



Future-Proofing Your Brand with America's Growth Engine: The Hispanic Marketing Imperative

TelevisaUnivision



Multicultural Consumers Are Key To America's Growth

The New York Times

Census shows sharply growing numbers of Hispanic, Asian, and Multicultural Americans

MARKETINGDIVE

P&G, Walmart, Google top list of multicultural ads driving purchase intent

ADWEEK

Publishers and Buyers Double Down on DEI Commitments as Upfront Talks Begin

U.S. Hispanics are changing the face of the country

17%

of the U.S. population
18 years and over
is Hispanic

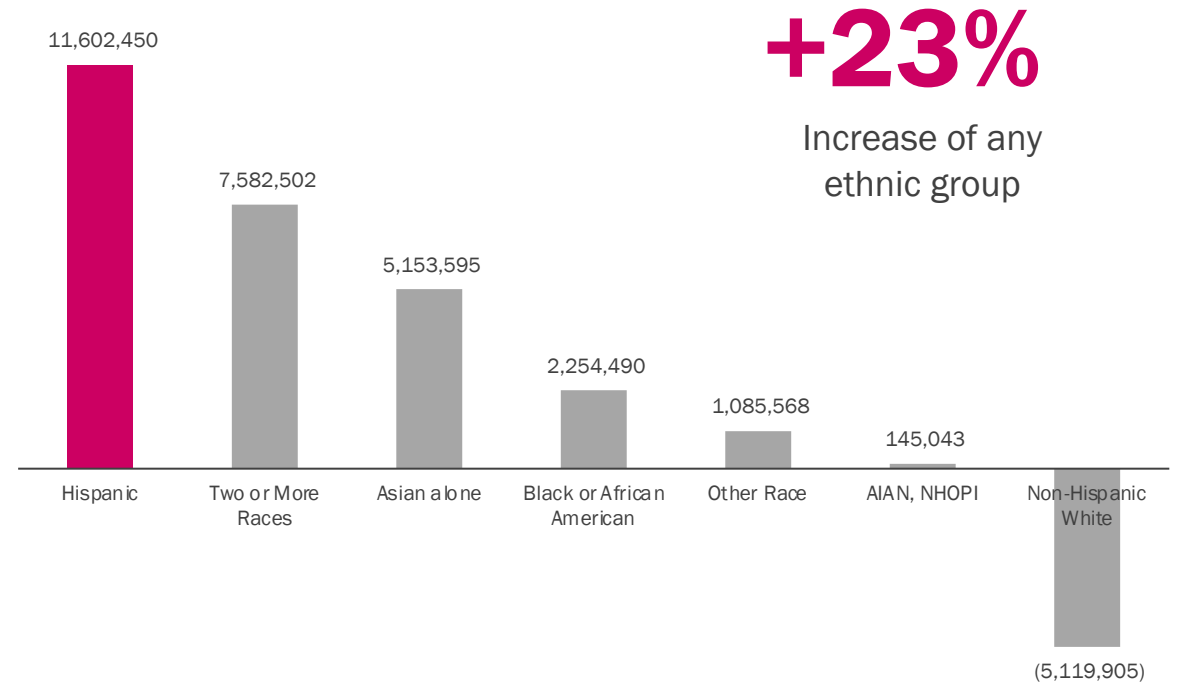
26%

of the remaining U.S.
Population under
18 years is Hispanic

And Hispanics will account for **59%** of the population
growth between 2023-2033

Source: U.S. Census Bureau, 2020 Census Public Law Redistricting Data File (P.L. 94-171) Summary File; U.S. Census Bureau 2017 National Population Projections (2023-2033)

Hispanics Represent The Largest Population Increase





**You have a
massive
opportunity**

U.S. Hispanics are an economic powerhouse

SPENDING POWER

\$3.2 Trillion

to the American Economy (GDP)¹

INCOME GROWTH

Hispanic HHLDs earning \$100K+

more than quintupled from
2000-2021²

LABOR GROWTH

91%

of labor growth will come from
Hispanics (2021-2031)³

78%

of total growth in college
enrollment will come from
Hispanics (2023-2030)⁴



Younger & growing families

**YOUNGER
MEDIAN AGE**

33 years

vs. 43 Non-Hispanic¹

**BIGGER
HOUSEHOLDS**

3.2 people

per Hispanic household
vs. 2.4 Non-Hispanic
household²

MORE KIDS

44%

of Hispanic HHs have
children under 18 in the
home vs. 27% Non-
Hispanic³

Source: (1) Nielsen, NPM and NPM-H 2024 TV Universe Estimates (2) U.S. Census Bureau, Current Population Survey, 2021 Annual Social and Economic Supplement - Table AVG1, Average Number of People per Household. (3) U.S. Census Bureau, Current Population Survey, 2021 Annual Social and Economic Supplement - Table AVG3, Average Number of People per Family Household With Own Children Under 18.

Looking Ahead: The future is bright

Hispanics will be a critical source of growth in the coming months. They are optimistic about their future, and financially resilient

IN THE NEXT 6 MONTHS:

MORE OPTIMISTIC

41%

of Hispanics expect improvements in their finances
vs. 33% non-Hisp

HIGHER INCOME

51%

of Hispanics expect to have a higher income
vs. 44% non-Hisp

INVESTING MORE

46%

of Hispanics expect to have more money invested
vs. 43% non-Hisp

Source: Civic Science Poll conducted online among Civic Science Network sites visitors . (1) Over the next six months, do you expect your personal financial situation to get better, stay the same or get worse? > % Get better. & (2) do you expect your income to be higher or lower 6-months from now? > Somewhat | Significantly Higher | More.. (3) Compared to today, do you expect to have more or less money invested (including retirement savings) 6-months from now? Pulled January 9th, 2024

**This vibrant audience is
fueling America's growth**

**Connect with their
culture & identity, and
they will connect with you**

Language is intrinsic to Hispanic Identity

82%

of Hispanics 18-49 speak Spanish at home

abc NEWS

Gen-z latino-americans are reclaiming their culture through language

iHOLA!

Camila Cabello says speaking and singing spanish connects her to childhood

LA
Times

How second- and third generation latinos are reclaiming the spanish language

ESPAÑOL WINS BRAND LOVE

83%

Say they **appreciate businesses** that speak to them in Spanish

84%

Feel companies **deserve their loyalty** if they make sincere efforts to be part of/invest in their community



Your dollar goes further with Hispanics

4X **HIGHER
RETURN**

Higher return on ad spend to advertisers that
spend on SLTV



Once engaged, Hispanics will transact in English

60%

OF HISPANICS AGREE

“If an advertiser runs ads in Spanish, it makes me more likely to visit their website, even if it’s only available in English.”

71%

OF HISPANICS AGREE

“I am comfortable shopping and buying on English-language-only websites”



Source: Media Predict as of December 2020 Q: Do you appreciate when companies and brands advertise in Spanish when trying to win your business? Q: How much do you agree or disagree with the following statements?

MEDIA PREDICT



**MAKING THE BUSINESS CASE
THROUGH RETAIL DATA**

Hispanics have significant impact on retail sales

HISPANIC RETAIL SALES FY'23

\$336B

Est. Hispanic retail spend
OMNI CHANNEL

16%

Of total retail sales

Source: Circana Checkout. General Merchandise Report 12ME December 2023 - For directional use only

Hispanics are
leisure
shoppers,
most spend
happens at
B&M

But Online Sales Are Growing

HISPANIC RETAIL SALES FY'23

ESTIMATED TOTAL SPENDING (IN \$BILLION):



Hispanic spend shifting slightly from B&M to online

B & M
- 0.3%
(NH -1%)

ONLINE
+1%
(NH +4%)

Where are they shopping?

HISPANICS OVERINDEX NH IN ALMOST ALL CHANNELS

TOP CHANNELS: BUYER PENETRATION

(OMNI CHANNEL: FY 23)

Channel	Hispanic	Index to Total U.S.	Non-Hispanic	Index to Total U.S.
Mass Merchant	99%	100	99%	100
Drug Store	89%	103	86%	100
Direct Mail / E-Commerce	85%	97	89%	101
Off Price	84%	109	76%	98
Home Hardware Store	82%	97	85%	101
Warehouse Club	79%	107	73%	99

FY 2023

Category Performance



Televisa
Univision

 **Circana**
Formerly NPD

HOME IMPROVEMENT



Hispanic Shoppers
Account for approx.

745M

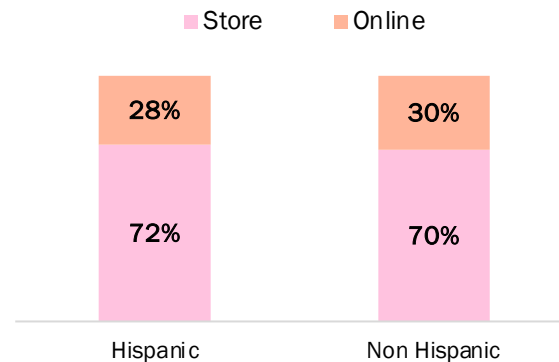
of buying visits within the
home improvement industry

14% of total buying visits

9%

of Hispanic Buying Visits
in FY'23 included
home improvement items

Share of buying visits by purchase method



Buying Visit Change vs YA

	Hispanic	Non-Hispanic
Total Omni	4%	6%
Brick & Mortar	-	-
Online	+20%	+22%



HOUSEWARES

Hispanic Shoppers
Account for approx.

467M

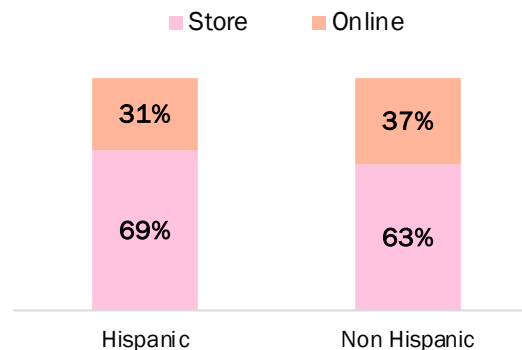
of buying visits within the
houseware industry

16% of total buying visits

5%

of Hispanic Buying Visits
in FY'23 included
houseware items

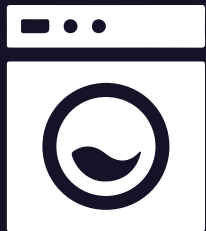
Share of buying visits by purchase method



Buying Visit Change vs YA

	Hispanic	Non-Hispanic
Total Omni	+9%	+8%
Brick & Mortar	+6%	+5%
Online	+15%	+13%

TOTAL APPLIANCES



Hispanic Shoppers
Account for approx.

220M

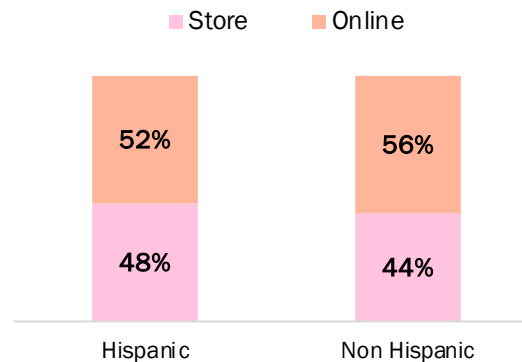
of buying visits within the
total appliances industry

15% of total buying visits

3%

of Hispanic Buying Visits
in FY'23 included
total appliances items

Share of buying visits by purchase method



Buying Visit Change vs YA

	Hispanic	Non-Hispanic
Total Omni	+6%	+5%
Brick & Mortar	-3%	-4%
Online	+15%	+12%



HOME DECOR

Hispanic Shoppers
Account for approx.

185M

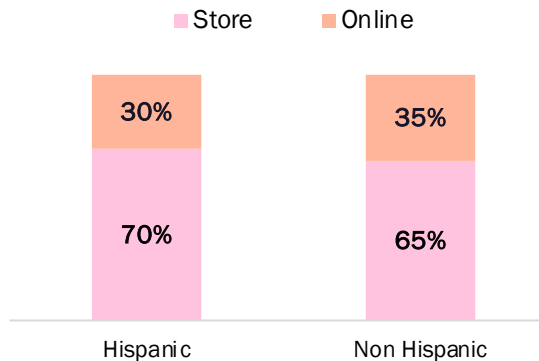
of buying visits within the
home décor industry

16% of total buying visits

2%

of Hispanic Buying Visits
in FY'23 included
home textile items

Share of buying visits by purchase method



Buying Visit Change vs YA

	Hispanic	Non-Hispanic
Total Omni	+10%	+9%
Brick & Mortar	+4%	+1%
Online	+29%	+27%



Investing in our **community** means
investing in the future of **your business**

**Because when you embrace this
audience authentically,
*you'll win hearts
and wallets***



LA CULTURA LIVES **HERE**



Your Culture Platform

across all touchpoints

53M **73m**

Average monthly reach across linear, digital video, and radio

U.S. followers on social

#1 **20%**

Network for Gen Z, regardless of language

Growth in 13-34 US social followers on the largest Gen Z platforms

STREAMING



BROADCAST



LOCAL MEDIA



DIGITAL



CABLE



AUDIO



STUDIOS



EMPOWERMENT



Source: 1) TelevisaUnivision HH consumption proprietary data 4Q2023, Nielsen, NPM-H 2024 TV Universe Estimates, Nielsen Media Impact, Nielsen Audio Spring Nationwide 2023, 2023 TelevisaUnivision Stations, M-Su 6a-12m, (Hispanic P12+), Cume, 1 spot per week, 4 weeks; 2) SproutSocial & YouTube Studio Analytics; only Univision owned accounts across Facebook, Instagram, TikTok and YouTube. Following based on US/PR users, as of December 31, 2023. 3) Nielsen, NPM-H (09/25/2023-01/28/2024) Mon-Sat 8pm-11pm/Sun 7pm-11pm, ad-supported networks, Adults 18-26, Live+7.

CASE STUDY



Partnership Strategy

Prove Walmart is a digital destination with everything Hispanics need for their holiday celebrations, by partnering with the first tentpole of the season – the Latin GRAMMYs.

AWARENESS

Promoted Walmart's "We Have Your Thing" messaging through festive custom content across all of TelevisaUnivision's distribution channels

Reached **19.3M** consumers

CONSIDERATION

Integrated Walmart's top holiday gifts within show segments and culturally relevant custom branded social-content.

Drove **5.8%** total Engagement rate

**4x higher Engagement Rate vs TU's benchmark for similar traffic campaigns (1.46% ER).*

CONVERSION

Via commerce-driven custom content leveraging Click2Cart, consumers were able to get a head start on their holiday shopping by adding products directly from the content to their Walmart carts.

Garnered over **\$1.72M** in additional purchases on Walmart.com



LATIN
GRAMMY
2023

Walmart



5 Recommendations to grow your brand with Hispanics

- 1** Know your audience through consumer insights & data – Build the business case
- 2** Include the Multicultural Consumer at every stage of Marketing/Planning/Product development
- 3** Measure, measure, measure. Add Hispanic KPIs to executive scorecards
- 4** Test the audience but don't abandon the audience – Go beyond Hispanic Heritage Month
- 5** Be consistent and proportional with marketing spend

TelevisaUnivision

**LA CULTURA LIVES HERE.
GROW WITH US.**