

THE CONFERENCE BOARD



## The Time is Now

Marketing Faces the Multicultural Majority

November 19, 2020





## Multicultural Marketing Council

### Cultural insights that deepen brand engagement

For marketing leaders with enterprise responsibility for the development and impact of multicultural and inclusive marketing

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# Today's Presenters



Linda Lane González  
Founder & President  
***Viva***



Nancy Tellet  
Founder, Brand &  
Consumer Navigator  
***PureClarity, LLC***



Chiqui Cartagena  
(Moderator)  
Chief Marketing Officer &  
Center Leader, Marketing &  
Communications  
***The Conference Board***



CULTURAL  
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# IT'S TIME

Ready or Not for the Multicultural Majority

2020 November – Part 2





## 2020: DEMOGRAPHIC CLOCK TICKED INTO A NEW ERA

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Before 2020  
Non-Hispanic White majority, all ages

2020  
0-17s became the 1<sup>st</sup> MC majority gen

After 2020  
<35 MC majority by 2028, <50 by 2033

# MARKETING FACES THE MULTICULTURAL MAJORITY

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## THE STUDY

2,472 Hispanics, NH Blacks + Non-Hispanic Whites

13-17s + Parents 25-49 of 8-12 Aged Kids

Quantitative online survey + Qualitative in-homes & POC workshops

January – February 2020



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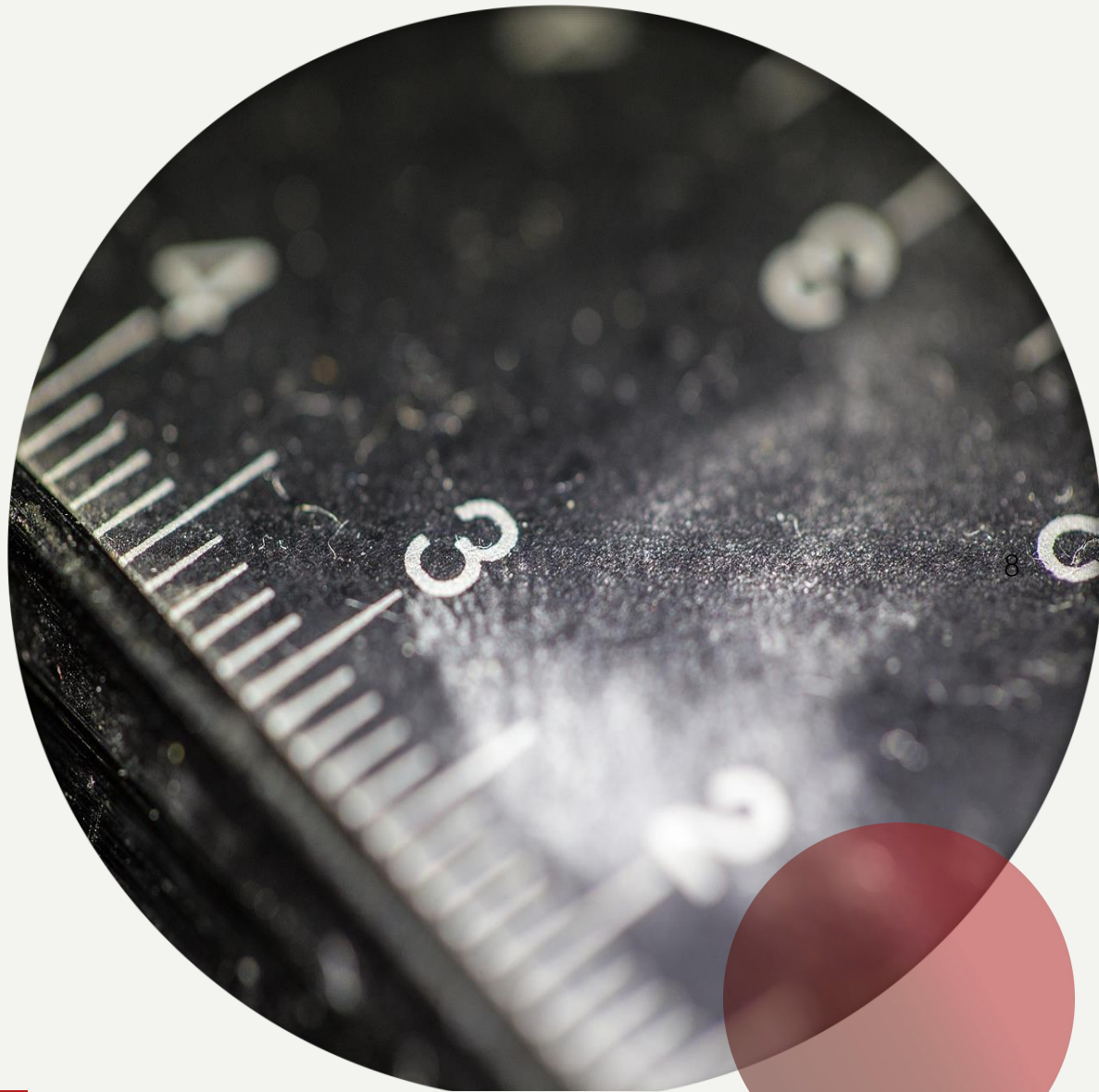
**KANTAR**

 **ThinkNow**

  
**UNIVISION**<sup>®</sup>  
COMMUNICATIONS INC

**VIACOMCBS**





# 1. CULTURAL LITERACY CAN BE QUANTIFIED

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Outside of Twitter, do average, everyday consumers really notice culturally illiterate marketing?

Are they offended?

Who is most offended?

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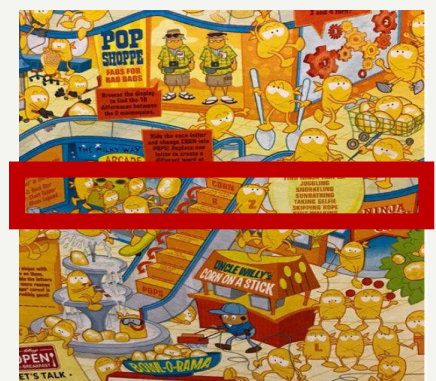
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QC12: You are the head of marketing for a company & have the authority to approve or reject ads, packaging etc. Which of these would you approve & which would you not approve? Click on the GREEN THUMBS UP to approve or RED THUMBS DOWN to NOT approve. BASE: 1,220 25-49 Parents of 8-12 aged kids + 1,198 13-17s + QC12A: Why didn't you approve this? BASE VARIES BY MARKETING PIECE QC12B Why is it offensive? BASE VARIES BY MARKETING PIECE



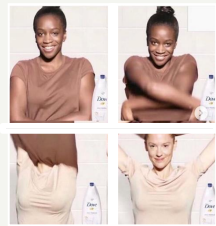
# 8 PIECES OF CONSUMER FACING MARKETING;

5 HAVE EXPERIENCED CULTURAL BACKLASH...  
3 HAVE NOT



# 21-69% TAKE ISSUE WITH A PIECE, VARYING WIDELY (13-49)

DEPENDING ON HOW VISUALLY OBVIOUS AN ISSUE MIGHT BE, HOW MUCH YOU CARE & YOUR GENDER



53% 59%  
NHW/  
HISP NHB



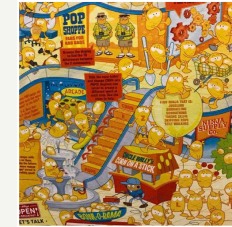
51%  
ALL



30% 48%  
NHW/  
HISP NHB



21% 41%  
NHB/  
HISP NHW



28%  
ALL

Females+17%

Females+9%

# HOW 'OFFENSIVE'? FOR THE MOST OBVIOUSLY RACIAL, VERY OFFENSIVE (13-49)

% "Thumbs Down" said was "offensive"



11



63%

NHW

87%

NHB

68%

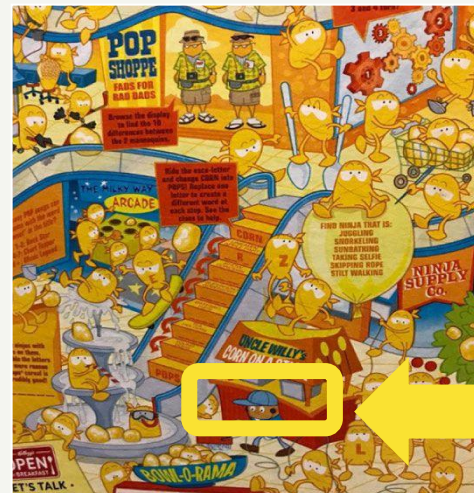
HISP



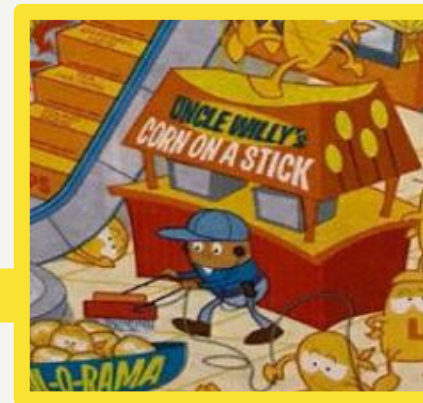
# SOMETIMES IT MAY GO UNNOTICED BY MOST, BUT A TICKING TIME BOMB (13-49)

% “Thumbs Down” said was “offensive”

Cell sample sizes too small to read accurately



12



# SOMETIMES YOUR BASE FALLS ON 1 SIDE OF A CULTURAL DIVIDE (13-49)

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% “Thumbs Down” said was “offensive”

Only NHW cell sample large enough to read



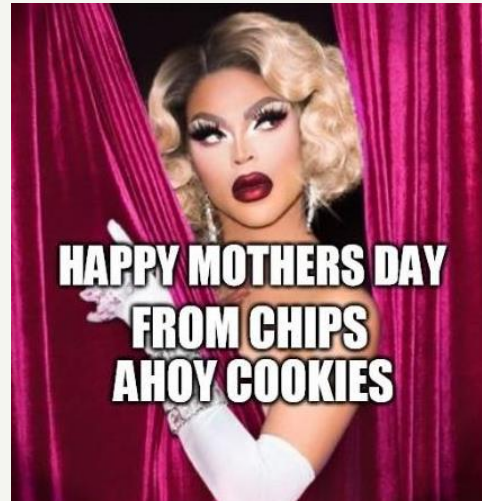
38%

NHW

# SOMETIMES A LOW % DECLARE A PIECE 'OFFENSIVE' BUT CLEARLY DON'T LIKE IT (13-49)

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ONLY 19% SAID FAMED DRAG QUEEN, MOTHER'S DAY TWEET WAS  
'OFFENSIVE' (Jose Cancel AKA Vanessa Vanjie Mateo)



81% SAID THEY "JUST DIDN'T LIKE IT"... NHW & NHB INCLUDED LGBTQ+  
ON THEIR TOP 5 LIST OF PEOPLE THEY ARE "LEAST" COMFORTABLE WITH

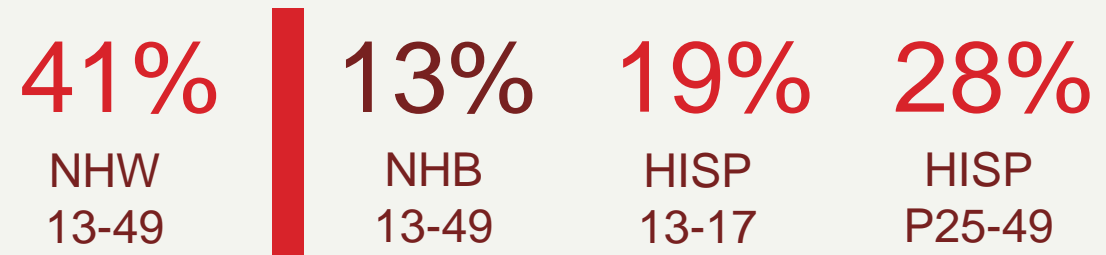




## 2. A CALCULATED RISK CAN WORK IF YOU KNOW YOUR CONSUMER'S & YOUR BRAND'S CULTURAL VALUES FIRST

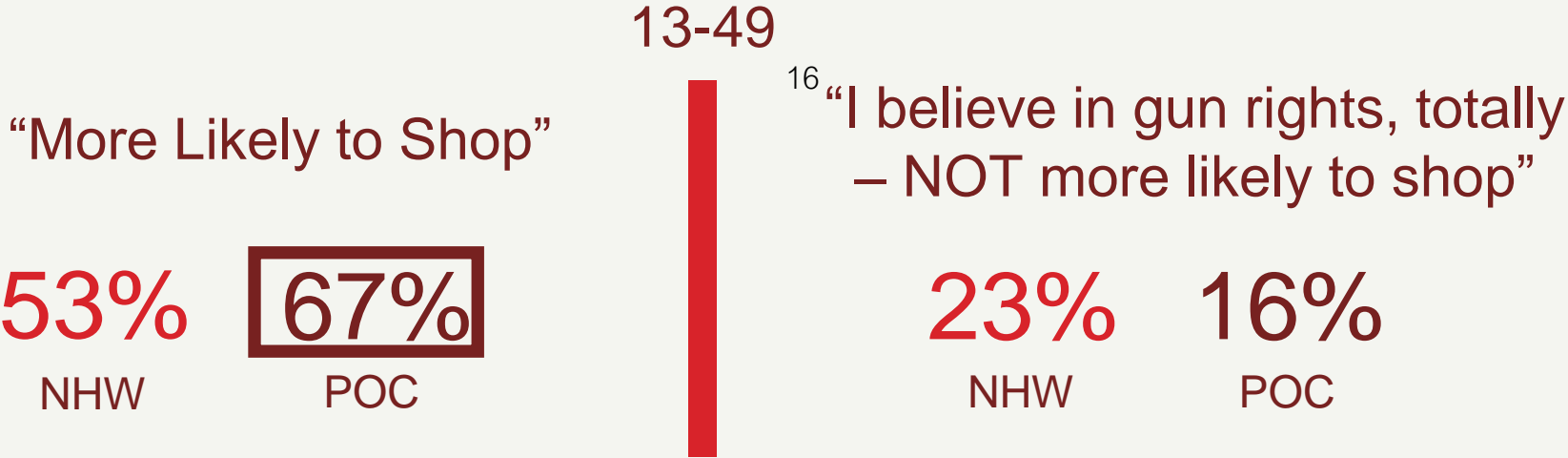
Nike customers value social justice, issues of police brutality & the right to protest over symbols of patriotism

“% THUMBS DOWN”



# Walmart & Dick's Sporting Goods Both Took Steps To Address Gun Violence

Removing firearms/ammunition from their stores with no negative bottom-line impact



WALMART, DICK'S & GUNS





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### 3. BRANDS DO MATTER

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ACROSS 4 MEASURED  
CATEGORIES, 9 OF 10 WERE  
LOYAL OR SEMI-LOYAL BRAND  
USERS (13-49s)

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QS25 – QS30 What best describes the \_\_\_\_\_ brand you use (Soap, Shampoo, Mobile Phone, Pain Relief) BASE: 1,220 25-49 Parents of 8-12 aged Kids + 1,198 13-17s.

LOYAL: USE ONLY 1 BRAND SEMI-LOYAL: USE A FEW BRANDS THEY CHOOSE FROM

PICTURE CREDIT: MEDIUM.COM

# MOBILE “MOST” LOYAL... USE ONLY 1 BRAND “I REALLY LIKE”



SOAP  
(13-49)

SHAMPOO  
(13-49)

PAIN RELIEVERS  
(13-49)

MOBILE

3 OF 10 NON-HISP  
4 IN 10 HISP

3 OF 10

3 OF 10

5 OF 10 P25-49  
6 IN 10 13-17



# HISPANIC TEENS MORE LIKELY TO MAKE THEIR OWN BRAND CHOICES

Heightened family responsibility role including bill paying & purchasing, almost 2X that of Non-Hispanics in 2018 Digital Lives study

“I Use What Someone Else Buys For The Household” (13-17s)

	Non-Hispanic	Hispanic <sup>21</sup>
SOAP	16%	12%
SHAMPOO	15%	12%
PAIN RELIEVER	28%	18%
MOBILE	17%	13%







4.  
92% (13-49s) SAID SOME  
THINGS MATTER MORE  
THAN PRICE

Price is important within context &  
often in combination with other leading  
customer values

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QC11: Do any of these choices matter more to you than price? (Select all)?  
BASE: 1198 13-17s + 1,220 Parents of Kids 8-12 (531 25-34s + 689 35-49s)

# PEOPLE BUY FROM PEOPLE THEY TRUST

NOTHING MATTERS AS MUCH AS QUALITY &  
RELIABILITY

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“I have consistent positive experiences with the  
brand...They always deliver”

**63%**  
13-17

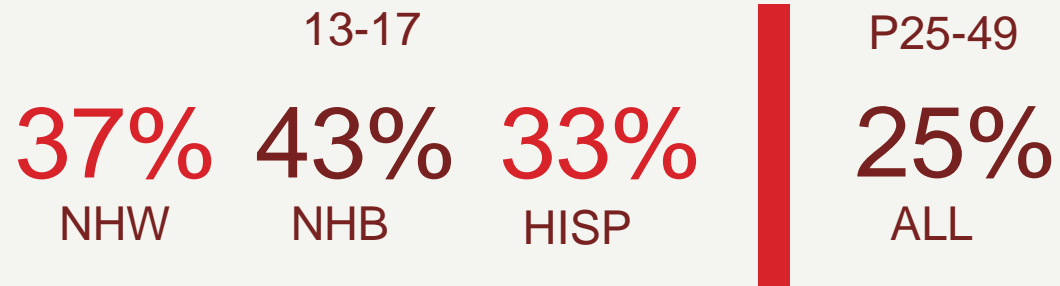
**68%**  
P25-49

23

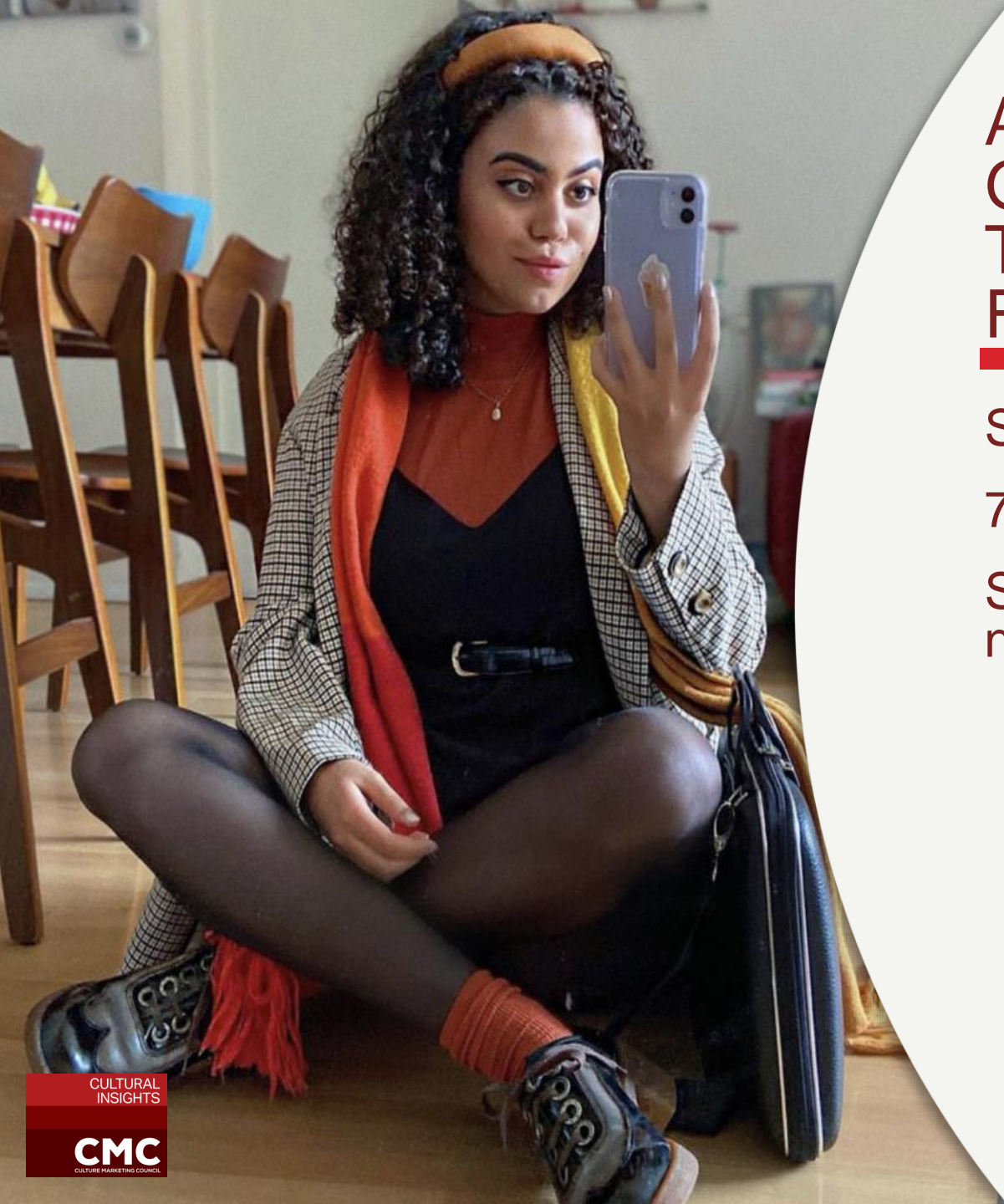
# FOR MANY TEENS, STYLE COUNTS MORE THAN PRICE

Especially, NHBs

25







# A TRIFECTA OF TREASURED GEN-Z CUSTOMER VALUES TEAM UP TO FUEL THRIFTING FERVOR

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STYLE, SAVINGS & SUSTAINABILITY

74% of 13-49s are doing it...Parents love it too!

Skews female among non-Hispanics but gender neutral with Hispanics

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PICTURE SOURCE: THRIFTS & ANGLES

QC9 Do you buy things that are used, recycled and/or thrift shop finds?

BASE:: 1,220 25-49 Parents of 8-12 aged kids + 1,198 13-17s + CMC 2020 qualitative



**Secondhand purchases +46% since 2017 attributed “largely to Gen-Z”**  
(clothing, shoes, accessories)

UNIDAYS



PICTURE SOURCE: David Morgan/Goodwill @ Wordpress.com  
Source: UNIDAYS global 13 million student database

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# OFTEN STYLE & PRICE WIN OUT OVER SUSTAINABILITY

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## FAST FASHION, A GUILTY PLEASURE

Style of the “NOW”, get it before it’s gone, throwaway fashion at low prices

28

Combo of buzzy IRL & online celebs + an army of unpaid content creators

All fueled by social media, particularly Instagram

**ASOS**  
discover fashion online

**FASHION  
NOVA**

**ETTYLITTLETHING**

**SHEIN**

**UNI  
QLO**

**ZARA**





FASHION NOVA x C A

“Fashion Nova ... cracked the code — thanks to its influencer network ... a demographic of people often systematically excluded from the fashion industry... more often-than not, **WOMEN OF COLOR**”

*Refinery 29, 7/25/18*

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Picture source  
Fashion Nova



# STYLE 1 - THRIFTING & FAST FASHION



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## 5. WITHIN GEN Z SOCIAL BUBBLES FASHION & LIFESTYLE INFLUENCERS RULE

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### SEEKING SOCIAL SECURITY

Fashion & Lifestyle is to GEN Z what technology was to Millennials

In 2018 Digital Lives all but 1 top teen influencer was F&L... 1 was technology

Vans v. Nike not Android v. iPhone

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**Fashion & lifestyle influencers are MOST associated with purchase behaviors by young consumers**

Robert Williams/Mobile Marketer  
3/6/20

33

**8 of 10 SM influencers POC 13-34 follow are from their own segment or other POCs**

CMC 2018 Digital Lives

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Summarized findings from Cassandra research "The Culture of Influence" 2019 quant: 1003  
US + 505 UK 14-34s by Mobile Marketer 3/6/20

STYLE 2 - FOOTWEAR & FENTY





## 6. GEN Z PATH TO PURCHASE BEGINS WITH BRAND DISCOVERY MOSTLY VIA SOCIAL MEDIA ADS & INFLUENCER ENDORSEMENTS

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AND SOME WORD-OF-MOUTH,  
TOO

# Celeb & Social Media Stars Spur Brand Trial & Purchase, Especially if KNOWN Unpaid

PARTICULARLY AMONG HISPANICS & OFTEN MALES

% MORE LIKELY TO TRY/BUY/USE VS. A TRADITIONAL AD

	NHW/NHB 13-49s	HISP 13-17s 36	HISP 25-49s	MALE SKEW 13-49s:
CELEB/SOCIAL MEDIA STAR ENDORSEMENTS	37%	55%	44%	53%M/23%F
CELEB/SOCIAL MEDIA STAR <b>KNOWN UNPAID</b> ENDORSEMENTS	48%	69%	59%	MALE SKEW 25-49s ONLY: 60%M/39%F

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QY14 Which political party do you ID with? Base: 949 30-49 Parents of 8-12 aged kids (registered voters) + 1,126 13-17s (plan to register when turn 18) + Harvard Institute of Politics Fall Poll data, same exact question with 2075 18-29s inc. NHW, NHB & HISP

BRAND DISCOVERY AKA "I SAW IT ON INSTAGRAM"

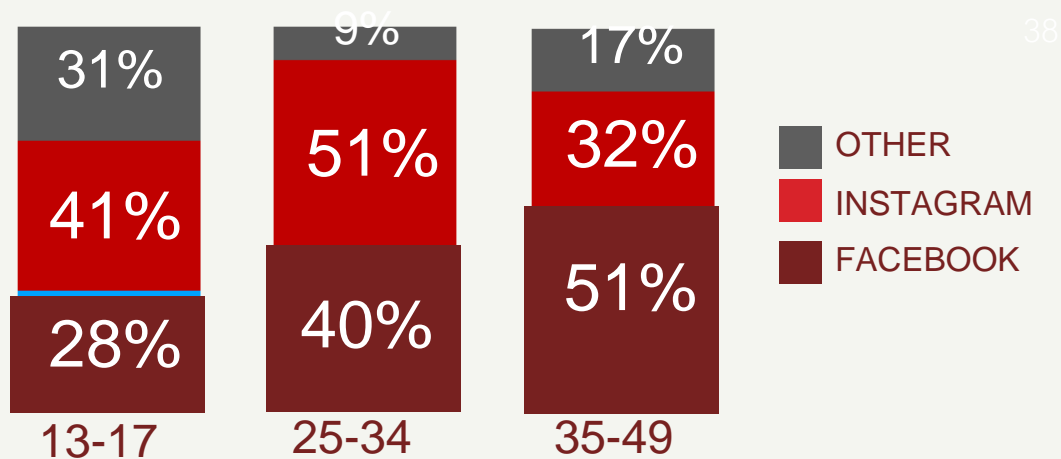


# WOM #1 FOR 2<sup>ND</sup> STEP: “PURCHASE CONSIDERATION”

(3 IN 10 13-49)

Advertising more important to HISP, 21% v. Non-HISP, 13%

Another leading prompt was online inspiration (14%)



# WHAT NEXT? 74% GO ONLINE

(13-49)

30% to search for more info

20% head to a marketplace site \* or Target

13-49s

39

AMAZON

55%

ALL

WALMART

28%

NHW

35%

NHB/  
HISP

...and 10% of HISP teens go to Target v only 2-3% of other segments

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PICTURE CREDIT: FORBES

QS2 You've decided to buy something but aren't sure yet what brand/style/model etc. What is the 1<sup>st</sup> thing you do?

BASE:: 1,220 25-49 Parents of 8-12 aged kids + 1,198 13-17s + CMC 2020 qualitative

QS3: Which big marketplace or Target do you go to all or most of the time? BASE" GO TO ONLINE MARKETPLACE SITE OR TARGET AS 1<sup>ST</sup> PLACE TO CHECK: 237 25-49 Parents of 8-12 aged kids + 201 13-17s





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## 7. CULTURAL LITERACY IS REQUIRED TO SURVIVE & THRIVE

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Multicultural marketing is no longer a “niche”, “nice to have” marketing afterthought...


The definition of “White as the norm” is no longer applicable for brands with targets including persons <35

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Note: R. Diangelo is an author & Affiliate Associate Professor of Education @ University of Washington. Remainder of the above quote...“or the standard for human, & POC as a deviation from that norm.”





**With 9 of 10 chief  
execs, ad, promo,  
sales & marketing  
managers being  
non-Hispanic White,  
“culture bubble”  
issues need faced &  
overcome**





## 53%+ 13-49s Have “Stopped Buying A Brand Because It Offended Them Or Disrespected Their Values”

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Especially NHB female P25-49 at 72%

#1 reason for teens & POC parents:  
43 “Disrespect for my racial group” OR  
“someone else’s.” (#3 for NHW parents)

And for 30% 13-49s, advertising  
adjacent to offending content was a  
brand break-up reason.

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QC13: Have you stopped buying a brand or service because it offended you or disrespected your values? BASE: 1220 25-49 Parents of 8-12 aged kids + 1,198 13-17s QC13A: The brand or service I stopped buying offended/disrespected... (SELECTALL THAT APPLY)? BASE: THOSE THAT STOPPED BUYING A BRAND OR SERVICE BECAUSE IT OFFENDED THEM OR DISRESPECTED THEIR VALUES 685 25-49 Parents of 8-12 aged kids + 62213-17s



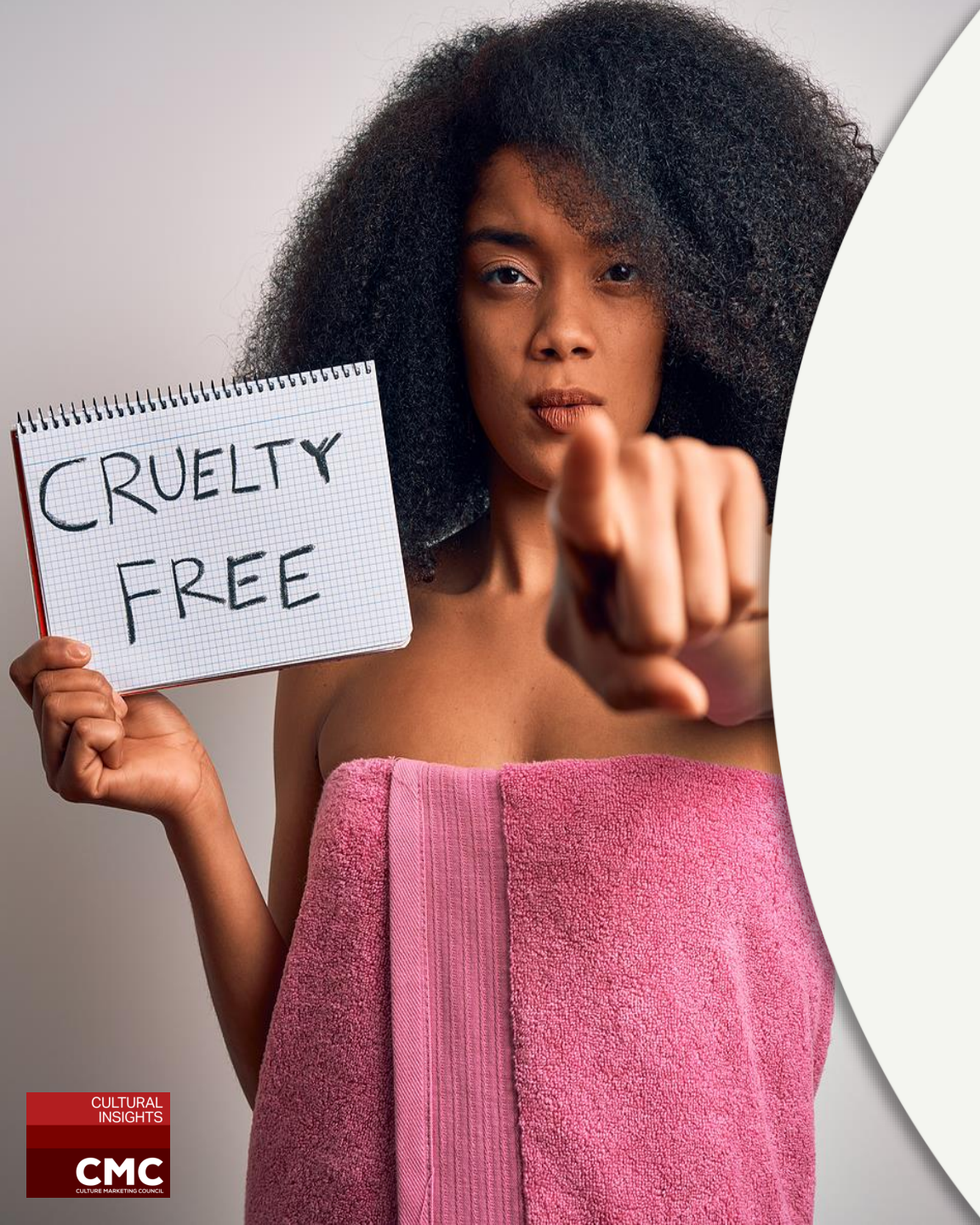
# ORGULLO GAY



## A TOP IRL BREAKUP REASON MORE UNIQUE TO GEN Z, LGBTQ+ DISRESPECT



QC13A: The brand or service I stopped buying offended/disrespected... (SELECT ALL THAT APPLY)?  
BASE: THOSE THAT STOPPED BUYING A BRAND OR SERVICE BECAUSE IT OFFENDED THEM OR  
DISRESPECTED THEIR VALUES 685 25-49 Parents of 8-12 aged kids + 62213-17s



# ANIMAL CRUELTY MOST TOP-OF-MIND REASON NOT TO BUY FOR QUAL FEMALES

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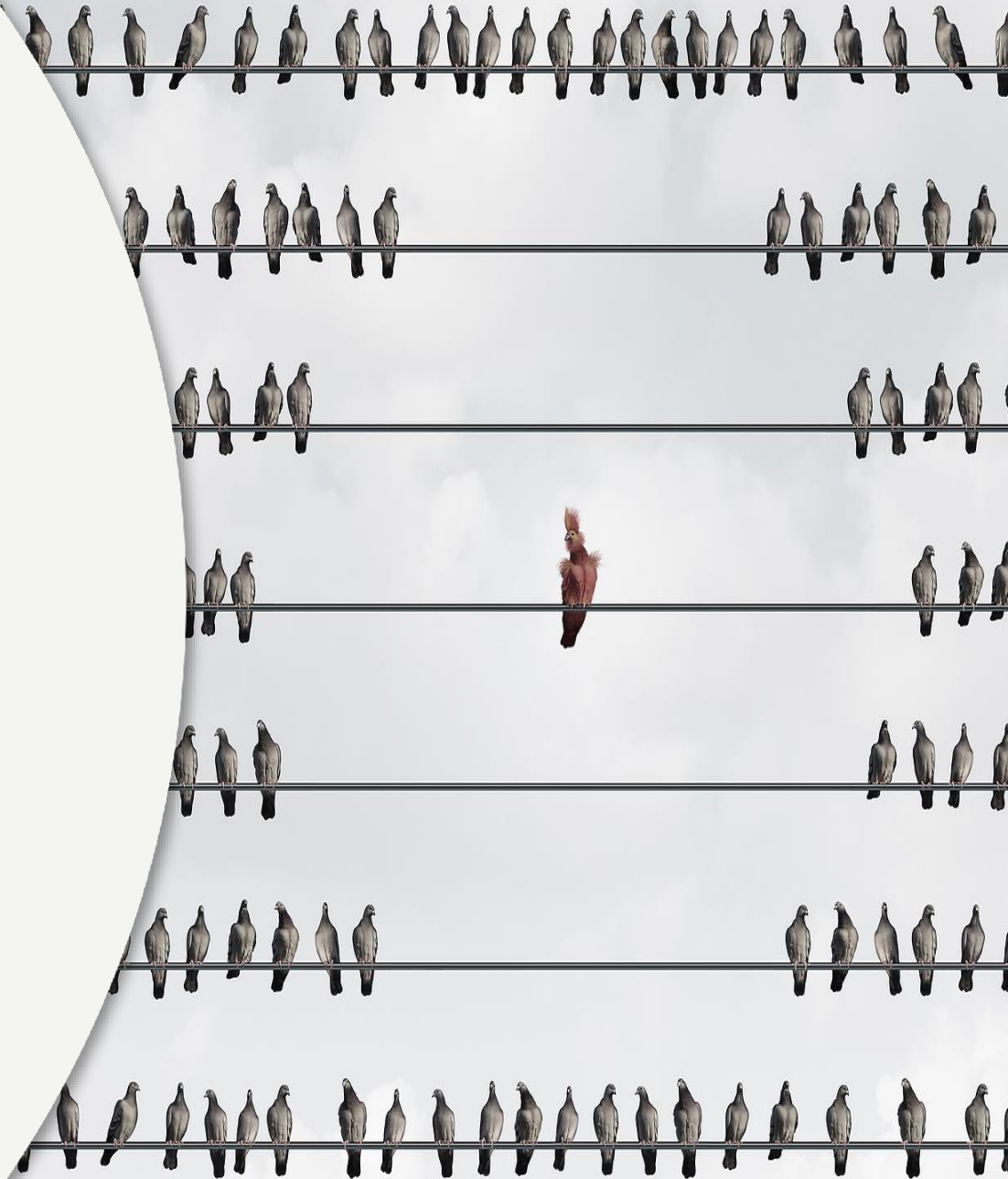
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QC13A: The brand or service I stopped buying offended/disrespected... (SELECT ALL THAT APPLY)?  
BASE: THOSE THAT STOPPED BUYING A BRAND OR SERVICE BECAUSE IT OFFENDED THEM OR  
DISRESPECTED THEIR VALUES 685 25-49 Parents of 8-12 aged kids + 62213-17s

# BRAND SOCIAL MEDIA BACKLASH CAN BE THE TIPPING POINT TO QUIT A BRAND YOU LIKE

(especially for teens)

46



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Source: CMC 2020 qualitative



# ANIMALS, RAINFORESTS & RACISTS

**64%** left a brand  
simply because  
something new  
was tempting  
(13-49)

48



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QC14: Have you ever stopped buying a brand simply because a newer brand caught your eye? BASE: 1,220 25-49 Parents of 8-12 aged kids + 1,198 13-17s

# TIME HAS RUN OUT...

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The MC majority has arrived & spreading rapidly...  
from teens to <35s to <50s

If you are not already focused on MC literacy, better  
hurry... or risk your brand becoming irrelevant or  
worse, negative social currency

Brands need to avoid mono-cultural marketing  
bubbles; they are culturally dangerous feedback loops

F&L influencers drive purchase behaviors & HISPs,  
NHBs & NHWs ALL follow mostly POC influencers

You can't take calculated cultural risks if you are  
unsure of your own brand cultural values & those of  
your customers

**BE CULTURALLY LITERATE &  
HIRE IN-CULTURE EXPERTS TO  
GUIDE YOU**





THANK YOU

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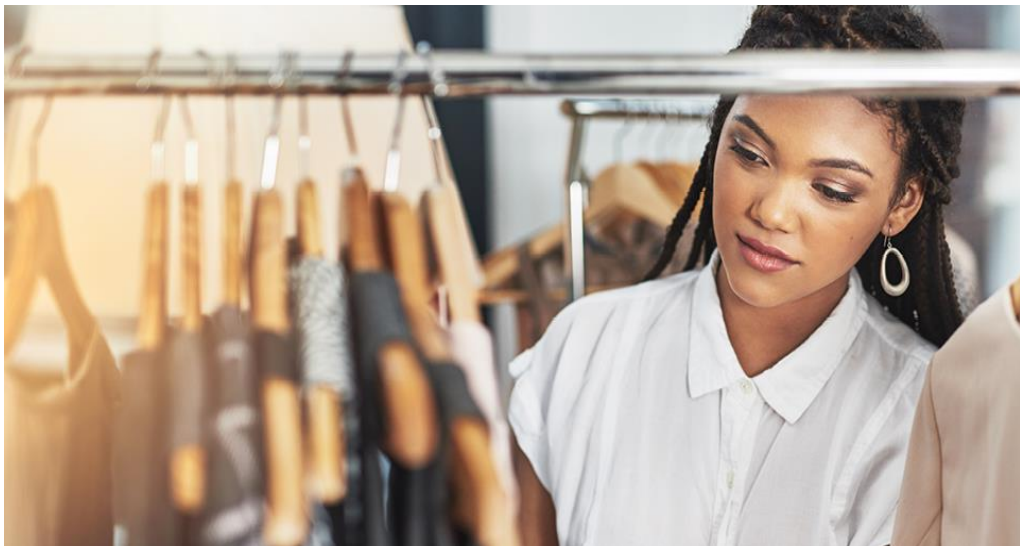
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Receive an update on the tech devices and media platforms we are using and the evolution of SVOD since 2018.
- **The Time is Now Part 4 - Welcome to The Evolution!** on **February 11<sup>th</sup> at 3pm ET**  
Receive an advanced cultural literacy course, including a deep dive into the “Cultural Closets” of Black & Hispanic Gen Zers and their parents to discover what they are keeping, throwing out and adding in.

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