

HISPANIC SENTIMENT STUDY 2023

BY

WE
ARE ALL
HUMAN



Nielsen

Powered by: **toluna***

In Partnership with: **Televisa
Univision**



TABLE OF CONTENTS

1. Why a Study About Sentiment?
2. Methodology & Sample Composition
3. Data Demographics
4. Executive Summary
5. Hispanic Sentiment Study Insights & Key Findings
6. Hispanic Star as a Solution



ABOUT THE RESEARCH

The first Hispanic Sentiment Study was conducted by We Are All Human in 2018. The study surveyed more than 2,500 US Hispanics and Latinos aged 14 and older and focused on the Hispanic/Latino community's outlook on topics such as the political landscape, business and education, and personal values. Participants were presented with a series of 16 data points about positive developments and accomplishments by the Latino community.

In 2023, We Are All Human and Nielsen conducted the Hispanic Sentiment Study again to understand trends or changes since the original study. This study is powered by Toluna and conducted in partnership with Televisa Univision.

The results in this report show the comparison of the 2018 and 2023 results.

This five-year comparative analysis provides a timeframe that allows us to understand how the Hispanic community has changed over time and to identify the challenges and opportunities they face.



WHY A STUDY ABOUT SENTIMENT?

The Hispanic community is a significant and diverse minority group in the United States. Their contributions to the country's culture, economy, and society are essential to American progress.

The objective of this study is to better understand the sentiment and perspectives of Hispanics on a variety of topics that impact their daily lives, such as the political landscape, business, education, and personal values.

The insights gained from this study will reflect the experiences, concerns, and aspirations of the Hispanic community. This will help us to gain a more comprehensive understanding of the challenges they face and the opportunities available to them.

By understanding the data, we can find ways to contribute to closing the gap in representation and provide a platform for advocating for the community's aspirations.

KEY PARTNERS



About We Are All Human:

We Are All Human is a registered 501 (c)3 public charity devoted to advancing Equity, Diversity & Inclusion for all, with a particular focus on accelerating the progress of Hispanics in the United States. Its biggest platform - the Hispanic Star - was a finalist on the 2023 Collective Social Innovation Award of the Schwab Foundation for Social Entrepreneurship.



About Nielsen:

Nielsen Holdings is a global leader in audience measurement, data and analytics, shaping the future of media. Measuring behavior across all channels and platforms to discover what audiences love, we empower our clients with trusted intelligence that fuels actions.

KEY PARTNERS



About

Toluna

Toluna is a technology company that delivers real-time insights at the speed of the on-demand economy. We do what no other insights company can. We combine innovative technology, award-winning research design, vertical expertise and a panoply of over 43+ million consumers



About

TelevisaUnivision

TelevisaUnivision is the world's leading Spanish-language media company. Powered by the largest library of owned Spanish-language content and a prolific production capability, Televisa Univision is the top producer of original content in Spanish across news, sports and entertainment verticals. This original content powers all of TelevisaUnivision's platforms, which include market-leading broadcast networks Univision, Las Estrellas, Canal 5 and UniMás, and a portfolio of 38 cable networks, which include TUDN, Galavisión, Distrito Comedia and TL Novelas.

METHODOLOGY & SAMPLE COMPOSITION

Who / Quién <ul style="list-style-type: none">• US Hispanics / Latinos• Age 18+• Nationally representative	Language / Idioma <ul style="list-style-type: none">• English: 87.4 %• Spanish: 12.6%
How many / Cuántos <ul style="list-style-type: none">• n = 2,500	Gender / Género <ul style="list-style-type: none">• Female: 49.64%• Male: 49.04%• Non-Binary: 1.12%• Not listed: 0.5%
When / Cuándo <ul style="list-style-type: none">• April 19-May 12, 2023	Age / Edad <ul style="list-style-type: none">• Gen Z (18-26): 29.72%• Millennials (27 – 42): 38.2%• Gen Xers (43 – 58): 19.72%• Boomers (59 – 77): 11.56%• Matures (78+): 0.8%
What / Qué <ul style="list-style-type: none">• We Are All Human• IP / Thought Leadership Research Study	Highest Represented States Estados Con Mayor Representación <ul style="list-style-type: none">• California: 18%• Florida: 13%• New Jersey: 3.04%• New York: 8.16%• Texas: 17.92%
How / Cómo <ul style="list-style-type: none">• Online Survey, offered in English and Spanish (option based on respondent preference)	
Margin of Error / Margen de Error <ul style="list-style-type: none">• +/- 2% (Overall Sample)• 95% confidence level	

DATA DEMOGRAPHICS

- Latinos are a key contributor to the economic prosperity of the United States, with a GDP of \$2.8 trillion, which is equivalent to 12% of the country's total GDP.
- If Latinos were a standalone economy, we would be the fifth-largest country in the world.
- Latinas are the largest group of women workers in the US, numbering over 12 million and accounting for 16% of the female labor force .
- Latinos are among the job creators in the country and play a significant role in making America run. Frontline workers, which constitute about 70% of the US workforce, include 36% Black and 33% Hispanic workers.
- Nearly one in four new businesses in the US is Hispanic-owned, and Hispanic-owned businesses contribute over \$800 billion to the US economy annually.

DATA DEMOGRAPHICS

- Hispanic-owned businesses employ about 3 million workers, with more than \$100 billion in annual payroll, showing a 55% increase in the number of employees since 2007.
- Latinos have shown resilience during hard times, with 62% of Latinas increasing their family responsibilities during the pandemic while still being the fastest-growing cohort of entrepreneurs in the US.
- Hispanic values drive Latinos to work hard and contribute to US prosperity, with eight in ten young Latinos saying that most people can get ahead in life if they work hard.
- Hispanics believe in the American Dream more than any other group in America, and they have higher aspirations for career success than the full population of 18- to 25-year-olds.

EXECUTIVE SUMMARY

- Only 42% of Latinos believe their values are shared with the majority of Americans, a decline from 68% in the previous study.
- Latinos feel better reflected in small businesses by 67%, which serves as a warning note for big brands and companies.
- Only 46% of Latinos feel that their values are reflected in popular English-language news media and 51% for TV shows and movies. This marks a further decline from 55% in 2018.
- Latinos expressed higher trust in Hispanic/Latino news and media compared to mainstream media, with an increase from 25% in 2018 to 32% in 2023.
 - The largest increase in trust is observed among the GenX generation, with a gain of +14%. Spanish language usage has also significantly increased from 63% to 77% in 2023.

EXECUTIVE SUMMARY

- The Latino position regarding brand engagement remains nearly identical to five years ago. 84% of Latinos are willing to show loyalty and favorability to big brands that demonstrate their interest through community involvement, and 83% are more likely to be customers if a brand plays a positive role in their community.
- Latino identity has strengthened over the past five years through cultural elements such as language, music, food, and the value of hard work.
- Pride and unity are on the rise among Hispanics. Latino pride has increased from 64% to 61% and the feeling of being unified as a community has risen from 48% in 2018 to 55% in 2023.
- Latinos are united culturally but divided politically, with only 27% feeling unified as a political group.
- Latinos feel even more undervalued than five years ago, with a significant portion (43%) still feeling undervalued in society, compared to 53% in 2018

A background image of three young women of diverse ethnicities smiling and laughing. The image is overlaid with a semi-transparent blue filter. The woman in the center is wearing a striped shirt tied at the waist. The woman on the left is wearing a light-colored sweater. The woman on the right is wearing a dark top.

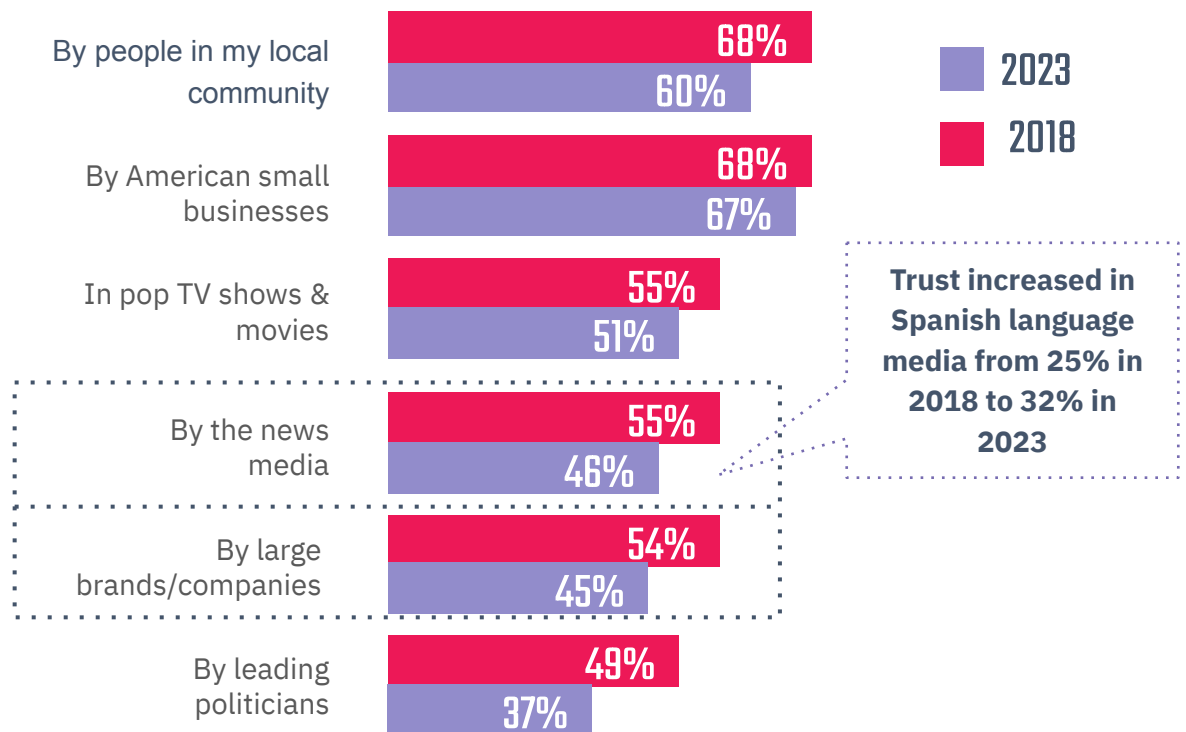
KEY INSIGHT

**HISPANICS ARE DRIVING
AMERICA'S GROWTH.**

**THEY ARE MORE RESILIENT,
PROUD, AND UNITED,
BUT FEEL DISREGARDED BY BIG
BRANDS AND MEDIA**

HISPANICS FEEL DISREGARDED BY BIG BRANDS AND MEDIA

My values are largely shared and reflected...



- Despite the emphasis on diversity, equity, and inclusion (DEI), there has been a decrease in how Latinos perceive their values being represented by big brands, dropping from 54% in 2018 to 29% in 2023.
- Only 35% of Latinos now feel their values are reflected in popular TV shows, movies, and news media, down from 55% in 2018.
- The perception of shared values with leading politicians has also significantly decreased, from 49% in 2018 to 26% in 2023.
- Latinos feel their values are much more reflected by small businesses and by people in my community.

HISPANICS FEEL DISREGARDED BY BIG BRANDS AND MEDIA

Generations with the largest decline in feeling their values were shared by brands and companies:

Generation	2018	2023	Difference
Gen Z	59%	41%	-18
Mill	60%	55%	-5
Gen X	47%	36%	-11
Boomers	46%	27%	-19
Mature	45%	38%	-7

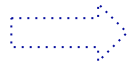
- The data shows that Gen Z Hispanic Americans have experienced the largest decline in feeling that their values are shared and represented by brands and companies. In 2018, 59% of Gen Z Hispanic Americans felt this way, but by 2023, that number had dropped to 41%. This represents a decline of 18 percentage points.
- Gen Z Hispanics are more likely to be exposed to different cultures and viewpoints than previous generations, which has made them more critical of brands and companies that they feel do not represent their values. Additionally, Gen Z Hispanic Americans are more likely to use social media, which gives them a platform to voice their opinions and connect with other like-minded people.

EXCLUDED FROM THE AMERICAN NARRATIVE, YET UNITY AND PRIDE INCREASED

→ My values are largely shared and reflected by a majority of Americans

% Somewhat + Strongly Agree

68%
2018

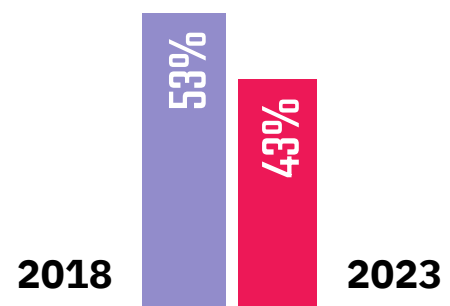


42%
2023

Hispanic values:
Honesty, authenticity,
equality loyalty.

- Over the last five years, a critical period during which Latinos were disproportionately affected by COVID-19, economic turmoil, and political polarization. The Hispanic community has demonstrated resilience and continues to progress with a steady increase in its economic power, with its purchasing power growing to more than \$2 trillion.
 - Only 42% of Latinos feel their values are shared and reflected by the majority of Americans; this represents a 26-point drop from 2018 (68%).

→ 43% of Latinos still feel the community is undervalued (53% in 2018)

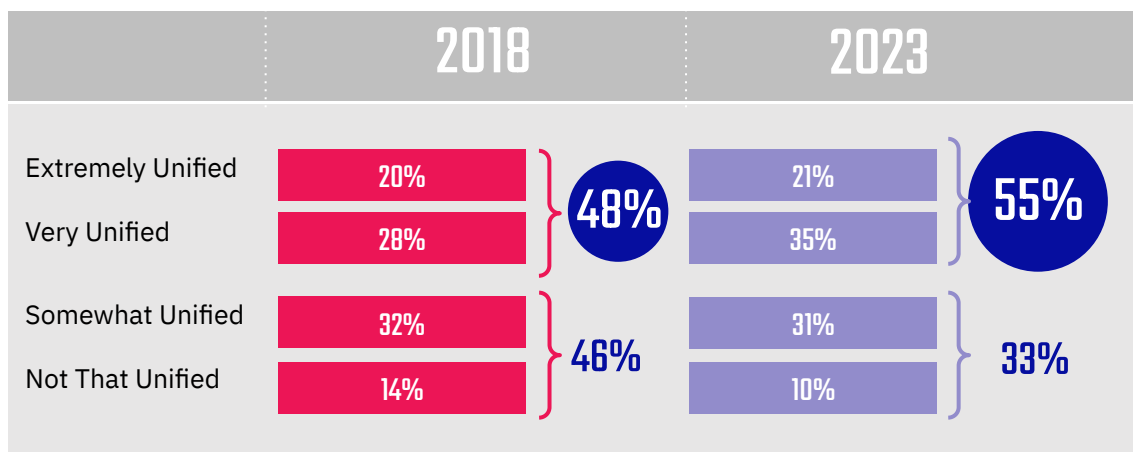


EXCLUDED FROM THE AMERICAN NARRATIVE, YET UNITY AND PRIDE INCREASED

Latino pride has increased to 64% from 61% in 2018

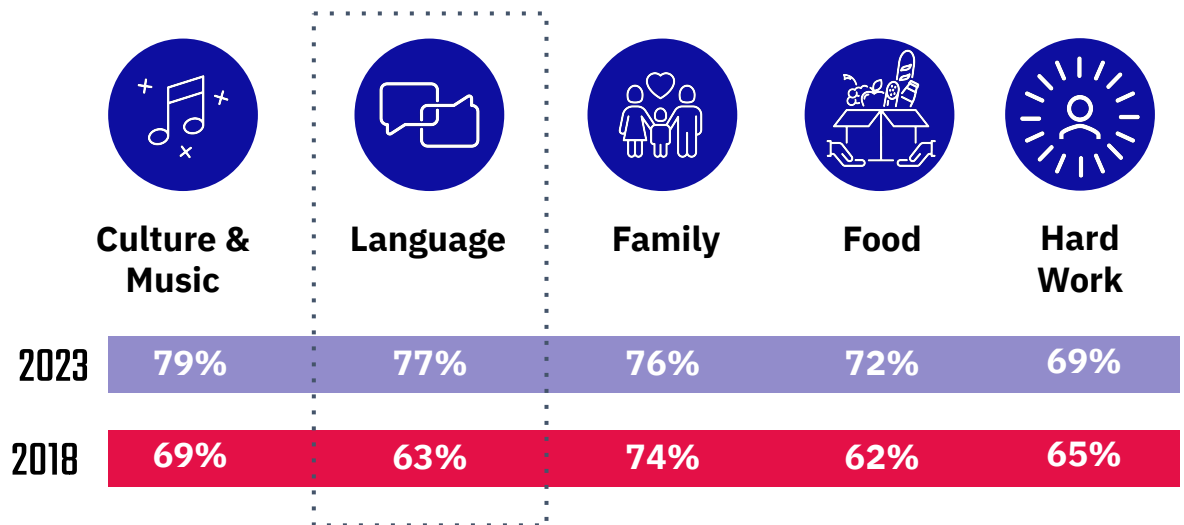
- The feeling of being unified as a community has also increased, from 48% in 2018 to 55% in 2023. The unification of Latinos can have interesting implications for marketers and politicians.

How unified do you think Hispanics are as a Community?



RECLAIMING LATINIDAD: SPANISH LANGUAGE IS ON THE RISE

What best defines the Latino Community? (Top 5):



- There's a trend to reclaiming latinidad thanks to the increase in unity and pride.
- There is a notable rise in culture, music, language, family, food and hardwork. Culture plays an increasingly defining role for Hispanics.
- This is a great opportunity for brands to be able to be fair, genuine, transparent and real when engaging with the Latino community.

LATINOS REMAIN LOYAL AND PATIENT, WE ARE READY FOR THE LOVE OF BIG BRANDS

Our position in relation to brand engagement remains nearly identical to 5 years ago:

BRAND ENGAGEMENT	2018	2023
If a brand plays a positive role in our community, we are more favorable	84%	84%
More likely to be customers	81%	83%

- In a fortunate turn for brands and companies, the Latino position regarding brand engagement remains nearly identical to five years ago. 84% of Latinos are willing to show loyalty and favorability to big brands that demonstrate their interest through community involvement, and 83% are more likely to be customers if a brand plays a positive role in their community.
- Latinos respond to emotion and reason, balance logic and magic:
 - They want to feel valued and valuable.
 - Companies and brands should both their cultural and economic contributions to the country. They are very proud of their achievements.

CONCLUSION

- The Hispanic Sentiment Study puts in perspective that Hispanics are essential for America we need to develop and invest in the community.
- This is the time. It is important to maximize the Latino opportunity.
- We need to start by increasing the representation within companies, behind and in front of the camera, and represent Latinos, in a positive narrative.
- Do not go just for Hispanic wallets only, invest in full circle in talent, campaigns, and the community.



TAKE THE BIG BET, INVEST IN LATINOS.

Start now, the Hispanic Star is an incredible framework to start a positive relationship with Latino and build partnerships.

www.hispanicstar.org

ABOUT HISPANIC STAR



US Hispanic Growth Platform: **THE HISPANIC STAR**

- The Hispanic Star is a platform to advance Hispanics in the U.S.
- Hispanics are positive contributors to the U.S. They mean economic growth and are shaping the culture.
- Built on the premise that what is good for Hispanics, is good for America.

Our purpose:

- Elevate Hispanic collaboration, perception and representation
- Celebrate and recognize Hispanic contributions
- Mobilize Corporate America to leverage the huge Hispanic opportunity

www.hispanicstar.org