The Hispanic Millennial Project

Wave 5: Media, Entertainment & Technology

ASIAN FOCUS
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The Hispanic Millennial Project is a joint research study developed by integrated cross-cultural advertising agency Sensis and market research firm ThinkNow Research.
ThinkNow Research

Online Panel
Over 30,000 respondents to recruit from
Nationally-representative, per Census
Unique recruitment model that encompasses online and offline recruitment methods such as Spanish-language television advertising

Research
Fortune 500 clients
Over 30 years of research experience specifically in the Hispanic market
Only Hispanic market research company that owns & operates an in-house panel

Experts in Hispanic Market Research
ThinkNow Research provides innovative online market research solutions for companies looking to understand the U.S. Hispanic consumer. We specialize in researching the U.S. Hispanic demographic and other hard-to-reach consumers in order to deliver high quality research to our clients that bear actionable and meaningful results.
Topics we have explored

• Introduction, Higher Education, & American Dream
  – The initial wave established a deeper understanding of Hispanic Millennials and highlighted meaningful differences between this group and other cohorts.

• Healthcare & Wellness
  – The 2nd wave focused on healthcare and explored attitudes and behaviors associated with health, diet, and exercise, as well as health-related technology, insurance, and the Affordable Care Act.

• Financial Services & Wealth
  – The 3rd wave explored attitudes and opinions among Hispanic Millennials about money, saving, financial well-being, and banking.

• Food, Beverage, & Alcohol
  – The 4th wave explored both the cultural impact and shopping behavior associated with food, beverage, and alcohol consumption.
This 5th wave explores the impact of culture on the Millennial consumption of media, technology, and entertainment.
38% of US Population is Multicultural

But Younger Americans are more likely to be Multicultural

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Hispanic</th>
<th>African American</th>
<th>Asian</th>
<th>Mixed Race &amp; Other</th>
<th>Non-Hispanic White</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 5 Years</td>
<td>26%</td>
<td>14%</td>
<td>6%</td>
<td>5%</td>
<td>50%</td>
</tr>
<tr>
<td>5 to 13 Years</td>
<td>25%</td>
<td>14%</td>
<td>6%</td>
<td>4%</td>
<td>52%</td>
</tr>
<tr>
<td>14 to 17 Years</td>
<td>24%</td>
<td>14%</td>
<td>5%</td>
<td>3%</td>
<td>54%</td>
</tr>
<tr>
<td>18 to 34 Years</td>
<td>21%</td>
<td>14%</td>
<td>5%</td>
<td>2%</td>
<td>57%</td>
</tr>
<tr>
<td>35 to 49 Years</td>
<td>19%</td>
<td>13%</td>
<td>7%</td>
<td>2%</td>
<td>60%</td>
</tr>
<tr>
<td>50 to 64 Years</td>
<td>12%</td>
<td>12%</td>
<td>5%</td>
<td>2%</td>
<td>70%</td>
</tr>
<tr>
<td>65 Years and Over</td>
<td>8%</td>
<td>9%</td>
<td>4%</td>
<td>2%</td>
<td>78%</td>
</tr>
</tbody>
</table>

Methodology

- ThinkNow Research conducted a nationwide online survey during June, 2015.
- A total of n=1,512 interviews were completed. Qualified respondents were segmented into one of the following five segments.

<table>
<thead>
<tr>
<th></th>
<th>Hispanic Millennials</th>
<th>Hispanics 35+</th>
<th>Non-Hispanic White Millennials</th>
<th>Asian Millennials</th>
<th>African-American Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin</td>
<td>Self-identify as Hispanic origin</td>
<td>Self-identify as Hispanic origin</td>
<td>Self-identify as White Non-Hispanic origin*</td>
<td>Self-identify as Asian</td>
<td>Self-identify as African-American</td>
</tr>
<tr>
<td>Age</td>
<td>18 to 34 years of age</td>
<td>35 to 64 years of age</td>
<td>18 to 34 years of age</td>
<td>18 to 34 years of age</td>
<td>18 to 34 years of age</td>
</tr>
<tr>
<td>Base Size</td>
<td>N=306 (Foreign Born: 91)</td>
<td>N=305 (Foreign Born: 95)</td>
<td>N=301</td>
<td>N=300</td>
<td>N=300</td>
</tr>
</tbody>
</table>

- Respondents in each group were weighted to match US Census for gender, age and US region.

*Non-Hispanic White (does not include African-Americans, Asians and other ethnic groups)
Profile of Asian Millennials
Asian Millennials
Entertainment & Media

**ENTERTAINMENT**

Top 3 reasons why I entertain myself

- To escape
- To relax
- To learn something new

81% primarily consume media in English (lowest for TV – 91%, highest for radio – 96%)

**TV / STREAMING**

Live TV viewing vs. Streaming / Timeshifted

- 32% watch live television most often
- 55% stream TV programming most often

66% have Binge Watched in the past 30 days

Top 5 TV networks watched during the past seven days:

- abc 29%
- Discovery Channel 24%
- abc family 22%
- Comedy Central 21%
- Disney 20%

**MOVIES**

On average has gone to the theater 3 times in the past six months

**MUSIC**

On average streams music 2.6 hours per day

32% have gone to a concert at least once in the past six months

Platforms used to listen to music:

- YouTube 82%
- Pandora 52%
- iTunes 46%
Asian Millennials
Tech, Gaming, & Advertising

**Social Media**

<table>
<thead>
<tr>
<th>Social Sites Visited Daily</th>
<th>Social Messaging Apps Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube: 72%</td>
<td>Facebook: 68%</td>
</tr>
<tr>
<td>Facebook: 68%</td>
<td>Instagram: 40%</td>
</tr>
<tr>
<td>Twitter: 33%</td>
<td>Facebook Messenger: 68%</td>
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<tr>
<td></td>
<td>Skype: 56%</td>
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<tr>
<td></td>
<td>Snapchat: 33%</td>
</tr>
<tr>
<td></td>
<td>WhatsApp: 28%</td>
</tr>
</tbody>
</table>

49% subscribe or follow YouTube channels/personalities

**Gaming**

Spend on average 6 hours a week playing video games

**Casual vs. Heavy Gamer**

(Core + Casual + Hardcore + Pro)

<table>
<thead>
<tr>
<th>Casual Players</th>
<th>Core Players</th>
<th>Hardcore Players</th>
<th>Pro Players</th>
</tr>
</thead>
<tbody>
<tr>
<td>48%</td>
<td>36%</td>
<td>13%</td>
<td>3%</td>
</tr>
</tbody>
</table>

32% plan on buying smart glasses
56% are most likely to use a GPS app on mobile
50% use multiple devices at the same time several times a day (i.e., watch television while using a smartphone)

**Advertising**

Top 4 Influences on TV and Movie Watching

<table>
<thead>
<tr>
<th>Television</th>
<th>Movies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word-of-Mouth</td>
<td>42%</td>
</tr>
<tr>
<td>Recomendations from friends on social media</td>
<td>31%</td>
</tr>
<tr>
<td>Advertisements on TV</td>
<td>29%</td>
</tr>
<tr>
<td>My spouse/significant other</td>
<td>27%</td>
</tr>
<tr>
<td>Word-of-Mouth</td>
<td>41%</td>
</tr>
<tr>
<td>Recomendations from friends on social media</td>
<td>38%</td>
</tr>
<tr>
<td>Advertisements on TV</td>
<td>36%</td>
</tr>
<tr>
<td>Word-of-Mouth</td>
<td>36%</td>
</tr>
</tbody>
</table>

67% play video games with other players several times a week
Why Is This Culturally Relevant?

**ASIAN CULTURE EMPHASIZES the greater good**

WHILE **AMERICAN CULTURE EMPHASIZES THE individual**;

**THEREFORE, COMMON AMERICAN THEMES DON’T RESONATE WITH** Asian Millennials.
Digital Product Usage
Asian Millennials over-index on ownership of common digital products

Please rate how much you agree or disagree with the following statements.
(Top 2 Box Agreement)
iOS is easily the top operating system among Asian Millennial smartphone users.

Which operating system does your current mobile phone use?

Base: Own a smartphone

- iOS (Apple): 52%
- Android: 41%
- Windows: 9%
- Blackberry: 1%

Q2. Which operating system does your current mobile phone use?
Like other Millennials groups, Asians utilize their smart phone for a wide variety of tasks

Which of the following activities have you done in the past 7 days on your mobile phone?

- Used a search engine like Google or Yahoo
- Listened to music
- Watched a video
- Sent a text to someone you know
- Visited or used a social networking site
- Used an application or "App"

- Hispanic Millennials
- Non-Hispanic White Millennials
- Asian Millennials
- African-American Millennials
Asian Millennials spend an average of 2 hours a day on social media – slightly less than the other groups.
Social networking apps are quite common among Millennials in general.

Which of the following kinds of Apps have you personally used in the last 7 days?
Like many other Millennials, Asians prefer to view other people’s online content than to post their own.

Which of these statements best describes you?

- Always/Regularly comment or post online content
  - Hispanic Millennials: 56%
  - Non-Hispanic White Millennials: 57%
  - Asian Millennials: 47%
  - African American Millennials: 57%

- I prefer to view other people’s online content than I am to post my own.
  - Hispanic Millennials: 55%
  - Non-Hispanic White Millennials: 65%
  - Asian Millennials: 65%
  - African American Millennials: 59%
Social media are most apt to influence Asian and Hispanic Millennials entertainment consumption particularly for movies and TV.

Which of the following sources would you say influence the movies you go watch at a theater?

From movie companies that I follow on social media (Facebook, Twitter, Instagram, etc.):
- Hispanic Millennials: 17%
- Non-Hispanic White Millennials: 13%
- Asian Millennials: 16%
- African-American Millennials: 13%

Which of the following sources would you say influence the programs you watch?

From networks that I follow on social media (Facebook, Twitter, Instagram, etc.):
- Hispanic Millennials: 24%
- Non-Hispanic White Millennials: 16%
- Asian Millennials: 18%
- African-American Millennials: 18%
TV Watching/Entertainment
Asian Millennials are adapting the earliest to streaming TV programming.

Proportion of All TV Hours Watched Per Method (Live vs. Streaming, etc.)

How Will You Watch TV in the Near Future? Exclusively/Mostly Streaming

- **Proportion of Streaming TV**
  - Hispanic Millennials: 34%
  - Non-Hispanic White Millennials: 37%
  - Asian Millennials: 39%
  - African-American Millennials: 32%

- **Exclusively/Mostly Streaming**
  - Hispanic Millennials: 34%
  - Non-Hispanic White Millennials: 37%
  - Asian Millennials: 50%
  - African-American Millennials: 30%
Streaming non-English programming is common among Asian Millennials - even those who are US born.

Have you streamed any non-English language programming in the past 30 days?

- Total Asian Millennials: 42%
- US Born: 40%
- Foreign Born: 47%
The ethnicity of an actor is relevant to both Asian and African-American Millennials.

If a new TV program has actors of the same ethnic background as you, what impact does this have on your interest level in seeing the program?

Top 2 Box

<table>
<thead>
<tr>
<th></th>
<th>Hispanic Millennials</th>
<th>Asian Millennials</th>
<th>African-American Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Makes me much/somewhat more interested</td>
<td>45%</td>
<td>58%</td>
<td>56%</td>
</tr>
</tbody>
</table>
Entertainment helps Foreign-Born Asian Millennials remain connected to their culture

How much of an influence would you say your culture/heritage is on each of the following? (Big Influence)

- Music you listen to:
  - U.S.-Born Asian Millennials: 17%
  - Foreign-Born Asian Millennials: 26%

- Movies you watch:
  - U.S.-Born Asian Millennials: 20%
  - Foreign-Born Asian Millennials: 31%
YouTube is one of the most visited online platforms for Asian Millennials.

Approximately how often do you access/use each of the following online platforms, if at all?

- **Visit YouTube At Least Once a Day**
  - Hispanic Millennials: 71%
  - Non-Hispanic White Millennials: 61%
  - Asian Millennials: 72%
  - African-American Millennials: 69%
... it is their go-to site for music and TV programming.

What are all the ways that you watch TV programming?

- YouTube: 57% Hispanic Millennials, 51% Non-Hispanic White Millennials, 67% Asian Millennials, 55% African-American Millennials

On which of the following services/platforms do you listen to music?

- YouTube: 78% Hispanic Millennials, 74% Non-Hispanic White Millennials, 82% Asian Millennials, 81% African-American Millennials

Base: Among Those Who Stream Music
Asian Millennials are more likely to use gaming apps, as well as apps for weather and fitness.

Which of the following kinds of Apps have you personally used in the last 7 days?

- Gaming Apps:
  - Hispanic Millennials: 67%
  - Non-Hispanic White Millennials: 71%
  - Asian Millennials: 73%
  - African-American Millennials: 69%

- Weather Apps:
  - Hispanic Millennials: 50%
  - Non-Hispanic White Millennials: 42%
  - Asian Millennials: 57%
  - African-American Millennials: 38%

- Fitness Apps:
  - Hispanic Millennials: 26%
  - Non-Hispanic White Millennials: 27%
  - Asian Millennials: 29%
  - African-American Millennials: 22%
Similar to other Millennial groups, Asians stream music online.

Which of these activities have you done online in the past 30 days?

- Listened to streaming music online:
  - Hispanic Millennials: 71%
  - Non-Hispanic White Millennials: 63%
  - Asian Millennials: 65%
  - African-American Millennials: 54%
There is a strong correlation between heritage and music

For all multicultural millennials

How much of an influence would you say your culture/heritage is on each of the following?
(A big influence/Somewhat of an influence)

- Music you listen to
- 69% Hispanic Millennials
- 63% Non-Hispanic White Millennials
- 62% Asian Millennials
- 67% African-American Millennials
Similar to other Millennial groups, about 8-in-10 Asians reported playing video games in the past year.

Which of the following activities have you done in the past 12 months?

- Played a video game in the past 12 months:
  - Hispanic Millennials: 80%
  - Non-Hispanic White Millennials: 83%
  - Asian Millennials: 80%
  - African-American Millennials: 81%
Asian and Hispanic Millennials are less serious about gaming compared to NH Whites and African-Americans

Which of the following best describes you in regards to playing video games?

Base: Video Game Players

- 'Casual' video game player (only play a few games from time to time)
- 'Core' player (play more than a casual player, but not as much as a hardcore player)
- 'Hardcore' player (frequent purchaser of games, spend a great deal of time playing)
- 'Professional' player (extremely serious about playing, participate in competitions)

Hispanic Millennials
- 48%
- 34%
- 38%

Non-Hispanic White Millennials
- 48%
- 32%
- 36%

Asian Millennials
- 38%
- 38%
- 22%

African American Millennials
- 18%
- 22%
- 13%

3% 7% 3% 6%
Asian Millennials are by far the most likely to watch others play online.

Which of the following activities have you done in the past 12 months?

- Hispanic Millennials: 50%
- Non-Hispanic White Millennials: 53%
- Asian Millennials: 68%
- African-American Millennials: 47%

Watched others play online
Clear Dissonance between Asian cultural beliefs and other Millennials
Asian Millennials identify less with the American Dream than other groups

Please rate how much you agree or disagree with the following statements.

Top 2 Box Agreement

- I believe that everyone can achieve their dreams if they try hard enough.
  - Hispanic Millennials: 77%
  - Non-Hispanic White Millennials: 69%
  - Asian Millennials: 60%
  - African-American Millennials: 70%

- Everyone should have the freedom to pursue their dreams.
  - Hispanic Millennials: 82%
  - Non-Hispanic White Millennials: 79%
  - Asian Millennials: 77%
  - African-American Millennials: 73%
.... and are less likely to believe in other themes commonly expressed in American pop culture

Please rate how much you agree or disagree with the following statements.
(Top 2 Box Agreement)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Hispanic Millennials</th>
<th>Non-Hispanic White Millennials</th>
<th>Asian Millennials</th>
<th>African-American Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td>I believe that everyone should follow their own path</td>
<td>77%</td>
<td>78%</td>
<td>71%</td>
<td>75%</td>
</tr>
<tr>
<td>Everyone deserves to be treated equally</td>
<td>76%</td>
<td>80%</td>
<td>74%</td>
<td>75%</td>
</tr>
<tr>
<td>I believe that I have control over my future</td>
<td>68%</td>
<td>71%</td>
<td>64%</td>
<td>69%</td>
</tr>
<tr>
<td>I believe in happy endings</td>
<td>64%</td>
<td>66%</td>
<td>60%</td>
<td>64%</td>
</tr>
<tr>
<td>Everything works out in the end</td>
<td>57%</td>
<td>57%</td>
<td>48%</td>
<td>55%</td>
</tr>
</tbody>
</table>
Asian Millennials

- Fastest growing ethnic group in the U.S.
- Highest earners, not as stressed about finances
- Most pessimistic in believing that their dreams will come true
- Are not heavy gamers who stick to casual formats on their mobile devices
- Only group to be more likely to own an Apple vs. Android phone
- Most likely to own laptops, tables and desktops
- Fastest group to cut the cable cord and adopt streaming services
What’s Next
Gen Z Report

- Groundbreaking research initiative on cross-cultural Gen Z segment
  - The largest generational cohort alive in the U.S. (25% of total pop)
  - The last generation where Non-Hispanic Whites make up the majority (at 53%)
- Designed to understand Hispanic, African-American, Asian and general market Gen Z and their digital behavior

Millennials are so yesterday!
THANK YOU!
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