

THE NEW **LATINO MOSAIC**



THE NEW LATINO MOSAIC

**Chemistry Cultura + U.S. Hispanic Chamber of Commerce
partnered on a proprietary research study
of Latino trends in media, marketing, culture.**



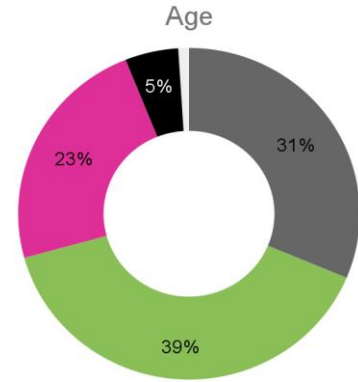
METHODOLOGY

**Statistically significant /
quantitative study**

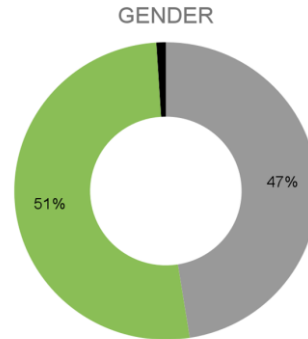
**We polled 1,427 U.S. Latinos across
country of origin, employment,
geography, age and gender**

**Added control group of gen pop to
compare & contrast**

WHO WE TALKED TO

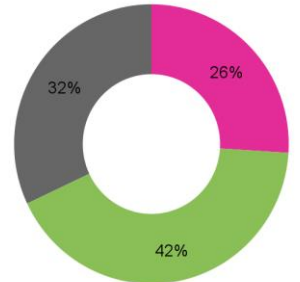


- 18-26 (GenZ)
- 27-42 (Millennial)
- 43-58 (GeX)
- 59-68 (Boomer I)
- 69+ (Boomer II)



- Male
- Female
- Non Binary

Generation of Residency

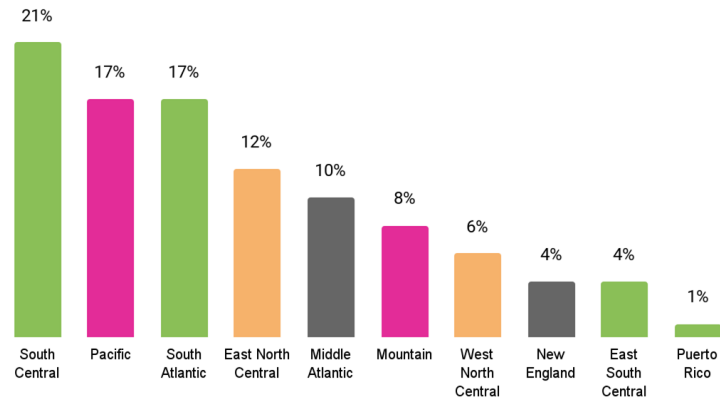


- First Generation - born outside U.S. or on island of Puerto Rico
- Second Generation - born in the U.S. to immigrant parents
- Third Generation - born in U.S. to U.S. born parents

WHO WE TALKED TO

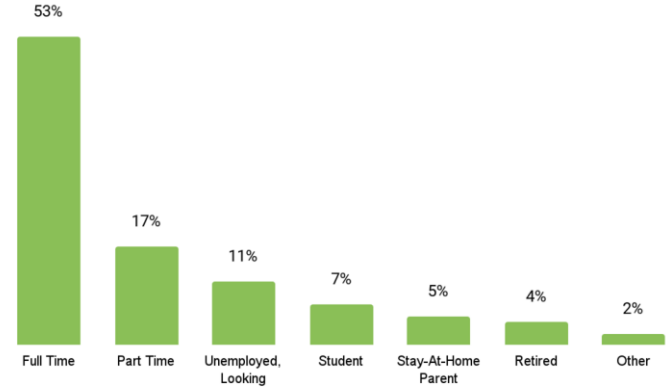


Geography

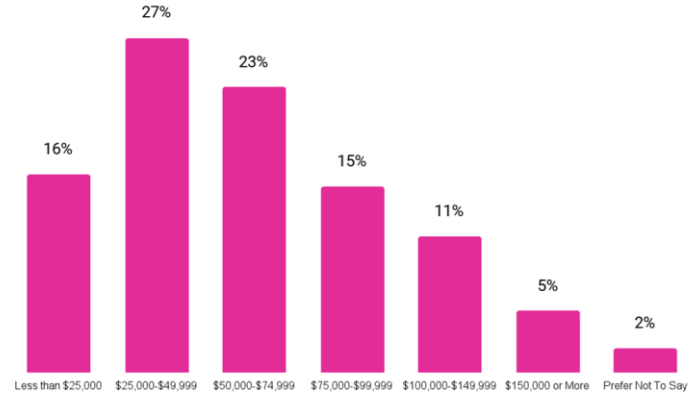


WHO WE TALKED TO

EMPLOYMENT STATUS



HHI



KEY TOPICS

Social Media
Habits

What Influences
Purchase Decisions?

Passion Point
Analysis

How To Appeal To
Younger US Born
Hispanics

Where Do
US Hispanics
Learn About
New Brands

Impact of
Acculturation

Brand Loyalty -
What Brands + Why

How To Refer To
Hispanics
Inclusively

When To Use
English v Spanish -
Is This Changing?

THREE
IMPORTANT
MYTHS BUSTED

SPANISH IS GOING AWAY



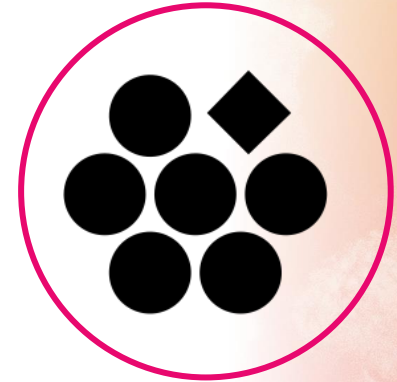
Wrong! Something new is emerging...

LATINOS ARE HOMOGENOUS, AND CAN ALL BE FOUND ON UNIVISION



It's Multi-faceted, Complex, Nuanced

LATINO CULTURE REMAINS STAGNANT



From social adoption, to passion points, *cultura* is rapidly evolving!

HIGHLIGHTS - MEDIA



Latinos are fervent viewers of television, including a whopping **42% who still watch broadcast TV daily.**

48%

**OF LATINOS
ARE DAILY
USERS OF
TIKTOK**

as compared
to **only 36%** of
the general
market

20%

**SAY THEY
“FIND NEW
BRANDS”
ON TIKTOK**

as opposed
to **only 11%** of
the general
market



Latinx Content Programming

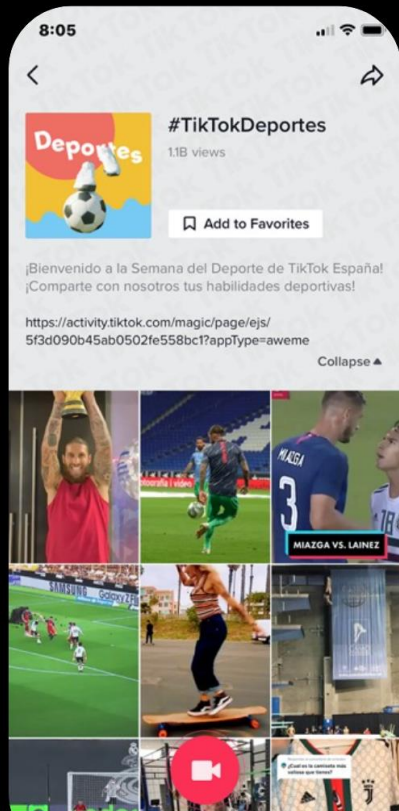
La Semana del Deporte
Aug 24 - Aug 30

#GolazoChallenge
TikTok LIVE featuring FC Barcelona

Latinx Heritage Month
Sep 15 - Oct 15

TikTok LIVE featuring Jennifer Lopez

TikTok For Business



Our Latinx Community is Engaged



Top Hashtags

#Latinx
446.2M

#Latino
14.9B

#Latina
22.2B

#Hispanic
9.1B

#HispanicTikTok
136.1M

#TikTokLatino
1.5B Views

#Hispanics
589.8M Views

#HispanicsBeLike
368.8M Views

#HumorLatino
462.8M Views

#LatinosBeLike
398.3M Views

#LatinaMom
241.2M Views

#HispanicProblems
190.9M Views

#GrowingUpHispanic
154.0M Views

#HispanicParents
124.4M Views

#HispanicFood
38.4M Views

THE NEW LATINO MOSAIC

HIGHLIGHTS - LANGUAGE



65%

OF LATINOS



PREFER AT LEAST
SOME SPANISH



IN THEIR
ADVERTISING.

- English as preferred language at home has grown exponentially by generation. **50% of first-gen prefer Spanish, and the number drops to 4% of third gen.**
- Counter-intuitively the opposite occurs with Spanglish. Rather than merely adopt English, **20% of Gen Z prefer Spanglish over either individual language,** as compared to only 14% of Millennials and 10% of Gen X.

Recipients overwhelmingly refer to themselves based on country of origin and / or the catch-all term *Latino*.

The term Latinx was negligible, and was strongly refuted as *“an inauthentic creation of corporate America.”*

HIGHLIGHTS – MARKETING



38% 

OF GEN Z LATINOS
SAY MUSIC IS THEIR
 #1 PASSION POINT

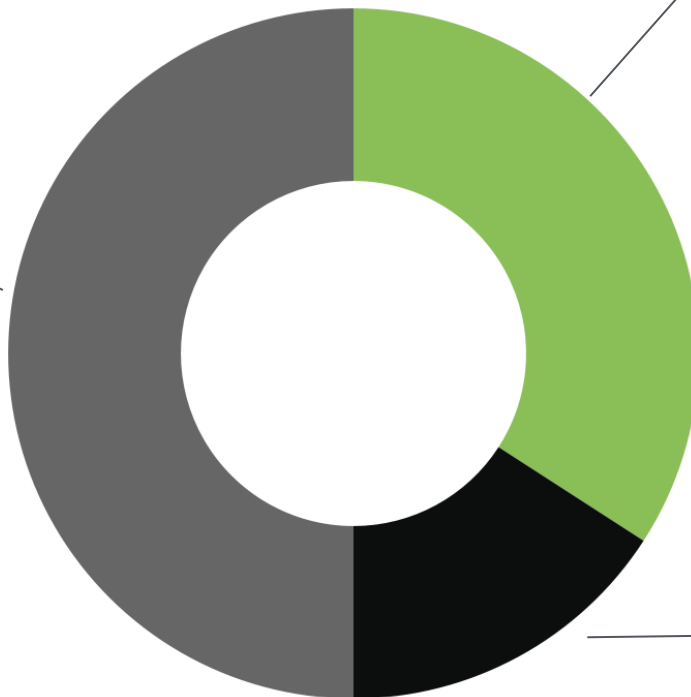
vs. only 17% of Boomers
(who prefer sports by a wide margin)

- When asked what element they most like in advertising, respondents heavily favored Hispanic casting (34%) over interest in product (19%).
- Latinos remain more brand loyal than the gen market, and 57% attribute that loyalty to “exhibiting a respect for my Latino heritage.”

IN WHAT WAYS DOES HISPANIC CULTURE INFLUENCE YOUR LIFE?

63%

How I live / What I believe...
values, outlook, opportunities,
family/community, celebrations, how
I'm treated, opportunities



43%

What I consume...
food, music, entertainment, art, style

20%

In All Ways

THE TOP 3 MISTAKES BRANDS MAKE IN THEIR LATINO ADVERTISING ARE:



1 Use of stereotypes

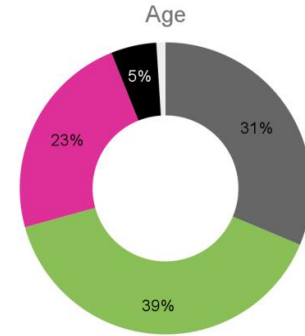
2 Misuse of language

3 Not reflecting the diversity
of the Latino community

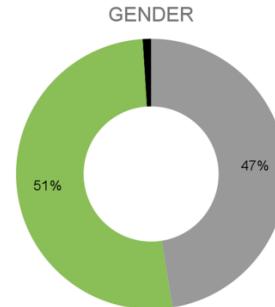


FULL RESEARCH REPORT

WHO WE TALKED TO

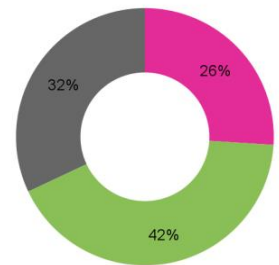


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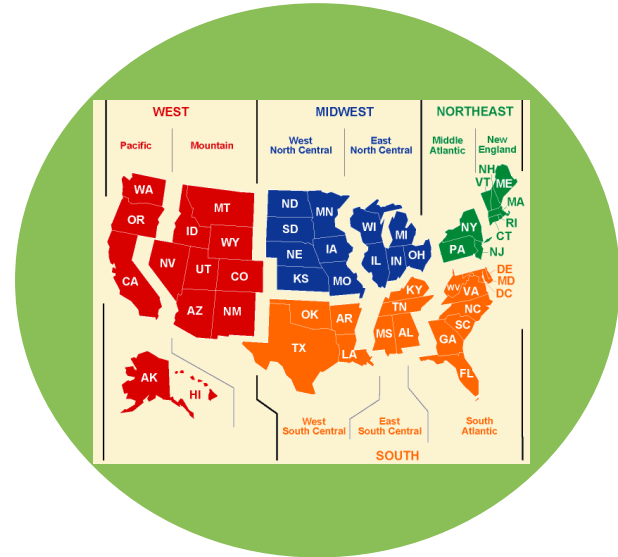
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Generation of Residency

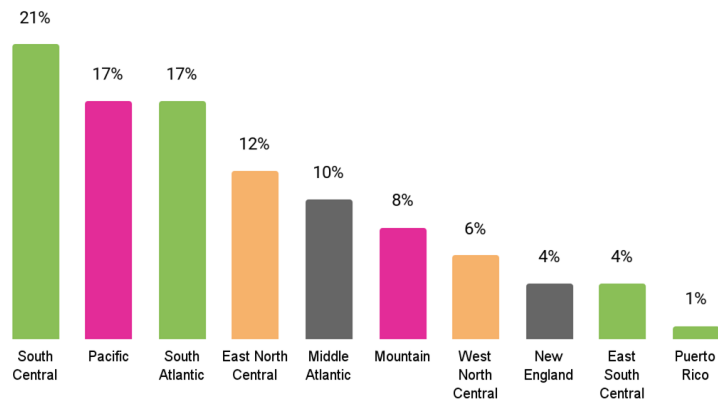


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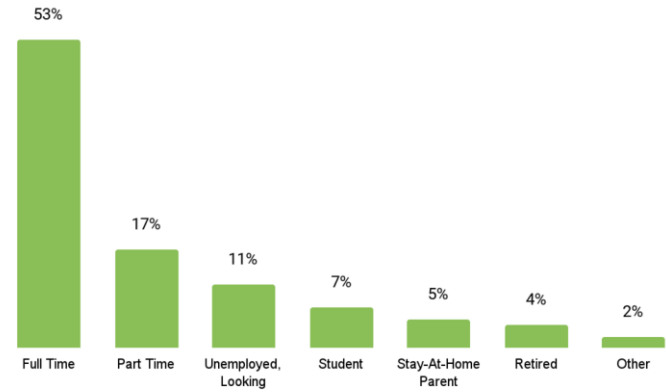


Geography

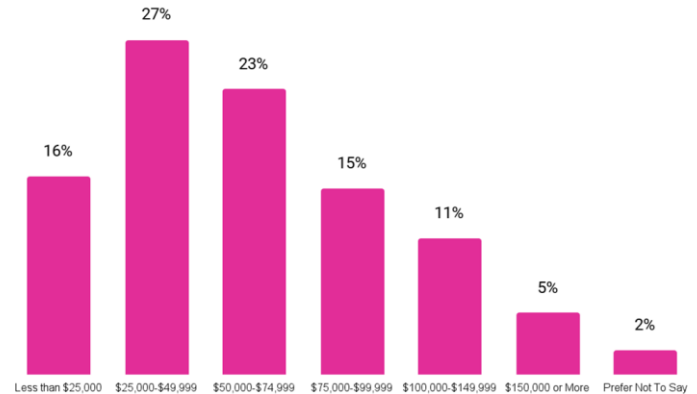


WHO WE TALKED TO

EMPLOYMENT STATUS



HHI



THREE
IMPORTANT
MYTHS BUSTED

**THERE ARE SIMPLE
STEPS TO CONNECTING**



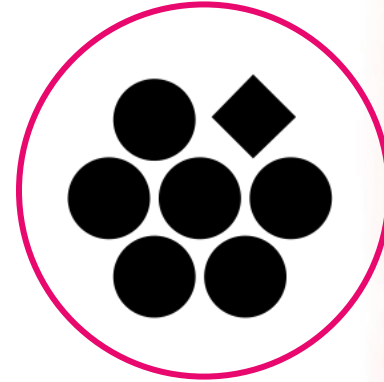
**There's
No Magic
Formula**

**LATINOS ARE
A SINGULAR GROUP**



**It's Multi-faceted,
Complex, Nuanced**

**HISPANIC HERITAGE
CREATES A SEPARATENESS**



**Craving
Inclusion but Impacting
American Culture**

Here's what U.S. Latinos
Want Brands To Know About...

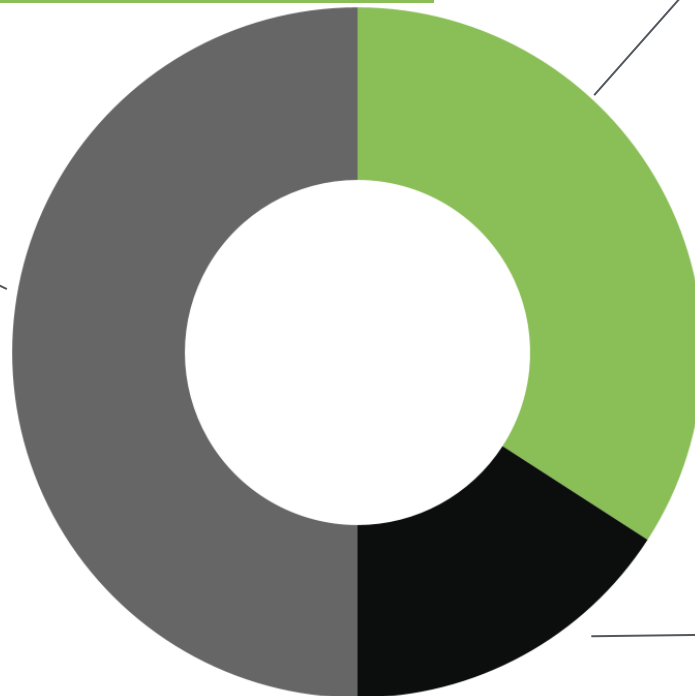
THEIR CULTURE

LATINO ROOTS RUN DEEP

IMPACTING EVERYDAY LIFE

63%

How I live / What I believe...
values, outlook, opportunities,
family/community, celebrations, how
I'm treated, opportunities



43%

What I consume...
food, music, entertainment, art, style

20%

In All Ways

BUT IT'S
COMPLICATED

PROUD AMERICANS,
WITH AN IMMIGRANT HERITAGE LIKE EVERYONE ELSE

EXTREMELY PROUD OF COUNTRY OF
HERITAGE,
EVEN MORE SO THAN BEING HISPANIC IN GENERAL

TREMENDOUS DIVERSITY WITHIN THE
COMMUNITY,
*PHYSICALLY, CULTURALLY...“WE’RE NOT ALL
MEXICAN”*

COUNTRY OF ORIGIN PRIDE IS REAL



Esther



Guerra
1st Generation



Hi I'm Guerra I'm a 42 mother of 2 and grandma to a 2 year boy Our family comes from Zaragoza Cohulia ,Mexico I've lived in United States part of my life growing up in different community but where there's love and people lots care our jobs are good our pays little so our family migrated to United States for a dream a new start we heard it's beautiful and there's a chance we can fit in and become better off meet new ppl schools jobs adventures I love they have tourist that can help make you feel comfortable



Eva
3rd+ Generation



I would not introduce myself as 3rd generation Hispanic in America. I would say I'm American and maybe if I had to say something about my heritage....I would indicate my ancestors were from Mexico. I did not grow up knowing much about Mexican customs as both my parents were born in Texas.



Christopher
1st Generation



I would consider myself an El Salvadorian and Asian. However, I most closely identify with being American because I can relate to so many of my friends that are not of similar heritage. I am an immigrant in American like many Americans and i feel proud of it.



Facebook
3rd+ Generation

I'm 57. I say "Mexican" or "Latino." Never heard anyone say Hispanic except whites.

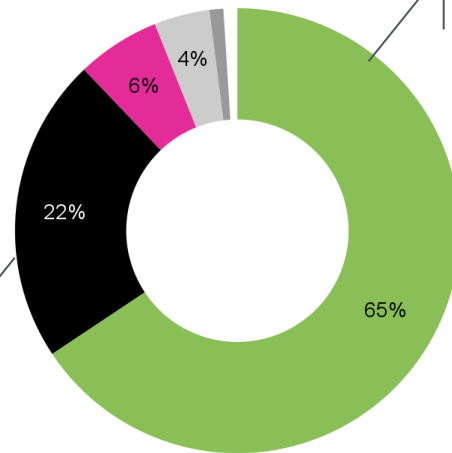
SO
DON'T LET THIS
FOOL YOU

- Hispanic
- Latino/a
- American
- Country of Heritage
- LatinX
- Other

The Real Preference



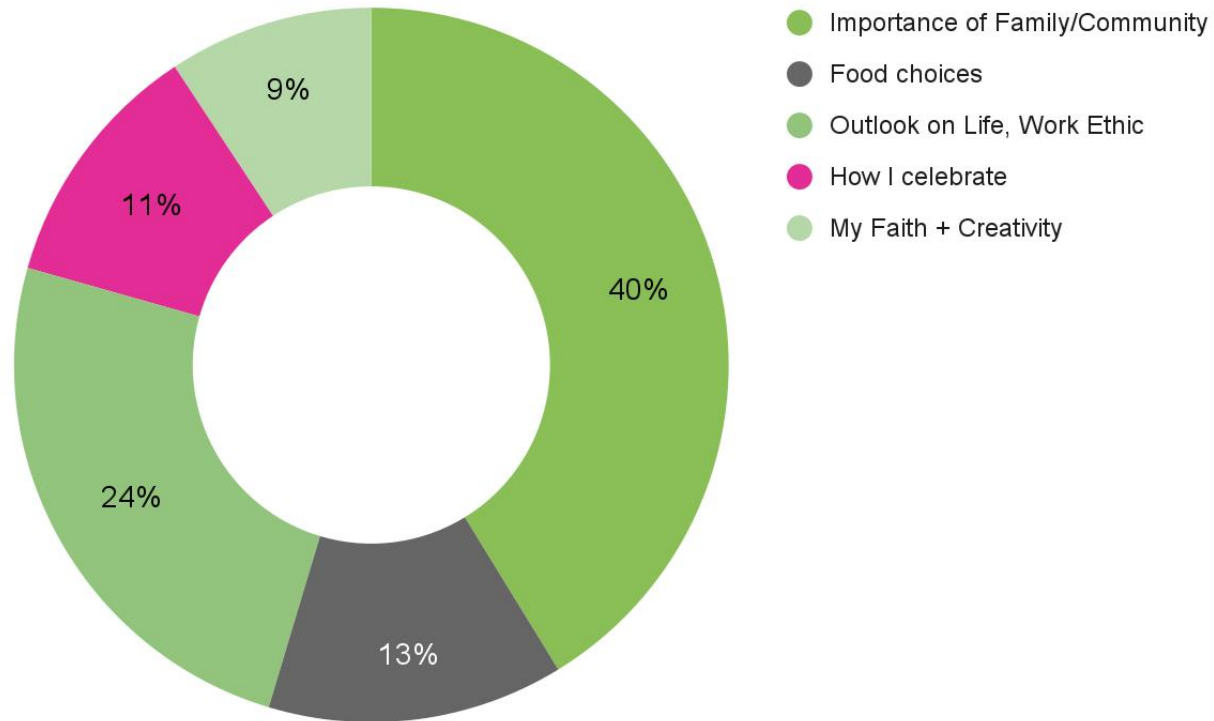
Describe Self As



Society's Default

PERSONAL CONNECTION IS

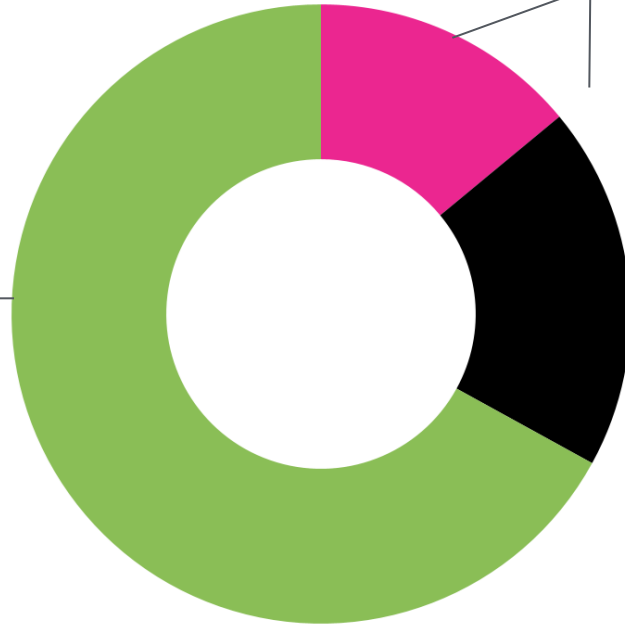
MOST DEFINED BY VALUES



AND NOT BY

LANGUAGE

67%
ENGLISH



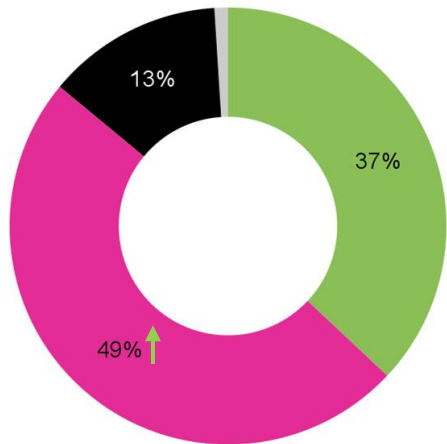
14%
SPANGLISH

19%
SPANISH

THE EXCEPTION IS

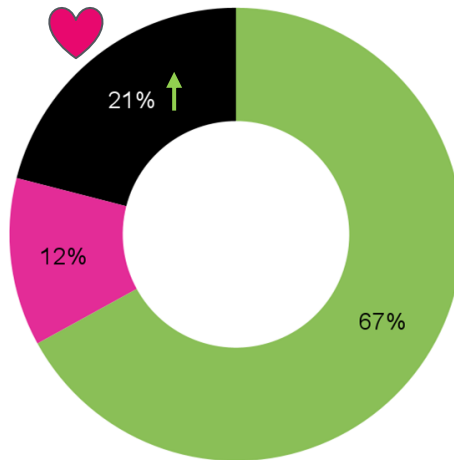
FIRST GENERATION

First Generation



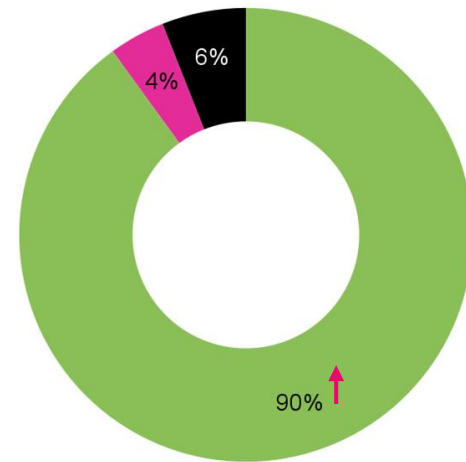
● English ● Spanish ● Spanglish ● Other

Second Generation



● English ● Spanish ● Spanglish

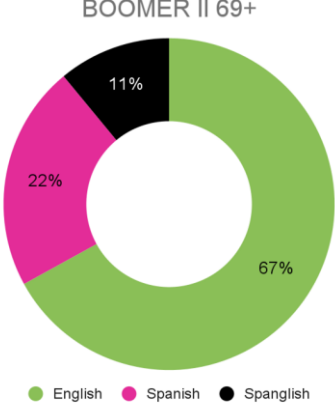
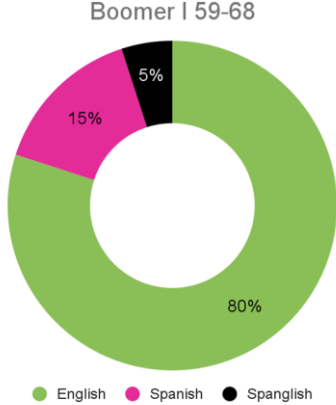
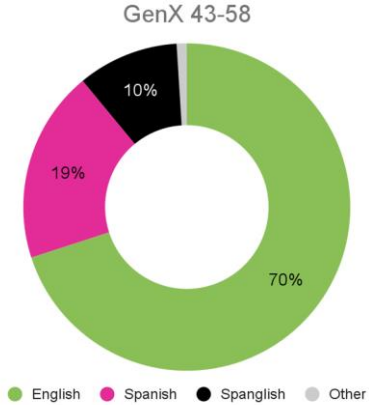
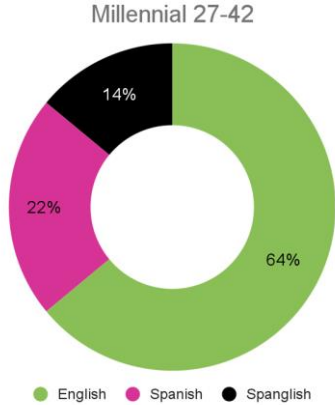
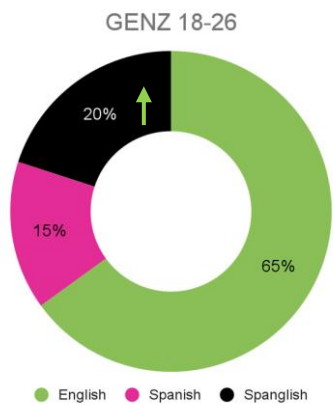
Third Generation



● English ● Spanish ● Spanglish

SPANGLISH POPS FOR

GENZ



Q2.3 - What language do you find yourself most comfortable speaking most of the time?

MEN MORE ENGLISH-COMFORTABLE

THAN WOMEN

MOST COMFORTABLE WITH ENGLISH

63%
WOMEN



72% ↑
Men

Q2.3 - What language do you find yourself most comfortable speaking most of the time?

MYTH BUSTING

HYPOTHESIS

IDENTIFY
MOST CLOSELY
WITH LATIN
HERITAGE

1ST GENERATION
PREFERS
SPANISH

AGE
IMPACTS
LANGUAGE
PREFERENCE

PROOF

FALSE-ISH

Latin Roots Run
Deep, But There
Is Great Pride
In Being American

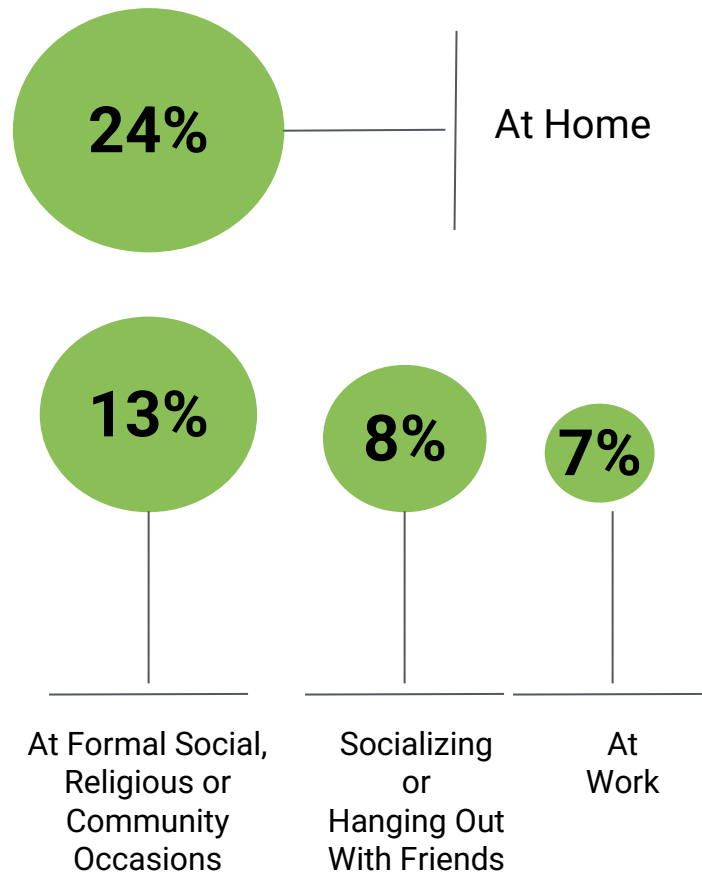
TRUE-ISH

49% of 1st
generation are
more comfortable
speaking spanish

FALSE

With 1 exception...
20% of GenZ is
most comfortable
with SPANGLISH

SO WHERE IS SPANISH SPOKEN?



ENGLISH IS LARGELY PREFERRED

FOR CONTENT

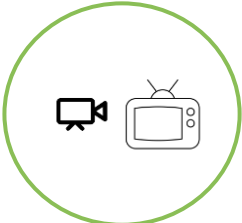
Always in Spanish Top 2 Box

3%



Social Media

3%



Movies/TV

4%



YouTube Videos

5%



Books, Newspapers, Magazines

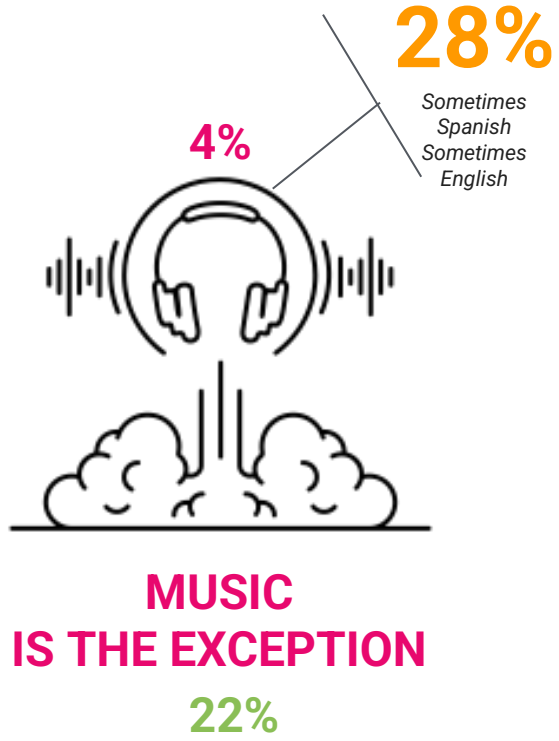
Always in English Top 2 Box

39%

33%

39%

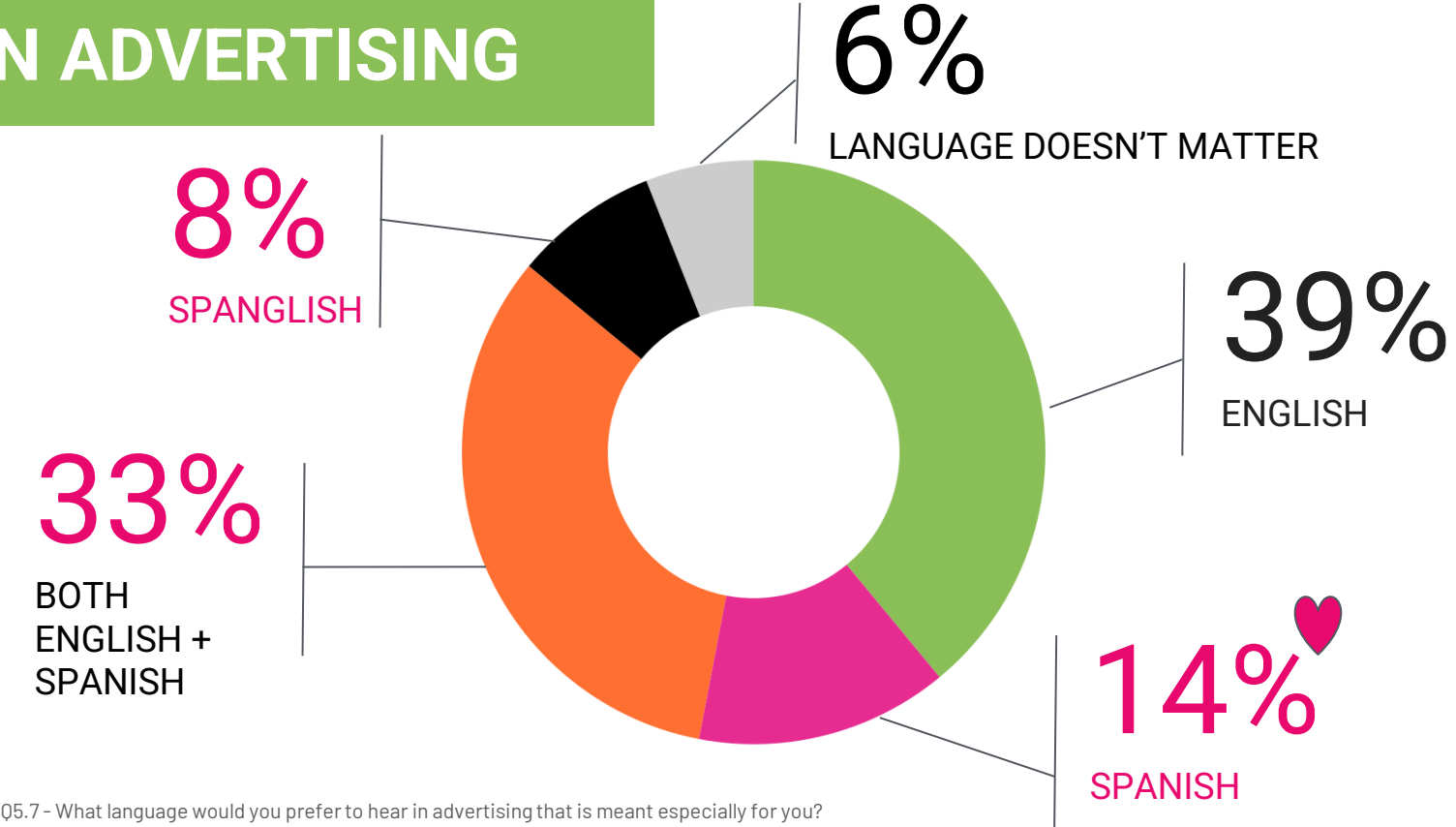
40%



Q5.8 - Using the below scale, please rate the language in which you prefer to consume the following kinds of content. 0 is Always in Spanish, 5 is Sometimes in Spanish, 10 is Always in English

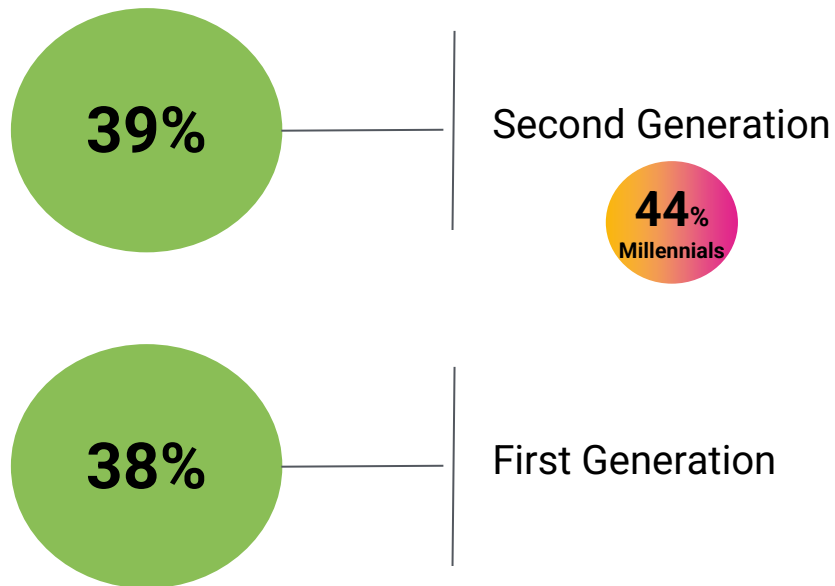
65% PREFER SOME SPANISH

IN ADVERTISING

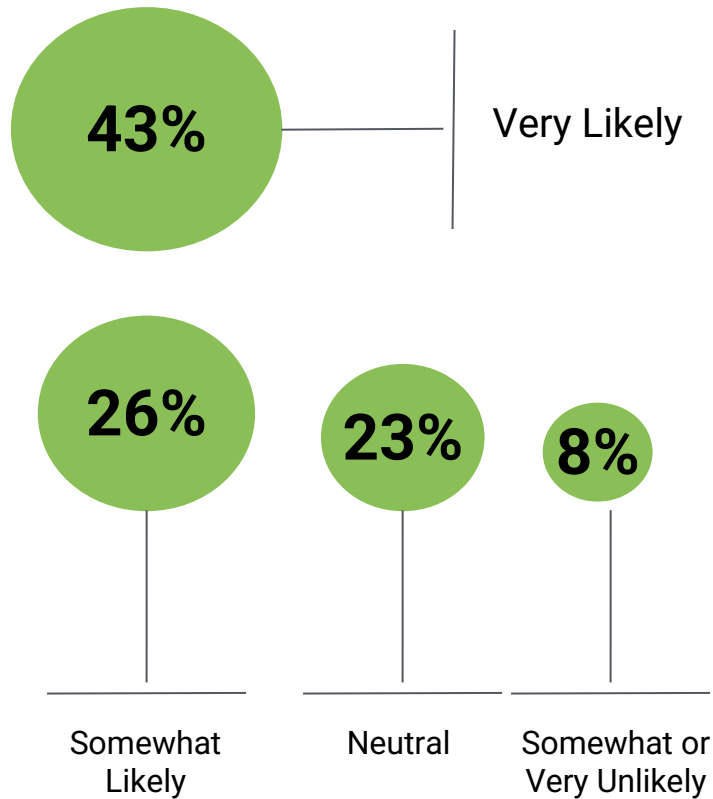


Q5.7 - What language would you prefer to hear in advertising that is meant especially for you?

WHO WANTS ADS IN BOTH SPANISH AND ENGLISH?



DO SPANISH ADS GET ATTENTION?



The Expected

**LANGUAGE
MATTERS
MOST**

The Experiment

**CULTURAL NUANCE
MATTERS
MORE**

Here's what U.S. Latinos
Want Brands To Know About...

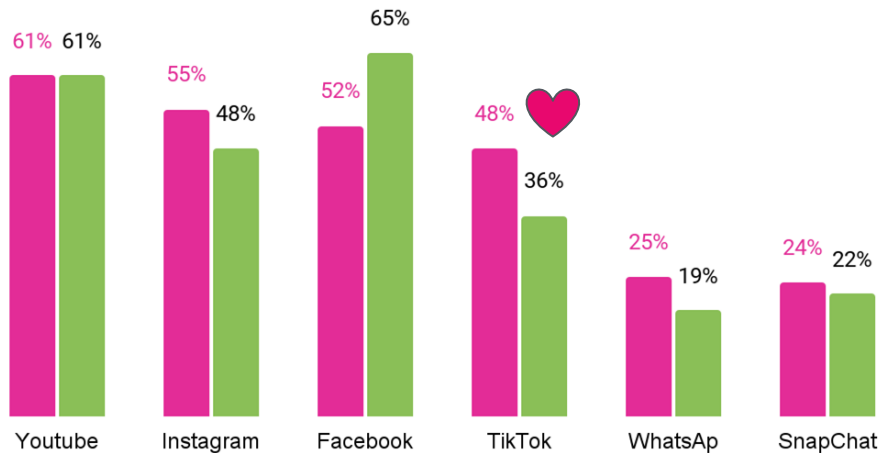
WHERE TO REACH THEM

LATINOS ARE PROGRESSIVE

IN SOCIAL MEDIA USAGE

Social Media Used Regularly

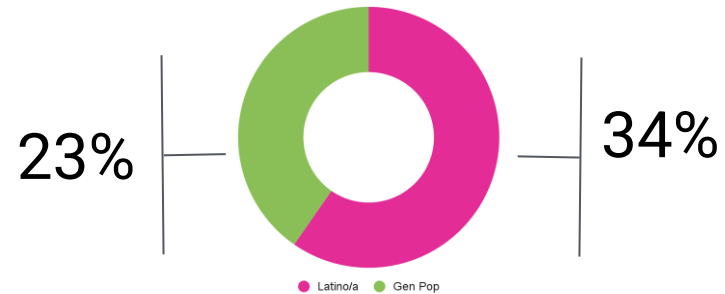
■ Latino/a ■ Gen Pop



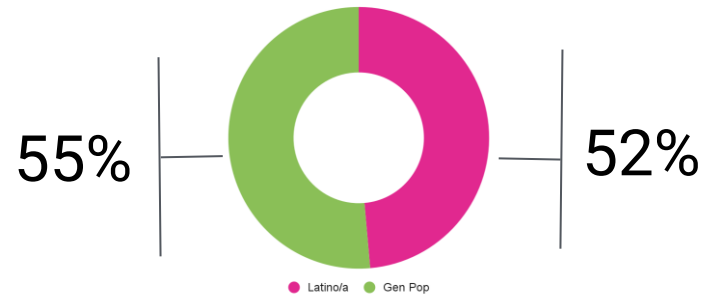
Q6.2 - Which of the following social media platforms do you use regularly

Q6.3 - Please rank the following social media platforms from the one you USE MOST (1) to the one you USE LEAST (10)

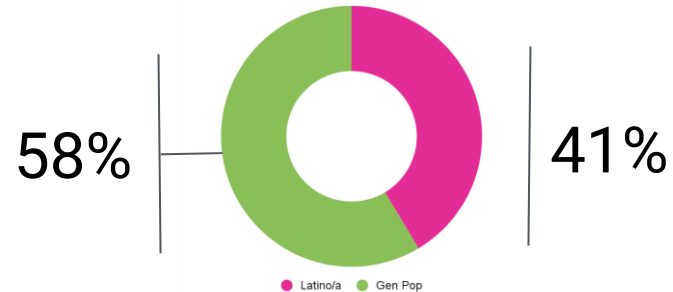
TIKTOK MOST USED TOP2 BOX



YOUTUBE MOST USED TOP2 BOX



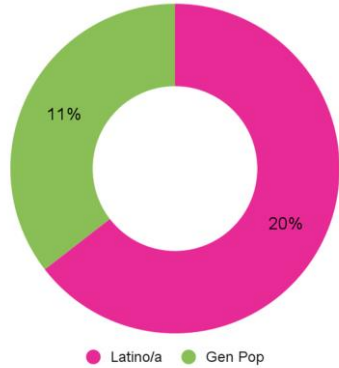
FACEBOOK MOST USED TOP2 BOX



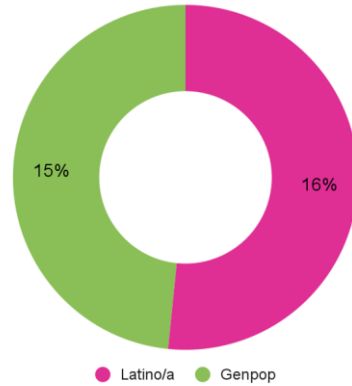
TIKTOK IS WHERE LATINOS

FIND NEW BRANDS

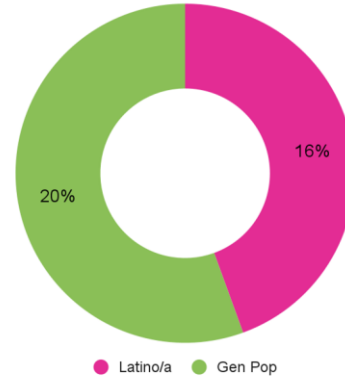
TIKTOK



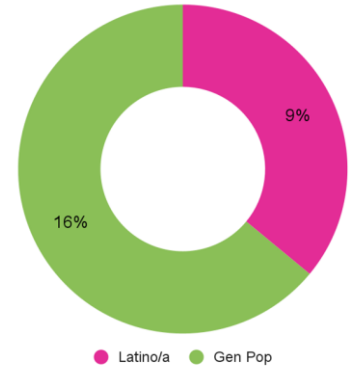
YOUTUBE



ADVERTISING ON TV/ RADIO



FRIENDS + FAMILY

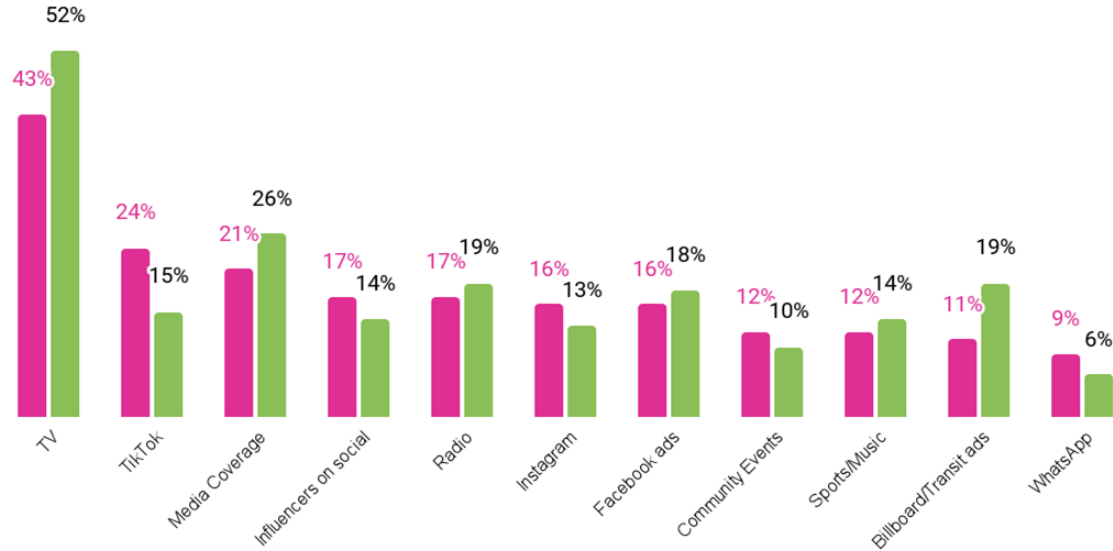


TIKTOK ADVERTISING INFLUENCES

PURCHASES

Top2 Box

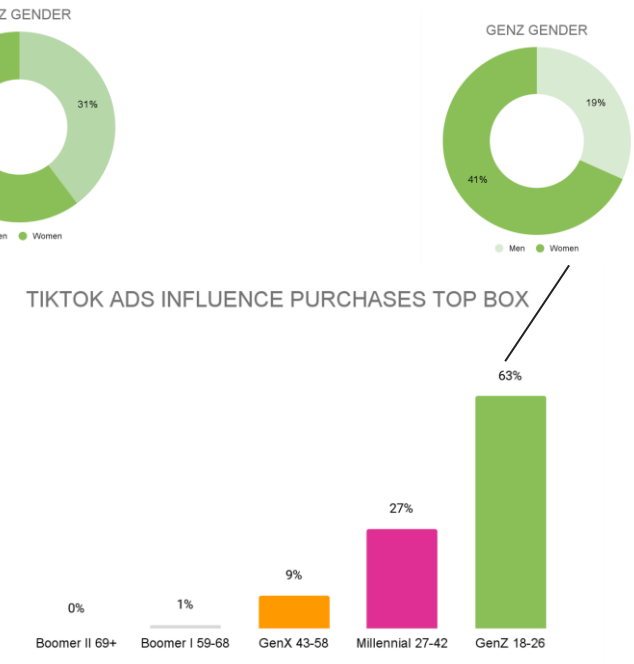
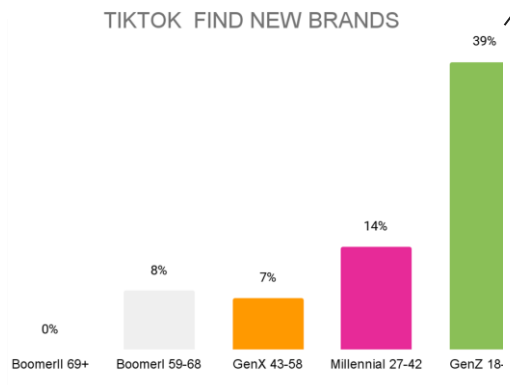
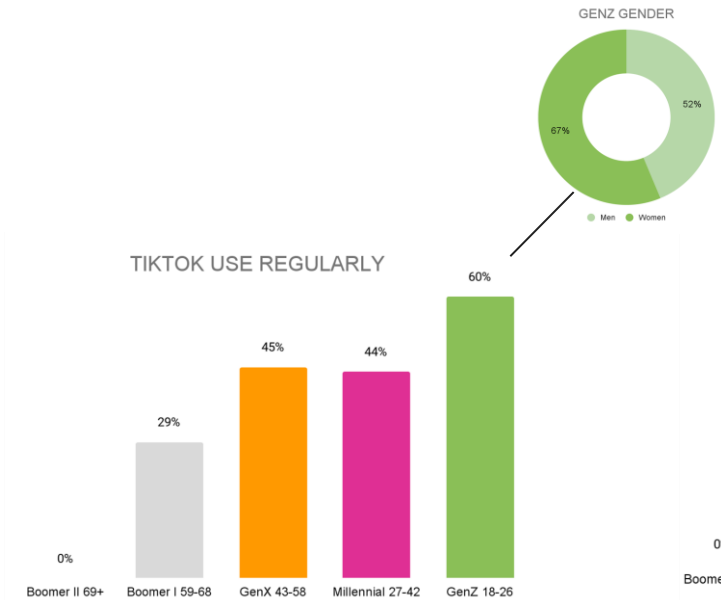
■ Latino ■ Gen Pop



Q5.9 - Please rank the places you see advertising from MOST IMPACTFUL (1) in influencing the brands, products and services you buy, to LEAST IMPACTFUL (11). Click and drag to change the order.

GENZ LATINAS DRIVING THE

TIKTOK POP

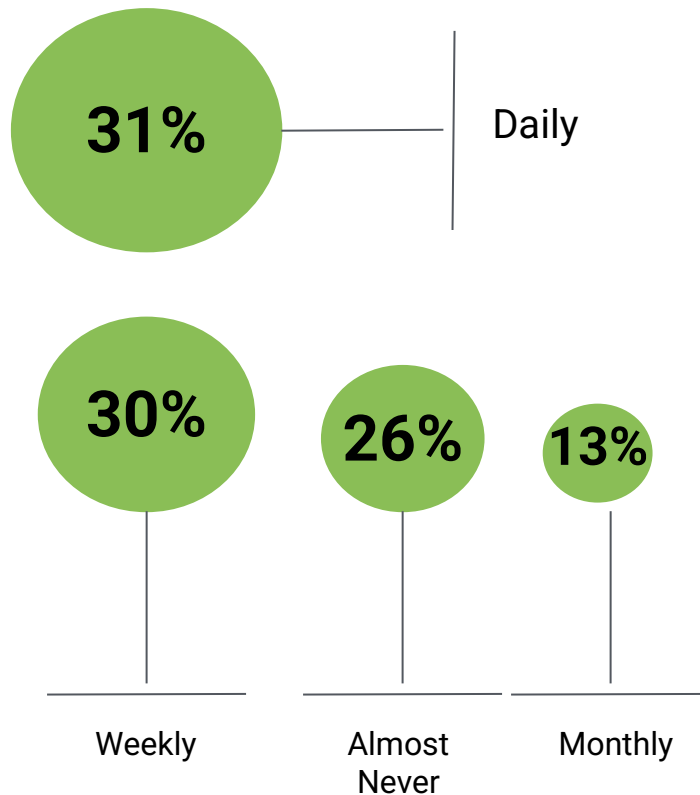


Q6.2 - Which of the following social media platforms do you use regularly

Q6.1 What ONE PLACE do you most often learn about new products, services and brands you'd like to try?

Q5.9 Please rank the places you see advertising from MOST IMPACTFUL in influencing the brands you buy to LEAST IMPACTFUL.

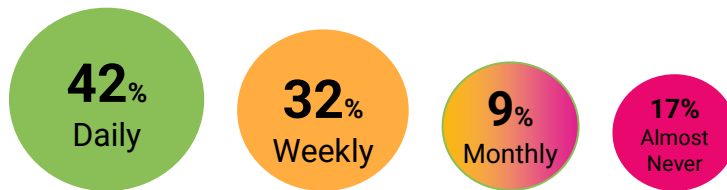
HOW REGULARLY IS SPANISH TV WATCHED?



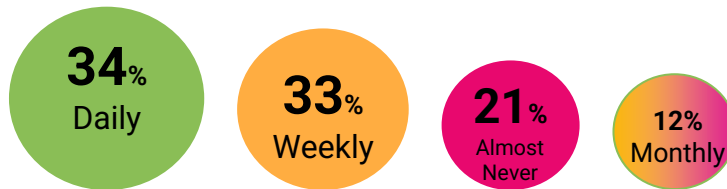
Q6.4 - How often do you watch television in Spanish, on channels like Univision, Telemundo, UniMas, ESPN Deportes?

WHO IS WATCHING SPANISH TV

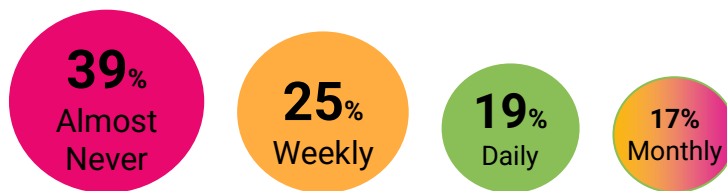
First Generation



Second Generation



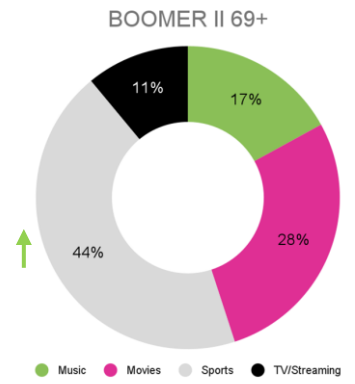
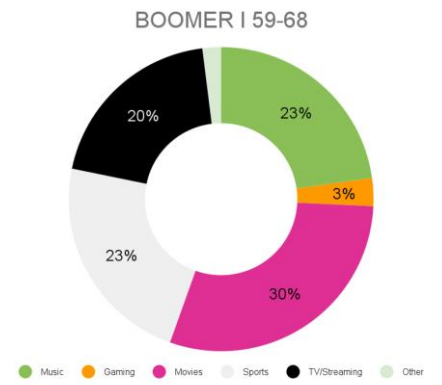
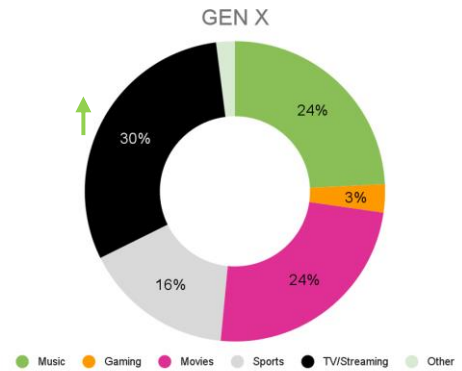
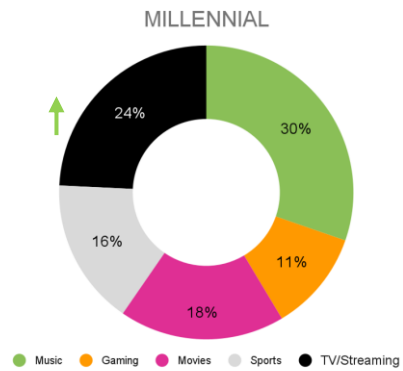
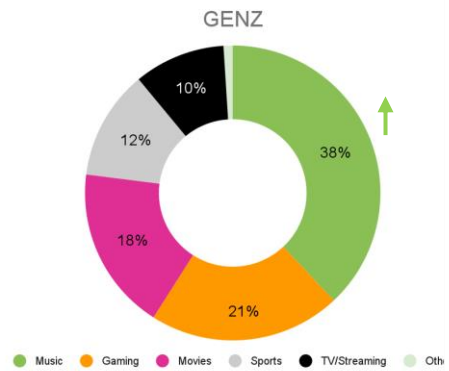
Third Generation



Q6.4 How often do you watch television in Spanish on channels like Univision, Telemundo, UniMas, ESPN Deportes?

ENTERTAINMENT PASSIONS

VARY BY AGE



Q6.5 - Which one of the following entertainment areas are you most passionate about?

MYTH BUSTING

HYPOTHESIS

TRADITIONAL
MEDIA
DOMINATES

SPANISH
LANGUAGE
MEDIA
IS DYING

MUSIC
SKEWS
OLDER

PROOF

FALSE

48% of Latinos
Regularly Use
TIKTOK

FALSE

42% of Latinos
Watch Spanish
Language TV Daily

FALSE

38% of GenZ Are
Passionate About
Music - An
Important Cultural
Staple

The Expected

**TRADITIONAL
MEDIA
RULES**

The Experiment

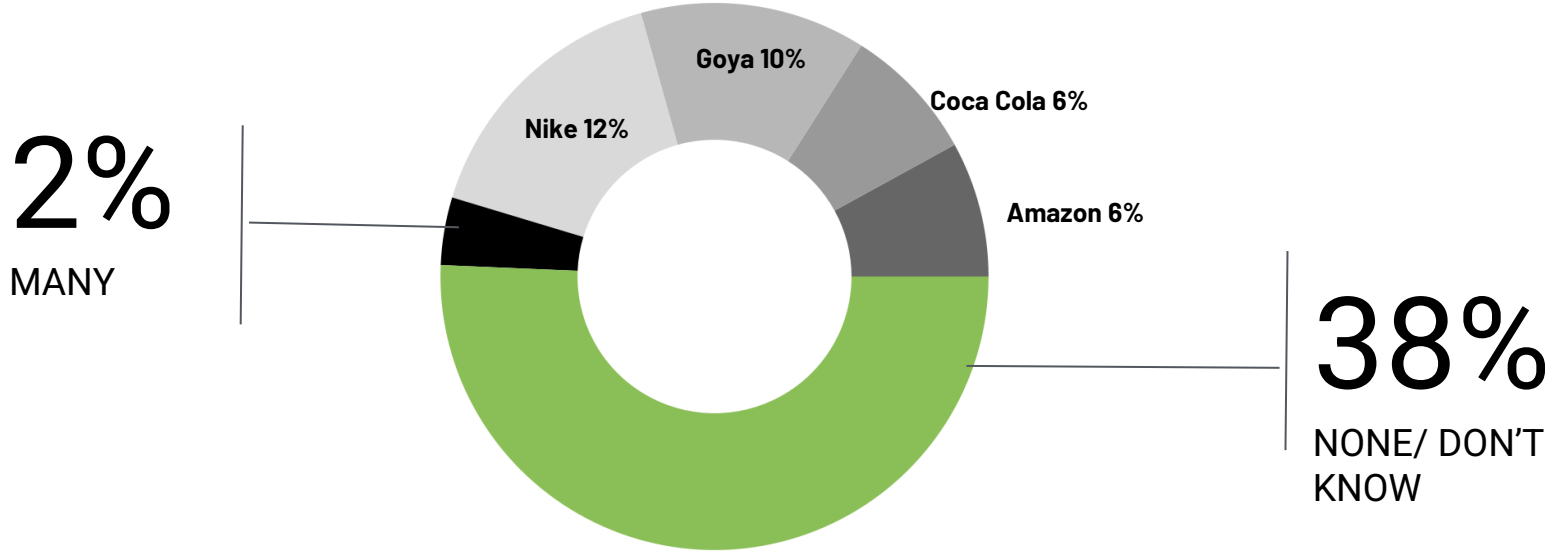
**IT'S A CURATED MIX
OF EMERGING
SOCIAL
+ SPANISH TV**

Here's what U.S. Latinos
Want Brands To Know About...

EFFECTIVE ADVERTISING

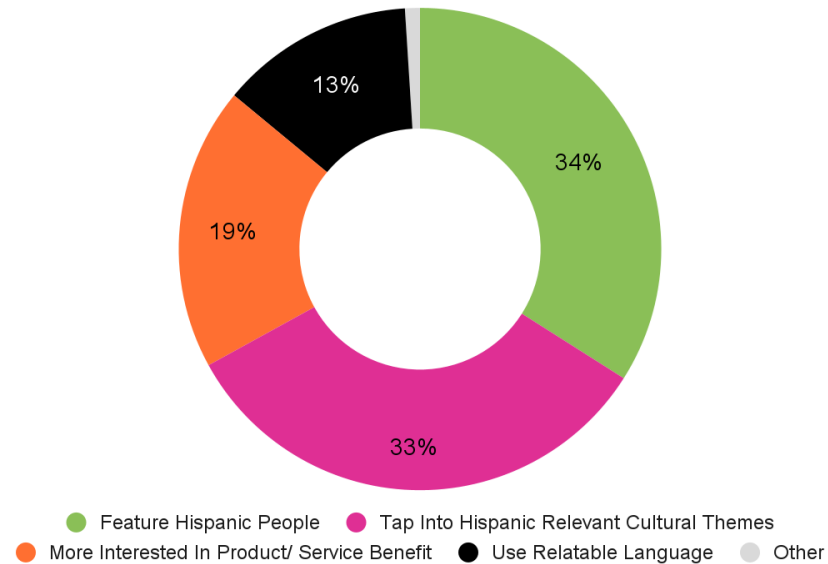
FEW BRANDS GET

ADVERTISING RIGHT



START WITH REPRESENTATION

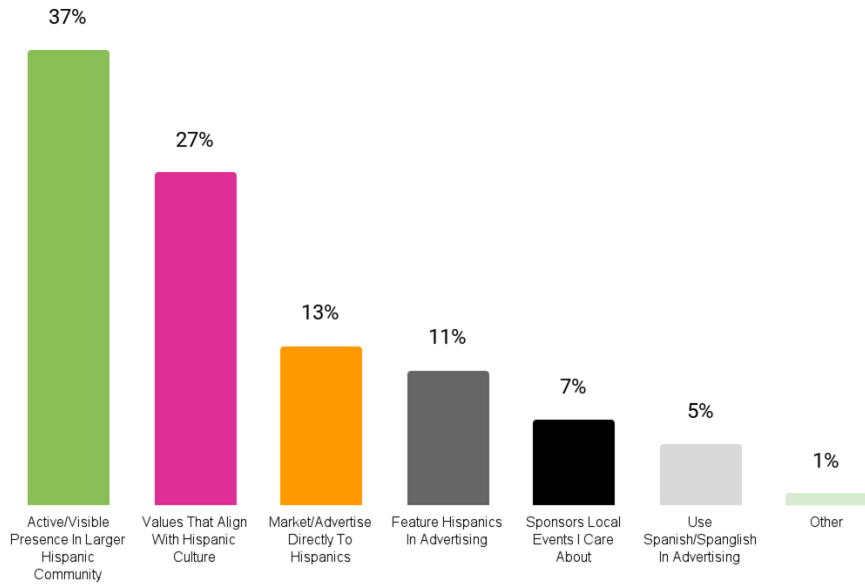
AND LEAN IN TO CULTURE



Q5.3 - How should Hispanic culture be represented in advertising? Choose the ONE most important aspect.

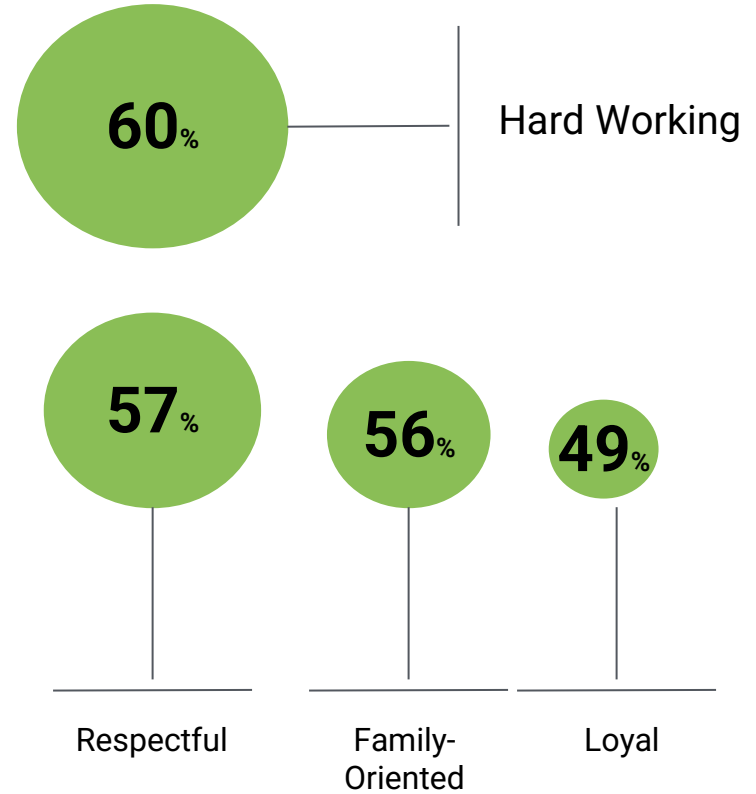
REFLECT COMMON VALUES

AND BE PRESENT



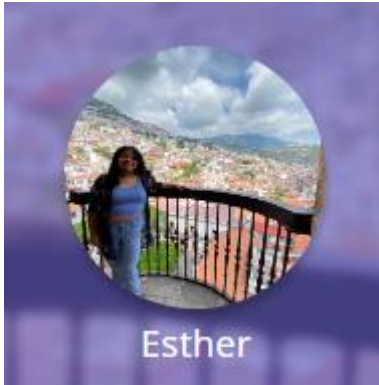
Q4.6 - In what way does X brand you are most loyal to, MOST respect your Hispanic heritage.

IMPORTANT VALUES IN LATIN CULTURE



FAMILY BONDS ARE CENTRAL

TO ALL GENERATIONS



Maria
2nd Generation



My connections start with my deceased father, his words and his personal love for our roots and culture. Our values of strong work ethic, our strong religious beliefs, our love of our mother country, her food, her music, her history...all threads in the tapestry of my life.



Christopher
1st Generation



I went to highschool and college with a very diverse group of people such as whites, blacks, Indians, etc. and we were all able to connect through school. So there is little I feel differently about my hispanic heritage. Some things they might not understand is the sense of food and being around **family**. **Family** is a priority over money and all other aspects of life.



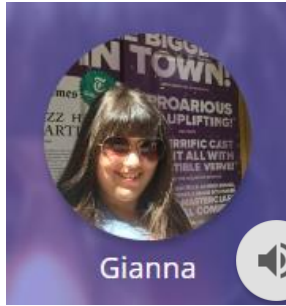
Trey
3rd+ Generation



I always loved going to **family** parties from the Hispanic side. The food was amazingggg. The piñata filled with candy for birthdays. Hearing English, Spanish, and Spanglish spoken throughout the party. I moved to another state as an adult and greatly miss those gatherings. It was when I felt like I had the closest thing resembling an "extended **family**" since I don't have first cousins, and my aunt and uncle both live in other states.

FOOD, MUSIC, CELEBRATIONS ARE

CULTURAL CONNECTORS



Gianna



Mat



Christina
2nd Generation



Christmas time in our house seems to be a time that is very unique to our culture. We do (did) regular things like Christmas tree and presents and all of that. But our celebrations always seemed like so much more. It was always almost exclusively family. We would plan our menu out weeks in advance—pierna (or lechon), pasteles, arroz con pollo etc. having a white dad we also mixed in stuff like deviled eggs but it always seemed to be heavier in the special occasion foods of my Mom's Honduran upbringing. The big one was tamales. Tamales are a day long process. Prep and cooking. Lots of work but of course mom makes them a few days in advance so that we can eat them for weeks (sometimes months). We celebrate Noche Buena not so much Christmas Day which is reserved for leftovers and opening presents



Melissa
3rd+ Generation



Just really being around my family during a family party or a bbq. All the family comes, we are loud, there is music, laughing and enjoying family and food. And just about every relative brings their own beer or drink of choice.



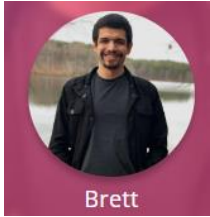
Monika
2nd Generation



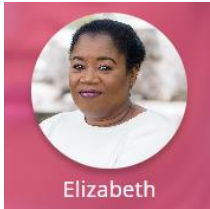
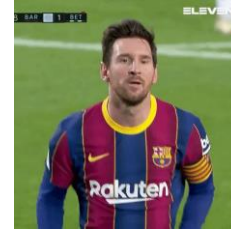
I remember spending time in Florida with my 100% Hispanic family, and although I am not fully Hispanic, they would incorporate their traditions with me and I loved it. They are very different than my white family, they will play Hispanic music and dance to it. I danced with my cousins and it just felt so much different than dancing to regular music. They taught me how to dance to the Hispanic music. The atmosphere is different around them. The food is absolutely delicious and better than any other food I've ever had. They make you feel loved and special no matter what. Being a Hispanic American, I'm sure that my family will always be there for me and never hold a grudge or think of me differently because no matter what happens we are family.

WORKING HARD TOWARD SUCCESS

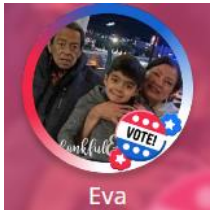
IS INSPIRING



For myself and my family, Messi, is someone we look up to. To me, it reflects my experience of being a Hispanic living in America because Messi came from nothing and rose to greatness, which is what I strive to do for myself.



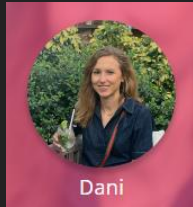
Celia Cruz was making music and breaking down barriers as an afro-Latina way before it was cool to be afro-Latina. She was the first person who looked like me that was doing positive things in this world .



I imagine that this actress had to work very hard to be a successful actress in America. I feel that she's very relatable because I feel I had to work very hard to be where I'm at now. There aren't that many Hispanic figures to choose from.



WHAT DO BRANDS GET WRONG?



Dani



Leandro

1st Generation

2 months ago via



I recently saw an ad on TV for an attorney firm and one of the ad presentators kept repeating one specific thing way too many times, and what made it feel weird to watch was the fact that the presentator had an American accent when speaking Spanish, and even though that is not inherently bad, for advertisement purposes I didn't think it was a good idea



Brett

2nd Generation



I honestly can't remember seeing an advertisement that was a terrible to advertise to Hispanic people. I guess really the only issue will be that some advertisements from multiple companies don't really incorporate Latin people within their advertisements, which kind of leaves a bit off the table as far as diversity goes.



Rggnyeli

1st Generation



I really don't care for the commercial from State Farm in Spanish, I don't think it captures the Hispanic community well just because it commercial is in Spanish. It shows to me, American people that speak Spanish with an American lifestyle, which is truly not with a majority of Hispanics lifestyle here in the states



Facebook

2nd Generation



That would have to be the Coca-Cola ad for Hispanic heritage month. It was insensitive and Prejudice. It was a miss because it showed coke cans being handed out to Hispanic guys with neck tattoos. Pushing stereotypes of Hispanic people having gang tattoos



Abraham

1st Generation



I remember that one ad from a Kardashian about their tequila brand, and portrayed the field workers, who were hispanic, as accessories. I would have preferred that she didn't create that tequila brand in the first place

TOP THREE MISTAKES TO AVOID



Stereotypes



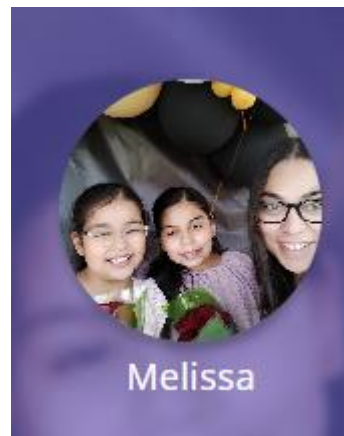
Mis-Using
Language



Ignoring The
Diversity In
Hispanic Culture

#1 WISH FOR FUTURE ADS

WOVEN INTO THE FABRIC OF AMERICA



MYTH BUSTING

HYPOTHESIS

FEW BRANDS
ARE GETTING
IT RIGHT

REPRESENTATION
MATTERS

FOCUS
EXCLUSIVELY
ON LATINOS

PROOF

TRUE

2 out of 5
Say NO Brands
Get Latino
Advertising Right

+

TRUE, BUT

Authenticity Rules.
Diversity Is King.
Stereotypes
Offend.

FALSE

There's A Longing
For Inclusion
In General
Advertising

The Expected

**REPRESENTATION
IS THE END GAME**

The Experiment

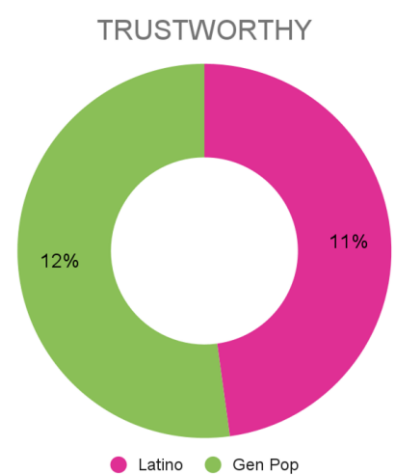
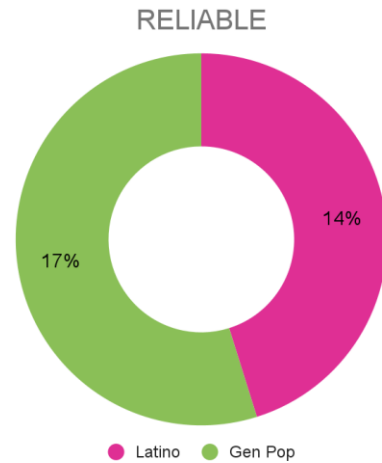
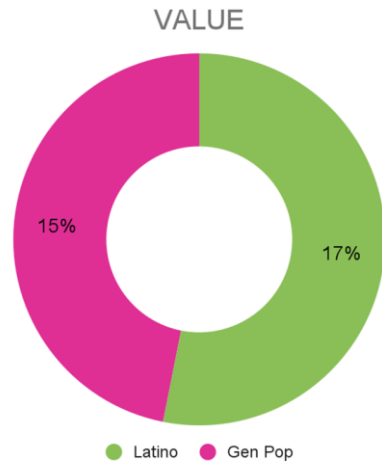
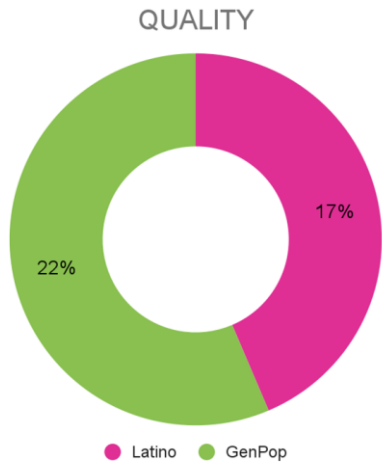
**AUTHENTIC
INCLUSION IS THE
LONG GAME**

Here's what U.S. Hispanics
Want Brands To Know About...

BRAND LOYALTY

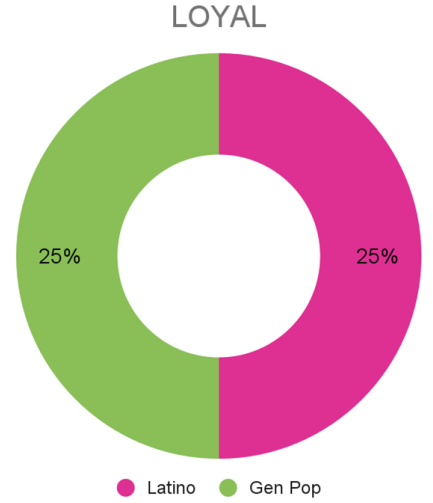
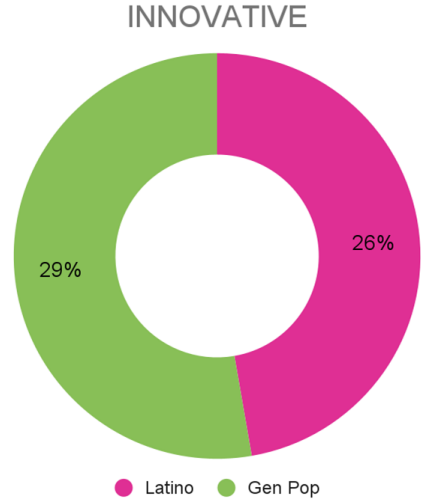
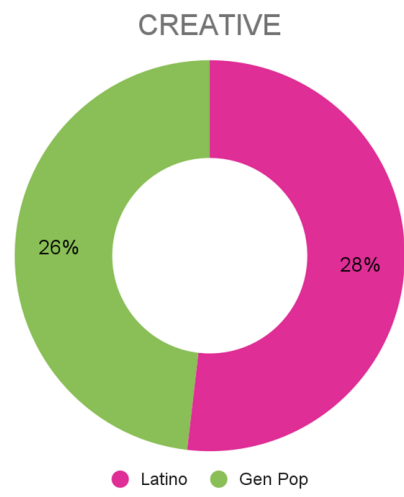
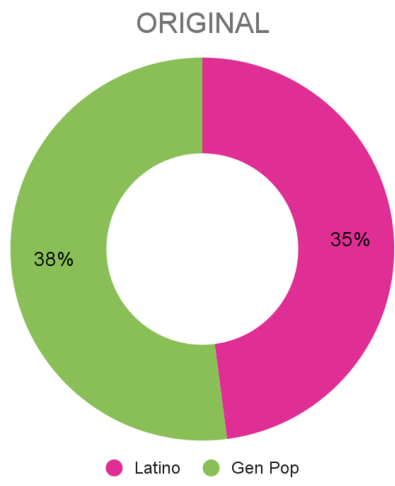
LOYALTY DRIVERS ARE NO

DIFFERENT



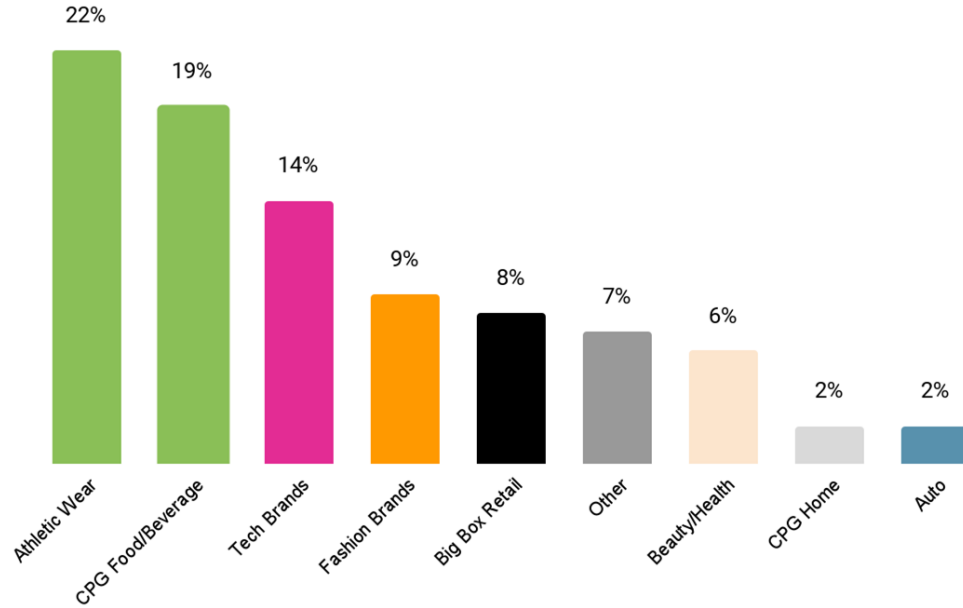
BRAND CHARACTERISTICS ARE

ALSO SHARED



TOP BRAND LOYALTY

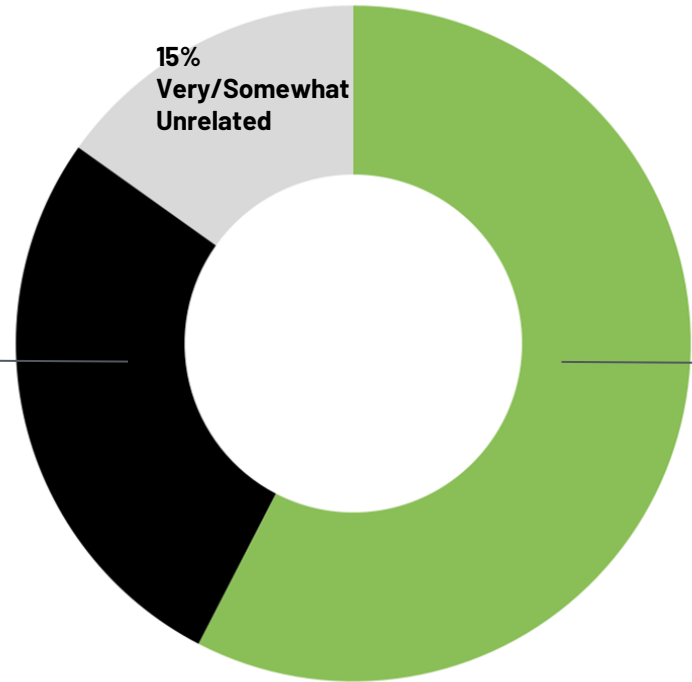
CATEGORIES



RESPECT FOR HERITAGE

BUILDS LOYALTY

27%
Neutral



57%
Very/Somewhat Related

Q4.5 - Earlier you mentioned the brand you are most loyal to is X. How related or unrelated is your loyalty to this brand's respect for your heritage.

MYTH BUSTING

HYPOTHESIS

LATINO
BRAND LOYALTY
IS HERITAGE/
NOSTALGIA
DRIVEN

LATIN BRANDS
WILL LEAD THE
LOYALTY
RACE

IT IS DIFFICULT
FOR NON-LATIN
BRANDS TO
BUILD
BRAND LOYALTY
WITH LATINOS

PROOF

FALSE

Product/Brand
Performance
Attributes Top
Loyalty Drivers

+

FALSE

NIKE Leads
Loyalty at 15%.

FALSE

57% Say
Respect
Builds Loyalty

The Expected

**LATINO
LOYALTY LIES
WITH LATIN
BRANDS**

The Experiment

**QUALITY +
RESPECT =
LOYALTY**

To explore an agency partnership that puts these insights to good use,
contact mosaic@ChemistryAgency.com

THE NEW LATINO MOSAIC

