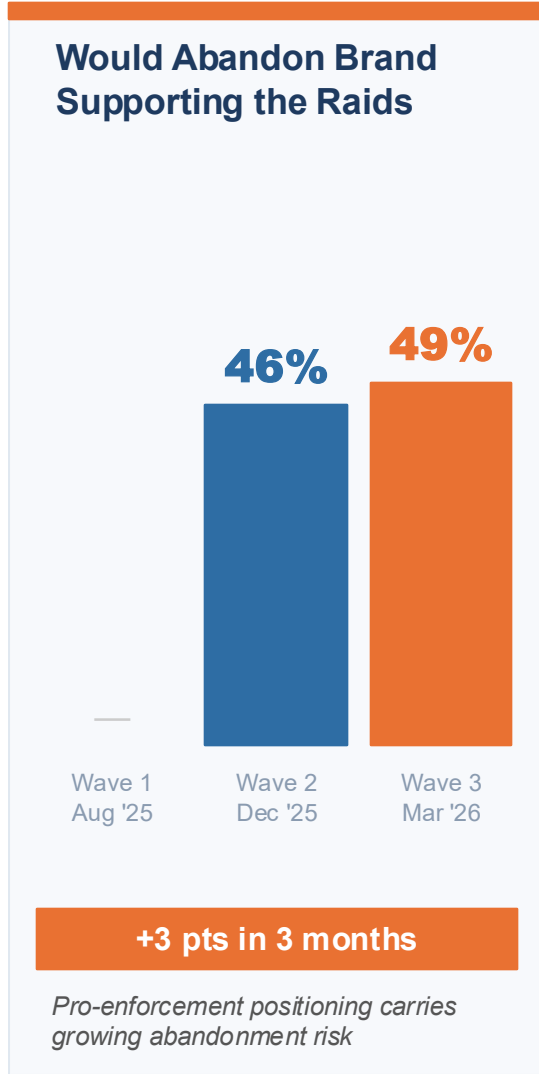
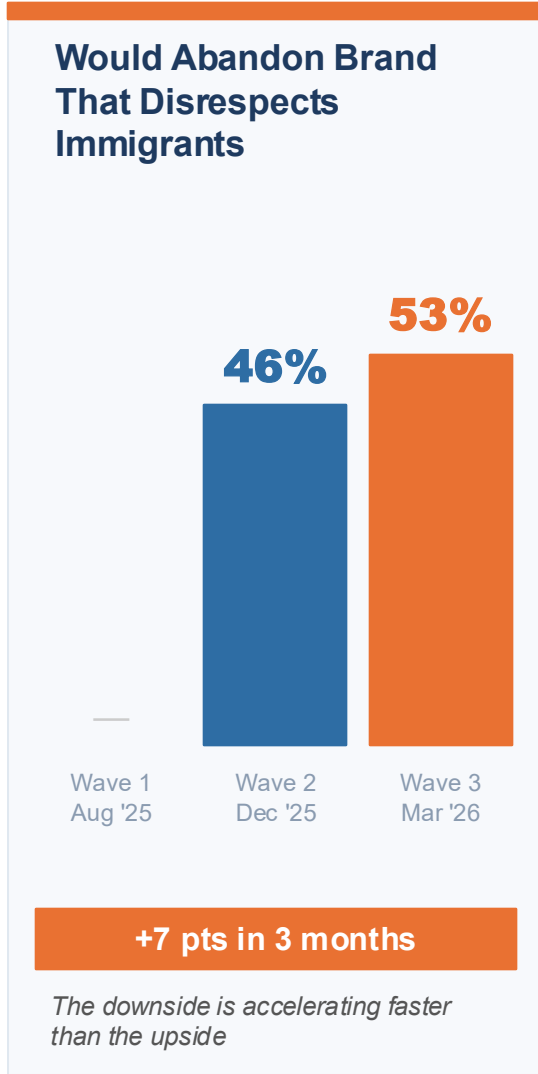
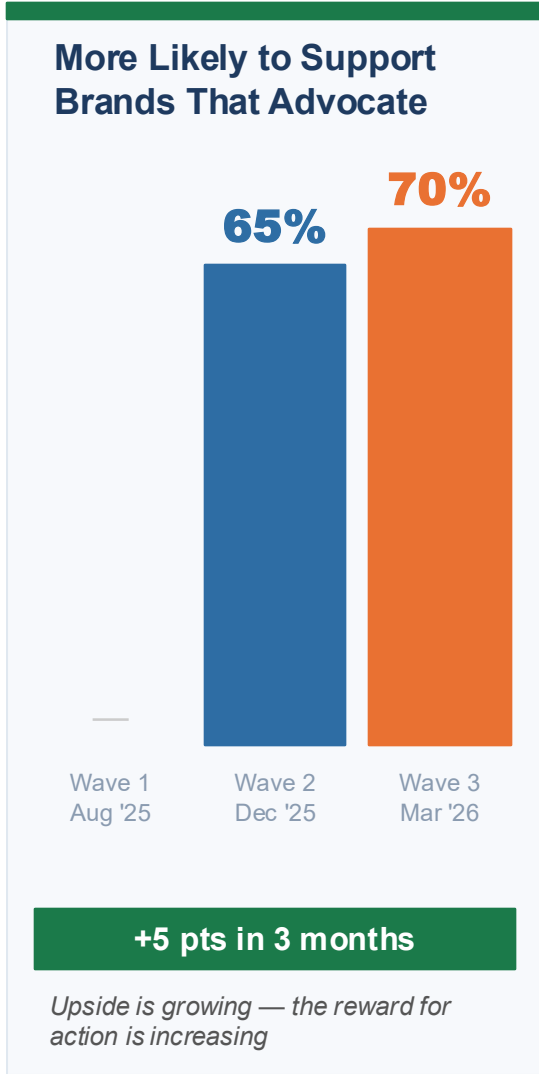
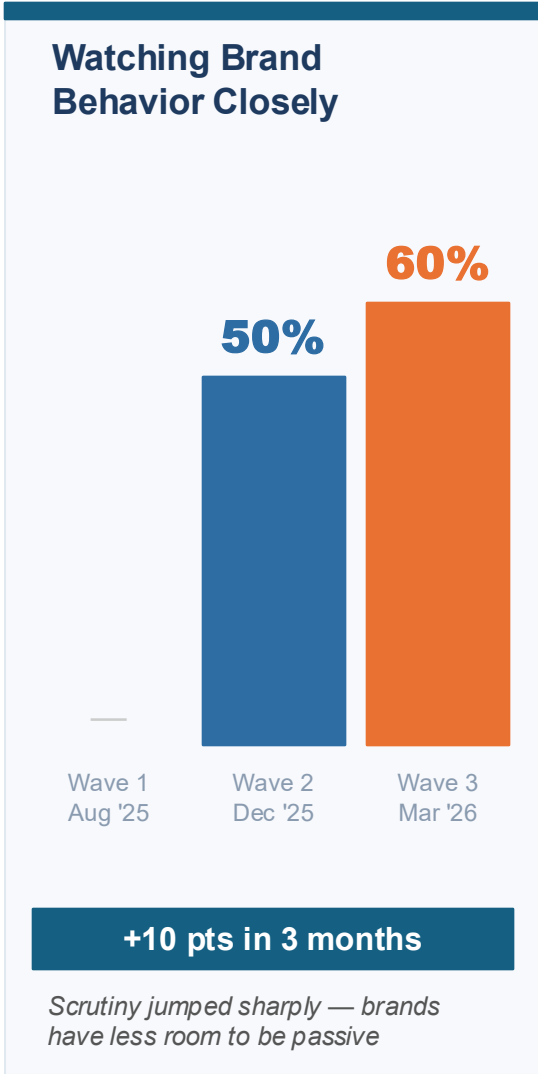
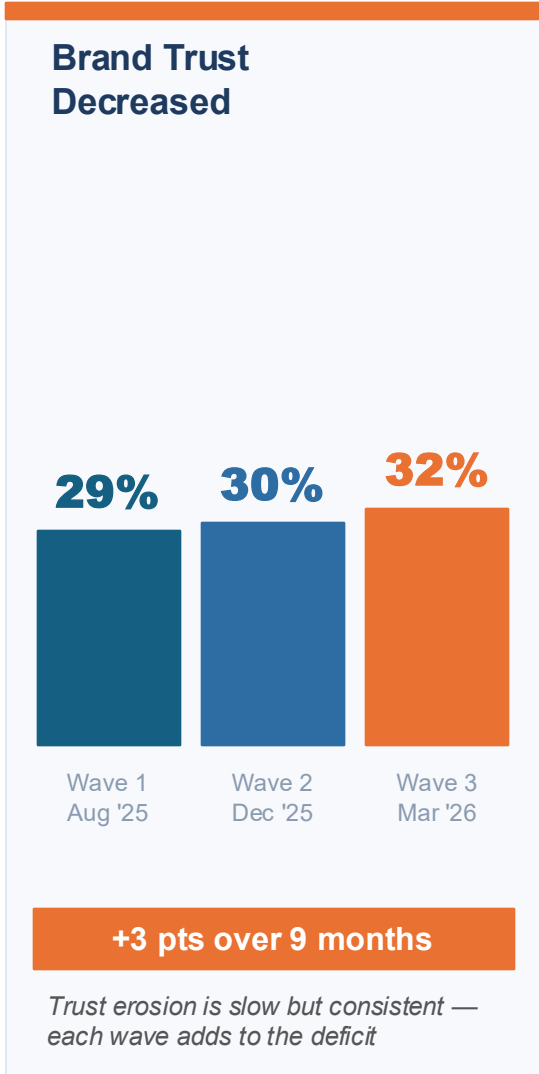


Base: Hispanics n=500 | Non-Hispanics n=526 | Letters indicate significance at 95% CI

Hispanic Consumer Sentiment Is Hardening

Three Waves of Data Show Escalating Brand Risk — and Growing Opportunity for Brands That Act

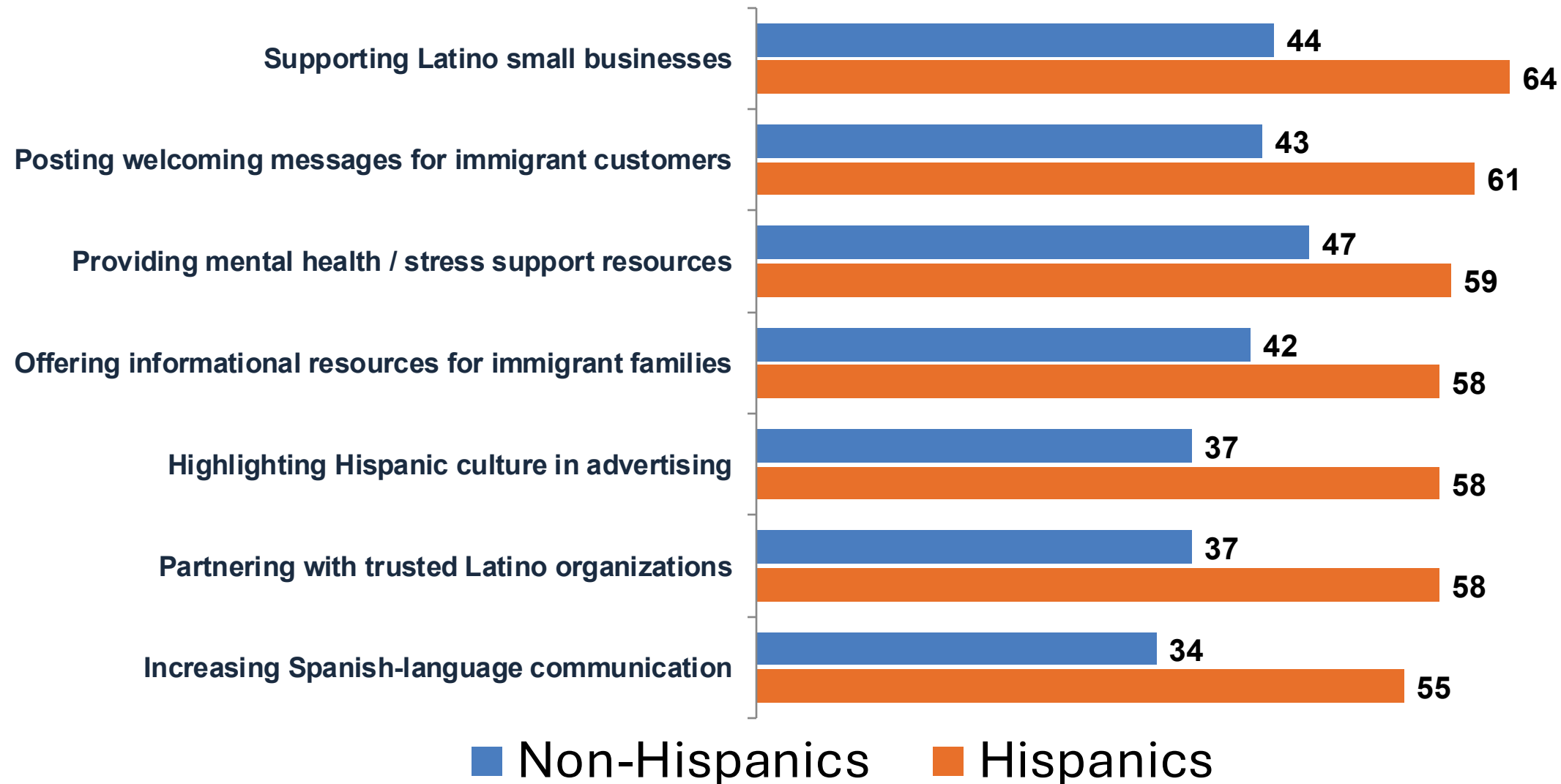
Wave 1: Aug 2025 | Wave 2: Dec 2025 | Wave 3: Mar 2026 | Base: Hispanics n=500 each wave



Playbook for Brands: What Actions Resonate Most

Tangible Support, Cultural Relevance, and Spanish-language Engagement — Top-Two-Box Scores

How supportive would the following actions feel coming from a brand during this time?



#1 Hispanic: 64% — Support Latino small businesses

What This Means for Brand Managers

4 Key Implications for Navigating the Current Environment

01

Silence Is No Longer Neutral

70% of Hispanics expect brands to do something — only 23% accept neutrality. Staying quiet is now a brand position, and a risky one.

02

Behavior Is Already Shifting

57% of Hispanics have changed where they shop or which brands they support — vs. 38% of Non-Hispanics. This is not a hypothetical risk.

03

Support Drives Loyalty — Opposition triggers risk of exodus

53% of Hispanics would be more likely to support a brand that publicly backs immigrant communities. 49% would abandon a brand with pro-enforcement messaging.

04

The Playbook Is Clear

Support Latino small businesses (64%), post welcoming messages (61%), offer resources for immigrant families (58%), and increase Spanish-language communication (55%).



Roy Eduardo Kokoyachuk

Co-Founder & Principal
ThinkNow

✉ roy@thinknow.com

[in /in/RoyEduardoKokoyachuk](https://www.linkedin.com/in/RoyEduardoKokoyachuk)



Marina Filippelli

Multicultural Marketing Executive

✉ marfilippelli@gmail.com

[in /in/marina-filippelli-8905893/](https://www.linkedin.com/in/marina-filippelli-8905893/)

Q & A

Download Full Report at:

<https://hispanicmarketingcouncil.org/brand-impact-of-immigration-raids/>

Demographic Profile

	TOTAL MARKET	Hispanics	Non-Hispanics
		(A)	(B)
GENDER			
Female	51%	50%	49%
Male	49%	50%	50%
Other (Net)	-	-	-
AGE			
18 to 26	17%	18%	15%
27 to 42	28%	44% B	25%
43 to 58	24%	22%	24%
59+	31%	15%	35% A
Median age	47	41	49
ETHNICITY			
Hispanic/Latino	19%	100% B	-
Black, African-American	14%	-	17% A
Asian	6%	-	7% A
White (Non-Hispanic)	60%	-	74% A
REGIONS			
Northeast	17%	16%	17%
Midwest	21%	8%	23% A
South	38%	39%	38%
West	24%	37% B	22%
Base:	(650)	(n=500)	(n=526)

	TOTAL MARKET	Hispanics	Non-Hispanics
		(A)	(B)
EDUCATION			
High School or Less (Net)	30%	32%	29%
Some College/Trade School (Net)	23%	26%	24%
Graduate and Above (Net)	46%	42%	47%
MARITAL STATUS			
Married	39%	37%	42%
Single	36%	36%	34%
Divorced / Separated	8%	8%	8%
Domestic / Life Partner	8%	9%	8%
Widowed	4%	3%	4%
Dating	4%	6%	4%
Civil Union	1%	1% B	0%
EMPLOYMENT STATUS			
Employee (Net)	57%	68% B	55%
BORN IN US			
	86%	68%	91% A
HOUSEHOLD INCOME			
Under \$50K (Net)	44%	44%	42%
\$50K to \$100K	33%	34%	34%
\$100 and Above	21%	20%	22%
Median	\$55,500	\$54,836	\$57,500
Base:	(650)	(n=500)	(n=526)