YARELI ESTEBAN

CEO @Strategar

WRITE ONE THING YOU KNOW ABOUT *HISPANICS*

DID YOUR THOUGHT INCLUDE ANY OF THEM?

5 MACROTRENDS

IMPACTING MARKETERS IN HIGHER ED

A new American reality

1. Hispanic Population Is Driving the Country's Growth

2020 Population Overview

2020 Population: 332,829,675

One birth every 8 seconds / One death every 11 seconds

One international migrant (net) every 670 seconds
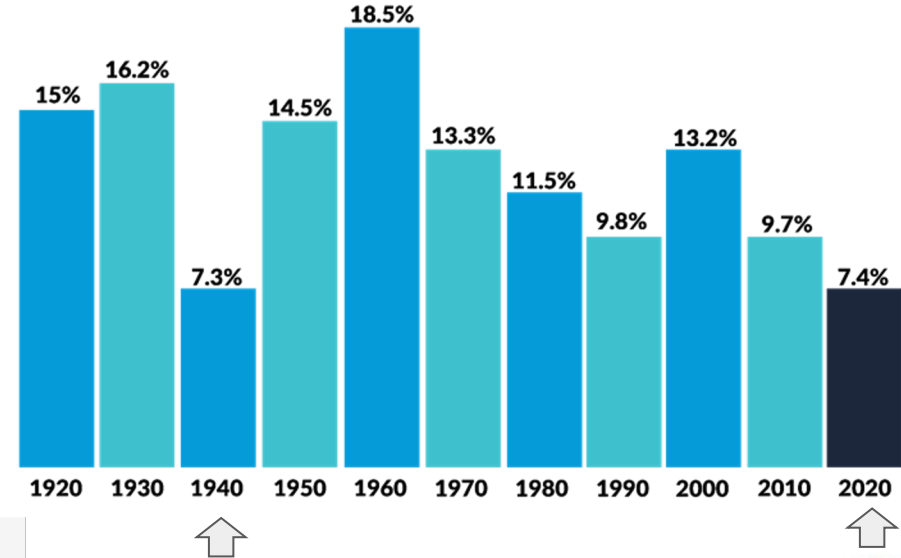
Net gain of one person every 29 seconds

AP

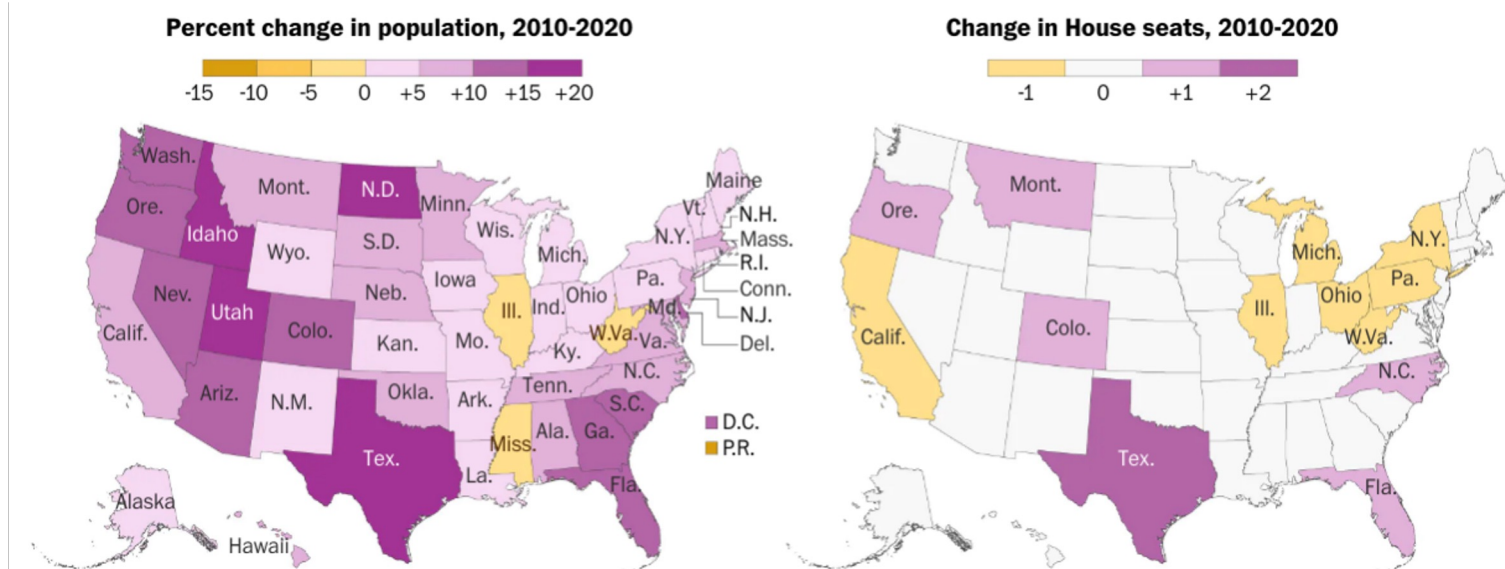## US marks slowest population growth since the Depression

By MIKE SCHNEIDER and NICHOLAS RICCARDI   April 27, 2021

U.S. Population Growth Since 1920

Year	Growth
1920	15%
1930	16.2%
1940	7.3%
1950	14.5%
1960	18.5%
1970	13.3%
1980	11.5%
1990	9.8%
2000	13.2%
2010	9.7%
2020	7.4%

2020 Census Population Shifts Impact

Percent change in population, 2010-2020

Legend: -15 -10 -5 0 +5 +10 +15 +20

States labeled: Wash., Ore., Idaho, Nev., Calif., Mont., Wyo., Utah, Ariz., N.M., N.D., S.D., Neb., Colo., Kan., Okla., Tex., Minn., Wis., Iowa, Mo., Ark., La., Mich., Ohio, Ind., Ill., Ky., Tenn., Miss., Ala., Ga., Fla., Maine, Vt., N.H., Mass., N.Y., R.I., Conn., Pa., N.J., Del., Md., W.Va., Va., N.C., S.C., Alaska, Hawaii, D.C., P.R.

Change in House seats, 2010-2020

Legend: -1 0 +1 +2

States labeled: Ore., Calif., Mont., Colo., Tex., Mich., Ill., Ohio, W.Va., N.C., Fla., N.Y., Pa.

2021 Texas Population

2021 Population: 29,527,941 (17% change)
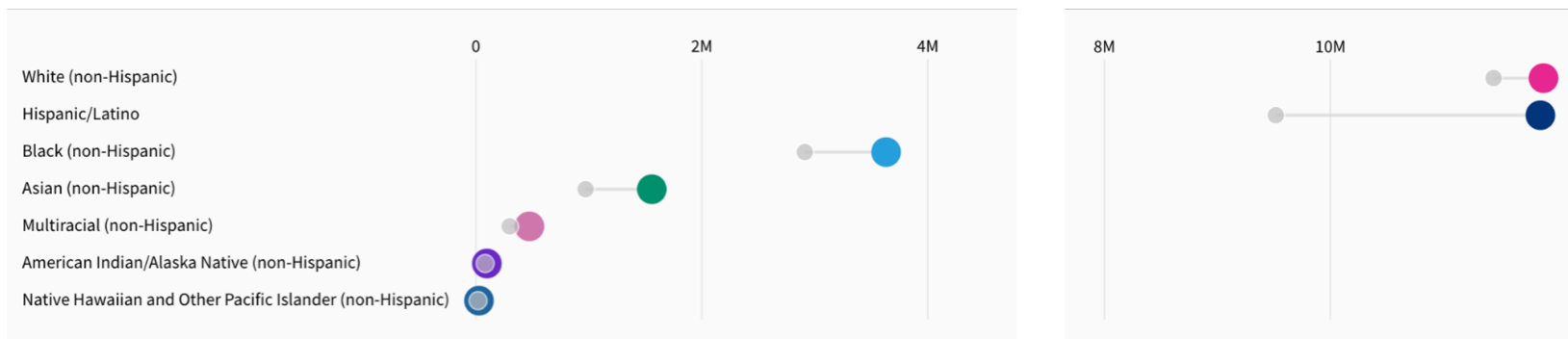
White (non-Hispanic): 11,885,058
Hispanic or Latino: 11,857,401
Black or African American: 3,630,642
Asian: 1,557,064

Multiracial: 473,467
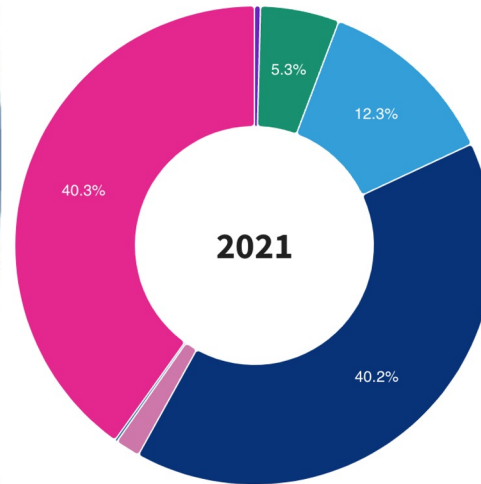**American Indian & Alaska Native:** 96,976
Native Hawaiian & Pacific Islander: 27,332

Home.

one

out of two births

60% Of The Texas Population Is Ethnically Diverse

American Indian/Alaska Native (non-Hispanic)

Asian (non-Hispanic)

Black (non-Hispanic)

Hispanic/Latino

Multiracial (non-Hispanic)

Native Hawaiian and Other Pacific Islander (non-Hispanic)

White (non-Hispanic)

2021

5.3%

12.3%

40.3%

40.2%

Texas Ethnic Composition

2. The Multicultural Effect

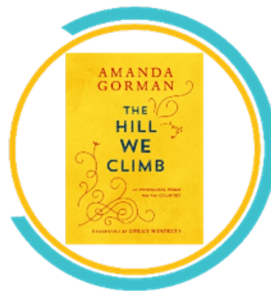**276%** growth
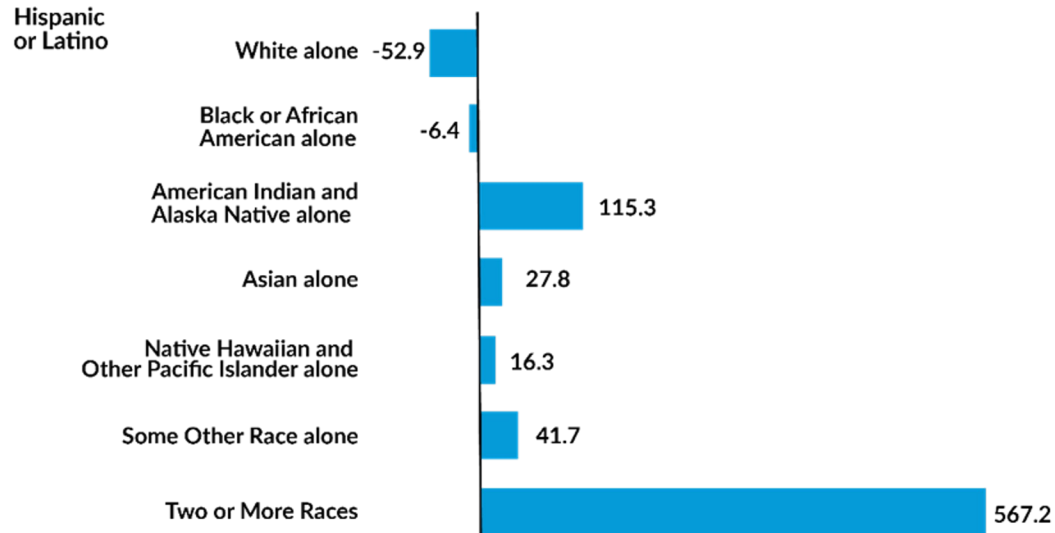
MULTIRACIAL GROWTH

13

Multicultural Influence Is Everywhere

Hispanics & Race Shifts In Latest Census
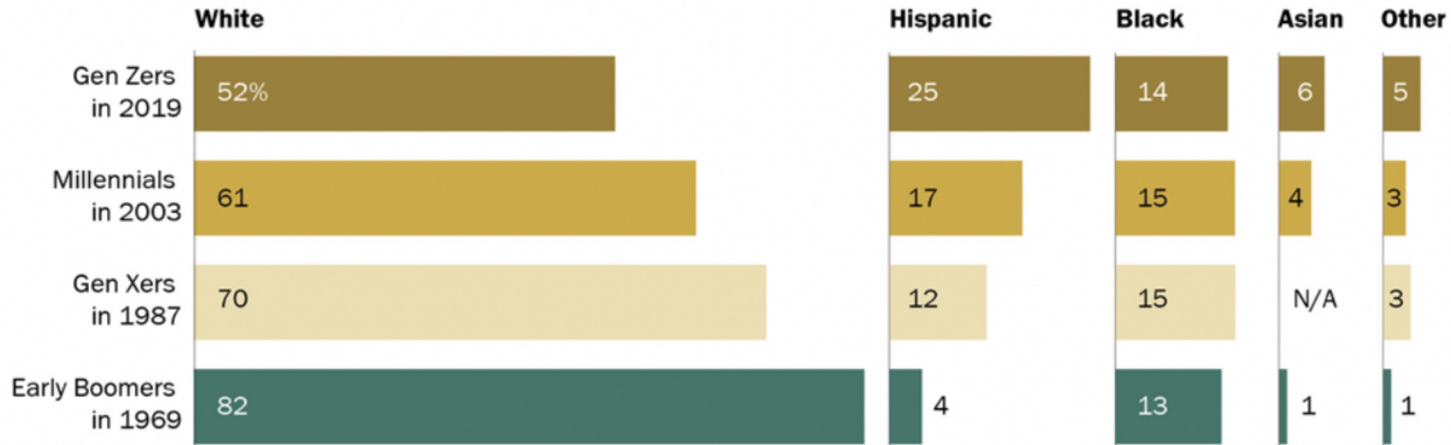
Hispanics Are Growing More Diverse

(Race Classification Percent Change from 2010 Census)

Hispanic or Latino

Category	Percent Change
White alone	-52.9
Black or African American alone	-6.4
American Indian and Alaska Native alone	115.3
Asian alone	27.8
Native Hawaiian and Other Pacific Islander alone	16.3
Some Other Race alone	41.7
Two or More Races	567.2

Source: U.S. Census Bureau, 2010 and 2020 Census Public Law Redistricting Data File (P.L. 94-171) Summary File

Gen Z'ers Are More Diverse Than Any Other Generation

	White	Hispanic	Black	Asian	Other
Gen Zers in 2019	52%	25	14	6	5
Millennials in 2003	61	17	15	4	3
Gen Xers in 1987	70	12	15	N/A	3
Early Boomers in 1969	82	4	13	1	1

Hyper-cultural Generation
=
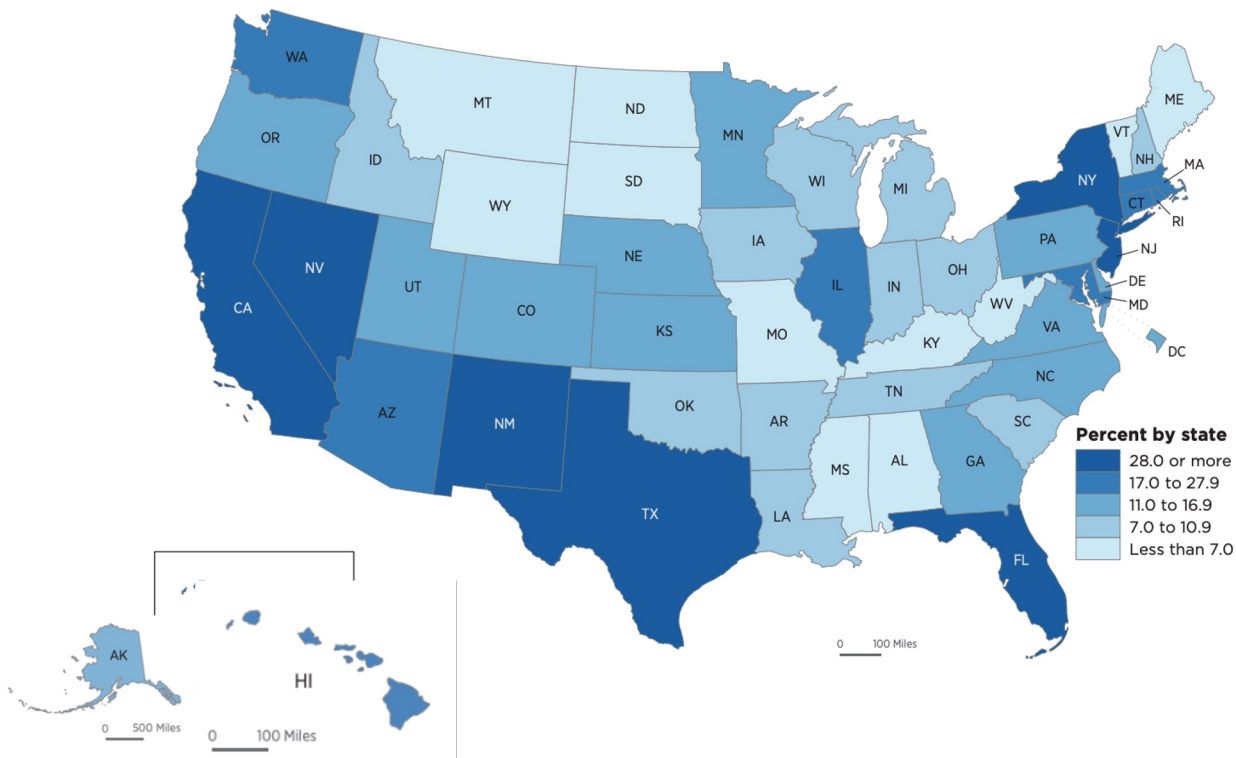# 100% Hispanic *(or Asian)* & 100% American

(Expressed in language, traditions, cultural inclusiveness and entertainment)

% of Population 5 years and Over Who Spoke a Language Other Than English at Home

Percent by state
- 28.0 or more
- 17.0 to 27.9
- 11.0 to 16.9
- 7.0 to 10.9
- Less than 7.0

32% or **2.2 million** Texans over the age of 5 spoke a language other than English in 2019

The most common languages spoken:

Spanish	**71.7%**
Vietnamese	**3.1%**
Chinese	**2.7%**
Hindi	
	2.0%
Other languages	**1.5%**

20

Cultural Inclusiveness

SHIFT TO A CULTURE OF OPENNESS

60% of the U.S. population ages 18+ expresses high cultural openness

70% of 12-to-17-year-olds manifest high cultural openness in their statements

51% of Boomers and 41% of Matures demonstrate this same high level of cultural openness

3. Mobile Is A Primary Channel For All Things

Gen Z Is On...

24

98% Own A Smartphone/83% Own a Laptop
7-8 hours are spent online per day
Evaluate content in 8 seconds (4 seconds less than Millennials)

Source: ThriveMyWay

Online Activities

Gen Z spends 7 hours of the day online

Online Activities By Device	MOBILE	PC/LAPTOP
Visited/used a social network	95%	72%
Used a chat or instant messaging service/app	92%	38%
Watched a video clip of visited a video-sharing site	91%	62%
Visited/used a search engine	90%	76%
Visted an online retail site or store such as Amazon	79%	56%
Used a map or directions service/app	77%	22%
Searched for a product or service you want to buy	73%	43%
Visited a news website/app/service	71%	42%
Uploaded/shared a photo	65%	25%
Checked the weather online	60%	24%

Not All Dayparts Are Equal When It Comes to Video

Gen Z: Platform Preference, by daypart
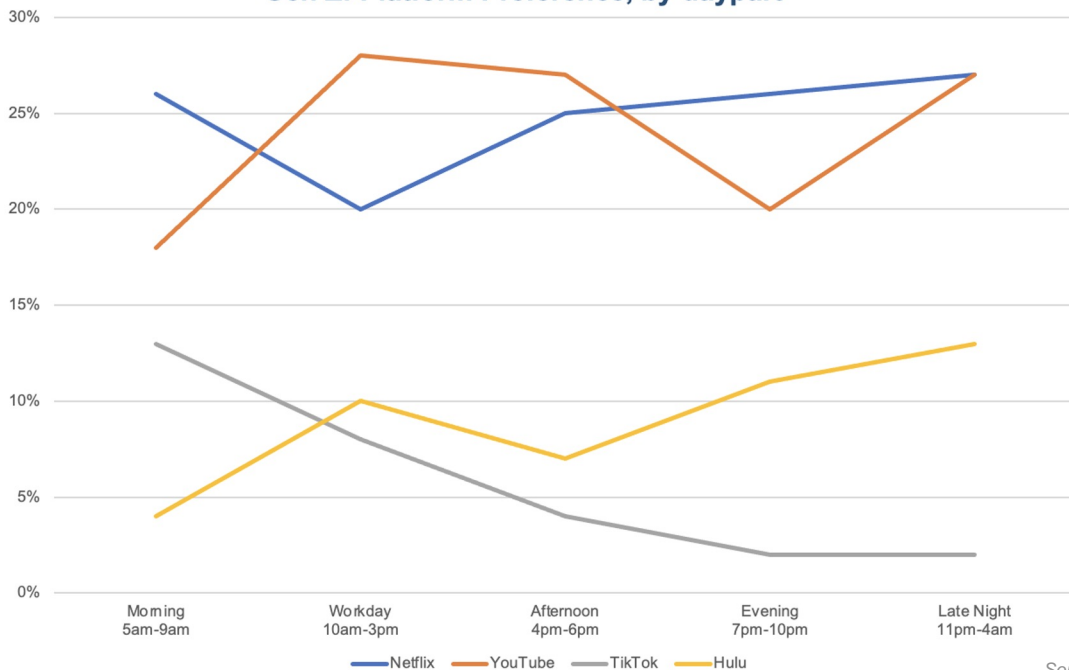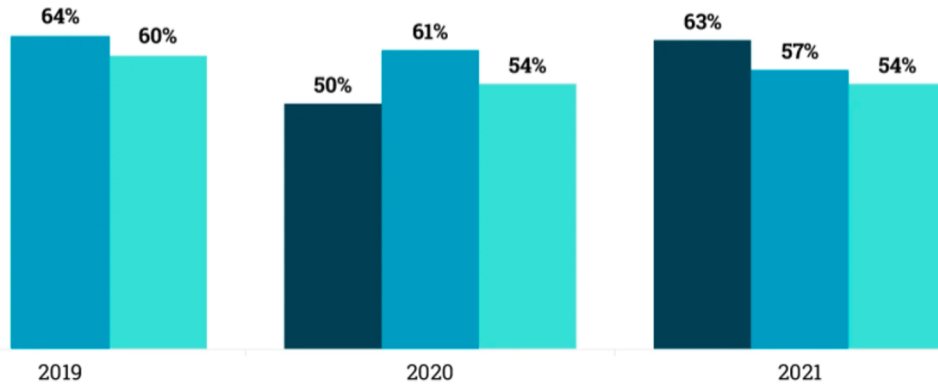
Gen Z typically starts the day with video content on TikTok/Netflix then moves through to YouTube and longer form content in the evening.

Gen Z Social Platforms Preference

Top 3 Social Media Platforms Used by Gen Z

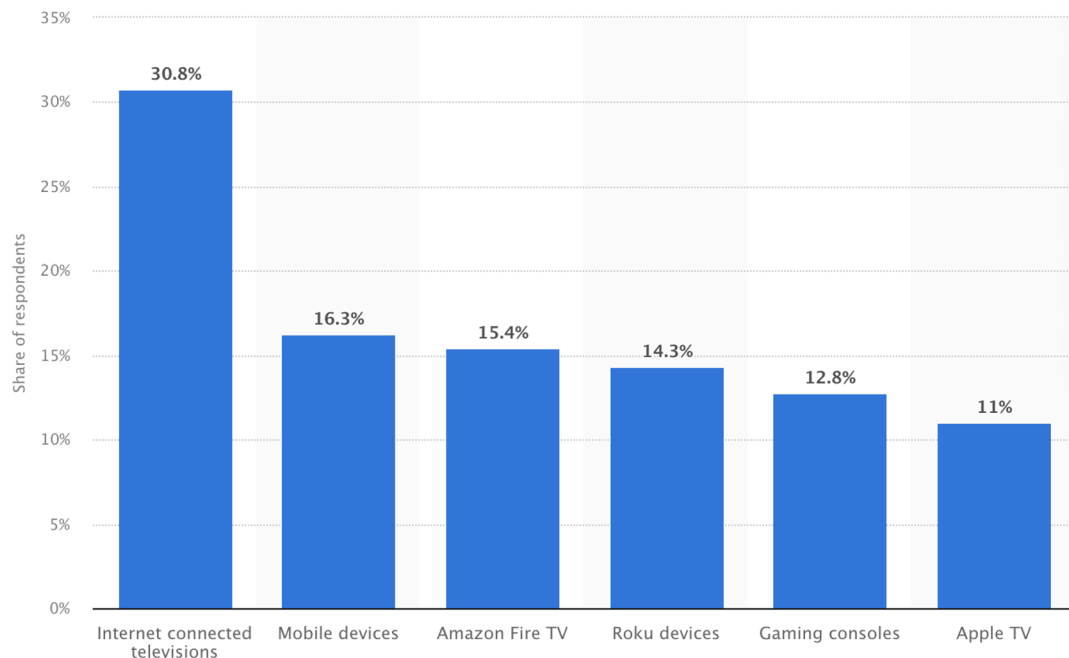TikTok, Instagram, and Snapchat are the most popular social media platforms among Gen Z

Understanding Engagement and Reach Channels for Gen Z

Source: Statista,cin, Most popular streaming media devices in North America in 1st Quarter 2020

Engagement with advertising more than other generations

43%
Gen Z

31%
Millennials

31%
Gen X

Shared an ad with someone else

40%
Gen Z

30%
Millennials

19%
Gen X

Source: How Gen Z connects to TV: Exploring the Generational Divide in the Future of TV

29

Chart (Share of respondents)

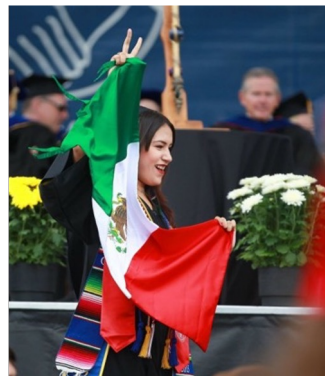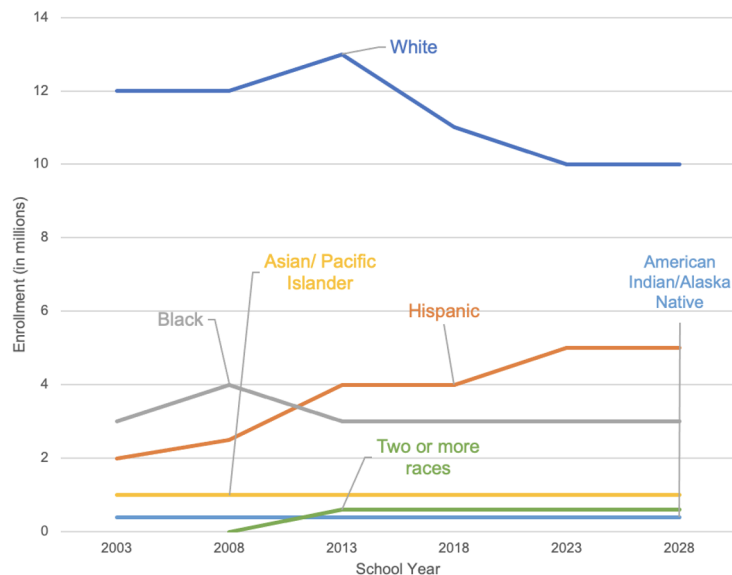| Device	Share
Internet connected televisions	30.8%
Mobile devices	16.3%
Amazon Fire TV	15.4%
Roku devices	14.3%
Gaming consoles	12.8%
Apple TV	11%

4. Understanding The Cohort, Many Still A Group of Firsts

College Attendance Is On The Rise...

National Center for Education Statistics Growth Projctions

Enrollment (in millions) vs *School Year*

Lines labeled: White, Asian/ Pacific Islander, Hispanic, American Indian/Alaska Native, Black, Two or more races

More Educated, But Lower Rates of Employment

Among 18- to 21-year-olds no longer in high school, % enrolled in college

Gen Zers in 2018	57
Millennials in 2003	52
Gen Xers in 1987	43
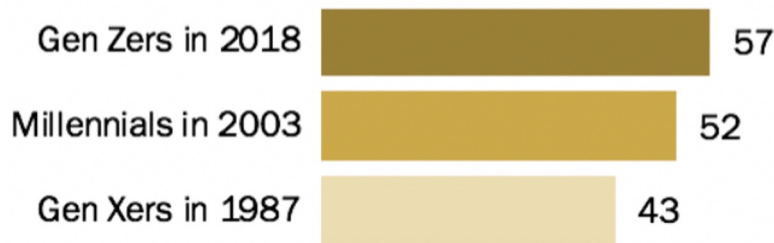
Employment Rates Among 15-17 year olds

Gen Z	18%
Millennials	27%
Xers	41%

Employment Rates Among 18-22 year olds

Gen Z	62%
Millennials	71%
Xers	79%

Source: Pew Research

32

Employment By Ethnicity Shows Advancement Opportunity for Hispanics

Employed people by occupation, race, Hispanic or Latino ethnicity, 2020 annual averages

Legend:
- Production, transportation and material moving
- Sales and office
- Management, professional and related
- Natural resources, construction, and maintenance
- Service
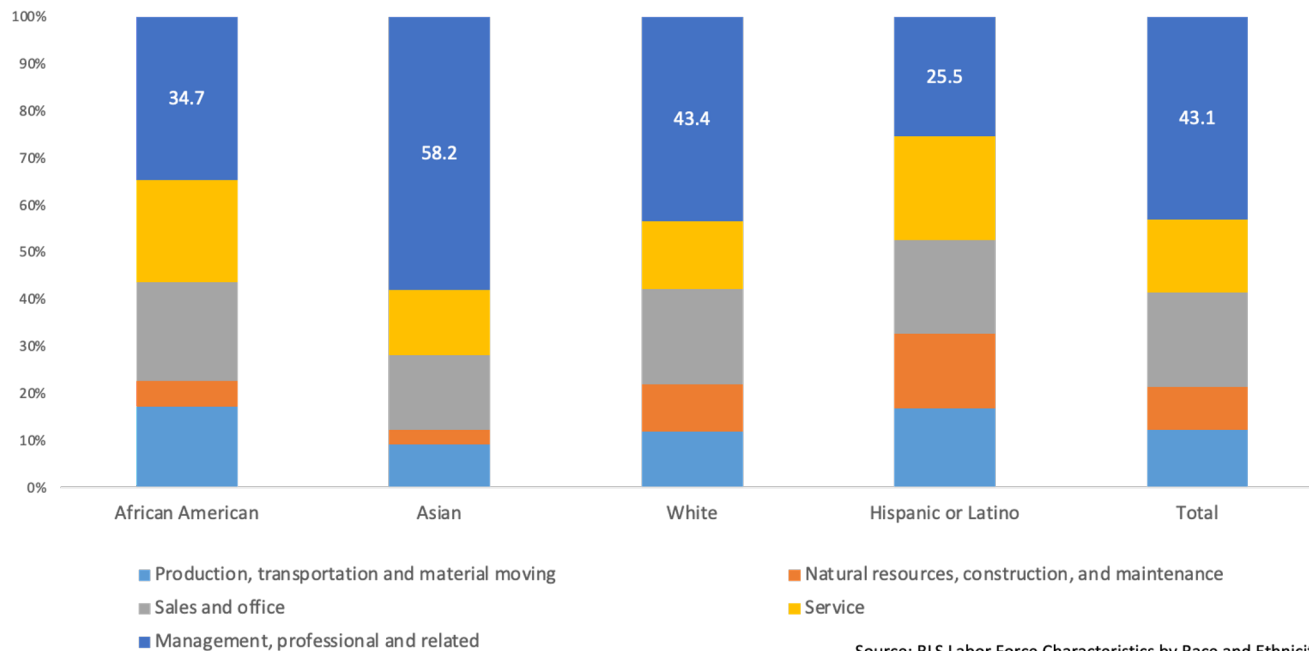
Source: BLS Labor Force Characteristics by Race and Ethnicity, 2020

33

U.S. Hispanic Labor Force Growth

2020-2030

78% OF THE U.S. LABOR FORCE GROWTH

2020 - 2030

Connection Opportunities

From Our Own Research...

Our ongoing research shows that students are looking for universities that reflect them - that are safe and inclusive of all communities

Oftentime the firsts lack support from their parents, not because they do not value education but simply because they don't know what their child should expect

Programs need to address this very diverse cohort on two fronts:
1. Students
2. Parents

ADDRESSING
THE GAPS

Family Dynamics When It Comes to College Planning

Students of color have other responsibilities that interfere with their ability to go to college such as work and other family obligations

- 34% are worried about being able to take care of their family or family obligations while studying
- Focus Group participants concurred with this indicating studying while at home did present an extra challenge for students, as their family still expects them to help out with chores and other activities

Tendency for family members and spouses/partners to be supportive of participants pursuing their college education

- However, about a third (30%) indicate that they feel their family doesn't think they "have what it takes to go to college" (this is more so among women of color)

While only slightly more than a third have parents that are college educated (35%), most have other family members (66%) that have attended college
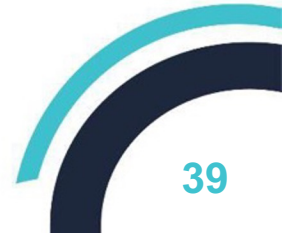
- 45% have a sibling or another member of their household that has attended college
- 21% have extended family, such as cousins, uncles etc. that have some college education

Participants elaborated that they find financial aid process complicated, even with guidance from family (and counselors)

5. Selling The Experience As Much As The Curriculum

Experience And Word Of Mouth Are Very Important

Researching and Choosing a College:

- Participants are researching for colleges primarily online
    - More so during Covid, they lamented that they were not able to do campus visits

- They utilized different processes for selecting their educational institution
    - Some selected it mainly based on price and financial assistance (costs was a consideration for all, but not always the main one)
    - Some selected it because of the availability of desired course curriculum
    - Some selected it mainly for location (in combination with other factors
- When available, they did take into consideration word of mouth recommendations, but it wasn't their first source of information

- All take into consideration student body diversity
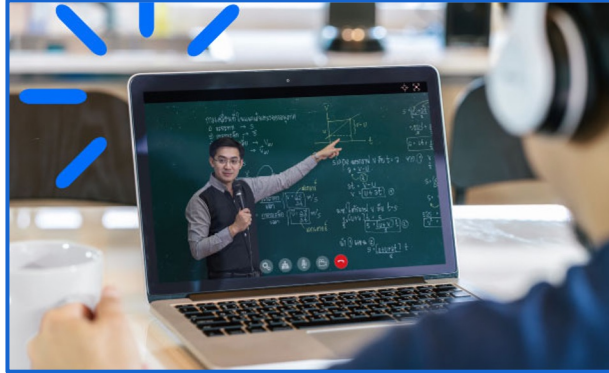
Effective Connection Examples

Culture of Inclusivity

Generation Z is the most diverse generation yet. Nearly half are racial or ethnic minorities, and they're pursuing college at rates higher than previous generations.
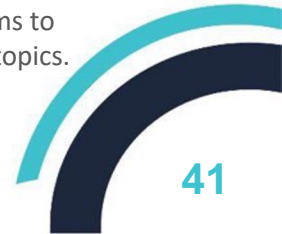
Beyond the Curriculum

Gen Z-ers tend to embrace social learning environments, where they can be hands-on and directly involved in the learning process. They expect on-demand services that are available at any time and with low barriers to access.

Real World Offerings
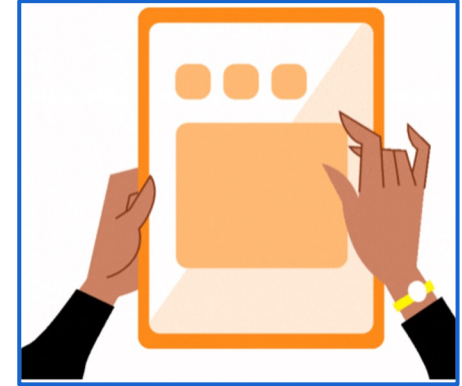
Offerings of pop-up classes, courses or programs to address real time topics.

41

Social Media Example - Authenticity

42

Social Media Example - Inclusiveness

Social Media Example - Connectivity

Do's and Don'ts When It Comes To Social Media & Multicultural Students

DO keep posts relevant to the education mission. Avoid posting about diversity for the sake of diversity

DO represent diverse communities in all social media initiatives. This indicates to the audience that diverse students are included beyond diversity initiatives. Find genuine stories that showcase the individual journey

DO share images often that represent more than one diverse community. Consistently sharing photos of diverse people alone looks too intentional

DO engage with other accounts that promote diverse communities

Do's and Don'ts When It Comes To Social Media & Multicultural Students

DO use images over infographics when possible

DO post photos that clearly show diverse individuals' faces. This goes without saying for most photos, but if diversity photos lack quality and clarity compared to the rest of the feed it looks bad

DON'T tag individuals, organizations, or use hashtags without researching their history with diversity initiatives

DON'T share the same stock photos of diverse individuals more than once

DON'T write captions that call out diversity demographics without any other purpose or substance

46

Connecting With A More Diverse Audience Takeaways

- Population growth is coming from communities of color, primarily from Hispanic families
- Texas has become a minority majority state
- Population shifts are making the "melting pot" of the U.S. a reality - the % of those who consider themselves multicultural grew 276%
- What worked to attract millennials may not work with Gen Z. Gen Z spends more content online, evaluate quicker and use a variety of channels throughout the day to always be on
- While college attendance is on the rise for Hispanics, the community still lags in "white collar" jobs. This may be despite of going to college, so real-work preparedness so they can be a successful cohort of "firsts" is important in overall development

47

Tips For The Road Ahead

Tips For Connecting with A More Diverse Audience

Short Term:

- Prioritize big content that could have infusion of authentic culture *(graphics, photos & tone)*
- Consider how language is used. Your audience is English proficient, but in-culture materials are key. Things that could be exceptions could include FAQs or anything involving more technical aspects of enrollment or financial considerations)that impact financial decisions
- Invest in developing sharable content *(offline and online, the shorter bite size the better!)*
- Determine recruitment campaigns and where you can **lead** with multicultural insights, maybe this is by program or degree plan
- Have events to invite the student and their family and can be shared online
- Invest in video, short form for students and longer form for families

49

Tips For Connecting with A More Diverse Audience

Longer Term:

- Determine how your touchpoints fair for a mobile first screen experience and plan media with the mobile screen in mind
- Invest in video for all campaigns and how-to's
- Consider as placements in entertainment touchpoints *(social, digital audio, YouTube)*
- Consider events that tie into hyper-culturalism
- Celebrate people and their journeys by telling their stories
- Research barriers, craft messaging based on insights that are relevant to diverse communities and don't assume that last year's plan will work for next year
- Measure and assess continuously - establish realistic benchmarks
- When in doubt - hire an expert. We're here to help!

50

THANK YOU

NOW LET'S GET CONNECTED

Yareli Esteban
President/CEO STRATEGAR
o. +1 469.791.0443 | m. +1 972.948.3781
yareli@strategar.com