NATIVITY-BASED VIEW: A NEW AUDIENCE MEASUREMENT STANDARD THAT DRIVES TELEVISION ROI FOR US HISPANICS

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SPEAKERS

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WHY ARE WE HERE TODAY

- **Bidimensional Identity Measure (BIM):** Brands and ad agencies have a generalized understanding of the multicultural consumer, lumping them all together. They also say, Hispanics assimilate and don’t need targeted messaging.

- **Nativity-Based View (NBV):** Language has defined Hispanic marketing since 1980s. The language “model” has impacted measurement and budget allocation. This model looks at the impact of nativity.
OUR RESEARCH
OBJECTIVES

- Uncover key insights among Latino Gen Z and Millennials
- BIM and NBV topline results
- Discuss implications and next steps
METHODOLOGY

- Award-winning ThinkNow Total Market panel
- On-line methodology, N=1,250, nat rep sample
- Gen Z Study (2016)
- mitú’s State of Digital and Social Media Study (2017)
TARGETING GEN Z AND MILLENNIALS
BIDIMENSIONAL IDENTITY MEASURE (BIM)

Hispanics are truly ‘the 200%’ and are not assimilating into the US

mitú and ThinkNow Research study on Identity, Dec 2016
MY CULTURE IS IMPORTANT TO ME

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<th>Index</th>
<th>NH White</th>
<th>Latino</th>
<th>African-American</th>
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ThinkNow Research. Gen Z Study, 2016
I WANT TO MAINTAIN MY CULTURE

ThinkNow Research. Gen Z Study, 2016
SELF REFERENCING EFFECT

Compared to NH Whites, Hispanics are 55% more likely to say:

“Ads are made for me if it includes people who look like me”

<table>
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mitú and ThinkNow Research. Self-Referencing Effect Study, 2017
SELF REFERENCING EFFECT

Compared to NH Whites, Hispanics are 60% more likely to say:

“Ads are more effective if they recognize my cultural background”

mitú and ThinkNow Research. Self-Referencing Effect Study, 2017
SELF REFERENCING EFFECT

Compared to US born Hispanics, foreign born Hispanics are almost 70% more likely to say:

“Advertising is made for me if it is in Spanish”

mitú and ThinkNow Research. Self-Referencing Effect Study, 2017
SELF REFERENCING EFFECT

Compared to foreign born Hispanics, US born Hispanics are almost 40% more likely to say: "Advertising is made for me if it is in English"
Millennials (like Gen Z) are Digitally Connected Throughout the Day

- In bed when I wake up
- Early morning (9-12 noon)
- Midday (noon-2 pm)
- Afternoon (2-6 pm)
- Dinner time (6-8 pm)
- Late evening (8 pm+)
- Before going to sleep
WHAT IF THERE’S A BETTER WAY?
Are you reaching Millennials effectively and efficiently?
NATIVITY-BASED VIEW (NBV)

- Language has defined Hispanic marketing since 1980s
- Language “model” has impacted measurement & budget allocation
- What if there’s better way?
NBV APPLIED TO DEMOGRAPHICS

Nativity is a Key Driver across Generational Levels

http://www.pewhispanic.org/2016/04/20/the-nations-latino-population-is-defined-by-its-youth/
NBV APPLIED TO LANGUAGE AT HOME

60-90% of US Born Hispanics are ‘English Dom’ and ‘English Only’ Speakers

<table>
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<th>Gen 2</th>
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<td>3.9%</td>
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<td>23.5%</td>
<td>61.3%</td>
<td>23.3%</td>
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NATIVITY-BASED VIEW OPERATIONALIZED

lead-creator
co-creator

KANTAR

+ nielsen

databases
Foreign Born Latinos (18-34) Prefer Spanish Language Television

Nielsen C3 data, Primetime Q1 2017

7 of the top 10 networks are Spanish-language
US Born Latinos (18-34) Prefer English Language Television

TV VIEWERSHIP OF US BORN LATINOS

8 of the top 10 networks are English-language

Nielsen C3 data, Primetime Q1 2017
Millennial Influence In QSR Forces Brands To Rethink Their Engagement Model

Millennials have quickly taken on an influential role in our consumer market. The Millennial Mindset has expanded beyond just the generation born between 1977 and 2000 and has now been adopted by consumers of all ages. Millennial behaviors such as hyper connectivity, content consumption, creation and curation, the belief in inclusivity and fairness and a thirst for affordable adventures are impacting the way not just millennials, but also consumers who may not be a millennial as defined by their age, interact with the world and with the brands that engage them most. Not to be looked over, however, is how these millennial behaviors are influencing the way consumers think about food.
NBV APPLIED TO SL-TV SPEND

Half of the SL-TV investment reached Fb and US born Hispanics

Calculations by MAGNA and Center for Multicultural Science, 2017 (QSR = key spender in category from Jan-Oct 2017)
NBV + AGE APPLIED TO SL-TV SPEND

25% of total SL-TV spend reached Latino Millennials for Leading QSR Company

Calculations by MAGNA and Center for Multicultural Science, 2017 (QSR = key spender in category from Jan-Oct 2017)
KEY TAKE AWAYS

- BIM quantifies the identity of multicultural America, and challenging the notion that the US is a ‘melting pot.’ Use the BIM to increase target effectiveness.

- NBV replaces language as the über variable in Hispanic marketing. NBV analysis in QSR shows that 75% of its spend did not reach Latino Millennials. Use the NBV to drive more informed budget allocation decisions.
WHAT’S IN STORE FOR 2018

- mitú / ThinkNow Gen Z and Gen Y Total Market Panel
- Snapchat research study
- Self-referencing research study (part 2) in June
Q/A

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