DIVERSE INTELLIGENCE SERIES | 2019

LA OPORTUNIDAD LATINX: CULTURAL CURRENCY AND THE CONSUMER JOURNEY

PREFACE

America is in the midst of a demographic revolution, which is fundamentally reshaping our economy, society and identity. Over the last 100 years, the Hispanic community has had the greatest impact on the demography of the United States of any ethnic or racial group. It appears this impact will continue for the foreseeable future. Today, the Latinx population is 60 million-strong, and firmly at the center of the new American identity.

While 2019 has ushered in a year of change for the U.S., and nowhere is that more apparent than in the Latinx community. This has been a year of advancement, and transformation. We have been lauded as the growth engine of the country, and at times we've been the center of a challenging national dialog about representation. One thing is certain: our community has united in strength and leadership and offers a glimpse of what's ahead for America.

The Latinx community is increasingly defining what it means to be American. As we fill classrooms, workplaces and stores (both physical and digital), our evolution into one of the most powerful economic and social influencers of this era is remarkable. This influence can be seen from performing arts to politics, from sports to media and even in the variety of flavors and products available on America's supermarket shelves.

The great diversity within our community presents both a challenge for marketers and an opportunity. For our colleagues, clients, educators, policymakers, businesspeople and others, we hope this report brings knowledge and understanding about the U.S. Latinx population and the groups within it, to more effectively serve the needs of this growing demographic who make up an essential growth engine in an increasingly diverse market. For brands looking to reach the loyal and savvy Latinx consumer, you will find insights on the value of including relevant, culturally appropriate messaging and delivery at the right time and on the right platforms.

The report is structured around the ever-evolving Latinx consumer path to purchase so that marketers can build their outreach plans around relevant, impactful and effective strategies that build an authentic and sustainable connection with these consumers.

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EDITOR'S NOTE

Nielsen uses the term Latinx in this report as a gender-neutral, inclusive alternative to "Latino." The decision is a nod toward greater inclusion of women, LGBTQ+ and nonbinary Hispanics and the popularity of the term in social media and academic writing.

EXECUTIVE SUMMARY

By 2023 the buying power of the United States Latinx population is expected to top $1.9 trillion, which is higher than the gross domestic product (GDP) of countries like Australia, Spain and Mexico. These powerful consumers are exerting influence as consumer dynamos and empowered activists in every aspect of American life. The 60 million Hispanics living in the United States constitute nearly a fifth of the total U.S. population, having grown by 70% from 2000 to 2018, compared with only 9% growth for non-Hispanics. Latinx consumers—the youngest minority group, with a median age of just 28—are swiftly approaching their peak earning years, accounting for 75% of all U.S. labor force growth over the last six years.

Latinx consumers are highly social and passionate about sharing what they love (and don't love) with their friends, family and community. For this consumer, the path to purchase—the process of shopping in which consumer demand is connected to what consumers actually buy—is social and circular. The recommendations of friends, family and virtual networks play a preeminent role in product/service discovery, awareness and decision making. The actual transaction is just one step in the process. Hispanic consumers will share their satisfaction (or dissatisfaction) with a transaction or product with their circles of influence, providing the fuel for others' decisions to buy or not buy.

Brand alignment with Hispanic consumers' values has never been more important, as the U.S. Census projects that the Latinx population in the United States will nearly double to 109 million in the next 40 years. The growing population underscores why it makes good sense for fast-moving consumer goods (FMCG) companies, media providers and marketers to understand U.S. Hispanics' aspirations, predispositions and concerns on their path to purchase.

In a world of rapidly evolving media options and new technologies, companies that want Latinx consumers' business must understand what most influences these consumers and how they influence others on their path to purchase. The Latinx affinity for technology and specific media platforms can provide marketers with a fast track to growth if they develop authentic outreach strategies.

SOCIAL DIALOGUE IS ESSENTIAL

Latinx consumers, compared with the general population, spend over one hour more each week on social-networking sites via their smartphones. Members of this demographic group regularly share their opinions and preferences online, surpassing the general population by 37% in agreeing with the statement "I like to share my opinions about products and services by posting reviews and ratings online"; Hispanics also are more likely to use social-networking sites to learn about products and services and receive deals. The increased importance of social networking to the Latinx consumer can be better understood in the context that there is a current of sharing, dialogue and engagement woven into Hispanic culture.

U.S. HISPANICS ACCOUNTED FOR 75% OF ALL U.S. LABOR FORCE GROWTH OVER THE LAST SIX YEARS.

VORACIOUS MEDIA CONSUMERS

Latinx consumers' love of media is evident in their weekly media consumption, which speaks volumes about their appetite for content. Whether it's the 29+ weekly hours spent with TV, the 27 hours spent on apps/websites via smartphones or the 13 hours listening to the radio, marketers have ample choices when determining which path to follow in order to reach Latinx consumers. Despite a love for new and emerging technology, radio remains one of the most reliable ways to reach Hispanic consumers, with 96% of these consumers tuning in every week.

MOBILE AND APPS ARE A MUST

Latinx consumers love navigating life with their mobile devices, as evidenced by the fact that 98% aged 2+ own a smartphone, versus 95% of the total U.S. The high ownership and use rates are not just because of their relative youth. In fact, Hispanics 35+ surpass the general population by 5% for smartphone ownership as well.

ONLINE AUDIO AND VIDEO ON SMARTPHONE

At 69%, Latinx adults 18+ have the highest share of online time spent consuming audio and video; that's 15 percentage points higher than for the total U.S. In addition, they were 42% more likely to have watched subscription service content on their smartphone, again illustrating the importance of the smartphone in the entertainment lives of Latinx consumers.

SPANISH AS A CULTURAL CONNECTOR OF CHOICE

Connecting "in culture" is important to U.S. Hispanics, and data show that language is a strong cultural connection point. Seventy-one percent of all Hispanics speak Spanish at home either primarily or in combination with English. The Latinx community connects with content and brands in Spanish as an important part of the ambicultural* (100% fluent in more than one culture) experience.

EVOLVING FOOD ATTITUDES

Family meals are at the center of Hispanic lifestyles. Sixty-six percent of Latinx consumers say they would rather prepare a meal than eat out at a restaurant. However, the pressures of a fast-moving society on Latinx consumers have evolved their day-to-day lives, increasing interest in health-conscious products and convenient, ready-to-make meal solutions.

SHOPPING IS A FAMILY AFFAIR

Latinx consumers are highly social, which is illustrated in their shopping experiences. In particular, 79% of Latinx consumers grocery shop with someone else, frequently with family members, a trend driven by larger multigenerational households. Twenty-seven percent of Latinx consumers live in multigenerational households, which contain more household members (3.26 vs. 2.42 for the total population). In addition, 48% of Hispanic households have children under 18, versus only 28% of the general population. Family members in Hispanic households influence not only what is purchased, but also why things are purchased, with cultural influences having deep roots in countries of origin of parents, grandparents, *tias*, and *tios*.

ONLINE SHOPPING GROWTH

Latinx consumers are increasingly shopping and making purchases online; 78% agree that the internet is "a great way to actually buy products." Non-food items top the list of high-index and growth items for online Latinx shoppers, indicating both an opportunity for non-food sellers to connect and for food sellers to evaluate their strategies to maximize this opportunity. High-index and growth online items include kids and family use items such as kitchen and household accessories.

BRAND ALIGNMENT WITH VALUES AND SOCIAL RESPONSIBILITY

Selecting brands that align with image and with personal values are important to Latinx consumers; 53% buy "natural products" because they are "concerned about the environment," and 45% (17% higher than the general population) say they expect the brands they buy to support social causes.

*Note: Ambicultural(s) is a registered service mark of EthniFacts, LLC, and is used with their permission.

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INFLUENCES AND INFLUENCERS ALONG THE LATINX CONSUMER JOURNEY

The consumer journey is evolving feverishly as technology use increases and new technologies become available, especially for the Latinx consumer. Latinx consumers differ from the U.S. population as a whole in one primary way: With a median age of 28, they are the youngest ethnic or racial group in the U.S., and as a consequence, most of these consumers have grown up entirely in the digital age.

The Latinx community is also highly social, which is apparent in their passion for social media and use of technology to connect. Latinx consumers like to share their opinions and preferences; they surpass the general population by 37% in agreeing with the statement "I like to share my opinions about products and services by posting reviews and ratings online." Tapping into this predisposition to share, can provide marketers with a fast track to exponential growth if those marketers seek insights and develop authentic Latinx outreach strategies.

COMUNIDAD: THE PHYSICAL AND VIRTUAL SOCIAL NETWORK

Latinx consumers are tech-savvy and comfortable with multiple media channels, which plays a critical role in their path to purchase. Significantly, young Latinx consumers are not the only tech-savvy ones. Older Latinx consumers also share a passion for all things mobile and digital.

For Latinx consumers, the major influences that have an impact on brand and product awareness and making purchase choices are family, friends, and consumer reviews. Thirty-three percent of Latinx consumers agree with the statement "I prefer to buy things my friends or neighbors would approve of," over-indexing by 20% versus the general population. Further, 79% shop for groceries with someone else, frequently with family members who participate in decision making. Reviewing and recommending are equally rewarding for Latinx consumers, with 40% agreeing with the statement "People often come to me for advice before making a purchase."

Social media is a very important part of the Latinx path to purchase. These consumers are more likely than the general population to use social-networking sites to learn more about products and services. They are also more likely to share their product or service experience on a social-networking site.

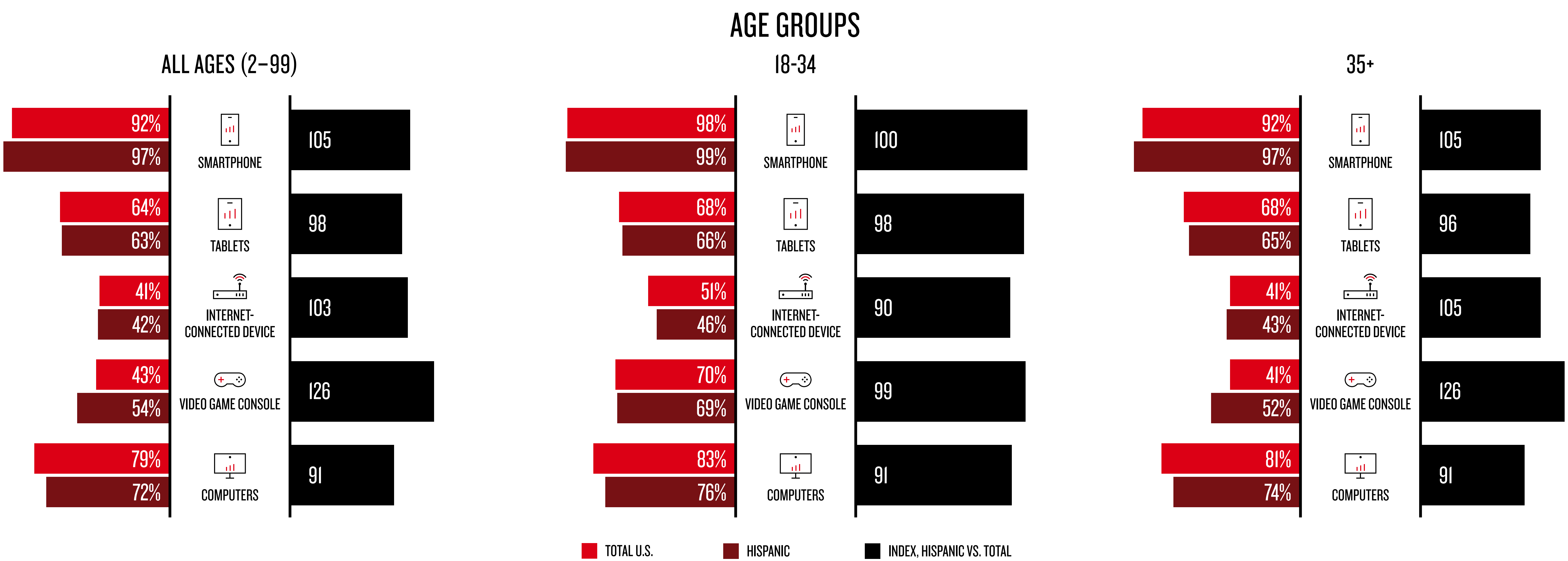
Latinx consumers are merging the physical and digital worlds into their shopping experiences. Fifty-eight percent of Hispanics say they enjoy wandering around the store, looking for new and interesting products, while almost half (48%) of Hispanics—13% higher than the general population—say they find shopping to be a great way to relax. The Latinx consumer is 29% more likely than the general population to agree that advertising on mobile phones provides them with meaningful information about the product use of other consumers, as well as 23% more likely to agree that "advertising on mobile phones provides me with useful information about bargains."

TECNOLOGÍA PARA PREDISPOSICIÓN: YOUNG AND OLD LATINX CONSUMERS LOVE THEIR DEVICES

Latinx consumers' love of technology is hardly confined to the younger generations. Ninety-seven percent of Latinx households own a smartphone, and older Hispanics (those aged 35+) surpass the total population in their age group even more than younger Hispanics (those aged 18–34). Older Hispanics over-index the general population by 5% for smartphone ownership, while the younger group is equal with its counterparts in the general population.

Older Hispanics also surpass the general population by 5% for having an internet-connected device to augment their online experience. Perhaps most surprising, they over-index their 35+ general-market counterparts by 26% for owning a video game console. Having a video game console in the house is indicative of the trend of multigenerational living and the desire to have the best and latest in entertainment options for kids and grandkids.

LATINX CONSUMERS AGED 35+ ARE 26% MORE LIKELY THAN THEIR GENERAL MARKET COUNTERPARTS TO OWN A VIDEO GAME CONSOLE.



Source: Nielsen NPOWER, April '19, based on households/persons installed in the National TV panel

LATINX HOUSEHOLD PROFILES

THE GARCIA HOUSEHOLD

Linda, Age 39
Alfonso (Partner), Age 30
Benicio, Age 3

Nationalities: Linda, Alfonso and Benicio are Mexican-American.

Responses submitted by Linda.

Q: How do you research new products and/or brands?
A: I do my best to shop local from women of color, but when I can't find products I want from women of color I check to see if they are inclusive of people of color and their politics, via the internet and their social media accounts.

Q: How do you prefer to receive shopping deals? Why?
A: I don't like to receive shopping deals, my mail inbox is too full. If I want a deal on something that I am shopping for, I do my research on the internet.

Q: When making a purchase, whose opinion(s) do you consider?
A: I read reviews and check with friends that might have experience with the product.

Q: How do you decide whether to shop for a product in-store or online?
A: I mainly shop online. If I shop in-store it because we are having a family outing, but we don't go out only to shop.

Q: What makes for a positive in-store shopping experience?
A: Great customer service, always.

Q: Do you use social media? If so, for what reasons?
A: Yes, for updates on my business, to communicate with friends and family and to build relationships with my clients.

Q: How do you prefer to watch video content?
A: On my phone.

Q: On what device(s) do you listen to music?
A: Via phone connected to our speaker.

Q: How do you stay up to date with current events?
A: Social media and occasionally I will look through apple news on my phone.

Q: What language(s) do you speak at home?
A: English.

Q: Who goes with you on your shopping trips?
A: Recyclable bags, phone, wallet and extra phone battery.

Q: What do you find most important about the food products you buy?
A: That I am shopping from stores owned by people of color, like Northgate Market.

These profiles were compiled via an independent online survey, and provide contextual background to the Nielsen data in the report. The responses reflect the opinions of the individual households and should not be interpreted as a scientific insight.

Patterns in Latinx consumers' time on device and reach will shape which advertising channels have the most potential for maximizing return on investment. With regard to time on device, a notable growth area is website and app visits on a smartphone, which was reported by 82% of Latinx consumers, up 4% year over year. Also, adult Hispanics spend only about two hours less each week visiting websites/apps on their smartphone (27:11) than they do on TV (29:28). For the general population, the gap is much greater, with over 10 hours more time spent weekly on live TV than time spent on their smartphone on websites/apps.

LATINX CONSUMERS SPEND ONLY TWO FEWER WEEKLY HOURS USING APPS AND THE WEB ON A SMARTPHONE THAN WATCHING TV.

WEEKLY TIME SPENT ON DEVICE: ADULT USERS, AGES 18+

	TOTAL U.S.	HISPANIC
Total use of television	39:06	29:28
Live + time-shifted TV	33:59	23:59
Time-shifted TV	7:15	5:02
TV-connected devices	10:42	10:31
DVD/Blu-ray device	4:11	4:19
Game console	9:47	8:36
Internet-connected device	9:01	8:56
Radio	13:06	12:52
Internet on a computer	7:12	6:36
Social networking	2:07	1:53
Video on a computer	2:28	2:55
App/web on a smartphone	26:31	27:11
Video-focused app/web on a smartphone	2:19	3:21
Streaming audio	0:57	1:01
Social networking	6:33	7:42
App/web on a tablet	12:47	12:26
Video-focused app/web on a tablet	2:49	3:54
Streaming audio	0:33	0:32
Social networking	2:29	2:23

Source: Nielsen Total Audience Report, Q1 2019

Latinx consumers' behaviors give advertisers multiple opportunities for connecting with them. Latinx consumers spend approximately 29-1/2 hours weekly on TV, an additional 27 hours weekly on apps/websites via their smartphones, plus another 13 hours listening to the radio. The largest weekly reach comes in radio, then live plus time-shifted TV, then mobile websites/apps.

Nearly twice as many Latinx consumers will visit websites/apps on their smartphone as on a computer or tablet. By carrying their digital experience in their pocket, Latinx consumers often merge their digital and physical experiences, allowing brick-and-mortar retailers to make physical shopping more attractive to Latinx consumers with a digitally augmented experience.

NEARLY TWICE AS MANY LATINX CONSUMERS VISIT WEBSITES/APPS ON THEIR SMARTPHONE AS ON A COMPUTER OR TABLET.

Radio has the highest weekly reach among adult Hispanics, at 96% versus 92% for the total population. The next-highest weekly reach for Latinx adults is TV at 90%, primarily through live plus time-shifted TV. For any media channel—be it audio, video or digital—the use of smartphone devices outreaches the use of PCs or tablets by large margins.

WEEKLY REACH (%): ADULT USERS, AGES 18+

	TOTAL U.S.	HISPANIC
Total use of television	90%	90%
Live + time-shifted TV	86%	86%
Time-shifted TV	52%	42%
TV-connected devices	54%	58%
DVD/Blu-ray device	13%	10%
Game console	15%	18%
Internet-connected device	42%	46%
Radio	92%	96%
Internet on a computer	53%	43%
Social networking	29%	21%
Video on a computer	24%	20%
App/web on a smartphone	80%	81%
Video-focused app/web on a smartphone	65%	70%
Streaming audio	50%	52%
Social networking	75%	76%
App/web on a tablet	45%	42%
Video-focused app/web on a tablet	29%	30%
Streaming audio	20%	19%
Social networking	33%	29%

Source: Nielsen Total Audience Report, Q1 2019

CONECTANDO: A VARIETY OF APPS CONNECT WITH LATINX CONSUMERS

It's important for advertisers and content providers to know what types of apps Latinx consumers frequent, in order to reach these consumers where they spend time on their path to purchase. Both younger (aged 18–34) and older (35+) Latinx adults surpass the general population on using most types of apps, with search engines, entertainment and electronics having the highest reach among Hispanics of all ages.

Younger Latinx adults over-index the general population most on corporate information sites. This may indicate the high level of importance these consumers place on corporate responsibility and brands that align with their values. Corporate responsibility is important to discerning Latinx consumers, as 55% of Hispanics of all ages agree that "I expect the brands I buy to support social causes."

REACH OF DIGITAL APPS: HISPANICS, BY AGE GROUP

	AGES 18–34		AGES 35+	
	Total Reach	Index, Hispanic to General Market 18–34	Total Reach	Index, Hispanic to General Market 35+
Search engines/portals and communities	93%	101	87%	101
Entertainment	92%	101	85%	103
Computers and consumer electronics	90%	103	84%	102
Multi-category commerce	80%	104	72%	95
News and information	72%	102	64%	94
Telecom/internet services	79%	105	72%	108
Finance/insurance/investment	73%	104	60%	100
Travel	47%	110	36%	96
Corporate information	33%	119	26%	92
Education and careers, app	28%	107	19%	121
Automotive	3%	118	2%	68

Source: Nielsen Media Impact, February 2019

APP

LATINX ADULTS AGED 35+ SURPASS THEIR GENERAL MARKET COUNTERPARTS FOR REACH ON EDUCATION AND CAREER APPS. NINETEEN PERCENT OF THESE CONSUMERS USE THESE APPS, 21% HIGHER THAN THE TOTAL POPULATION AGED 35+.

Older Latinx adults surpass the general population most on reach of apps dealing with education and careers, with 19% of them using these apps, over-indexing by 21%. These apps reach younger Hispanic adults at an even higher rate: 28% use these apps, over-indexing their general-population counterparts by 7%.

Younger Latinx consumers surpass their general-market counterparts by 18% for using automotive-related apps and are more likely to visit an automotive app, signaling that this demographic is eager to engage with brands on their path to purchase automobiles. Researching vehicles is critical to these passionate Latinx car shoppers, with 49% of Hispanics agreeing that their first consideration in choosing a vehicle is its exterior styling and another 34% agreeing they seek out vehicles with bold innovative designs that stand out from others on the road.

MIRANDO: LATINX CONSUMERS ARE AVID VIDEO ENTHUSIASTS

Latinx consumers spend a lot of their time watching video, and content providers should know there are important differences in how Hispanic adults access their video and TV programming on their path to purchase. Like many Americans, Latinx consumers are evolving in the way they watch television. While 21% of Latinx consumers (vs. only 13% of the total population) access TV over the air, remaining steady from 2018 to 2019, traditional cable connectivity fell almost five percentage points from 2018 to 2019. At the same time, higher-tech connection methods such as virtual multichannel video programming distribution (vMVPD, including Sling TV, DirecTV Now, YouTube TV, Hulu Live and PlayStation Vue) nearly doubled from 2% to 4%, and broadband connections increased among Latinx consumers by one-third, from 6% to 8% of households. Knowing how Latinx consumers are evolving in their TV connectivity allows marketers and content providers to connect with younger and older Hispanics on the platforms that best meet their needs.

HOW HISPANIC HOUSEHOLDS ACCESS TV

	TOTAL		HISPANIC	
	MAR '18	MAR '19	MAR '18	MAR '19
Cable No vMVPD	78.7%	74.5%	70.6%	66.4%
vMVPD	2.5%	4.8%	2.3%	4.2%
Over The Air	12.9%	13.0%	20.9%	21.3%
Broadband Only	5.8%	7.8%	6.2%	8.2%
Total Multichannel	81.2%	79.3%	72.9%	70.6%

Note: Traditional Cable, vMVPD, Over the Air, and Broadband Only breaks are mutually exclusive. Total Multichannel is the sum of Traditional Cable and vMVPD

COMPARTIENDO: LATINX CONSUMERS LOVE TO SHARE DURING THEIR FAVORITE SHOWS

Information about the types and genres of shows preferred by Latinx consumers can help marketers decide where and when to place messaging that will connect. As in the general population, the top two genres of TV shows for all age groups are participation variety (including reality shows) and award ceremonies. A third genre is uniquely a favorite of younger and older Latinx viewers: The conversation or talk show. Daytime dramas, many of them telenovelas, also are popular with younger and older Latinx viewers, perhaps indicating a love being passed down to younger adults watching with their parents and grandparents.

FAVORITE TV GENRES

ADULTS 18-34		ADULTS 35+	
TOTAL MARKET	HISPANIC	TOTAL MARKET	HISPANIC
Participation Variety	Award Ceremonies	Participation Variety	Participation Variety
Award Ceremonies	Participation Variety	Award Ceremonies	Award Ceremonies
Evening Animation	Evening Animation	Quiz Give Away	Conversations, Colloquies
Quiz Give Away	Daytime Drama	Child - Live	Daytime Drama
Popular Music	Conversations, Colloquies	Concert Music	General Drama
General Documentary	General Drama	Audience Participation	General Variety
Sports Events	General Variety	Daytime Drama	Quiz Give Away
General Drama	Popular Music	News	News Documentary
General Variety	Quiz Give Away	Conversations, Colloquies	Child - Live
Concert Music	News Documentary	General Documentary	Concert Music

Genres that appear for Hispanic but not the total population

Source: Nielsen NPOWER, Broadcast and Cable programming, Live+7 Days, January 1, 2018 - December 31, 2018, excludes repeats

TV viewing for Hispanics extends far beyond the successful world of telenovelas. Latinx TV viewers are searching for content choices that authentically represent the push and pull of their cultural experiences. Traditional and nontraditional content producers are breaking new ground by developing Latin-themed shows, joining an array of successful content by the major Spanish-language networks already servicing the market. “La Casa de Papel” (or “Money Heist,” as it’s known in English) is now the most watched non-English series on Netflix ever. During the summer of 2019, HBO launched its first primarily Spanish-language original series, “Los Espookys.” Eva Longoria is executive producer of a new series on ABC called “Grand Hotel,” a drama set at a Hispanic-family-owned hotel in Miami Beach. And Comedy Central’s “Alternatino with Arturo Castro” is a new sketch series spoofing pop culture, politics and life as a modern Latino man.

Latinx consumers are passionate about sharing their live-TV experiences, and these consumers, particularly Spanish speakers, are dually engaged. They love to watch TV programs and talk about them on social-media networks at the same time. In fact, highly engaging shows will draw large live Hispanic audiences and, thus, social engagement around content and even product placement. Latinx consumers’ use of social media to engage with content presents remarkable opportunities for programming and advertising.

TOP 10 MOST TALKED ABOUT SPANISH-LANGUAGE SERIES ON FACEBOOK, INSTAGRAM & TWITTER

January 1 - June 3, 2019

RANK	NETWORK	PROGRAM	# OF EPISODES	AVE. TOTAL INTERACTIONS (000)	AVE. FACEBOOK INTERACTIONS (000)	AVE. INSTAGRAM INTERACTIONS (000)	AVE. TWITTER INTERACTIONS (000)
1	Univision	Mira quien baila All Stars	6	454	38	412	4
2	NBC Universo	WWE Raw en Español	5	447	54	381	12
3	NBC Universo	WWE Smackdown en Español	13	238	46	190	2
4	NBC Universo, Telemundo*	La Voz	15	171	27	141	3
5	Univision	Pequeños Gigantes USA	9	54	9	38	8
6	NBC Universo, Telemundo*	La Reina del Sur	29	34	7	26	1
7	Univision	Amar a muerte	33	31	2	26	3
8	Telemundo	Jugar con Fuego	9	20	2	17	1
9	Telemundo	Señora Acero	20	17	3	14	0.3
10	NBC Universo, Telemundo*	Betty en NY	82	11	1	9	1

Source: Nielsen Social Content Ratings measures U.S. social media activity on Facebook, Instagram and Twitter related to programs from three hours before through three hours after linear telecasts. Includes new/live telecasts aired on Spanish-language broadcast and national cable networks between 1/1/2019 and 6/3/2019. Series list includes primetime and late fringe programming and excludes programs with less than five telecasts as well as all specials, sports and talk & news programming. Programs that are simulcast on multiple networks are listed alphabetically and metrics reflect the highest interactions across all airing networks, denoted with an asterisk. Due to data collection issues, programming aired on the following dates may have been impacted: 2/13/19, 3/3/19, 5/5/19. Episodes appear for networks that SCR tracks, programs that aired originally on other networks may not be captured.

CULTURA Y ENTRETENIMIENTO: MUSIC AND VIDEO ARE CULTURAL CONNECTORS

For marketers looking to engage the Latinx consumer, an understanding of their passion for music and video content is required. Hispanic adults have the highest share of time spent on audio/video, at 69%. In contrast, in the total U.S. population, adults report spending only 54% of their online time consuming audio/video.

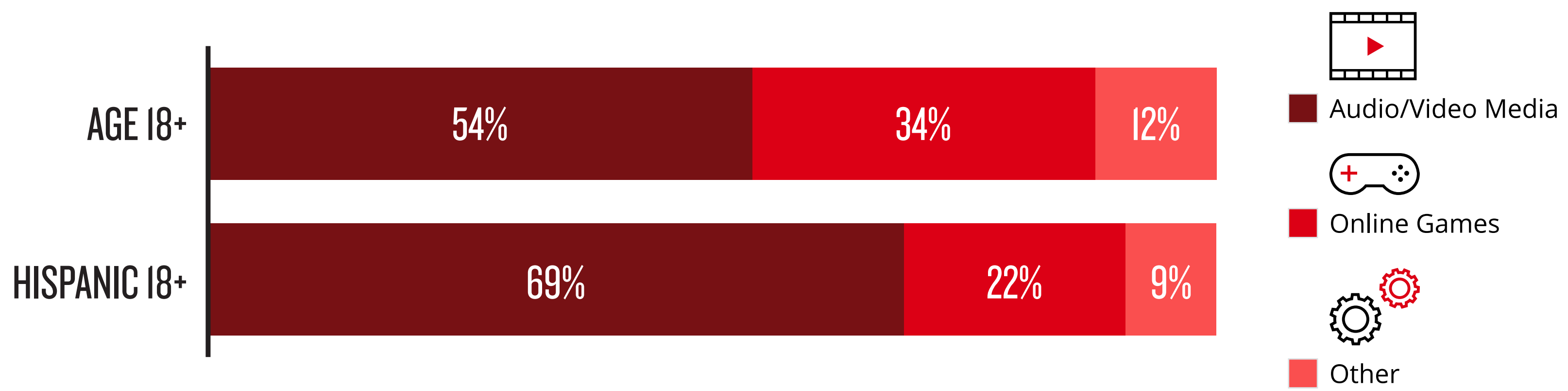
Unique to Latinx consumers is their use of smartphones to access their favorite video content. In the past 30 days, Latinx consumers were 59% more likely than the total population to have watched/downloaded a movie on their smartphone, 43% more likely to have used it to watch free TV shows, and 42% more likely to have watched subscription service content on it.

Music is a social and cultural connector, a source of personal enjoyment, and an important unifier within the Latinx community. Regardless of how or where Hispanics consume their music, marketers need to understand the importance of connecting with the community authentically through music. With nearly 100% of Hispanics listening to some form of audio on a weekly basis (either on radio, smartphones and/or tablet), music/audio platforms should be a centerpiece of messages aiming to reach Latinx consumers on their path to purchase.

Further highlighting the smartphone as the content conduit of choice, Latinx consumers are 51% more likely than the general population to have used their phone to listen to a local radio station, and 41% more likely to have used it to listen to internet radio. They are also 29% more likely to have listened to an online music service like Pandora or Spotify. Users of voice-activated devices (Amazon Echo, Google Home and Apple Homepod) are among music's fastest-growing consumer bases. Continuing the trend to early tech adoption, Hispanics make up 23% of those consumers, greater than their share of the total population.

SHARE OF TIME SPENT BY ENTERTAINMENT SUBCATEGORY

Based on total U.S. population



Source: Nielsen Total Audience Report, Q3 2018.

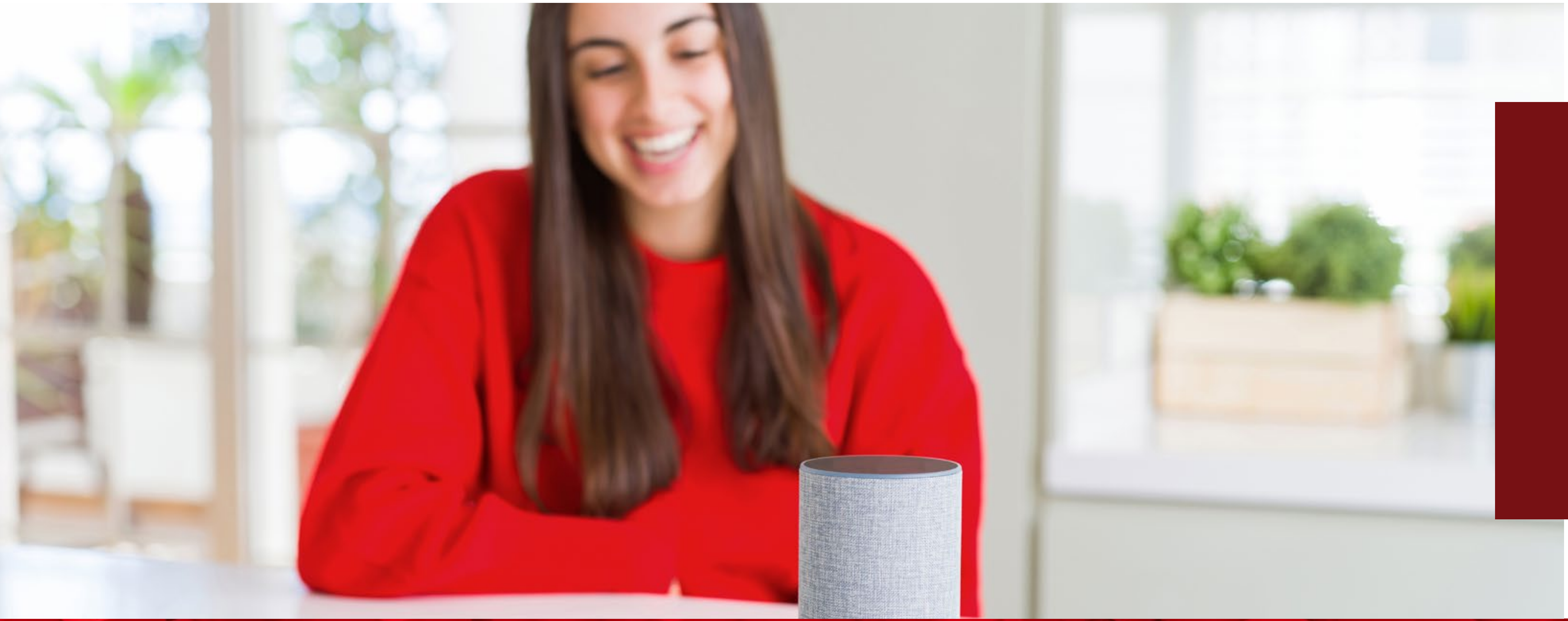
LLEGAREMOS: LATINX INFLUENCERS ARE RESHAPING THE AMERICAN MAINSTREAM

Latinx influencers are recreating the American mainstream, and movies are no exception. At the 91st Academy Awards in 2019, Alfonso Cuarón's "Roma" tied for most nominations of any film, at 10, and the film's Best Picture nomination made "Roma" only the second movie nominated for the Best Picture (after "Babel") to feature Spanish. In late summer 2019, the live-action adaptation of the wildly popular Nickelodeon cartoon "Dora the Explorer," featuring a Latina title character and a largely Latinx cast, will be released. For many American kids, "Dora" was their first exposure to Spanish language in mainstream pop culture, and the premiere of the movie is expected to expand the ambicultural influence of this beloved character.

The Spanish language is also a more frequent feature of popular music. In 2018 in the U.S. alone, there were 69.8 billion on-demand audio and video streams of Latin music (defined by the music industry as songs with lyrics more than half in Spanish), according to Nielsen Music. That was up 37% from 51 billion streams in 2017. The popularity of Latin music videos is evident on YouTube's charts: Ozuna ended 2018 as the most viewed music artist on YouTube globally, and eight out of the 10 most-viewed music videos of the year worldwide were Latin. Billboard reports that 24 Spanish-language songs hit the Hot 100 in 2018, compared with 19 in 2017.

The number of Latinx content creators on the internet continues to grow. Social-media sensation and author LeJuan James is one of the best known and most influential comedy creators in the United States, with over 5 million followers across Facebook, Instagram and other digital platforms. His content depicts the cultural push and pull of Latinx life. His "grandma" character recently appeared in Camila Cabello's "Havana" music video, which now has approximately one billion views and counting.

As more Latinx influencers continue to shape the American mainstream in their cultural image, it is important for manufacturers, media companies and marketers to understand the mutual benefits of engaging Latinx consumers through content that aligns with the Latinx cultural experience and where Latinx are seeking their entertainment.



IN 2018 IN THE U.S. ALONE, THERE WERE 69.8 BILLION ON-DEMAND AUDIO AND VIDEO STREAMS OF LATIN MUSIC.

CONSUMIDORES PODEROSOS: THE PRE-STORE INFLUENCERS OF LATINX CONSUMERS

Positive Latinx images, celebrity and endorsement are important influencers on the Latinx path to purchase. Forty-five percent of Hispanics agree with the statement “I feel really good about seeing celebrities in the media that share my ethnic background,” which surpasses the general population by 37%. They are also 21% more likely than the general population to agree with the statement “I love keeping up with celebrity news and gossip.” Most importantly to marketers, Latinx consumers are 29% more likely to agree with the statement “A celebrity endorsement may influence me to consider or buy a product.”

Recommendations, digital reviews and celebrity endorsements are pivotal as primary influential sources prior to purchase. Thirty-five percent of Hispanics report that they are influenced by “what’s hot and what’s not,” while only 30% of the total population says the same. Face-to-face and virtual worlds surface as important influencer pathways, as seen in Nielsen Category Shopping Fundamentals. Data shows that personal recommendations and digital recommendations via reviews over-index in many shopping categories for Latinx consumers and are relied upon as pre-store influencers in the Latinx path to purchase.

PRE-STORE INFLUENCERS	TOTAL	FOOD	NON-FOOD	BEVERAGES	FRESH	FROZEN	HEALTH	PERSONAL CARE	HOUSEHOLD CARE
RECOMMENDATION	119	133	106	110	136	197	77	141	218
DIGITAL	142	140	139	158	136	107	132	147	131
AD	77	70	96	37	87	43	20	106	108
COUPON / PROMO CODE	103	91	113	105	77	85	133	111	100
REQUEST	124	125	127	111	136	120	110	113	136

Hispanics are more likely to purchase a product for the given intended user than the total population

Hispanics are less likely to purchase a product for the given intended user than the total population

Source: Nielsen U.S. Category Shopping Fundamentals, 2017

LATINX HOUSEHOLD PROFILES

THE TORO/CAMPBELL FAMILY

Kristina, Age 24
Andrew (Husband), Age 26
Zak (Son), Age 1

Nationalities: Kristina is Puerto Rican, Andrew is Grenadian and Zak is Puerto Rican-Grenadian.

Responses submitted by Kristina.

Q: How do you research new products and/or brands?
A: Through trusted magazine (online or in print) sources, occasionally blogs and Youtube channels.

Q: How do you prefer to receive shopping deals? Why?
A: Email, so I can filter through them easily.

Q: When making a purchase, whose opinion(s) do you consider?
A: Mine and my family's.

Q: How do you decide whether to shop for a product in-store or online?
A: I won't buy something online if I am unsure of the fit (if it is clothing), or quality. I also won't purchase something online if there is a chance it will come damaged.

Q: What makes for a positive in-store shopping experience?
A: Ambiance and organization, friendly in store staff, pleasant music.

Q: Do you use social media? If so, for what reasons?
A: Yes, to build my own professional social network and community as a musician.

Q: How do you prefer to watch video content?
A: On Youtube on my computer, occasionally through Instagram.

Q: On what device(s) do you listen to music?
A: My IPhone and computer.

Q: How do you stay up to date with current events?
A: Through google articles, Youtube and instagram.

Q: What language(s) do you speak at home?
A: English and some Spanish.

Q: Who goes with you on your shopping trips?
A: My son and husband.

Q: What do you find most important about the food products you buy?
A: Quality, nutrition value and price.

These profiles were compiled via an independent online survey, and provide contextual background to the Nielsen data in the report. The responses reflect the opinions of the individual households and should not be interpreted as a scientific insight.

SECTION I TAKEAWAYS

Ninety-seven percent of Latinx households own a smartphone. Adult Hispanics spend only 2 fewer hours each week using websites/apps on their smartphone (27:11) than they do on live+time-shifted TV (29:28). A mobile outreach strategy is an absolute must for companies seeking to reach Latinx consumers. However, marketers should not overlook traditional media when building Hispanic outreach plans. After all, 96% of these consumers listen to radio weekly, making the medium one of the most reliable to reach Latinx consumers.

The top two genres of TV shows for all Latinx age groups are participation variety (including reality shows) and award ceremonies with conversation or talk shows coming in third (unique to Latinx consumers vs. the total population). Daytime dramas are popular with both younger and older Latinx viewers. Latinx families cherish shared experiences. Savvy marketers should look to connect across generations to truly connect with Latinx households.

Latinx adults spend much more of their entertainment time with audio and video (69% of total entertainment time spent) compared to the general population (54% of total entertainment time spent). This insight provides a starting place to engage with Latinx consumers on the content platforms where they spend their time—which is key as these platforms proliferate.

Recommendations, digital reviews and celebrity endorsements are pivotal as primary influential sources prior to purchase as 35% of Hispanics report that they are influenced by “what’s hot and what’s not,” vs. only 30% of the total population. Thus, brands have appeal to Latinx consumers in culturally relevant terms—while also generating buzz that indicates the next big thing.

SECTION 2:
THE SURGING DEMOGRAPHIC AND ECONOMIC IMPERATIVE

ESTARÁ INCLUIDO: THE U.S. CENSUS BUREAU–NIELSEN 2020 PARTNERSHIP

The decennial census is absolutely essential to many civic functions U.S. residents count on every day. For instance, local government use the census to ensure public safety and plan new schools and hospitals; residents use the census to support community initiatives involving legislation, quality-of-life and consumer advocacy; real estate developers and city planners use the census to plan new homes and improve neighborhoods; every 10 years, the results of the census are used to reapportion the U.S. House of Representatives, determining how many seats each state gets; and, after each census, state officials use the results to redraw the boundaries of state and legislative districts, adapting to population shifts.

Beyond this though, business decisions across the country also depend on accurate census data. Companies use this data to plan for growth and adapt to changing demographics. For example, through Nielsen, census measurement underpins $90 billion in advertising transactions and powers decision-making by the country's biggest retailers and manufacturers that influence more than $1 trillion.

We use census data to determine universe estimates (population estimates) in our U.S. panels and as a key benchmark for understanding consumers. Accurate census data has never been more important, due to the rapid diversification of the U.S. population. Multicultural consumers are projected to become the numerical majority in the U.S. by 2044. That's why Nielsen is proud to be a 2020 Census Official Partner and an active participant in ensuring that the 2020 Census is as accurate as possible.

The results described in this section are primarily sourced from and based on data collected by the U.S. Census Bureau.

CENSUS AND YOU—DID YOU KNOW?

95% OF HOMES IN THE COUNTRY WILL RECEIVE LETTERS WITH INSTRUCTIONS BY MID-MARCH 2020. YOU WILL HAVE THE OPTION TO RESPOND DIGITALLY (FOR THE FIRST TIME IN 2020), BY TELEPHONE CALL OR ON THE PAPER FORM.

RETURNING A PARTIALLY FILLED-OUT QUESTIONNAIRE MAY RESULT IN A FOLLOW-UP PHONE CALL OR VISIT FROM A CENSUS WORKER TO COMPLETE THE FORM.

DO IT RIGHT THE FIRST TIME!

IT'S CONFIDENTIAL. IT IS AGAINST THE LAW FOR THE U.S. CENSUS BUREAU TO SHARE OR PUBLISH ANY PRIVATE INFORMATION THAT IDENTIFIES AN INDIVIDUAL, INCLUDING WITH OTHER GOVERNMENT AGENCIES.

PERSONAL INFORMATION CANNOT BE USED AGAINST YOU BY ANY GOVERNMENT AGENCY OR COURT.

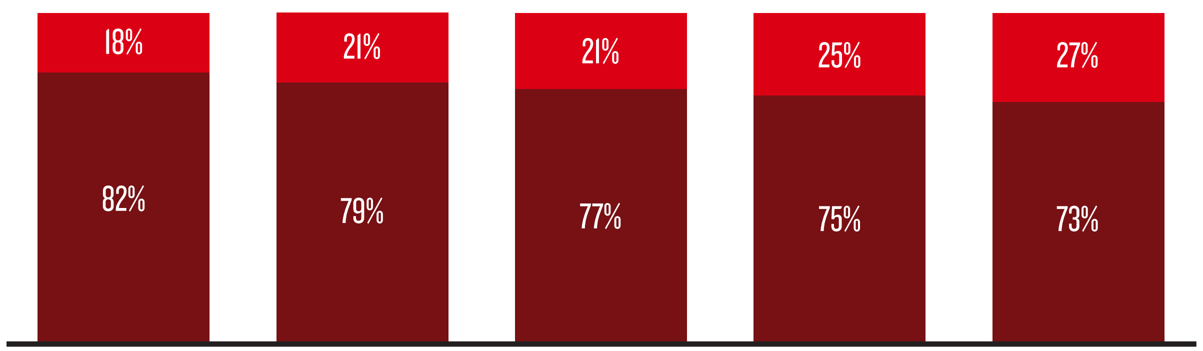
REPRESENTATION MATTERS. THE CENSUS ONLY HAPPENS ONCE EVERY 10 YEARS. MAKE SURE YOU ARE COUNTED TO HELP ENSURE YOUR FAMILY, AND YOUR COMMUNITY, RECEIVE THE FUNDING AND RESOURCES THEY NEED.

POBLACIÓN ACELERADA: ACCELERATING PROJECTIONS FOR POPULATION GROWTH

As the fastest-growing and youngest ethnic or racial group in the U.S., Hispanics constitute over 18% of the total U.S. population, with influence far greater than their burgeoning numbers. This group's relative youth—a median age of 29.1 for Hispanic males and 30 for Hispanic females (vs. 37 and 39.5 for males and females in the general population)—means that Latinx consumers are swiftly approaching their peak earning years. Hispanics also account for 76%* of all U.S. labor force growth between 2010 and 2016.

*Source: Employment Projects program, U.S. Bureau of Labor Statistics, (Last modified October 24, 2017)

HISPANIC PERCENTAGE OF TOTAL U.S. POPULATION



	2018	2028	2038	2048	2058
Hispanic Pop	59,881,134	72,259,592	85,075,723	97,436,929	108,969,232
Non-Hispanic Pop	268,010,777	278,612,415	285,102,981	288,480,699	292,307,358

Source: U.S. Census Bureau, 2017 National Population Projections

The U.S. Hispanic population, which was 59.9 million in 2018, is growing much more rapidly than the total population. It is increasingly becoming the primary source of U.S. population growth relative to other ethnic or racial groups. The total population of the U.S. grew 16% from 2000 to 2018, while the Hispanic population grew by 69.6%. The non-Hispanic population grew just 9% over the same period.

Another measure of the relative youth of the U.S. Hispanic population is that 31.2% is under age 18, compared with 20.46% of non-Hispanics. With a higher share of the Hispanic population entering their childbearing years, Hispanics' leading share of growth will continue*. The Census Bureau projects that the Latinx population in the U.S. will nearly double to 109 million between 2018 and 2058, a projected percent change of 82%, versus projected percent change of only 9% over the same period for the non-Hispanic population.

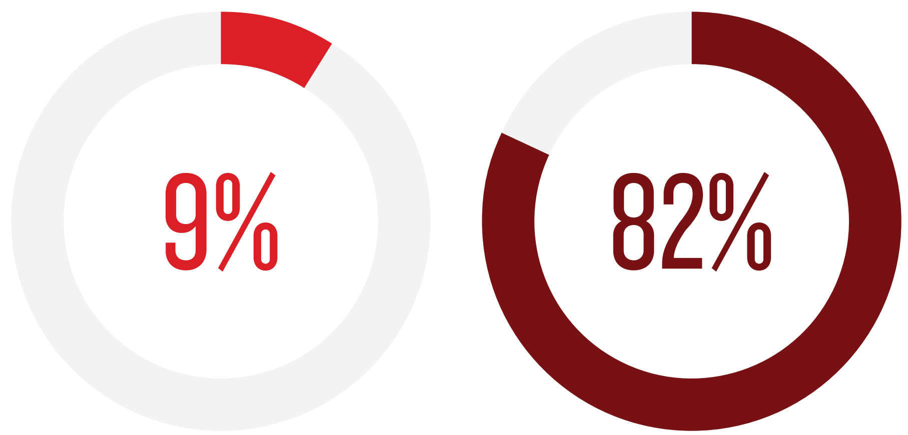
*Source: Centers for Disease Control and Prevention, 26.8 mean age at first birth, 2017.

PERCENTAGE GROWTH IN POPULATION

from 2018 to 2058

Non-hispanic growth

Hispanic growth



PUEBLOS Y CIUDADES: GEOGRAPHIC CONCENTRATIONS OF LATINX POPULATION

Nineteen counties in the U.S. have more than half a million Hispanic residents, according to data from the Census Bureau. The largest of these is Los Angeles County, with nearly 5 million Hispanics, followed by Harris County in Texas, with 2 million; Miami-Dade County in Florida, with 1.9 million and Maricopa County in Arizona with 1.3 million. The remaining counties are located in California, Texas, New York, Nevada and Florida.

NINETEEN COUNTIES IN THE U.S. HAVE MORE THAN HALF A MILLION HISPANIC RESIDENTS, ACCORDING TO DATA FROM THE CENSUS BUREAU.

U.S. COUNTIES RANKED BY SIZE OF HISPANIC POPULATION

COUNTY	STATE	TOTAL POPULATION	HISPANIC POPULATION	% HISPANIC
Los Angeles County	California	10,163,507	4,939,605	49%
Harris County	Texas	4,652,980	1,998,479	43%
Miami-Dade County	Florida	2,751,796	1,887,267	69%
Maricopa County	Arizona	4,307,033	1,339,574	31%
Cook County	Illinois	5,211,263	1,327,941	25%
Riverside County	California	2,423,266	1,188,993	49%
Bexar County	Texas	1,958,578	1,181,315	60%
San Bernardino County	California	2,157,404	1,152,510	53%
San Diego County	California	3,337,685	1,129,970	34%
Orange County	California	3,190,400	1,091,887	34%
Dallas County	Texas	2,618,148	1,053,358	40%
Bronx County	New York	1,471,160	826,176	56%
Hidalgo County	Texas	860,661	793,513	92%
El Paso County	Texas	840,410	695,938	83%
Clark County	Nevada	2,204,079	688,812	31%
Queens County	New York	2,358,582	660,550	28%
Tarrant County	Texas	2,054,475	593,452	29%
Broward County	Florida	1,935,878	574,026	30%
Fresno County	California	989,255	525,935	53%

Source: U.S. Census Bureau, 2017 National Population

Growth in the Hispanic population is taking place far beyond the southern and western border states. Rates of growth are greater in areas where new jobs are plentiful, as U.S. Hispanic unemployment nationally reached a record low of 4.2% in 2019*. Counties within states in the north central U.S. are showing the strongest increases, related to economic growth brought by the oil boom and the jobs around fracking*.

*Source: U.S. Bureau of Labor Statistics, April 2019.

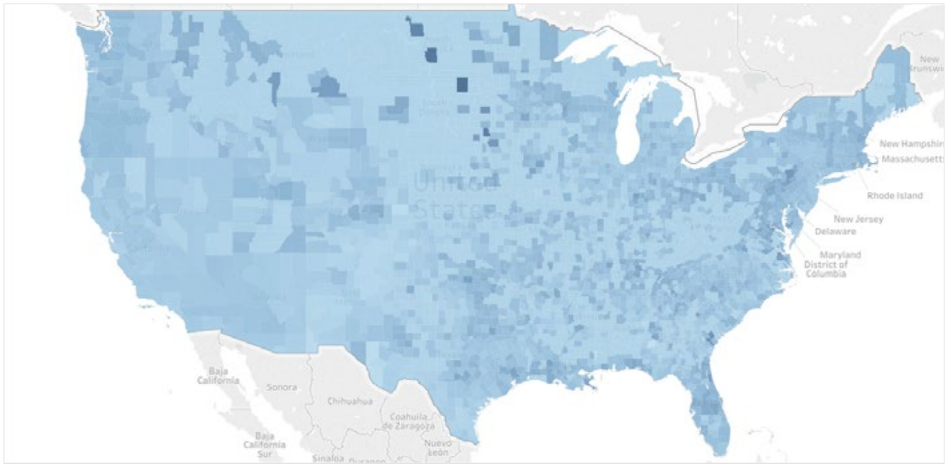
As Hispanic economic clout increases, marketers would be wise to study trends already happening in the counties with the highest concentration of Hispanic residents. Consumer trends in these counties can be a harbinger of future broader U.S. trends. Of particular note are the 31 U.S. counties that combine a high concentration (at least 25% Hispanic) with a large Hispanic population (greater than 300,000). The chart lists the 11 counties where Hispanics already make up a majority of the population.

U.S. COUNTIES WITH LARGE HISPANIC POPULATIONS (300,000+) AND HIGH HISPANIC DENSITY (50%+)

COUNTY	STATE	TOTAL POPULATION	HISPANIC POPULATION	HISPANIC DENSITY (% HISPANIC)
Hidalgo County	Texas	860,661	793,513	92%
Cameron County	Texas	423,725	380,168	90%
El Paso County	Texas	840,410	695,938	83%
Miami-Dade County	Florida	2,751,796	1,887,267	69%
Tulare County	California	464,493	300,647	65%
Bexar County	Texas	1,958,578	1,181,315	60%
Bronx County	New York	1,471,160	826,176	56%
Kern County	California	893,119	477,237	53%
San Bernardino County	California	2,157,404	1,152,510	53%
Fresno County	California	989,255	525,935	53%
Bernalillo County	New Mexico	676,773	338,920	50%

Source: U.S. Census Bureau, 2017 National Population

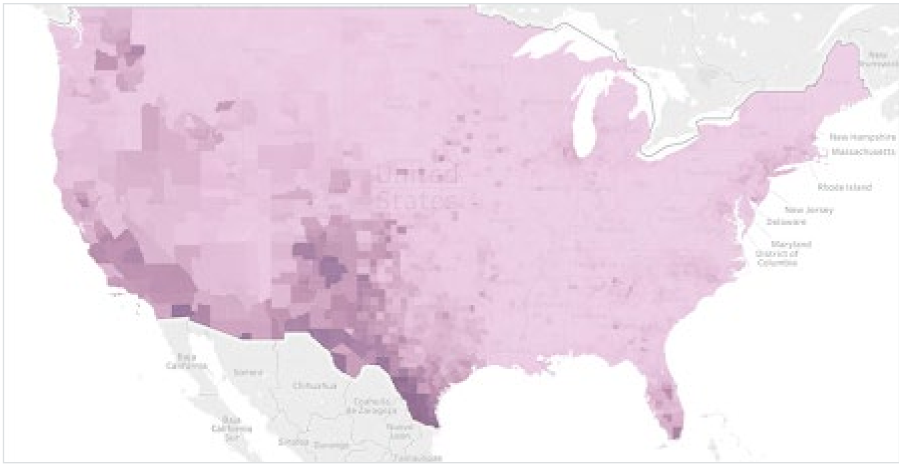
PERCENT GROWTH IN HISPANIC POPULATION 2010-2018



% Growth
-0.210 1.540

Based on counties with more than 500 Hispanics in 2010

PERCENT HISPANIC OF TOTAL POPULATION (2018)

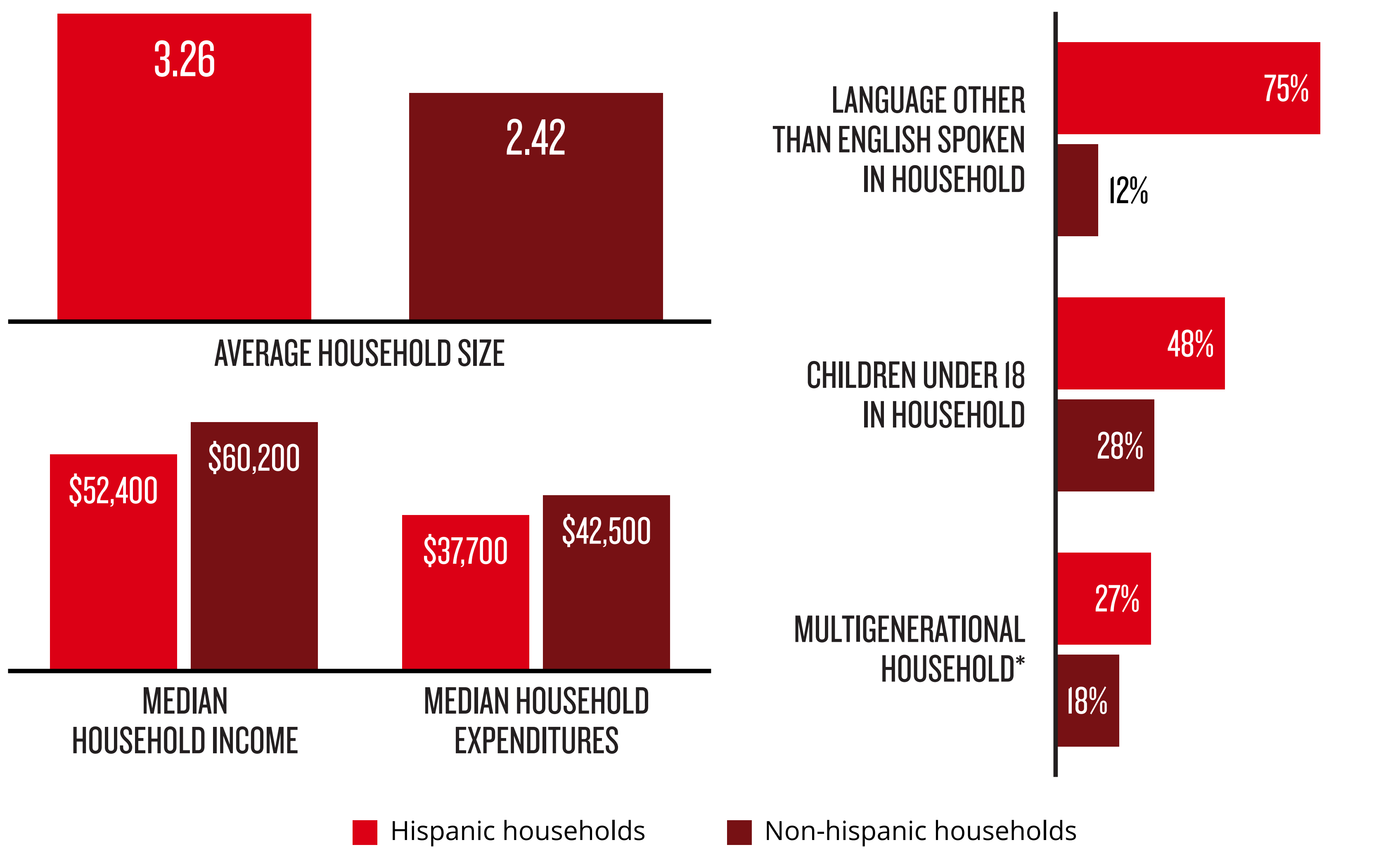


Percent Hispanic
0.0100 0.9600

FAMILIA Y HOGAR: A SNAPSHOT OF THE LATINX HOUSEHOLD

The unique needs of Latinx consumers are largely influenced by the distinct demographic characteristics of the Hispanic household. Household size is of particular relevance, with Hispanic households averaging 3.26 members, versus 2.42 for non-Hispanics. This larger household size is primarily due to a greater number of children under 18: (48% of Hispanic households have children under 18, vs. 28% of non-Hispanic households) and to multigenerational living (27% of Hispanics live in a multigenerational household, vs. only 18% of non-Hispanics), with grandparents and other relatives often sharing familial responsibilities and duties.

LOS DEMOGRÁFICOS: HOUSEHOLD DEMOGRAPHICS: HISPANIC VS. NON-HISPANIC



Sources: Sources: U.S. Census 2017 National Population Datasets
American Community Survey 2017 1-year PUMS data.
Current Population Survey: Table AVG1. Average Number of People per Household, by Race and Hispanic Origin, Marital Status, Age, and Education of Householder: 2018
Consumer Expenditure Surveys 2017 Public-use Microdata.

*Multigenerational includes those living in households with three or more generations living together; children and their grandparents living together, with or without the children's parents; and adult children age 25+ living with a parent. Based on EthniFacts analysis of 2018 ACS data.

CONEXIÓN CULTURAL: DESIRE FOR A CULTURAL CONNECTION THROUGH LANGUAGE

For U.S. Hispanics, language is a cultural connector by choice. As the percentage of U.S.-born Latinx consumers increases, younger Hispanics continue to speak Spanish at an all-time high: 71% of all Hispanics (and 75% of those 18+) are speaking Spanish at home. Largely bilingual, the Latinx community connects with content and brands, in culture, by choice, at their discretion. Spanish language is an important part of the ambicultural (100% fluent in more than one culture) nature of many U.S. Hispanics. Furthermore, the ability to navigate more than one culture, including speaking more than one language, is a competitive advantage to many U.S. Hispanics.

Latinx consumers actively seek out in-culture media content and Spanish-language conversations online, in music, on television and in conversations with friends and family. With 27% of the U.S. Hispanic population living in multigenerational family households, the influences and fluid sharing of conversations, ideas and entertainment in Spanish and English with parents, grandparents and other relatives is not only a reality, but also a source of cultural pride.

The cultural connection provided by Spanish language is important to U.S. Hispanics. Seventy-three percent of U.S. Hispanics agree that it's important to them that their children continue their family's cultural traditions, and that their cultural ethnic heritage is an important part of who they are. Consequently, language, culture and familial ties are a foundation for understanding the unique Latinx path to purchase.

PODER POLÍTICO: AWAKENING POLITICAL CLOUT

Unprecedented issues affecting the U.S. Latinx community have risen to the forefront of American politics in the last several years and are having a profound effect on the American electorate. Issues like immigration (including the Deferred Action for Childhood Arrivals, or DACA, program), health care, and the inclusion of a citizenship question in the 2020 Census have motivated Hispanics, particularly young Hispanics who have recently aged into voting eligibility, to register and to vote. In the 2018 midterm elections, the Hispanic turnout rate increased dramatically from the 2014 midterm elections. In 2014, 18% of Hispanics (27% of those eligible) voted in the midterm election, versus 39% of the total population, whereas in the 2018 elections, 29% of Hispanics (40% of those eligible) voted, versus 49% of the total population.

Looking at voting behavior by age group, the largest increase by far was for voters aged 18 to 24. In 2014, 10% of this age group voted, and in 2018 that percentage more than doubled to reach 23%. As a ratio of Hispanic to general-population voting rates, that is an increase from 64% in 2014 to 77% in 2018. This signals that this young Hispanic voting block is engaged and can continue to become an even greater political force in the future.

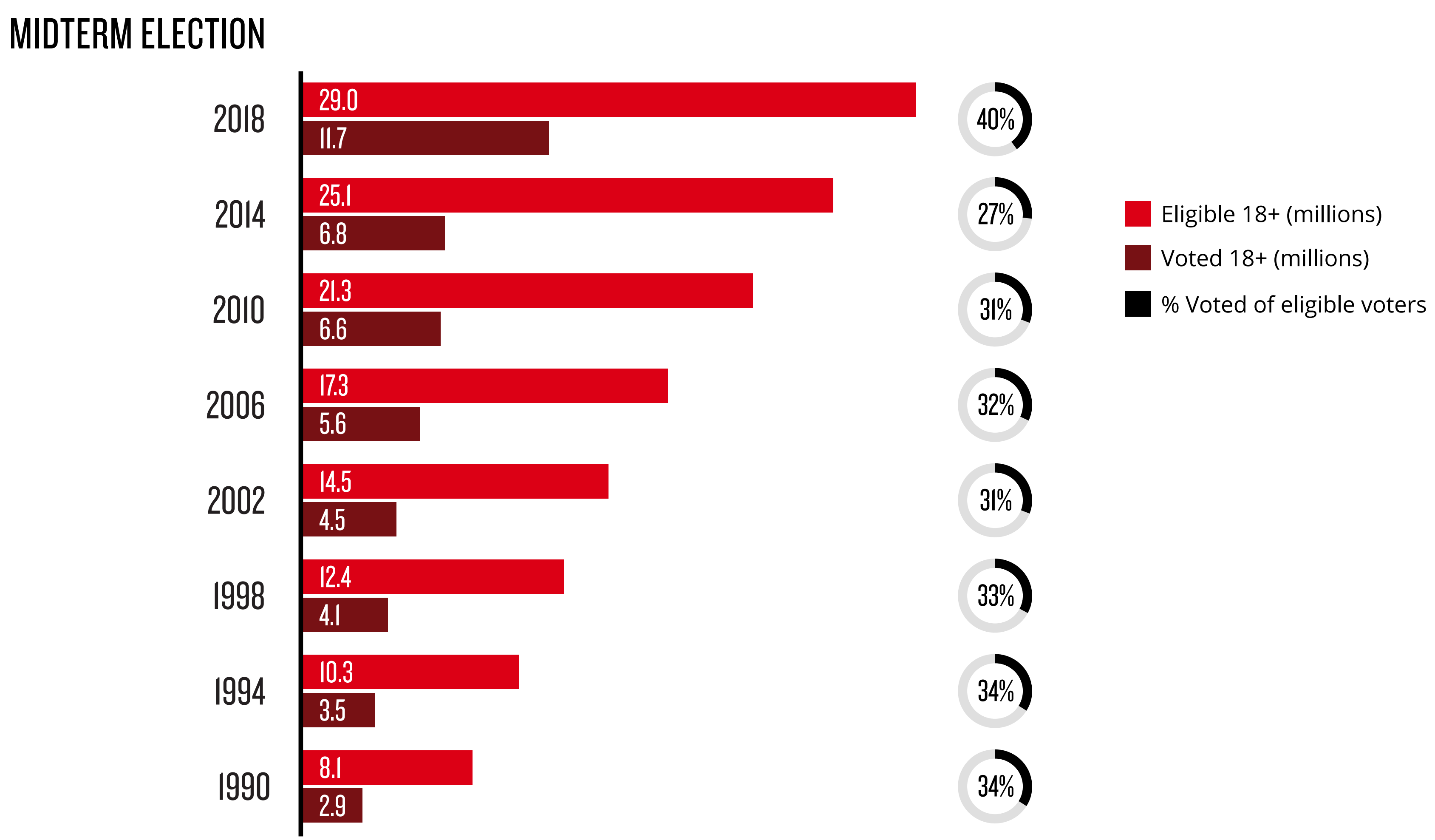
Hispanic Voting vs. Total Population in 2014 and 2018 Midterm Elections	2018 MIDTERM					2014 MIDTERM				
	TOTAL POPULATION		HISPANIC POPULATION			TOTAL POPULATION		HISPANIC POPULATION		
	Reported registered percent of 18+	Reported voted percent of 18+	Reported registered percent of 18+	Reported voted percent of 18+	Hispanic Voted percent of 18+ vs. Total	Reported registered percent of 18+	Reported voted percent of 18+	Reported registered percent of 18+	Reported voted percent of 18+	Hispanic Voted percent of 18+ vs. Total
Total 18 years and over	61	49	38	29	58%	59	39	35	18	48%
18 to 24 years	46	30	34	23	77%	39	16	28	10	64%
25 to 44 years	55	40	34	24	59%	53	28	31	14	48%
45 to 64 years	66	55	41	32	59%	65	46	40	25	54%
65 to 74 years	74	66	52	45	68%	74	59	53	35	60%
75 years and over	73	61	52	44	72%	72	55	51	37	67%

Source: Source: Current Population Survey November Supplement Microdata. Years 2018, 2014.

These percentages represent a significant rise in the number of Latinx voters. Overall, Latinx voter turnout nearly doubled, reaching 11.7 million in 2018, up from 6.8 million in 2014—the single largest increase on record from one midterm election to another. Hispanic turnout in 2018 was consistent with substantially greater interest in the election compared with four years earlier. Prior to the midterms, 52% of Hispanic registered voters said they were giving “quite a lot” of thought to the elections, up from just 35% in 2014.

HISPANIC VOTERS

(Eligible vs. Voted)



Source: Current Population Survey November Supplement Microdata. Years 2018, 2014, 2010, 2006, 2002, 1998, 1994, 1990.

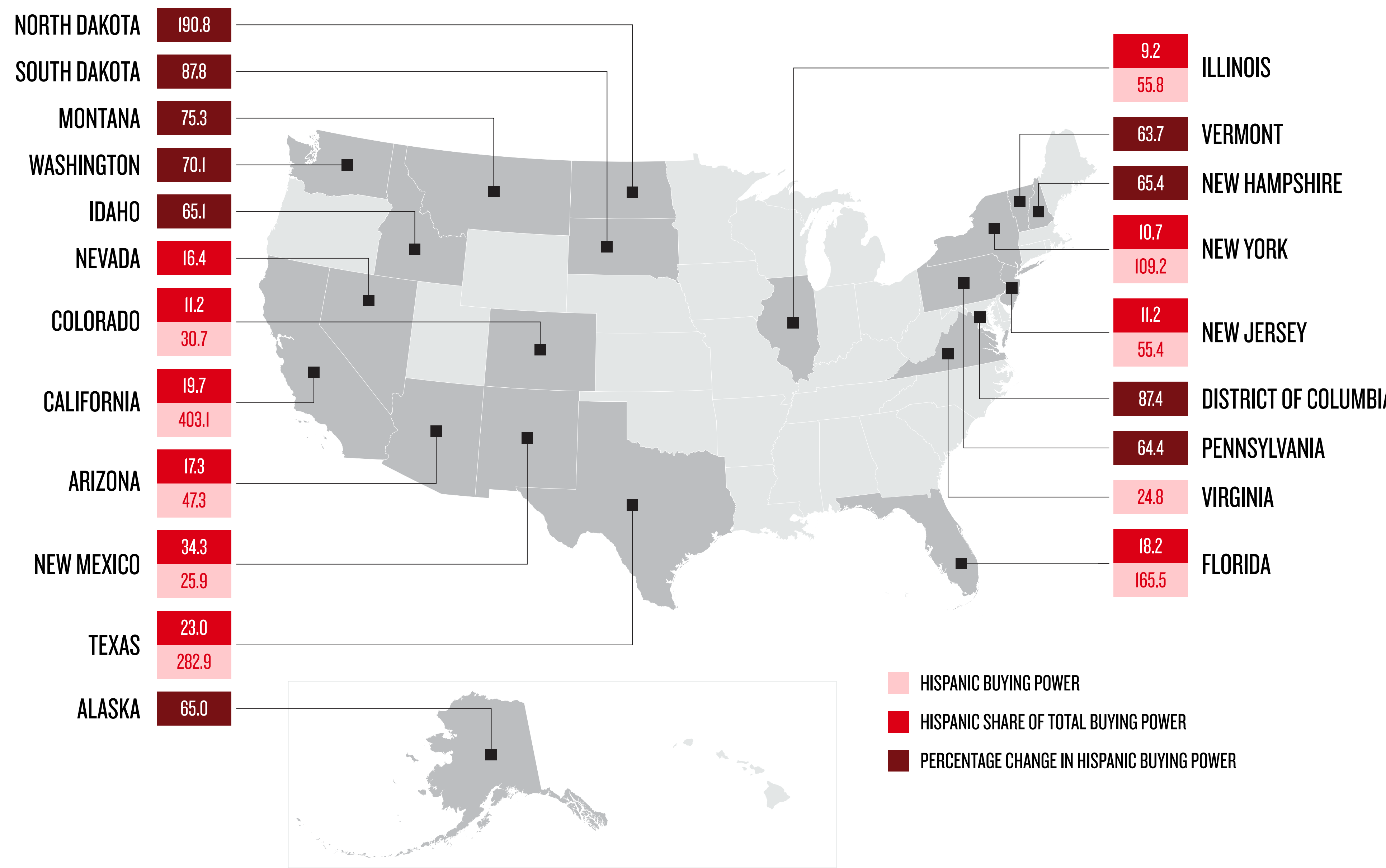
The rising influence of Hispanics as consumer dynamos and empowered activists is manifesting itself clearly in the recent successes of Latina politicians. Currently, they include one Latina U.S. Senator, 12 Latinas serving in the U.S. House of Representatives, and 117 Latinas serving as statewide elected legislators in 27 states.

LA CARTERA LATINA: SURGING LATINX BUYING POWER

U.S. Hispanic buying power is expected to grow at more than double the rate of non-Hispanic buying power over the period 1990–2023. Latinx buying power has risen from $213 billion in 1990 to $1.5 trillion in 2018; it is expected to rise to $1.9 trillion in 2023. The change from 1990 to 2018 represents an increase of 212%, a growth rate more than double the non-Hispanic growth of 92% over the same period.

The ten states with the largest Latinx spending are California ($403 billion), Texas ($283 billion), Florida ($165 billion), New York ($109 billion), Illinois ($56 billion), New Jersey ($55 billion), Arizona ($47 billion), Colorado ($31 billion), New Mexico ($26 billion) and Virginia ($25 billion). Growth, however, is taking place all over the country, not just in a handful of border states. The fastest growth in Hispanic buying power has been occurring in the northern tier of states.

LATINX BUYING POWER HAS RISEN FROM $213 BILLION IN 1990 TO $1.5 TRILLION IN 2018



Source: Selig Center for Economic Growth, Terry College of Business, The University of Georgia, June 2018.

SECTION 2 TAKEAWAYS

The U.S. Hispanic population are the youngest ethnic or racial group in the U.S., swiftly approaching their peak earning years with a median age of 28 for Hispanic males and 29 for Hispanic females (vs. 37 and 39 for males and females in the general population). Marketers that are able to build authentic connections with these consumers now stand to benefit for years to come.

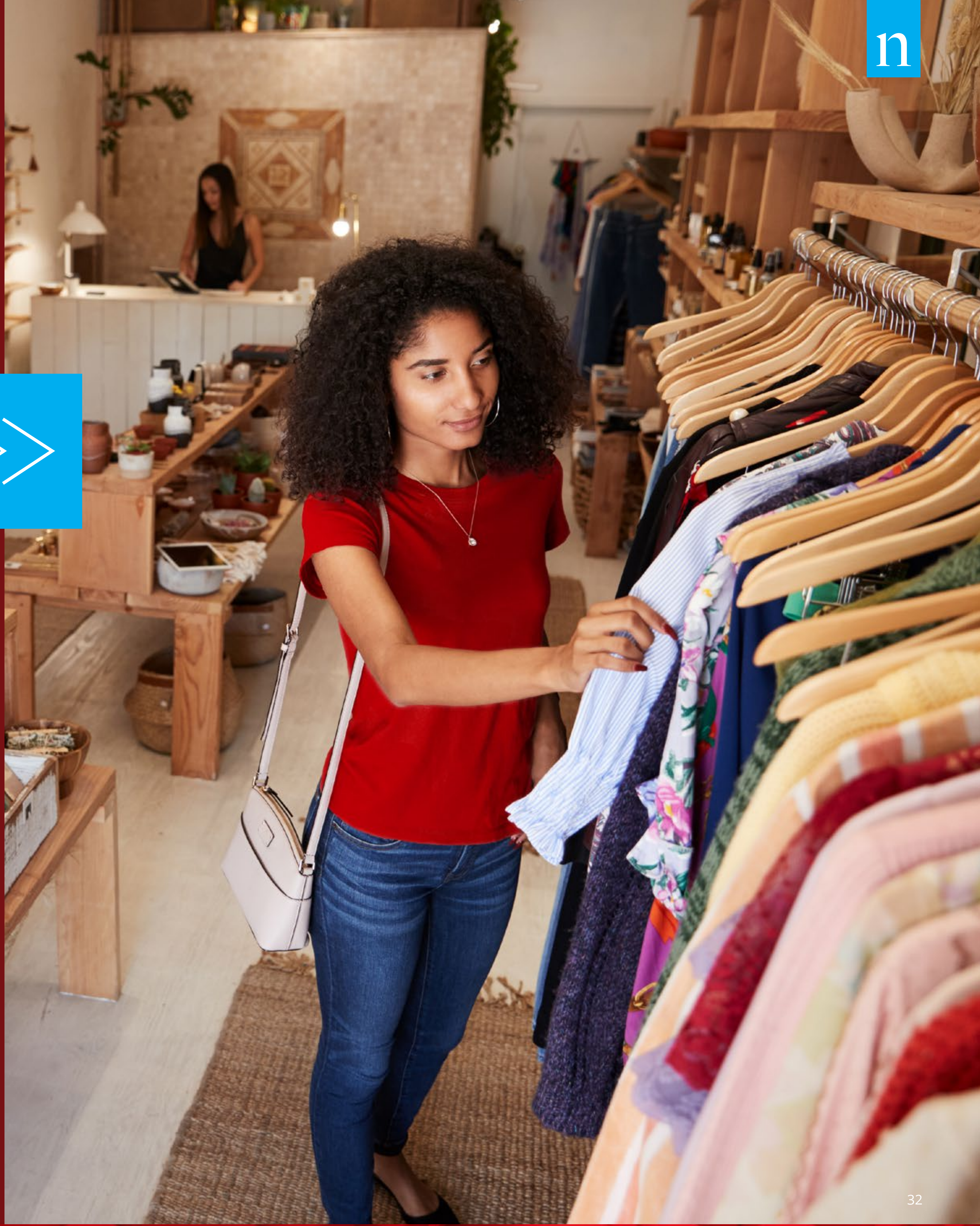
Hispanic household size is larger than the general population at 3.26 members, versus 2.42 for non-Hispanics, due to a greater number of children under 18 and to a preference for multigenerational living. Marketers must be able to develop flexible messaging that speaks to the primary shopper in Latinx households, while acknowledging that individual is also keeping the concerns of their household top-of-mind as they make purchasing decisions.

Language is a cultural connector by choice, with 71% of all Hispanics (and 75% of those 18+) speaking at least some Spanish at home. However, for marketers, context is key. U.S. Hispanics are largely bilingual, and engage with brands in the language of their choice and at their own discretion.

Latinx buying power has risen from $213 billion in 1990 to $1.5 trillion in 2018; it is expected to rise to $1.9 trillion in 2023. The change from 1990 to 2018 represents an increase of 212%, a growth rate more than double the non-Hispanic growth of 92% over the same period. Brands must step up and realize that Latinx consumers represent one of the most sure bets for future growth.

SECTION 3:
LATINX POWER AT THE POINT OF PURCHASE

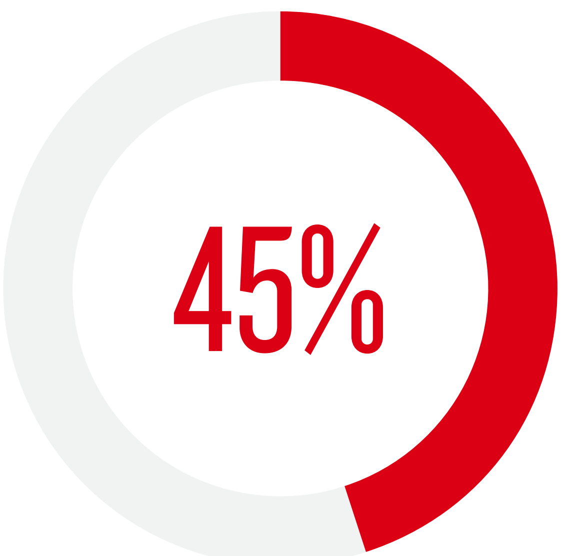
In the path to purchase, the transaction is the point where consumers vote with their dollars. To meet the needs of Latinx consumers at the point of purchase, marketers must understand the primary categories where these consumers are spending their dollars and obtain insights into their attitudes about purchasing.



LATINX ATTITUDES AT THE POINT OF PURCHASE

PRICE

Did you know over 22% of Latinx consumers say that they do not know the price they pay for most of the foods and packaged goods they buy (surpassing the total population by 31%)?



BRAND ALIGNMENT WITH VALUES AND SOCIAL RESPONSIBILITY

Did you know that Latinx consumers select brands they like whose image and values align with their own? Forty-five percent of Latinx consumers expect the brands they buy to support social causes, a rate 17% higher than for the total population.

BODEGAS Y PANADERÍAS: LOCAL SOURCING AND FOOD SAFETY ARE PARAMOUNT

Latinx shoppers are increasingly passionate about their environment, including buying local. We asked Latinx consumers, “How important is it to buy local?” in multiple food categories. The most important category for local sourcing was produce, with 60% saying it was extremely or very important, followed by bakery at 56%, prepared foods and eggs at 53% and dairy at 50%.

LATINX CONSUMERS’ ATTITUDES TOWARD LOCALLY SOURCED FOOD CATEGORIES

Thinking of how you define local, how important is it to you to buy local for each of the following categories you shop?	Produce	Bakery	Prepared Food	Eggs	Dairy	Seafood	Meat	Deli Cheese	Deli Meat	Frozen foods	Shelf-stable
Extremely or Very Important	60%	56%	53%	53%	50%	45%	45%	38%	38%	27%	25%

Source: December Online Views, Nielsen National Consumer Panel

When asked, “What defines local?” in the same food categories, Latinx consumers gave varied answers by category, but the primary definition in most categories was food grown or raised in the same state or city/town as their store. The exceptions to this rule were for seafood, frozen foods and shelf-stable foods, where the primary definition of local was grown or raised in the U.S.

WHAT DEFINES LOCAL TO LATINX CONSUMERS BY FOOD CATEGORIES

What defines local?	Produce	Bakery	Prepared Food	Eggs	Dairy	Seafood	Meat	Deli Cheese	Deli Meat	Frozen foods	Shelf-stable
Grown, raised, or made in the U.S.	20%	13%	13%	20%	21%	25%	25%	21%	20%	27%	31%
Grown, raised, or made in the same state as the store	28%	16%	18%	28%	30%	24%	31%	26%	25%	22%	22%
Grown, raised, or made in the same city/town as the store	32%	32%	25%	31%	28%	18%	26%	22%	20%	17%	18%
Grown, raised, or made within a certain radius of the store	26%	31%	27%	23%	21%	16%	19%	18%	17%	15%	14%
Anything sold at a farmers market	22%	10%	9%	15%	11%	6%	10%	10%	7%	5%	7%
Anything grown or raised on a family farm	14%	7%	6%	15%	12%	5%	11%	8%	6%	4%	4%
None of the above	10%	15%	14%	10%	10%	16%	11%	15%	18%	24%	23%

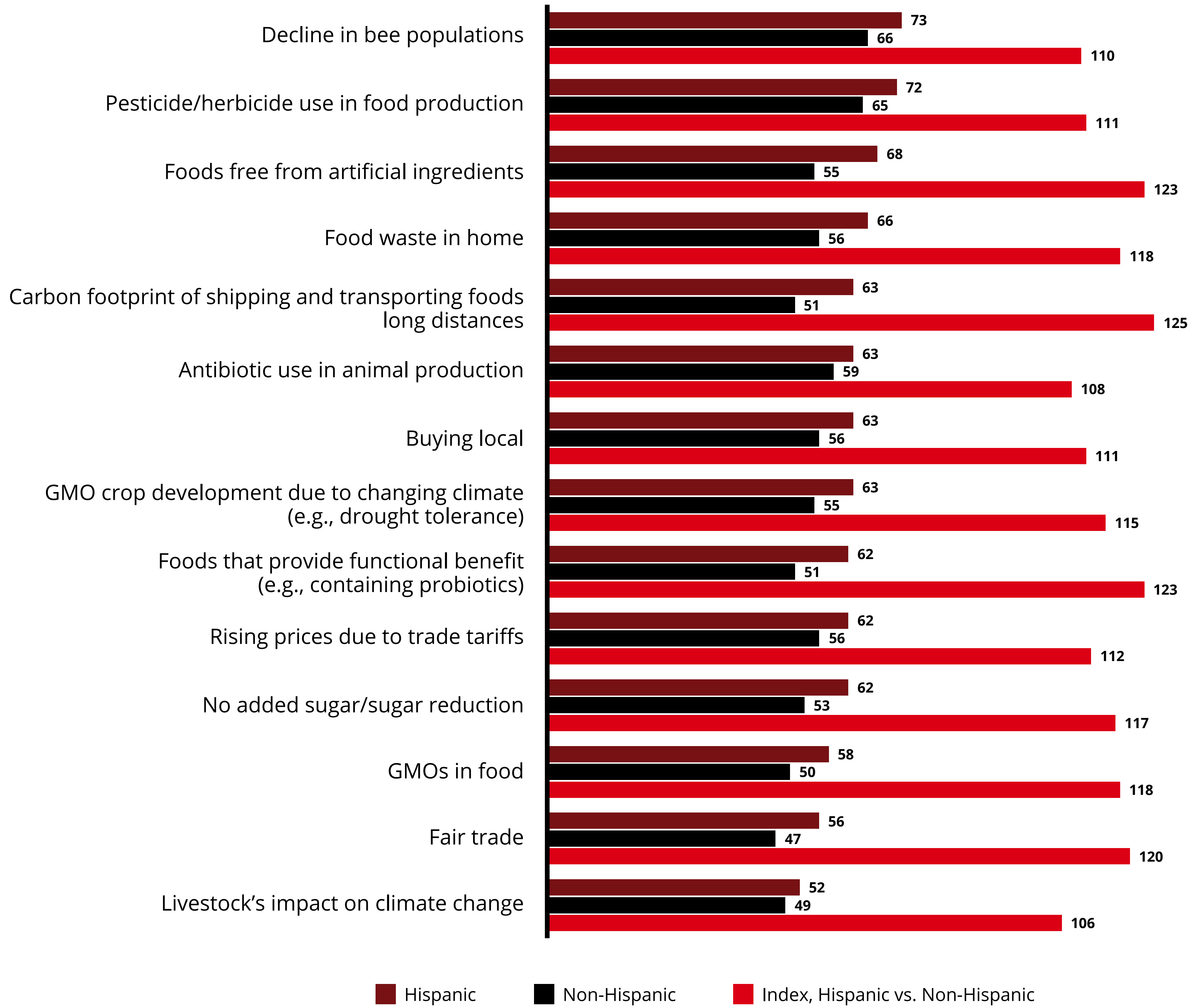
Source: December Online Views, Nielsen National Consumer Panel

Hispanic consumers are aware of, and concerned with a variety of food-related social issues. The top concerns for Hispanic consumers, relative to the total population, are “pesticide/herbicide use in food production” (72%) and foods that are “free from artificial ingredients” (68%).

Latinx consumers are, in many contexts, more attuned to food safety issues than the total population. Thus, it’s not enough for companies to build in-language messaging and culturally relevant products. These products, and the advertising developed to market them, must also be healthy for Latinx consumers, their families and communities. Aligning a brand with Latinx values and fulfilling this segment’s need for more than just function is the path to authenticity in the eyes of the Latinx consumer.

HISPANIC VS. NON-HISPANIC CONCERNS ABOUT FOOD SAFETY

Percent of Respondents Saying They Are Extremely or Very Interested in Topic



Source: December Online Views, Nielsen National Consumer Panel

COMIDA Y FAMILIA: PURCHASING FOR THE HOUSEHOLD IS AN EXTENDED-FAMILY AFFAIR

Shopping is a family affair for Latinx consumers, given the multigenerational nature of Latinx households. A key area of distinction is the intended user of products purchased by the primary shopper. In Latinx households, buying for a household member other than oneself is much more common than for the U.S. population overall. The largest differences in intended users for Latinx consumers versus the total population are for purchases of fresh goods, health-related items, and groceries for another household member—often a parent or other relative, rather than a child or spouse. In addition, Latinx moms buy for children as the intended user 46% more often than the total population does. The highest differential categories in shopping for children are health-related items (purchased 53% more often than in the total population) and fresh items (purchased 58% more often).

INTENDED USER	TOTAL	FOOD	NON-FOOD	BEVERAGES	FRESH	FROZEN	GROCERY	SNACKS	HEALTH	PERSONAL CARE	HOUSEHOLD CARE
MYSELF	97	97	96	98	97	93	96	98	94	96	96
SPOUSE / PARTNER	118	120	116	115	119	121	125	117	89	118	119
CHILD(REN)	146	150	134	148	158	150	151	139	153	127	134
OTHER HH MEMBER	120	118	125	134	134	140	91	106	158	132	120

Hispanics are more likely to purchase a product for the given intended user than the total population

Source: Nielsen U.S. Category Shopping Fundamentals, 2017

IN LATINX HOUSEHOLDS, BUYING FOR A HOUSEHOLD MEMBER OTHER THAN ONESELF IS MUCH MORE COMMON THAN FOR THE U.S. POPULATION OVERALL.

LATINX HOUSEHOLD PROFILES

THE PEREZ HOUSEHOLD

Lennis, Age 37
Scott (boyfriend), Age 36
Adelso (father), Age 69

Nationalities: Lennis is Venezuelan-American, Scott is American and Adelso is Venezuelan.

Responses submitted by Lennis

Q: How do you research new products and/or brands?
A: Online research and word of mouth

Q: How do you prefer to receive shopping deals? Why?
A: Email. I don't like to keep paper deals. I feel the paper gets wasted, or I tend to forget it at home.

Q: When making a purchase, whose opinion(s) do you consider?
A: My partner's opinion and my own

Q: How do you decide whether to shop for a product in-store or online?
A: Convenience and quality

Q: What makes for a positive in-store shopping experience?
A: Organization plus ease to find the item I need.

Q: Do you use social media? If so, for what reasons?
A: Yes, business and to stay connected with family abroad.

Q: How do you prefer to watch video content?
A: Cell phone and computer

Q: On what device(s) do you listen to music?
A: Cell phone, car stereo, computer and tablet

Q: How do you stay up to date with current events?
A: Mostly word of mouth from family members and friends. I also read the news headers on my Cell phone from Google Updates, and sometimes through social media and seldom from TV.

Q: What language(s) do you speak at home?
A: Both English and Spanish

Q: Who goes with you on your shopping trips?
A: Sometimes my boyfriend, sometimes my Dad

Q: What do you find most important about the food products you buy?
A: Quality, I prefer to buy organic, freshness and cost.

These profiles were compiled via an independent online survey, and provide contextual background to the Nielsen data in the report. The responses reflect the opinions of the individual households and should not be interpreted as a scientific insight.

OFERTAS DEL MOMENTO: IN-STORE INFLUENCERS AT THE POINT OF PURCHASE

Relative to the general population, Hispanics are more open to considering information they obtain while shopping, especially in the case of mobile in-store influence. Latinx consumers surpass the general market by about 50% in mobile in-store influence for virtually every category of shopping, including health and personal care items, food, non-food and beverages.

IN-STORE INFLUENCERS	TOTAL	FOOD	NON-FOOD	BEVERAGES	FRESH	FROZEN	HEALTH	PERSONAL CARE	HOUSEHOLD CARE
PRICE CHECKING	101	104	93	106	102	122	79	88	94
MOBILE	147	142	151	144	149	135	169	169	60
PRODUCT ATTENTION	123	117	138	116	144	130	209	139	118
STORE ASSOCIATE	110	100	115	19	132	61	58	180	178
COUPON / SALE	96	92	109	97	94	100	86	125	101
MERCHANDISING	103	102	110	135	103	98	86	107	111
AD	97	100	93	91	113	63	101	143	47

Hispanics are more likely to purchase a product for the given intended user than the total population

Hispanics are less likely to purchase a product for the given intended user than the total population

Source: Nielsen U.S. Category Shopping Fundamentals, 2017

Other influencers are important for specific categories. In-store merchandising, such as displays, is particularly important to Latinx shoppers in the beverage category, where this group surpasses the general population by 35% for being influenced. A store associate's recommendation is very important to Hispanics at the point of purchase in the personal and household care categories, where these consumers surpass the general population by 80% and 78%, respectively. Finally, product attention (in-store informational messages) are particularly important to Latinx consumers in the health, fresh and personal care categories (over-indexing by 109%, 44% and 39%, respectively).

EVOLUCIONANDO SABORES: GROCERY GROWTH CATEGORIES AND EVOLVING LATINX BEHAVIORS

Other distinctive behaviors of Latinx consumers involve dining preferences. While dining out is an important part of the social experience for Latinx households, eating at home with family and preparing fresh meals is a cornerstone of the Latinx lifestyle. In fact, 66% say they would rather prepare a meal than eat in a restaurant.

This preference shows up in the highest-growth grocery categories in 2018, measured in dollars per buyer. Latinx consumers have dramatically increased their spending on items that offer convenient meal solutions. The increase in frozen meal starters, frozen meats, and freezer supplies indicates Latinx cooks need to prepare ahead and have a quick, easy meal solution available. The increase in appliances like breadmakers indicates a solution for cooks who want to serve homemade food, but more quickly and easily. Accompanying this focus is a growing awareness and concern over taking care of one's health.

SPENDING BY LATINX CONSUMERS: HIGH-GROWTH GROCERY CATEGORIES

GROCERY CATEGORIES: ONLINE AND BRICK-AND-MORTAR	CURRENT YEAR (DOLLARS PER BUYER)	LAST YEAR (DOLLARS PER BUYER)	GROWTH (DOLLARS PER BUYER IN CURRENT VS. LAST YEAR)
Health-Related Items			
Dieting aids: Appetite suppressant	147	44	230%
Anti Smoking products	141	104	35%
Convenient Meal Solutions and Aids			
Frozen meat: Beef steak	28	12	127%
Total meal starters, frozen	16	8	108%
Freezer supplies	18	10	78%
Breadmaker appliance	135	61	123%

Source: Nielsen Homescan, Total Online and Brick-and-Mortar Shopping, 12/31/17 - 12/29/18

66% OF LATINX CONSUMERS SAY THEY WOULD RATHER PREPARE A MEAL THAN EAT IN A RESTAURANT.

TIENDAS TRADICIONALES EN MANERA MODERNA: BRICK-AND-MORTAR GROWTH CATEGORIES AND THE PHYSICAL SHOPPING EXPERIENCE

Creating a culturally relevant in-store experience as an important touchpoint in the consumer journey could be a competitive advantage for brick-and-mortar retailers in the race against online purveyors. As noted earlier, 79% of Latinx consumers shop with someone else, frequently with family members who also participate in the decision making. Creating in-store opportunities for Latinx customers to have an authentic in-store experience where they can touch, feel and try new products while shopping could be essential to building long-term loyalty.

Analysis of brick-and-mortar opportunity categories needs to look not only at growth, but also at where Latinx shoppers over-index their general market counterparts, suggesting the categories where they are most likely to seek an in-store experience. Several categories meet these criteria:

- **Beauty Products:** Latinx consumers care deeply about beauty and style. The high indices for hair and skin care products and cosmetics point to opportunities for retailers offering a physical shopping experience.
- **Appliances:** Latinx consumers are often the dominant segment for do-it-yourself retailers, as showcased by the growth and high indices of home-related appliances.
- **Health and Diet Aids:** Reflecting a growing concern for health and diet consciousness in America, Latinx consumer spending on appetite suppressants has grown at higher rates than spending by the total population.

OPPORTUNITY CATEGORIES: SPENDING AT BRICK-AND-MORTAR RETAILERS

	HISPANIC SPENDING (DOLLARS PER BUYER)	INDEX, DOLLARS PER BUYER, HISPANIC VS. TOTAL U.S.	YEAR-OVER-YEAR GROWTH, 2017–2018 (PERCENT)
Beauty Products			
Hair care	$57	136	8%
Skin care preparations	$44	110	4%
Cosmetics	$41	114	5%
Appliances			
Air conditioner appliances	$291	125	19%
Specialty household appliances	$69	118	39%
Health and Diet Aids			
Appetite suppressants	$156	131	256%

LATINX CONSUMERS CARE DEEPLY ABOUT BEAUTY AND STYLE. THE HIGH INDICES FOR HAIR AND SKIN CARE PRODUCTS AND COSMETICS POINT TO OPPORTUNITIES FOR RETAILERS OFFERING A PHYSICAL SHOPPING EXPERIENCE.

PREFERENCIAS DE COMPRA: RETAIL SHOPPING CHANNEL PREFERENCES

Preferences for shopping channels reflect Latinx household composition and the value placed on meals prepared at home. Latinx consumers shop more at club stores (surpassing the general market by 17%) and less at grocery stores, mass merchandisers and dollar stores. The preference for club stores is consistent with the higher-volume household purchases needed for larger, multigenerational households. Interestingly, Latinx online food shopping is showing significant growth as Hispanics over-index the general population by 23% for buying food online. Convenience stores are a staple of Latinx shopping, as they provide a ready source of food and nonfood items.

HISPANIC CHANNEL PREFERENCE: INDEX, HISPANIC VS. TOTAL MARKET

PREFERRED CHANNEL	TOTAL	FOOD	NONFOOD
Grocery store	96	97	107
Club store	117	115	121
Mass merchandiser	99	97	98
Convenience store	149	149	283
Drugstore	105	99	98
Dollar store	90	98	79
Total online (net)	107	123	94

Hispanics are more likely to purchase a product for the given intended user than the total population

Hispanics are less likely to purchase a product for the given intended user than the total population

Source: Nielsen U.S. Category Shopping Fundamentals, 2017

LA ONDA OF ONLINE SHOPPING: CATEGORIES GAINING GROUND FASTEST

Latinx consumers are increasingly reliant on the convenience of online shopping. Seventy-eight percent of Hispanics agree that the internet is "a great way to actually buy products," a response rate in line with general-market numbers.

With Latinx consumers basically tracking the general population in the rate of online shopping, marketers particularly find advantages by analyzing the online categories where opportunity is the greatest, especially where Latinx shoppers over-index over the general market the most. Several categories stand out:

- **Non-Food Items:** The list of high-index and growth items for online Latinx shoppers is dominated by non-food items. This indicates both an opportunity for nonfood sellers to connect and for food sellers to evaluate their strategies to increase this business.
- **Kids' Items:** High-index and growth items include film and cameras, baby milk, and nursing supplies.
- **Kitchen and Household Accessories and Gadgets:** Cooking utensils, appliances and vacuum cleaners are prominent on the list, indicating an acceptance of sourcing these items online.
- **Pet Supplies:** The convenience of shopping for pet supplies online is evident, as flea collars and products are high in spending indices and growth.

OPPORTUNITY CATEGORIES: ONLINE SPENDING

	HISPANIC SPENDING (DOLLARS PER BUYER)	INDEX, DOLLARS PER BUYER, HISPANIC VS. TOTAL U.S.	YEAR-OVER-YEAR GROWTH, 2017–2018
Kid-Related Items			
Film and cameras	$258	119	97%
Baby milk and milk flavoring	$180	150	30%
Nursing accessories	$58	170	323%
Kitchen and Household Gadgets			
Vacuums and carpet cleaners	$173	147	40%
Fryer, skillet and wok appliances	$106	164	122%
Griddle, grill and waffle iron appliances	$43	114	50%
Water conditioner units and filters	$47	128	68%
Motor oil fluid and lube	$48	149	171%
Pet Supplies			
Pet flea and tick products	$89	129	53%
Flea collars	$84	126	45%

Source: Homescan, Total Online and Brick-and-Mortar Shopping

MEDIA MEZCLA AND CULTURAL PREDISPOSITION: OPTIMIZING MEDIA MIX DELIVERS MORE THAN EFFICIENCIES

Nielsen knows the importance of reaching the Latinx consumer, through the right channel, with the right message and frequency. Optimizing reach and increasing engagement with the Latinx consumer through channels that meet their cultural predispositions has never been more important.

Optimization is more than being able to efficiently and effectively streamline message delivery. It allows brands to create deeper connections with consumers as well as elevate delivery.

Nielsen's media planning and optimization tools help users cut through the clutter of media choices to construct an optimal plan for connecting with Latinx consumers on the right platforms with the right message at the right time.

THE ABILITY TO MAXIMIZE RETURN ON ADVERTISING INVESTMENT THROUGH THE USE OF MORE MEDIA CHANNELS WITHOUT INCREASING BUDGETS IS CRITICAL IN MAXIMIZING STRATEGIES TO BEST SERVE THE LATINX CONSUMER.

MORE EFFICIENT PLANNING FOR AGENCIES AND ADVERTISERS

- DETERMINE WHICH MEDIA TYPES ARE BEST SUITED FOR YOUR PLANS
- IDENTIFY WHICH ASPECTS OF YOUR CAMPAIGN DRIVE THE MOST UNIQUE REACH AND ARE THE MOST COST EFFICIENT
- EVALUATE THE EFFECTIVENESS OF SECONDARY TARGETS—THOSE THAT EXTEND BEYOND TRADITIONAL DEMOGRAPHICS
- DISCOVER THE EXPECTED IMPACT ON YOUR SALES OR OTHER BRAND KEY PERFORMANCE INDICATORS
- LEARN HOW TO SHIFT DOLLARS TO THE RIGHT MEDIA CHANNELS TO MEET YOUR CAMPAIGN OBJECTIVES

The ability to maximize return on advertising investment through the use of more media channels without increasing budgets is critical in maximizing strategies to best serve the Latinx consumer. One example of a beer campaign optimized through Nielsen shows significant results in an increase in reach, frequency, gross rating points (GRPs) and impressions while decreasing the cost per consumer of the campaign.

OPTIMIZE MEDIA INVESTMENTS TO REACH HISPANIC CONSUMERS

Opportunity For Beer Campaign To Increase Hispanic Net Reach By 29% Without Increasing It's Media Budget Adding Mobile, Cinema, Digital Outdoor, TV and Radio!

ORIGINAL MONO MEDIA PLAN

- 55% Net Reach
- 6.4 Ave Frequency
- 349 GRPs
- 137MM Impressions
- $84 CPM

OPTIMIZED PLAN

- 84% Net Reach
- 6 Ave Frequency
- 503 GRPs
- 197MM Impressions
- $62 CPM

Source: Nielsen Media Fusion: July 2018 projecting for summer campaign 2019

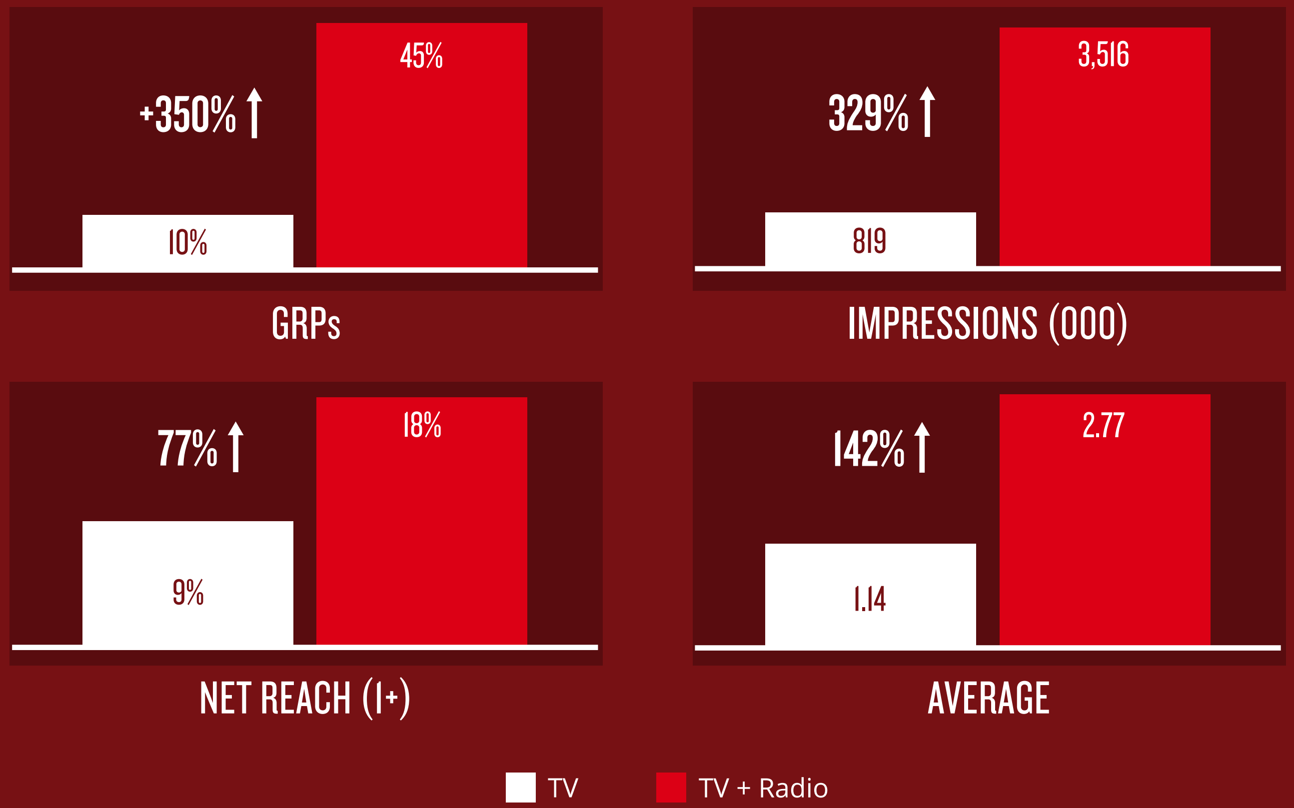
In addition to improving national campaigns, we can take a step further and take a deep dive at the local level, a function that had not been possible before. Another example of an optimized media campaign allowed a TV-only advertiser to add Spanish radio to their media mix without spending any more dollars while increasing their reach to consumers by 57%.

OPTIMIZE FOR INCREMENTAL REACH WITH HISPANIC RADIO

CASE STUDY:

TV only advertiser invested $161K in Q4 for NY campaign.

By shifting 60% of the budget to Radio the incremental reach increases by **77%**!



Source: Nielsen Media Impact Local TV & Radio, Hispanic 18-49 Q4 2018, New York DMA. $161,000 100% TV (English TV Only), 18 week long campaign, shifted to 60% Spanish radio.

The media universe and path to purchase can be confusing, but investing in Latinx consumers' loyalty and delivering satisfaction that results in consumer evangelism can be game changing. Marketers and providers of goods and services should seek the best available tools to make wise strategy decisions that will lead to growth for years to come in the new American mainstream.

SECTION 3 TAKEAWAYS

Latinx shoppers are passionate about their environment, and are inclined to buy local. The most important category for local sourcing was produce, with 60% saying it was extremely or very important, followed by bakery at 56%, prepared foods and eggs at 53% and dairy at 50%. In fact, Latinx consumers are more likely to be concerned with a variety of food safety issues than the total population, which underscores the imperative brands face to align themselves with Latinx consumer values.

Shopping is a family affair and Latinx consumers tend to buy for a household member other than themselves. Latinx moms buy for children as the intended user 46% more often than their general market counterparts. When developing messaging to reach Hispanic shoppers, marketers must keep the intended end-user of the product in mind as much as the shopper.

Latinx consumers shop more at club stores (surpassing the general market by 17%) consistent with the higher-volume household purchases needed for larger, multigenerational households.

Nielsen Media Impact tools can maximize return on advertising investment through the use of more media channels without increasing budgets. Examples show significant results in an increase in reach, frequency, gross rating points (GRPs) and impressions while decreasing the cost per consumer of the campaign.

CONCLUSION

Latinx consumers are taking over the U.S. mainstream. The 60 million Hispanics living in the U.S. are exerting their influence over culture and commerce, driven by their passion for sharing and powered by their love of technology and media. With a population projected to nearly double to 109 million between 2018 and 2058 and a projected growth rate of 82% versus only 9% over the same period for the non-Hispanic population. The Latinx path to purchase is social and circular, relying on the recommendations of friends, family and virtual networks in their discovery, awareness and decision-making processes. Developing strategies to connect with Latinx consumers and assure their satisfaction will provide fuel for growth not only within the Latinx community, but also with their broad circles of influence in the total market.

With Latinx buying power expected to rise to $1.9 trillion in 2023 increasing at a rate more than double non-Hispanic growth over the same period, companies must understand the unique needs of Latinx consumers, largely influenced by larger household size, multigenerational living, and a higher presence of kids under 18. They must also understand the largely bilingual and ambicultural nature of the Latinx community in strategizing how to market their brands in relevant ways that speak to the cultural push and pull of living 100% in more than one culture.

Not only is the Latinx community growing in numbers, but in activism, as Hispanic voter turnout nearly doubled in the 2018 mid-term elections as Hispanic voters asserted their political clout in increasing numbers. This civic activism extends to attitudes about consumption preferences, food safety, and buying styles meaning companies must seek data and develop strategies to best serve Latinx consumer needs now to remain vital into the future.

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METHODOLOGIES

NIELSEN HOMESCAN PANEL DATA

The Homescan national panel consists of a randomly dispersed sample of households that is intended to be representative of, and projectable to, the total U.S. market. Panel members use handheld scanners and/ or a mobile app to record items with a UPC code purchased from any outlet. Data for this report is based on Homescan panel data from the following periods: 52 weeks ending December 30, 2017 and 52 weeks ending December 29, 2018.

TELEVISION METHODOLOGY

Television data are derived from Nielsen's National TV Panel that is based on a sample of over 45,000 homes that are selected based on area probability sampling. Live+Time-shifted TV (PUT) includes Live usage plus any playback viewing within the measurement period. Time-shifted TV is playback primarily on a DVR but includes playback of encoded content from video on demand, DVD recorders, server-based DVRs and services like Start Over. Total Use of Television (TUT) includes Live TV + Time-shifted TV as well as TV-connected devices (DVD, Game Console, Internet Connected Device). TV-connected devices include content being viewed on the TV screen through these devices. This includes when these devices are in use for any purpose, not just for accessing media content. For example, Game Console also includes when it is being used to play video games. Internet Connected Device usage includes Smart TV app usage. Reach for television and TV-connected devices includes those viewing at least one minute within the measurement period. Data used in this report is inclusive of multicultural audiences.

DIGITAL METHODOLOGY (COMPUTER, SMARTPHONE, TABLET)

Digital data is based on Nielsen's Total Media Fusion, which is reflective of both panel and census measurement. It leverages the most granular and comprehensive cross-platform respondent-level data from our panels, along with census data from Nielsen's Total Audience Measurement solutions, to provide the highest-quality, representative sample of digital media consumption. Data for this was sourced from Nielsen Media Impact (Nielsen's cross platform planning solution). Data used in this report is inclusive of multicultural audiences.

TIME SPENT AMONG U.S. POPULATION, TIME SPENT AMONG USERS, REACH OF USERS, REACH %

Total Use of Television, Live+Time-shifted TV, Live TV, Time-shifted TV, TV-Connected Devices (DVD, Game Console, Internet Connected Device) 12/31/2018–03/31/2019 via Nielsen NPOWER/National Panel; Radio 03/29/2018–03/27/2019 via RADAR 141; Computer, Smartphone, Tablet via Total Media Fusion sourced from Nielsen Media Impact. For digital data, weeks that cross calendar months are not included. Weeks included for digital: 01/07/19, 01/14/19, 01/21/19, 02/04/19, 02/11/19, 02/18/19, 03/04/19, 03/11/19, 03/18/19, 03/25/19.

Note: Time spent among U.S. population includes whether or not they have the technology, and data sources can be added or subtracted as appropriate. Time spent among users of each medium would include different bases by source, and data sources should not be added or subtracted. Time spent among U.S. population includes visitor viewing, and time spent among users excludes visitor viewing, resulting in occurrences of reported time spent for U.S. population to be higher than users. Some amount of simultaneous usage may occur across devices. Sum of individual sources may vary slightly from total, due to rounding.

TELEVISION DISTRIBUTION STATUS, DEVICE OWNERSHIP

Based on scaled installed counts for March 2018 and March 2019 via Nielsen NPOWER/National Panel.

NIELSEN SOCIAL

Social Content Ratings® (SCR) is the first standardized third-party measurement of program-related social-media activity across Facebook, Instagram and Twitter. With the continued fragmentation of media and consumer choice, social TV data, which measures the social media response to television content, is a valuable way for industry players to better understand how fans are engaging with television and brands. SCR delivers one comprehensive solution to help networks, agencies and advertisers measure, understand and act on social TV.

NIELSEN SCARBOROUGH

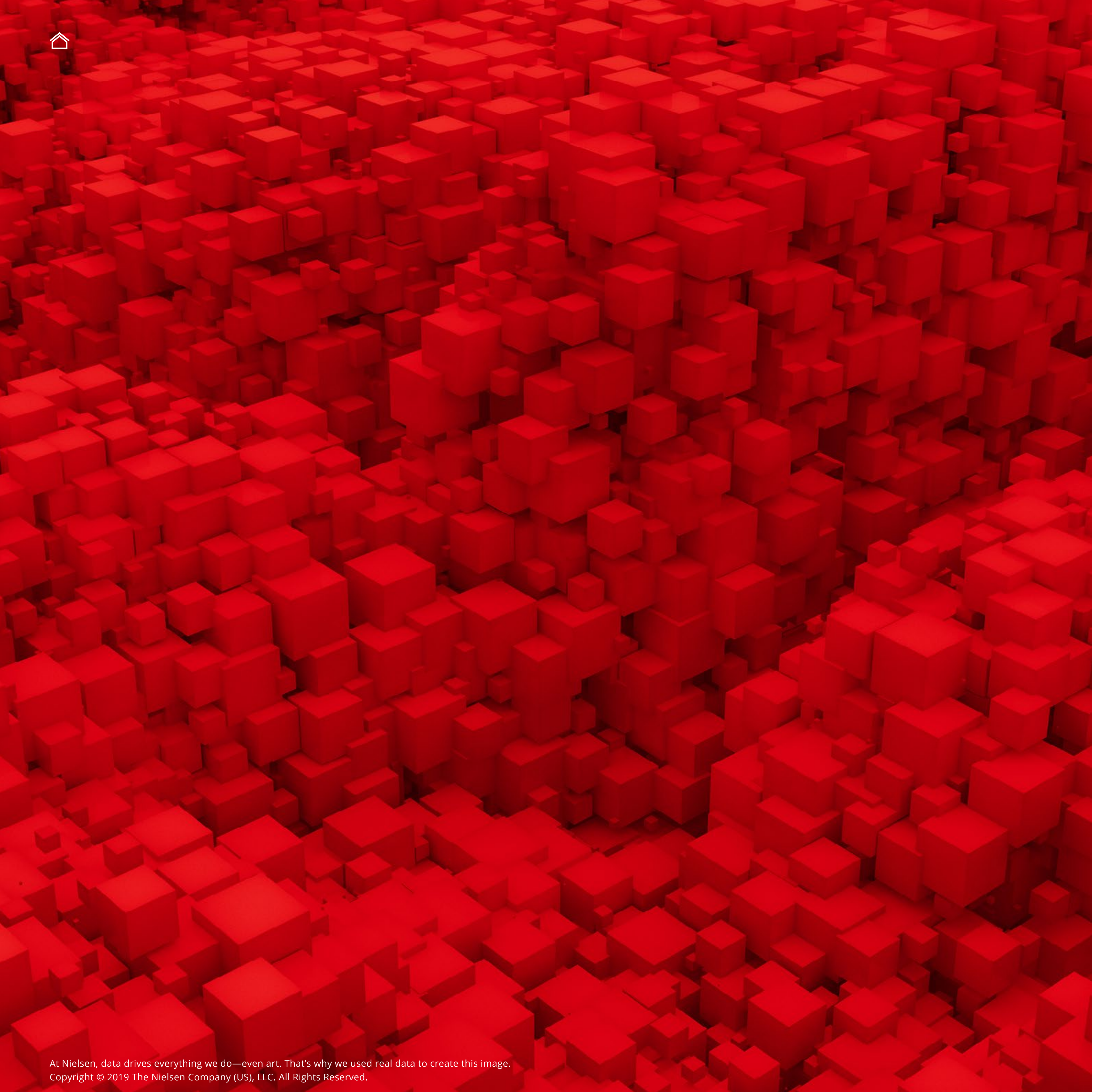
Nielsen Scarborough Hispanic Multi-Market Database 2018 Release 2 GfK MRI Attitudinal Insights Module: By integrating 400+ attitudinal statements and segmentations with Nielsen Scarborough's syndicated data set, this analysis reflects consumer psychographics in the studied categories.

NIELSEN U.S. CATEGORY SHOPPING FUNDAMENTALS

Category Shopping Fundamentals is one of Nielsen's complementary solutions that makes up Nielsen's Shopper Essentials suite. Together, Nielsen's Shopper Essentials paint a picture of a brand's shopper across the entire path to purchase. The Category Shopping Fundamentals survey is fielded online in the U.S.

LATINX HOUSEHOLD PROFILES

The profiles of Latinx households featured in this report were gathered using an independent online survey, which was voluntarily completed by households. The responses are the personal opinions of respondents and should not be interpreted as a scientific analysis of Latinx consumer sentiment as a whole. Rather, the responses contained in household profiles can be read as a contextual background to the Nielsen data in the report. Selected respondents were compensated.



At Nielsen, data drives everything we do—even art. That's why we used real data to create this image.

ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global measurement and data analytics company that provides the most complete and trusted view available of consumers and markets worldwide. Our approach marries proprietary Nielsen data with other data sources to help clients around the world understand what's happening now, what's happening next, and how to best act on this knowledge. For more than 90 years Nielsen has provided data and analytics based on scientific rigor and innovation, continually developing new ways to answer the most important questions facing the media, advertising, retail and fast-moving consumer goods industries. An S&P 500 company, Nielsen has operations in over 100 countries, covering more than 90% of the world's population. For more information, visit www.nielsen.com.

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