

The Need for Better Data

Enhancing Product Distribution and Marketing with Actionable Market Intelligence



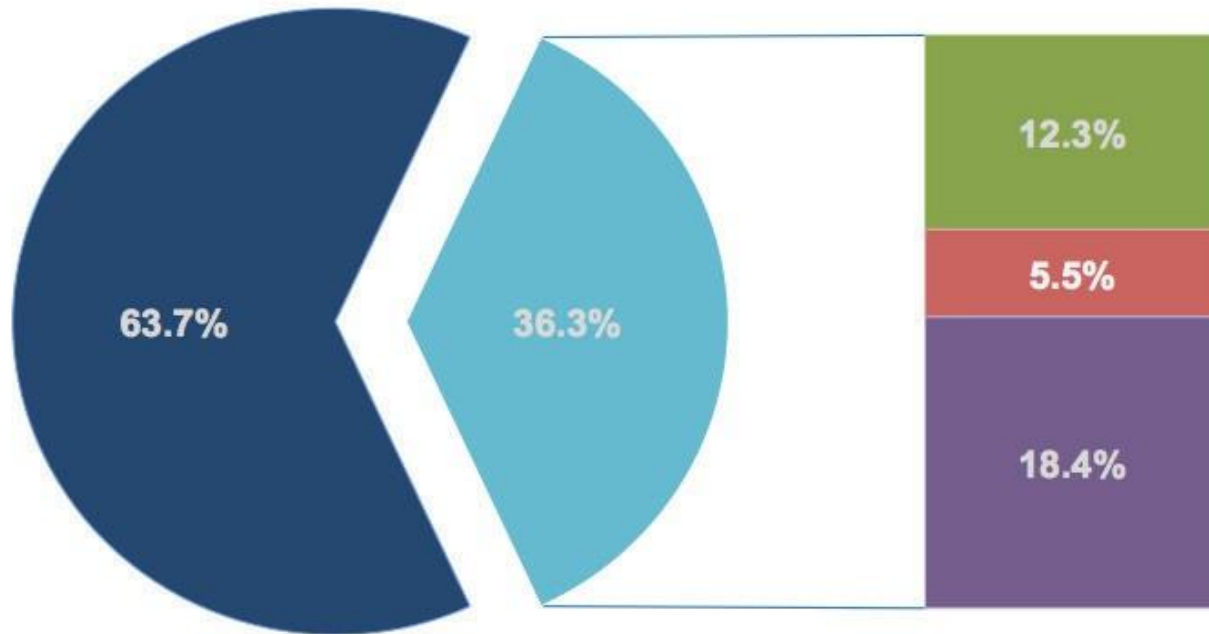
THE
INTERNATIONAL
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U.S. POPULATION: 2016 BY ETHNIC GROUP

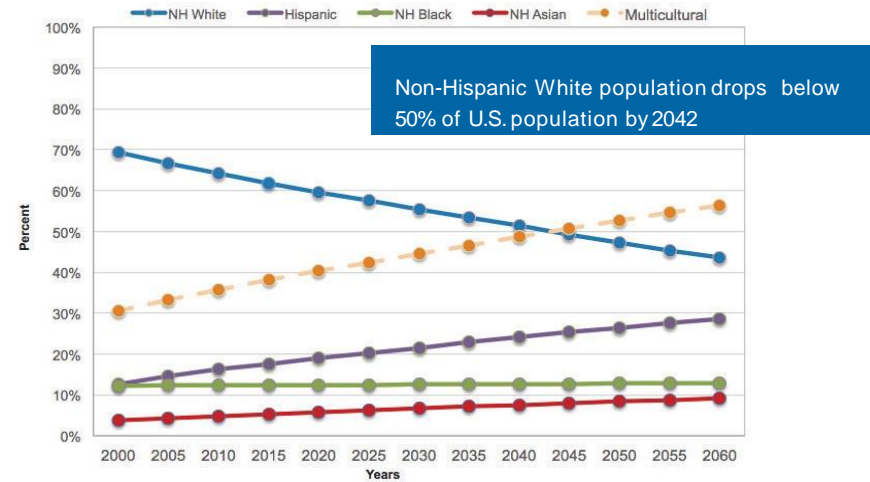
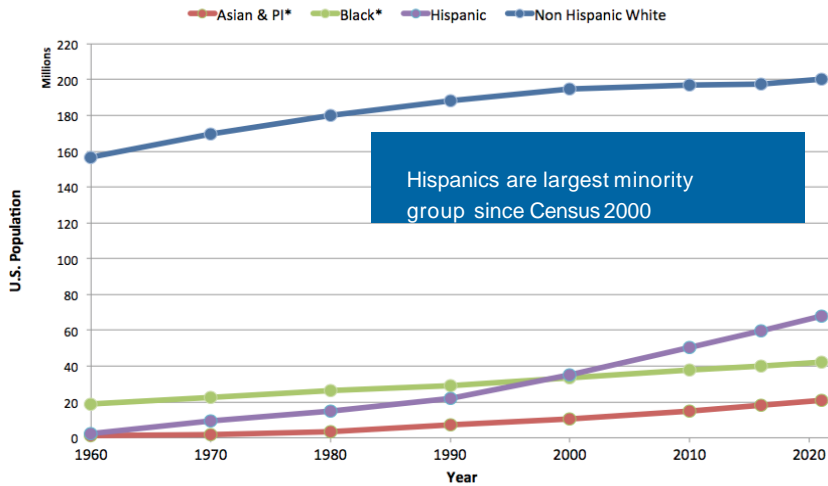
Population groups Asian, Black, Pacific Islander, and Hispanic account for over 36% of the United States 2016 population. This is 4.5 percentage points greater than Census 2010.

■ Non-Hispanic All Others ■ Non-Hispanic Black ■ Non-Hispanic Asian & Pacific Islander ■ Hispanic



POPULATION CHANGE BY ETHNICITY/RACE

The three largest ethnic groups will be nearly 131 million persons by 2021, with Hispanics over 52% of that population.

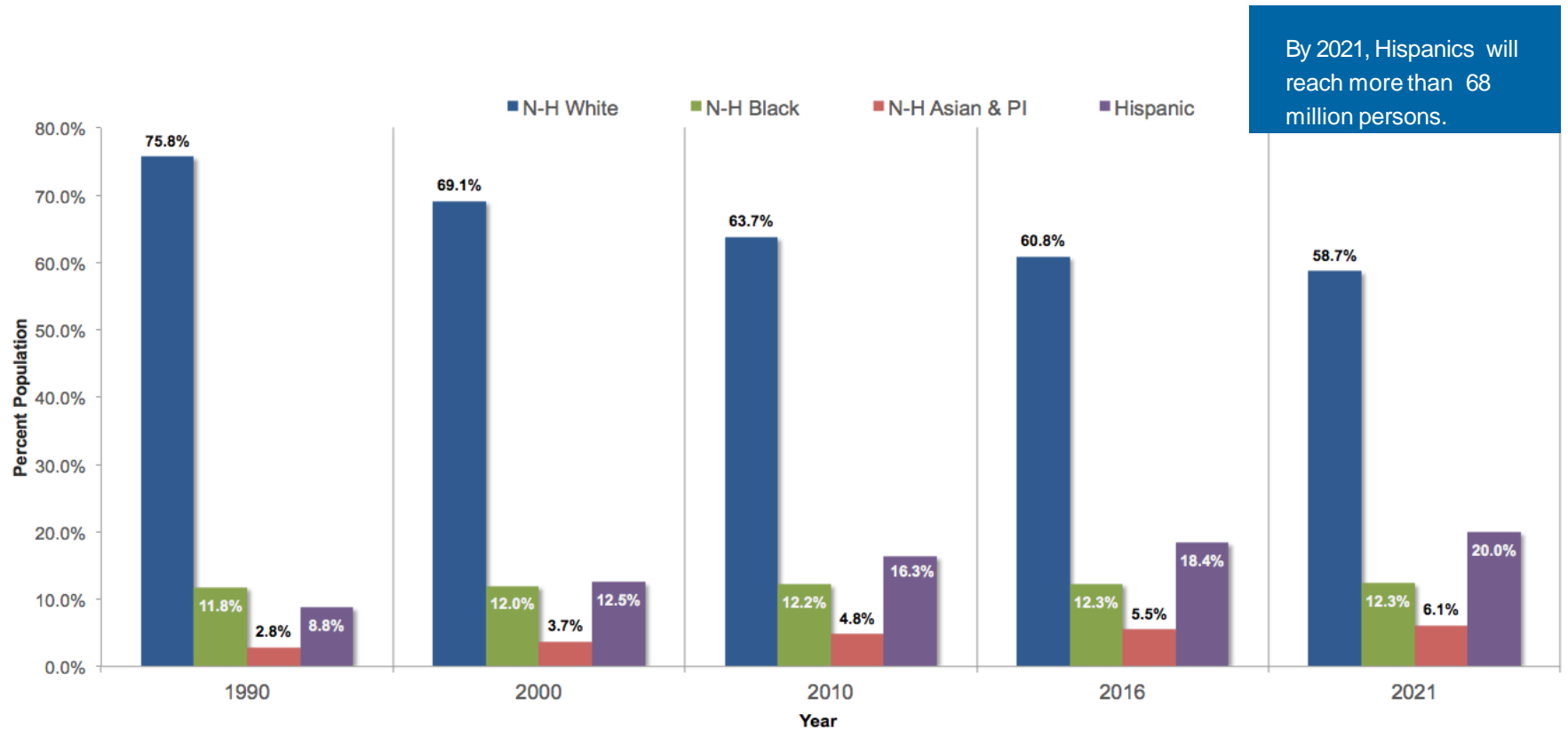


POPULATION	1960	1970	1980	1990	2000	2010	2016	2021
Asian & PI*	980,337	1,538,721	3,500,439	6,994,034	10,410,556	14,946,700	17,969,668	20,726,220
Black*	18,871,831	22,580,289	26,495,025	29,284,605	33,707,230	37,685,848	39,951,523	42,077,537
Hispanic	2,181,409	9,589,216	14,608,673	21,898,546	35,238,481	50,477,594	59,901,181	68,102,399
Non Hispanic White	156,690,970	169,653,095	180,256,366	188,401,932	194,514,140	196,817,552	197,678,861	200,250,503
Total	179,323,175	203,211,926	226,545,805	248,709,873	281,421,906	308,745,538	324,867,919	340,996,435

1. "*" Non-Hispanic population part of Asian-Pacific Islander and Black race groups.
2. Population projections 2016 and 2021, Geoscape AMDS 2016 Series.
3. Population projections 2025 to 2060, U.S. Census Bureau, December 2014.

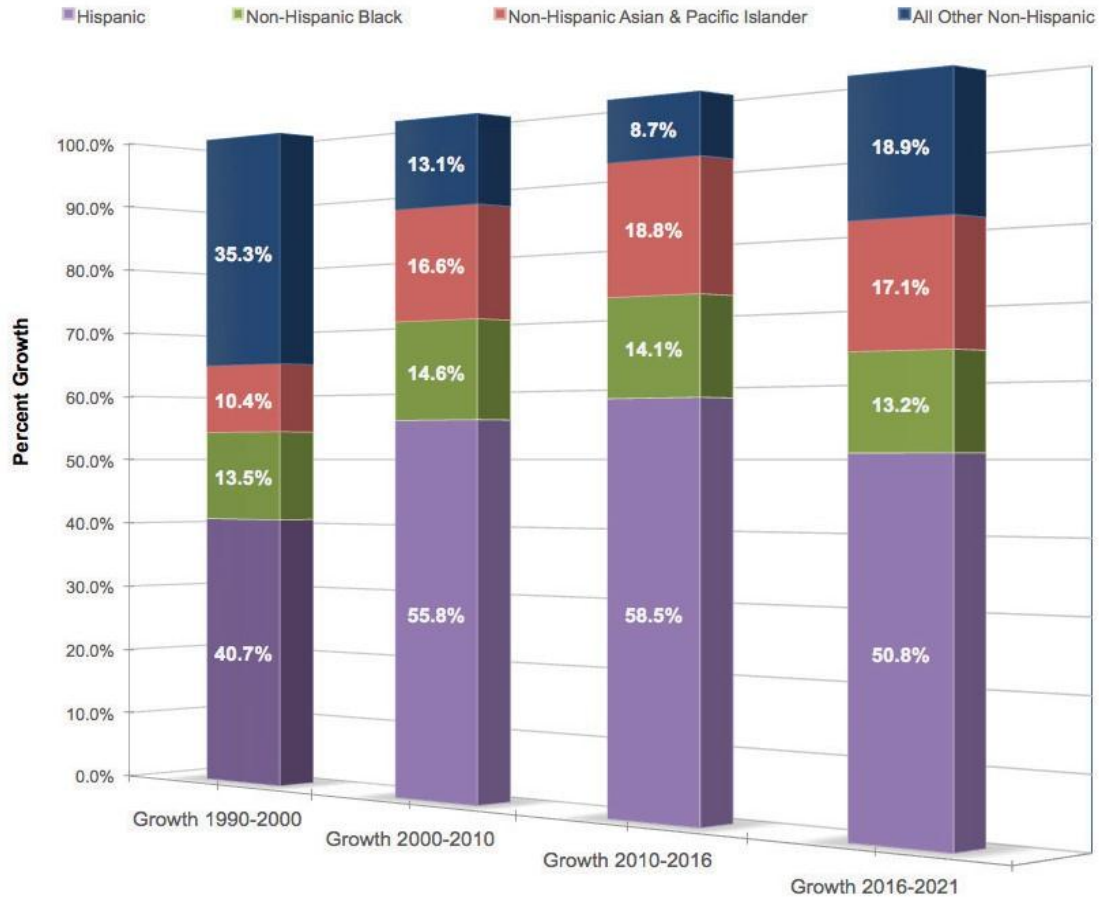
GROWTH: 1990 TO 2021 BY ETHNICITY & RACE

Hispanics, Asians, and Pacific Islanders are becoming a larger portion of our nation. The Black population is growing, but is nearly flat as a portion of the population. Meanwhile, the Non-Hispanic White population proportion is gradually declining.



POPULATION GROWTH 1990 TO 2021

The Growth-Majority is clearly multicultural with Hispanic populations featuring prominently in our nation's future. Due to political unrest in the Middle-East other non-Hispanic is expected to increase, combined with a slightly lower birthrate among Hispanics.



Source: U.S. Census Bureau for 1990 - 2010 and Geoscape for 2016 and 2021 projections.

DURING THE 16-YEAR PERIOD 2000 TO 2016...

Strong growth during this period, increasingly diversifying the American population

> **24,662,700 Additional Hispanics**

- 70% percent growth during period
- 57% percent of total pop growth

> **6,244,293 Additional Non-Hispanic Blacks**

- 19% percent growth during period
- 14% percent of total pop growth

> **7,559,112 Additional Non Hispanic Asian & Pacific Islanders**

- 73% percent growth during period
- 17% percent of total pop growth

> **43,446,013 More People Overall**

- 38,466,105 persons from these three cultural groups
- 89% percent of total growth contributed by these three cultural groups



THE MULTICULTURAL BOOM

New Population From 2016 to 2021

> 1,640,244 Average number Hispanic Americans per year

- 136,687 per month
- 4,494 per day
- 187 per hour

> 425,203 Average number African American and Black non-Hispanics per year

- 35,434 per month
- 1,165 per day
- 49 per hour

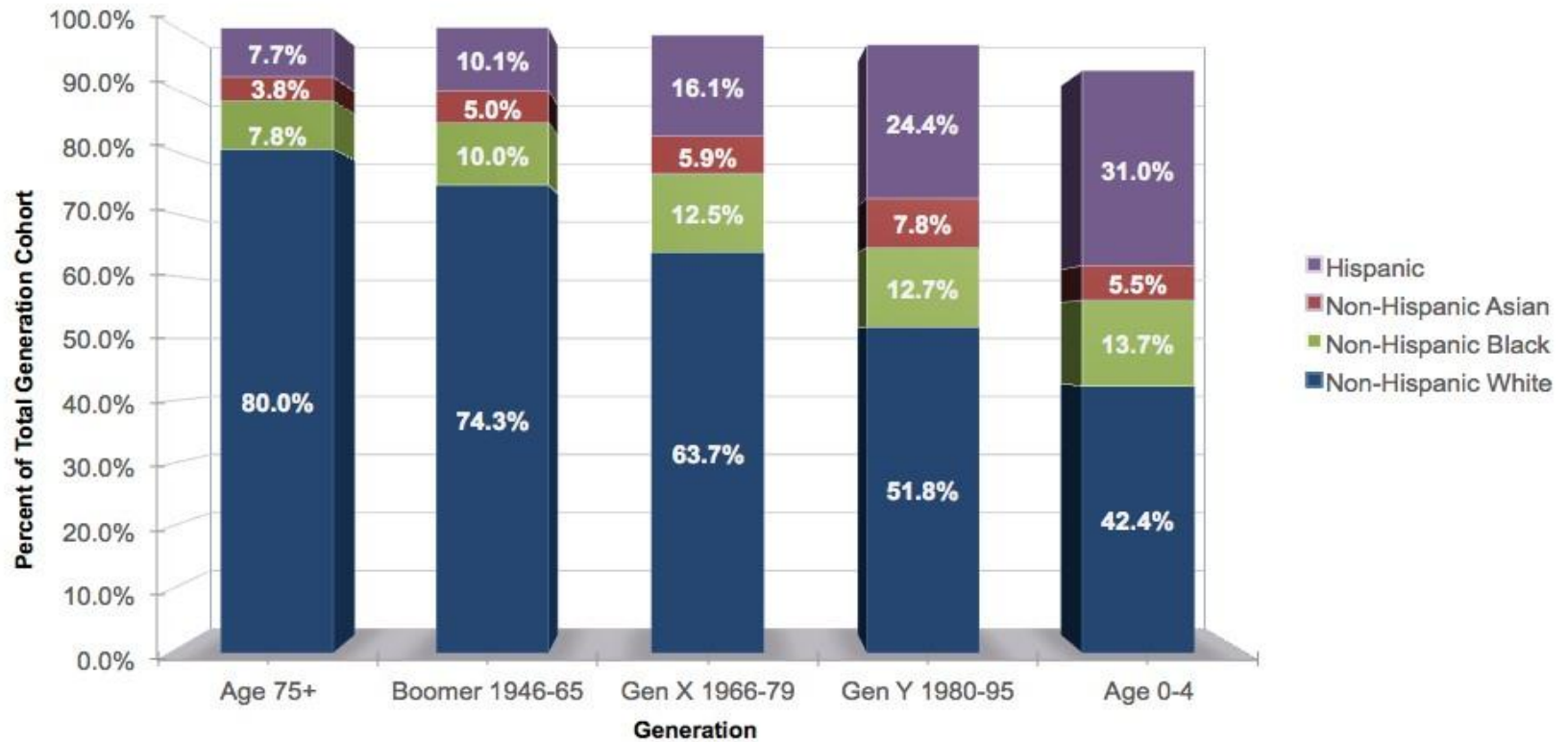
> 551,310 Average number Asian & Pacific Islander non-Hispanics per year

- 45,943 per month
- 1,510 per day
- 63 per hour



GENERATIONAL POPULATION 2021

Younger age groups are made up from a more diverse population and vice versa. This dramatic trend in life stage presence by ethnicity will have deep implications for marketers in the years and decades that follow.



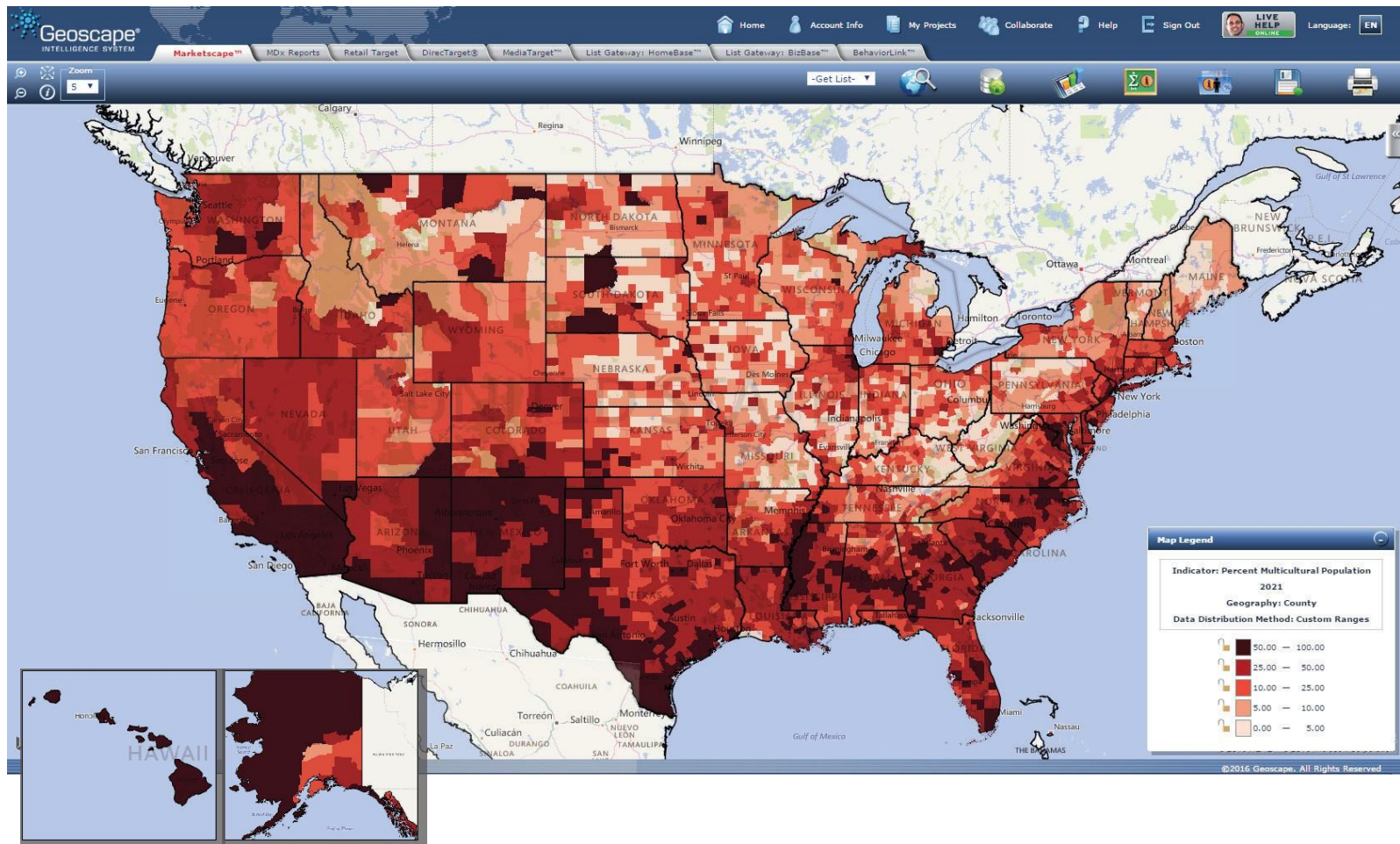
Regional Shifts

Noteworthy Evolution of Key American Subcultures



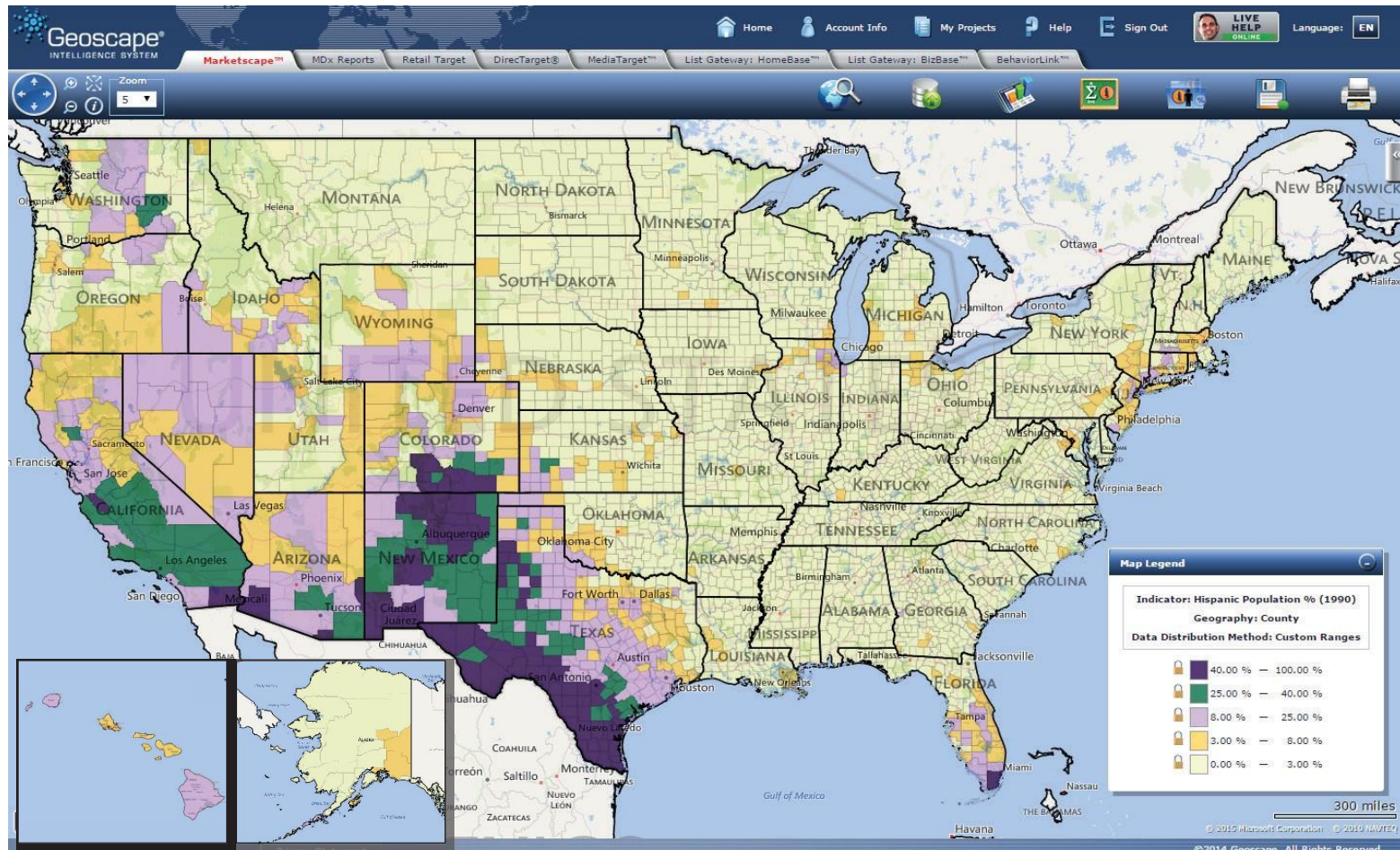
MULTICULTURAL AMERICA BY COUNTY IN 2021

Multicultural population includes all minority groups excluding non-Hispanic Whites. The darker shades indicate the heavy presence of cultural groups in all areas except those that are primarily Mid-West rural.



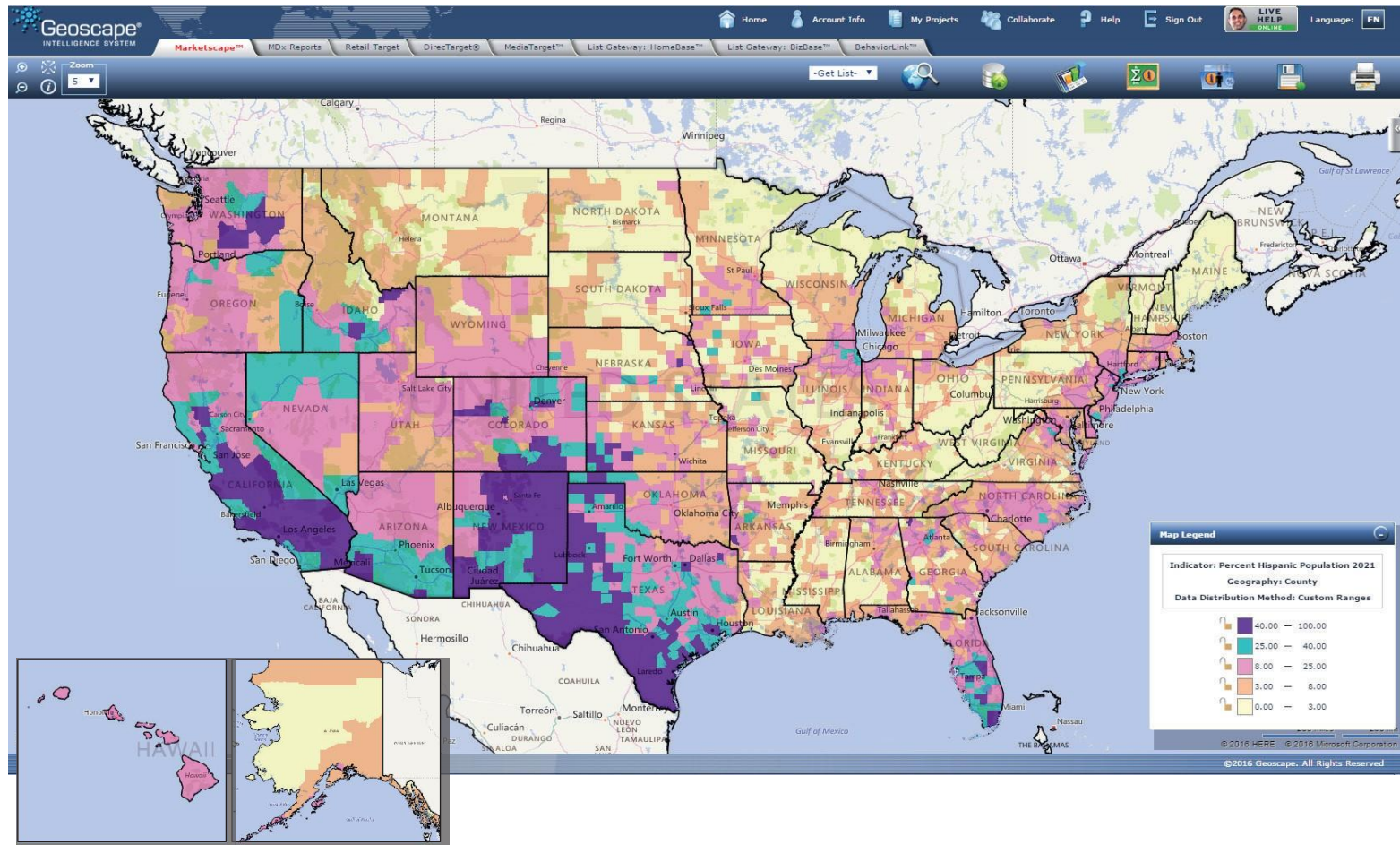
1990 HISPANIC POPULATION

Comparison of this map showing 1990 census percent Hispanic population to the following page's Geoscape projected 2021 population shows large increases beyond the traditional Latino states of Florida and the four states bordering Mexico.



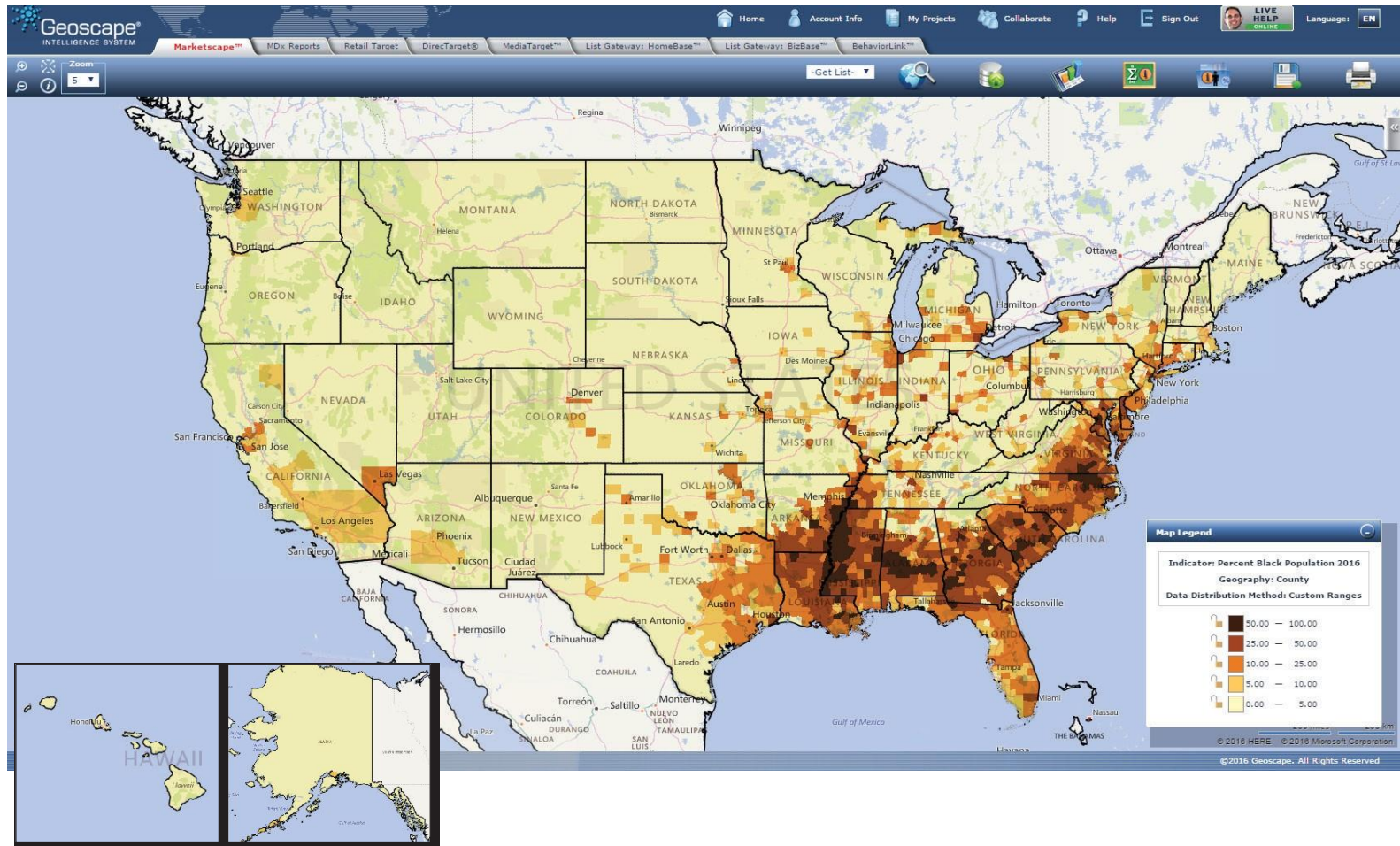
HISPANIC POPULATION EXPANSION: 2021

The two-decade period will see significant Hispanic population in the Rocky Mountain region, Northwestern U.S., and in the newer Latino growth Midwest and Southeastern states.



AFRICAN-AMERICAN POPULATION CONCENTRATION 2016

African American population growth continues a gradual western dispersion from its traditional Southeastern and Atlantic states. This growth is augmented with Black immigrants from the Caribbean and Africa, nearly 140,000 persons per year.



ASIAN POPULATION CONCENTRATION 2016

Asian population segments are concentrated in California, Washington, Las Vegas and New York. Their presence in many other areas is growing as well.





Hispanicity™ and Asianicity™

Life stage, language, birthplace, immigration

CULTURECODE® HISPANICITY™ SEGMENTS

Hispanicity is a Geoscape CultureCode® measuring the degree to which people of Hispanic heritage in the United States retain elements of the Hispanic culture while they acquire elements of the American culture. Hispanicity™ can be dimensionalized by various characteristics including socioeconomic status, income, life stage, country-of-origin, media usage and shopping behavior.

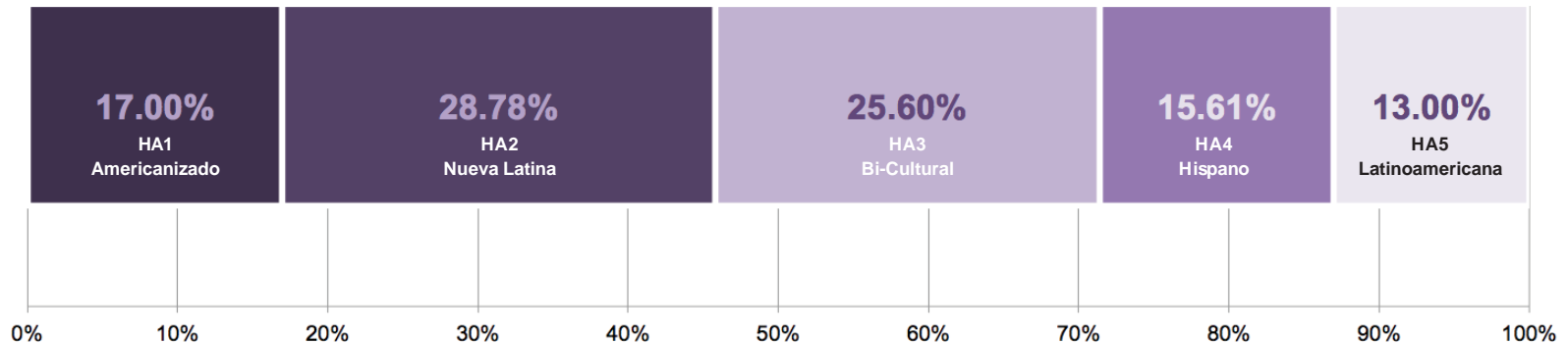
HA1 English dominant (nearly no Spanish)
Born in US; 3rd+ generation Few
Hispanic cultural practices

HA2 English preferred (some Spanish) Born
in U.S.; 2nd generation Some
Hispanic cultural practices; often
“retro-acculturate”

HA3 Bi-Lingual (equal or nearly) Immigrant
as child or young adult Many Hispanic
cultural practices

HA4 Spanish preferred (some English) Immigrant as
adult, in U.S. 10+ years Pre-dominant Hispanic
cultural practices

HA5 Spanish dominant (nearly no English)
Recent immigrant as adult
(less than 10 years ago)
Primarily Hispanic cultural practices Identify
with home country more so than U.S.



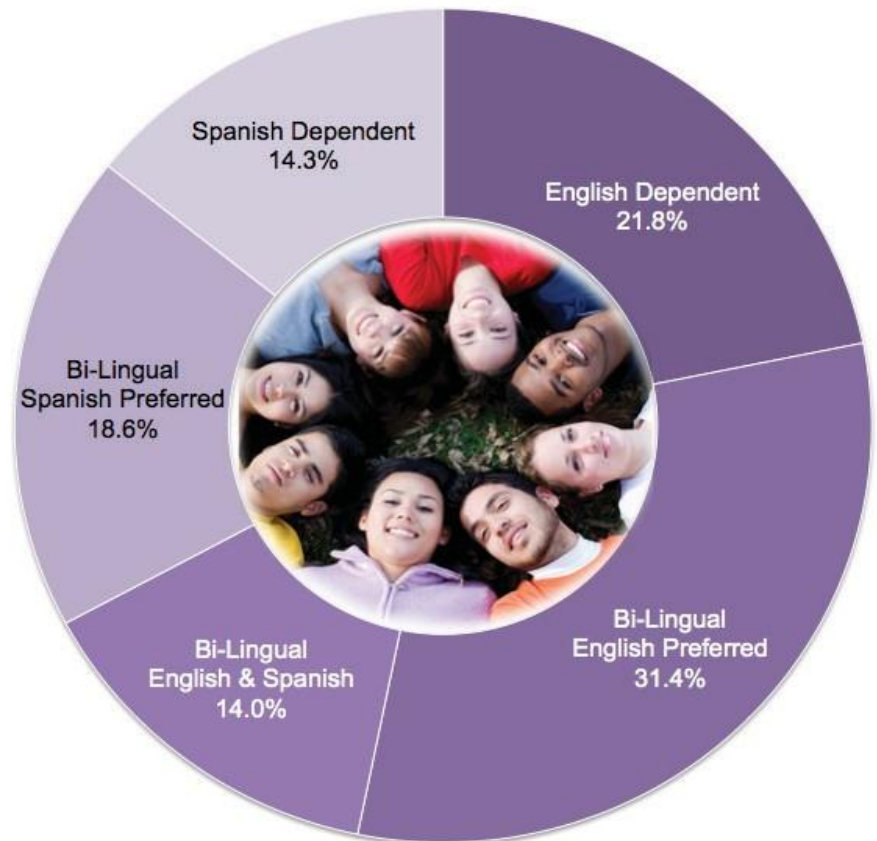
HISPANIC LANGUAGE USAGE SEGMENTS

About 64 percent of Hispanics are Bilingual to some degree, 78 percent speak some level of Spanish and 36 percent are dependent on either English or Spanish.

Language Segment	Hispanics Age 5+	%
English Dominant	28,554,034	53.2%
Bi-Lingual	7,488,105	14.0%
Spanish Dominant	17,631,535	32.8%

English Capable	46,004,715	85.7%
Spanish Capable	41,962,454	78.2%

Code	Language Segment	Hispanics Age 5+
5+		
HL1	English Dependent	11,711,220
HL2	Bi-Lingual English Preferred	16,842,814
HL3		
HL4	Bi-Lingual English & Spanish	7,488,105
HL5	Bi-Lingual Spanish Preferred	9,962,576
	Spanish Dependent	7,668,959
Total		53,673,674



COUNTRY OF ORIGIN: HISPANICS

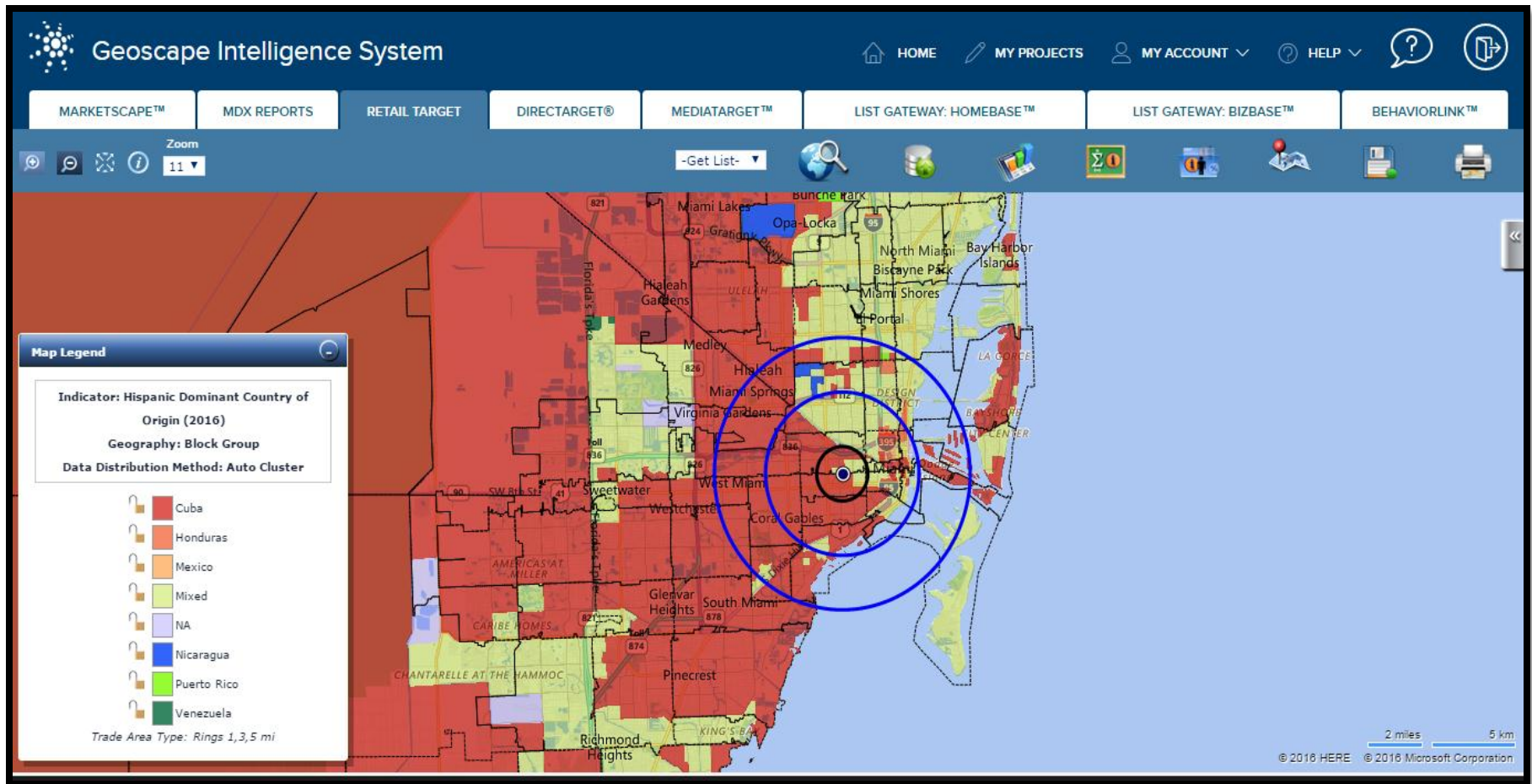
Puerto Ricans have increased migration to the United States due to the weaker economy in their home island. The proportions of individual Hispanic origins varies greatly around the U.S., Mexicans and Central Americans have larger proportions in California, while Caribbean Hispanics are proportionally greater in Florida and New England states.



Note: The US Census Bureau includes a large category of Hispanics of "unknown" origin; Geoscape® has developed a model to accurately attribute Hispanic population by origin.

LOCAL DOMINANT COUNTRY OF ORIGIN: HISPANICS

Although Mexican origin Hispanics are the most populous nationwide, on a local level, the Dominant Hispanic Country of Origin metric allows you to see how that changes among neighborhoods.



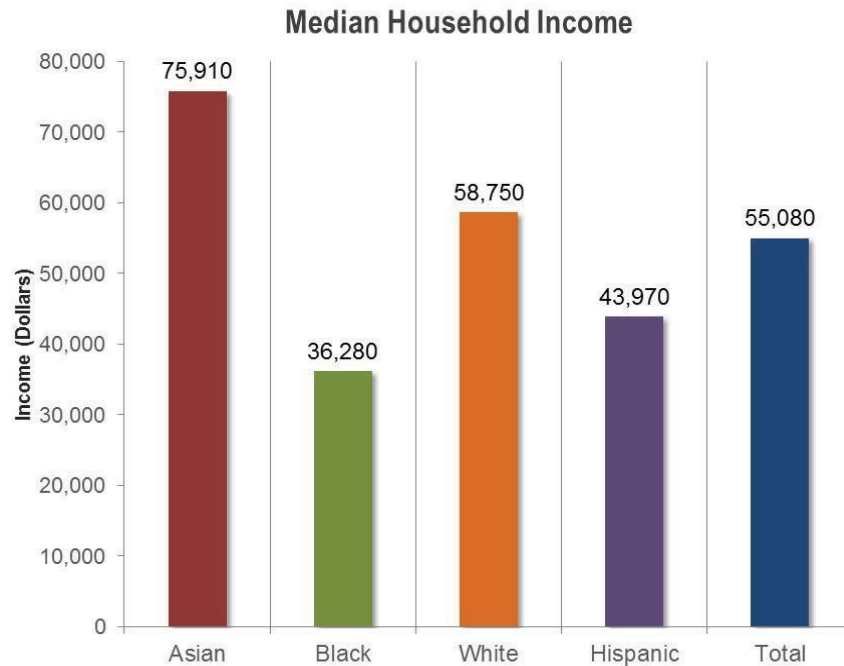
Economics

Income, Socioeconomic Strata and Consumer Spending Dynamix™



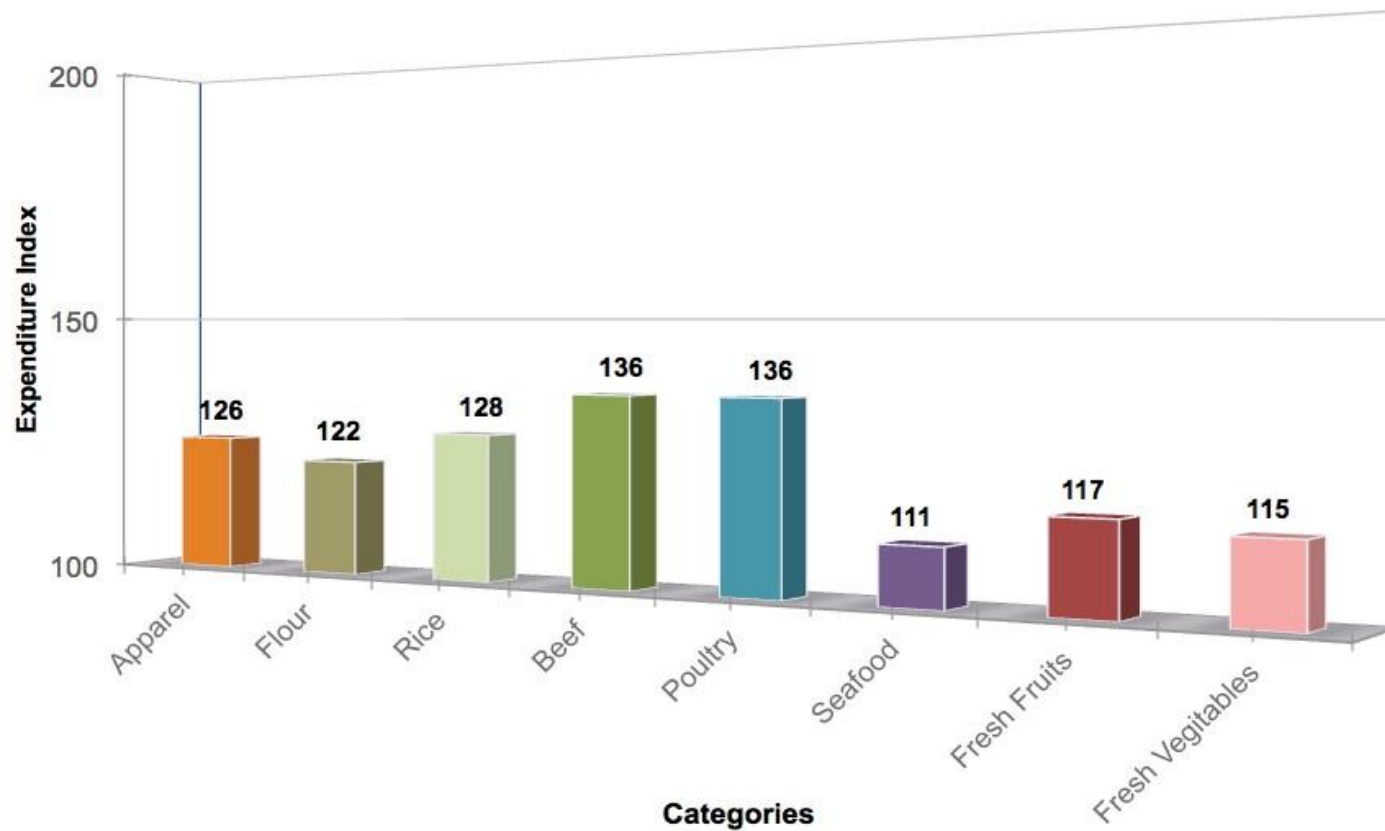
MEDIAN HOUSEHOLD INCOME BY CULTURE GROUP

Compared to the overall 2016 household median income, the Asian household median income is about one-third higher, Black household one-third lower, and Hispanic households about one-fifth lower. During the past 10 years, Hispanic medium income has increase slightly, yet significantly, from 78% to 80% of the overall household income.



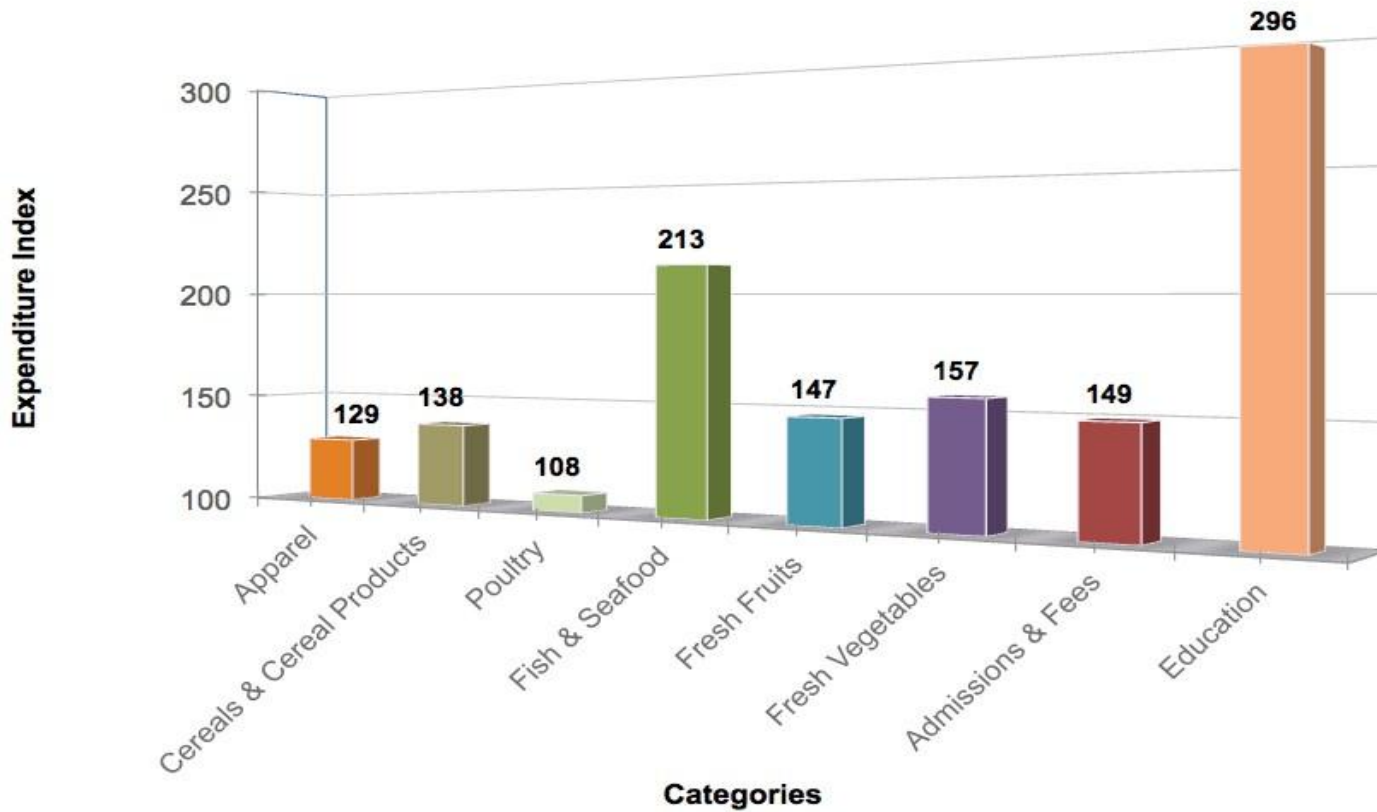
TOP HISPANIC CONSUMER SPENDING CATEGORIES

Hispanics consume more than the average American household in many categories. Among those over-indexing categories are several fresh and staple food products consumed at home, which reflects both cultural cooking practices and higher Hispanic household size. The categories listed below show above average spending compared to the all households.



TOP ASIAN CONSUMER SPENDING CATEGORIES

Asians consume far more than the average American household in various categories such as apparel, certain foods consumed at home, certain entertainment categories and education. The categories listed below show above average spending compared to the all households.



Questions?

