



Cambios demográficos, nuevas audiencias, nuevas oportunidades



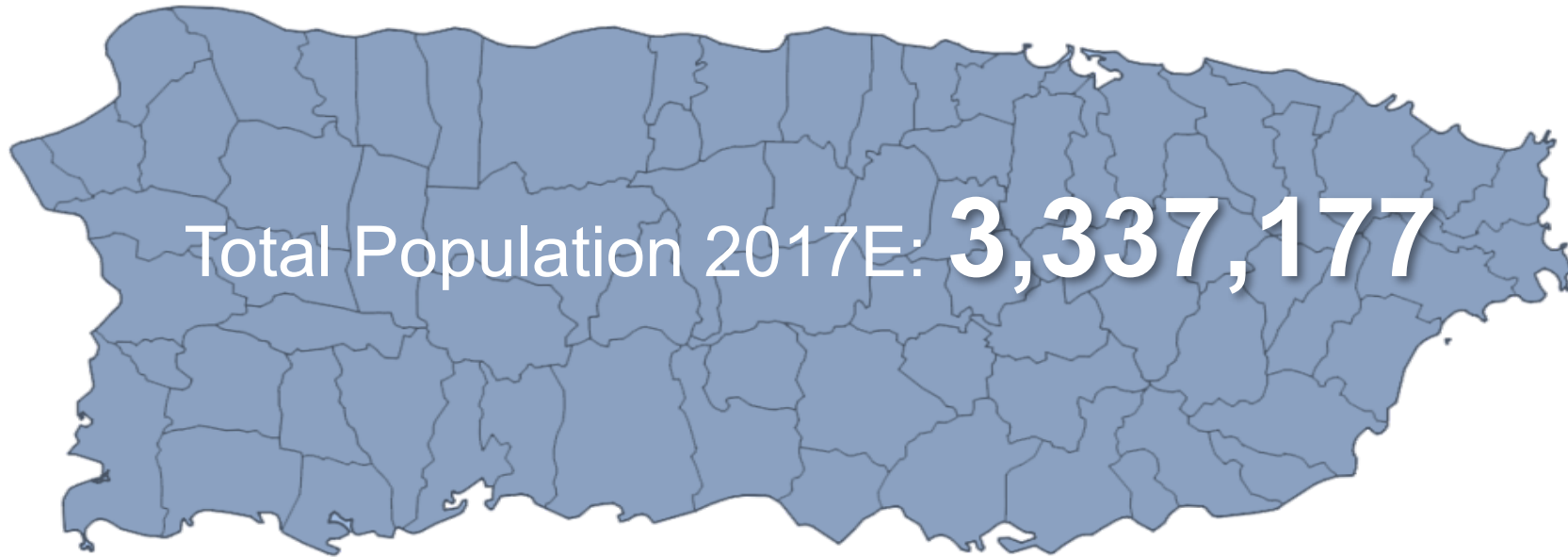
GAITHER

Get Addicted to Knowledge

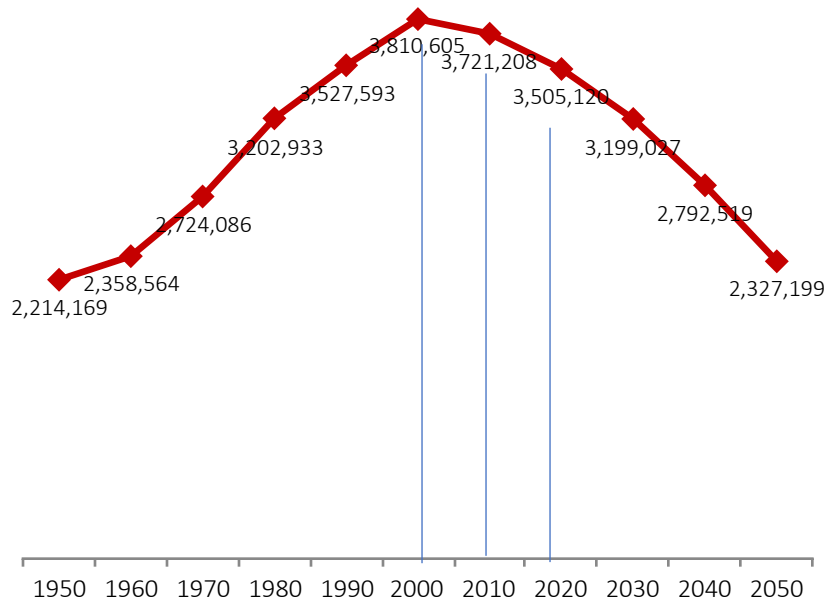
Market Presentations



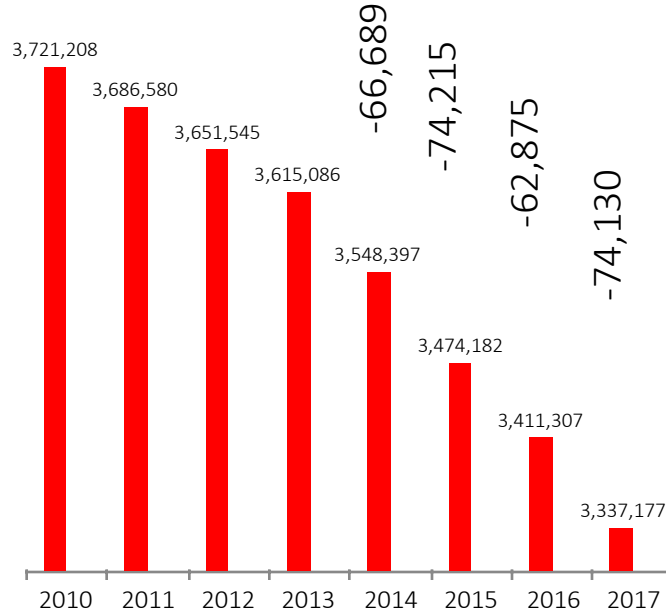
Puerto Rico's population is decreasing and aging faster than forecasted



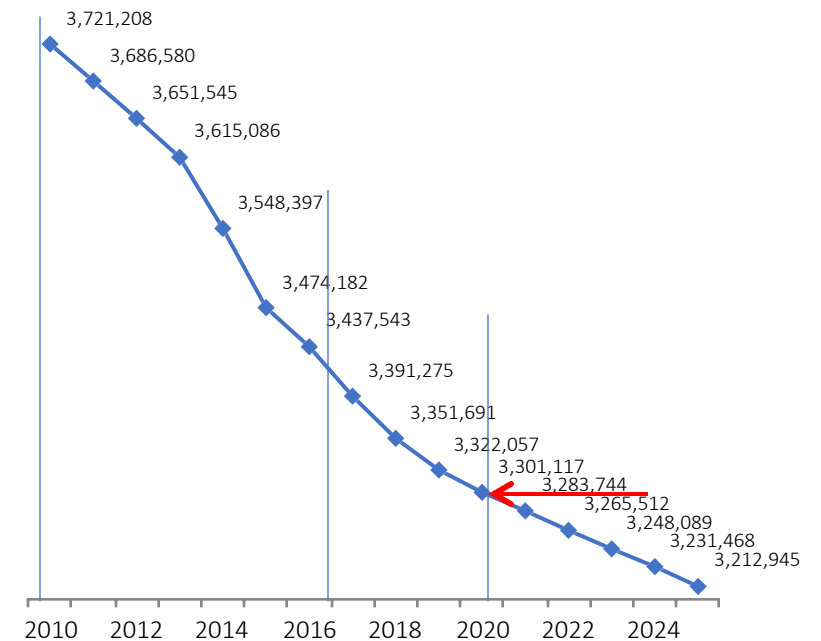
2010 Projections



Actual



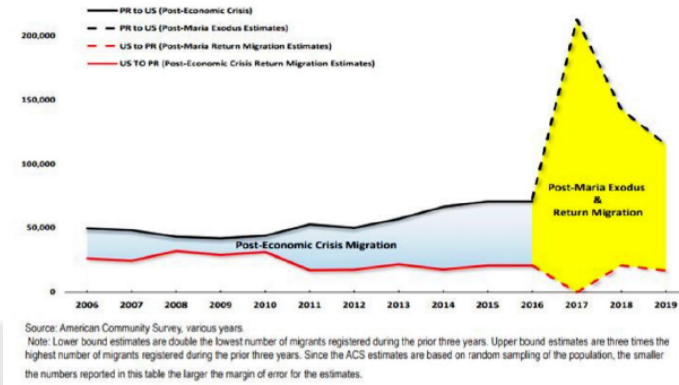
Revised Projections



Source: Junta de Planificación, Estimados Poblacionales. U. S. Census Bureau, Intercensal Estimates; International Data Base (IDB) y Population Estimates. * Total HH has not been revised. Source: US Census 2015 Est *Households Update 2013

2017-2019 Forecasts

Graphic 2. Post-Maria Migration from Puerto Rico to the United States 2006 to 2016 and 2017 to 2019 Estimates



“Less Pessimistic” – Dr. Juan Lara

200,000

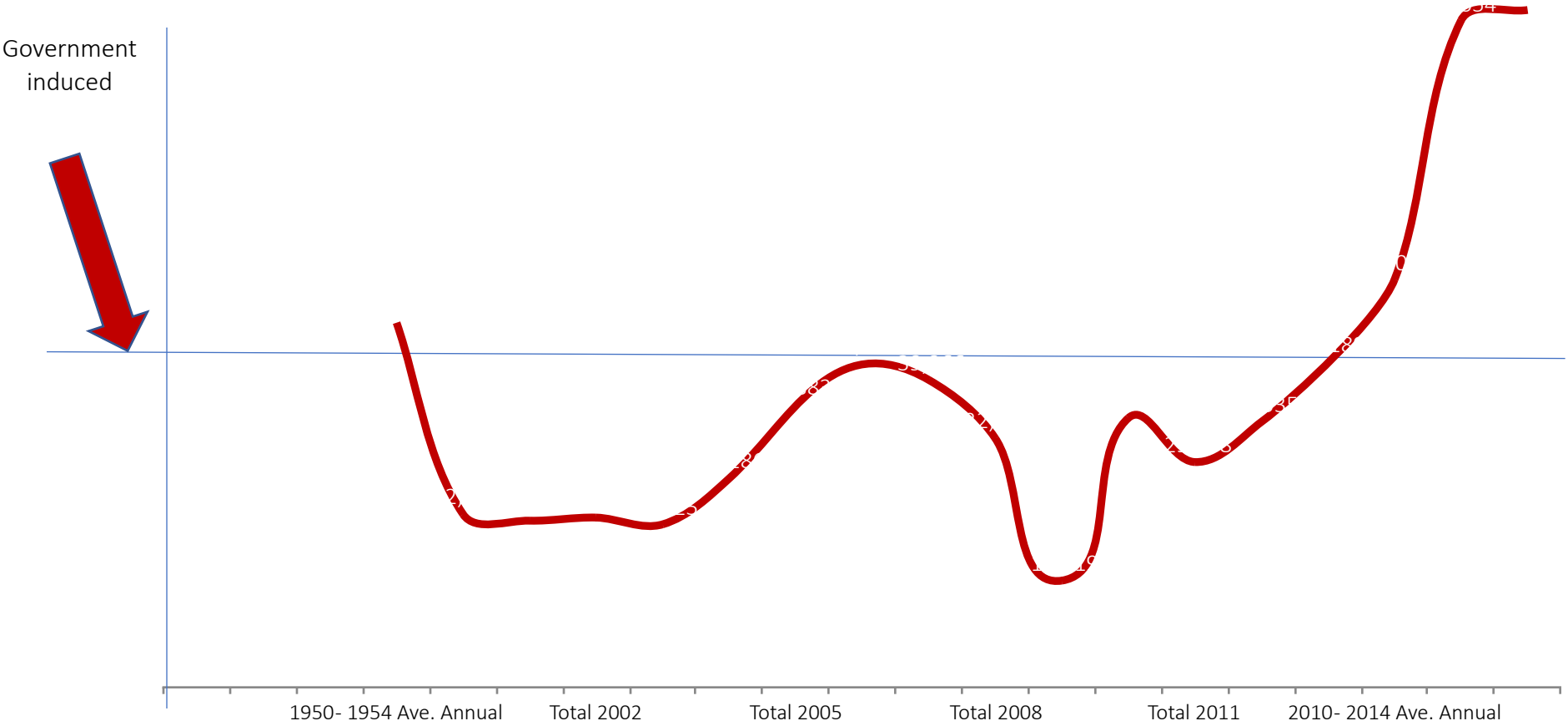
In next two years

Hecatomb – Hunter College

470,335

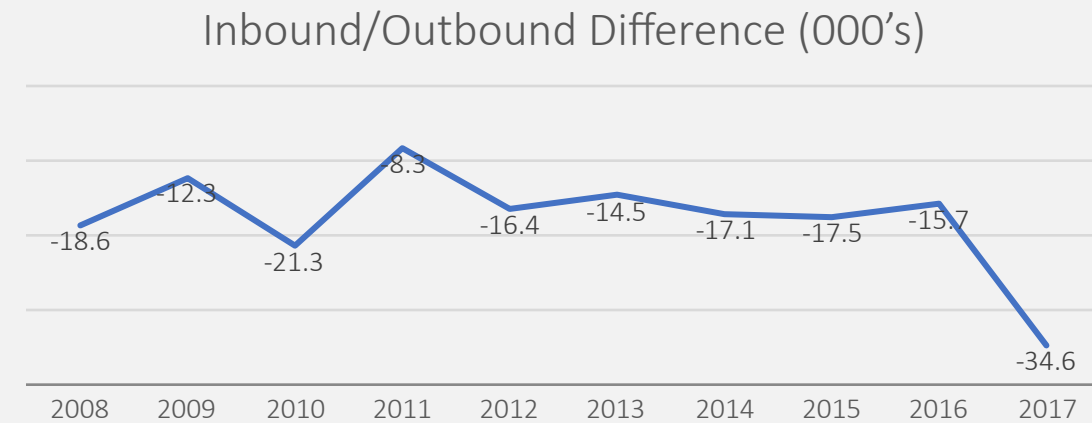
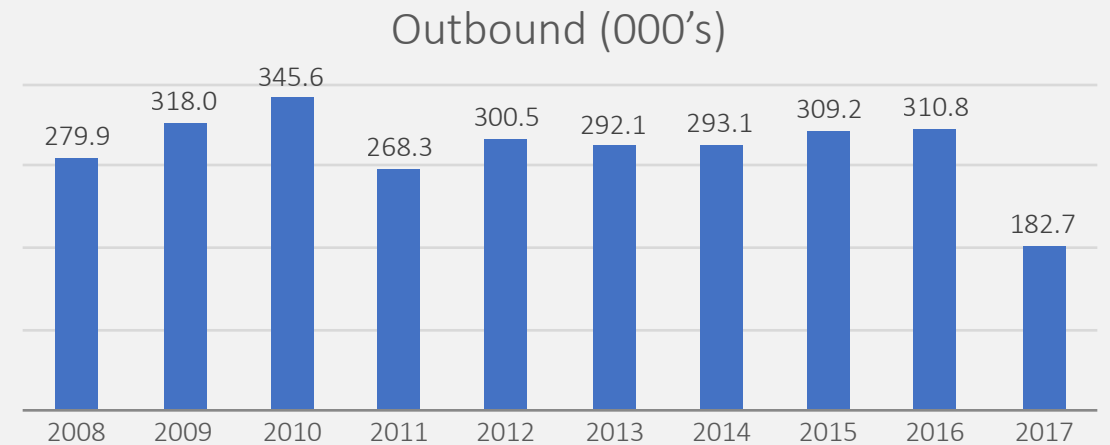
In next two years

Migration Trends



Forecast Indicators

- Historic September Air Passenger Traffic Deficit

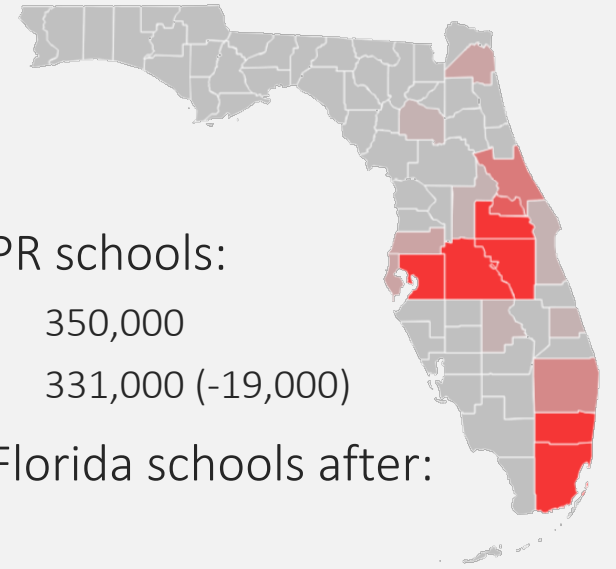


Forecast Indicators

- 300,000+ arrived in Florida since October 3, when the state began counting.
 - January 12, 2018
- 1,600 to Chicago
- El grupo poblacional más numeroso entre los migrantes serán adultos de entre 25 y 64 años, según el análisis. En el próximo año, los migrantes de esas edades serán entre 50,458 y 104,091.
 - Florida, Pennsylvania, Texas, Nueva York, Nueva Jersey, Massachusetts, Connecticut, Ohio, California e Illinois.

Forecast Indicators

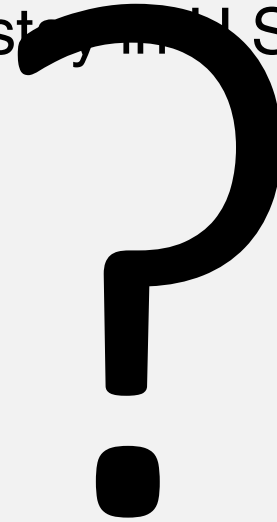
- Children registered in PR schools:
 - Before Maria: 350,000
 - After Maria: 331,000 (-19,000)
- Children registered in Florida schools after:
 - 7,756



- Elders registered in Medicare Advantage
 - 2016: 568,637
 - 2017: 555,787 (-12,850)

Forecast Indicators

Intentions to stay in U.S. after María



In a survey of more than 6,000 Puerto Ricans in the U.S. the majority seemed uncertain about whether their family members intended to return

Permanent

18.39%

Temporary

29.48%

Depends

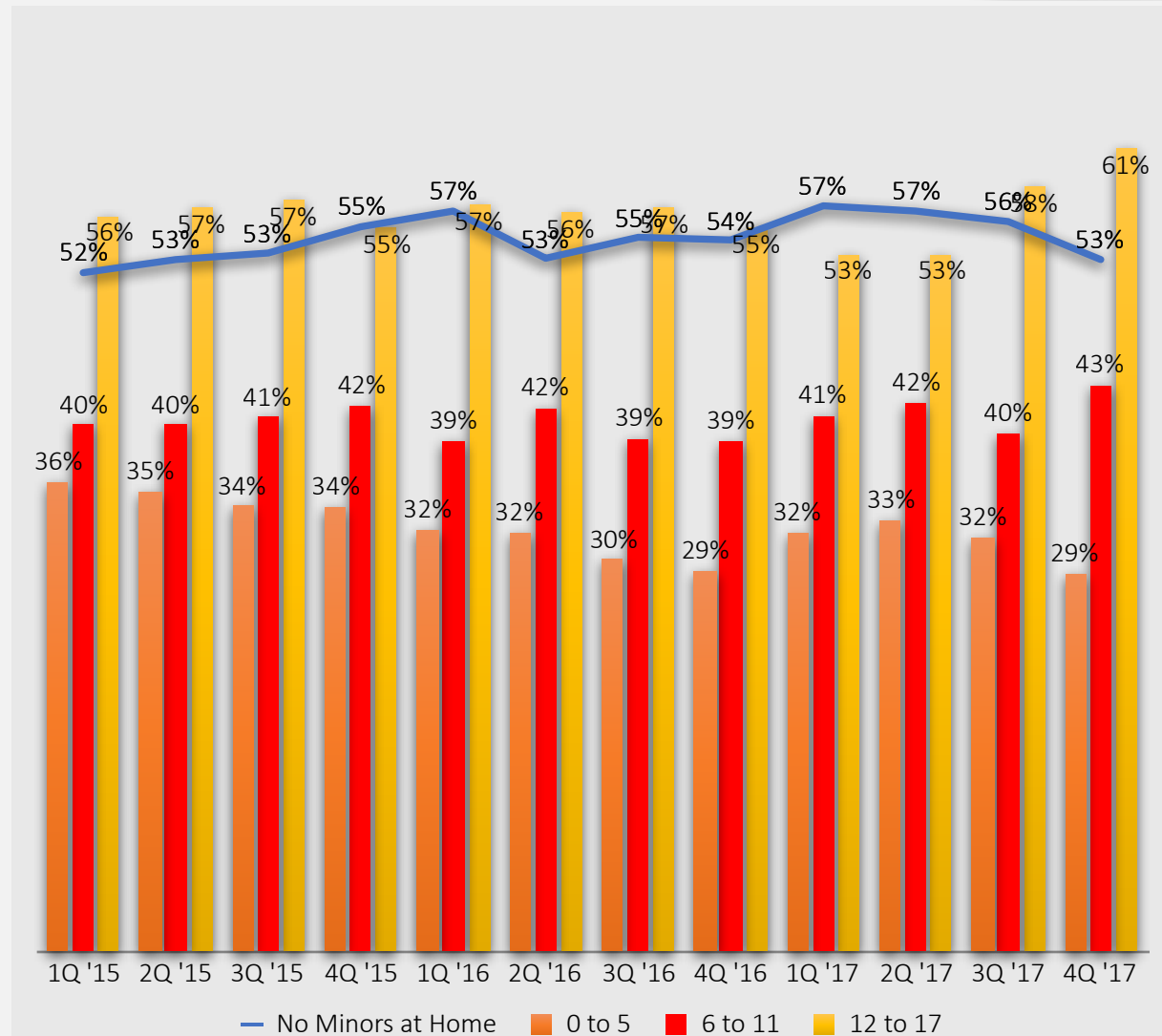
52.13%

Alexis R. Santos CC-BY-ND

Source: [Puerto Rico Diaspora Study](#) • Created with [Datawrapper](#)

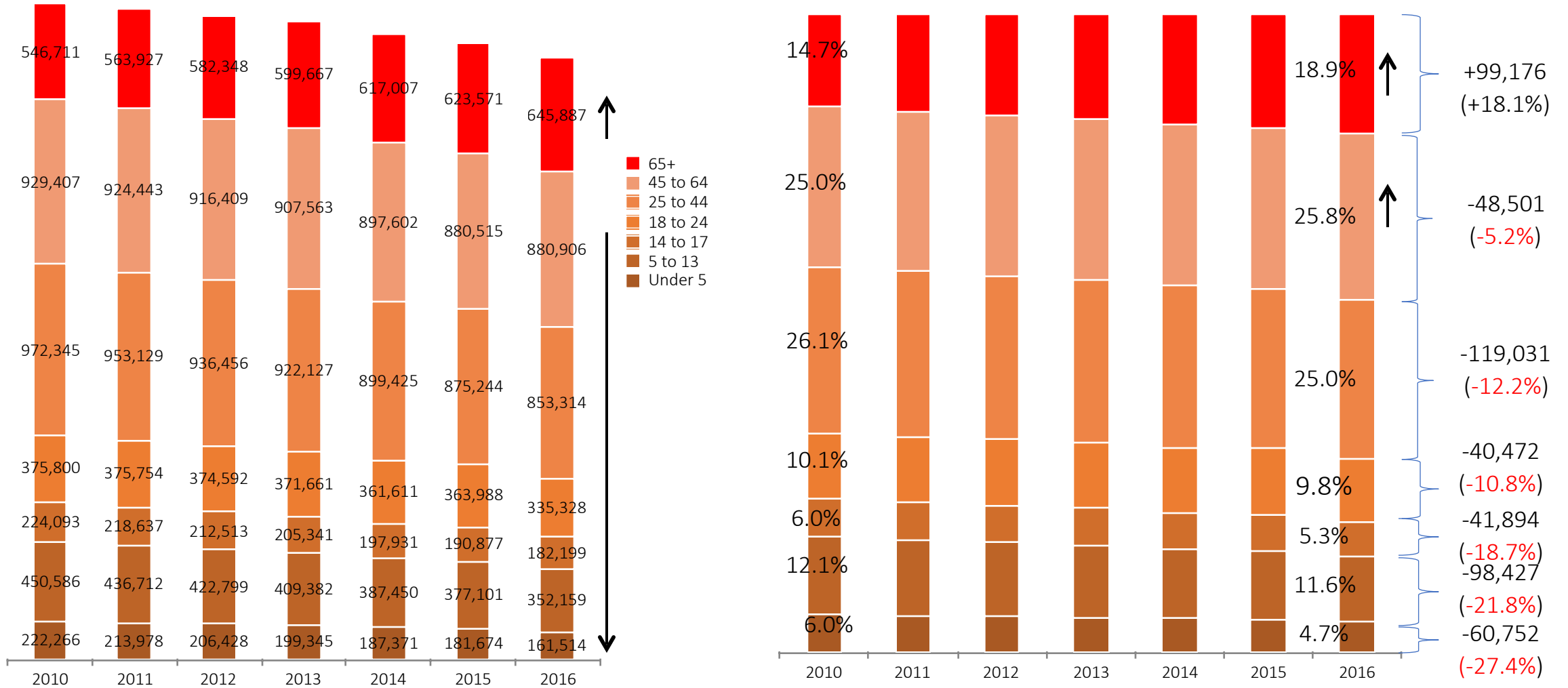
Minors at Home

Forecast Indicators



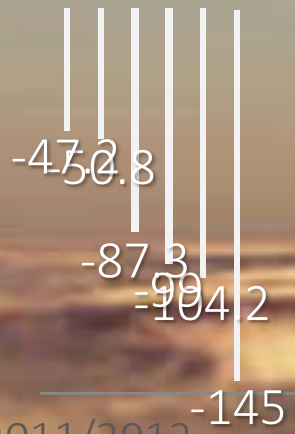
Census Population Estimates 2010 to 2016 By Age Group

Total Population: -6.1%
2016 v. 2010
-309,901



Source: Junta de Planificación, Estimados Poblacionales. U.S. Census Bureau, Intercensal Estimates; International Data Base (IDB) y Population Estimates.

Net Air Passenger Traffic

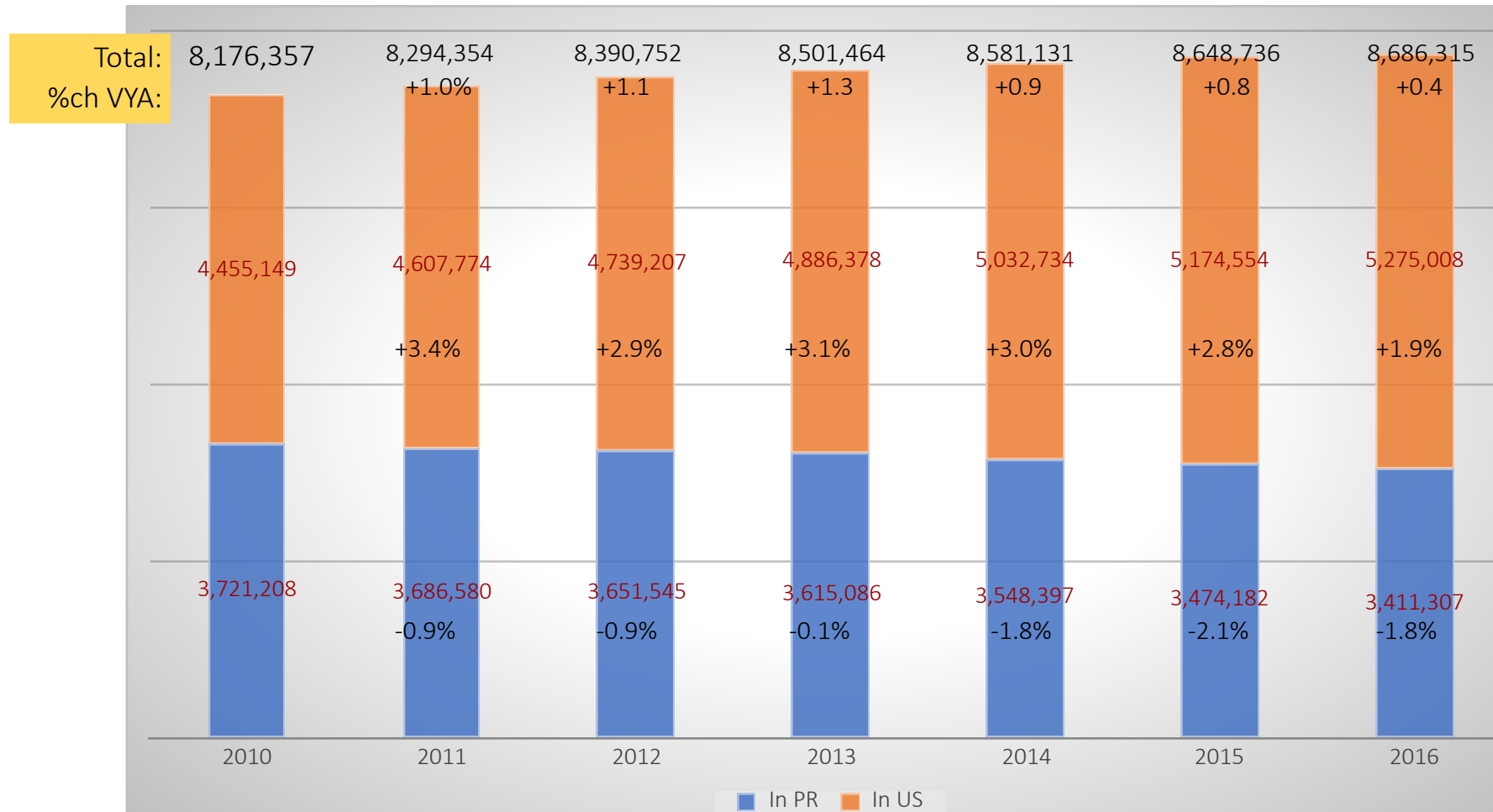


Y 2011/2012

Puerto Ricans here and there



Puerto Ricans in PR and in US



16,000 Est. Puerto Ricans in the Dominican Republic

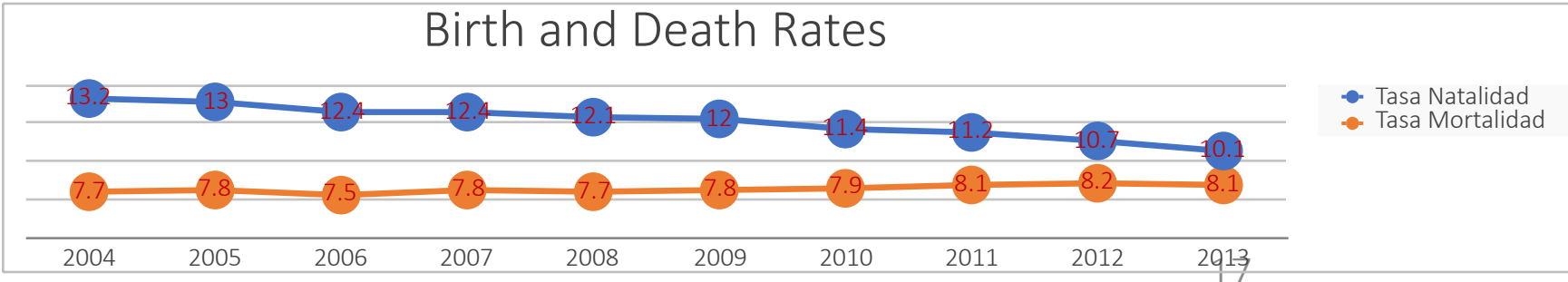
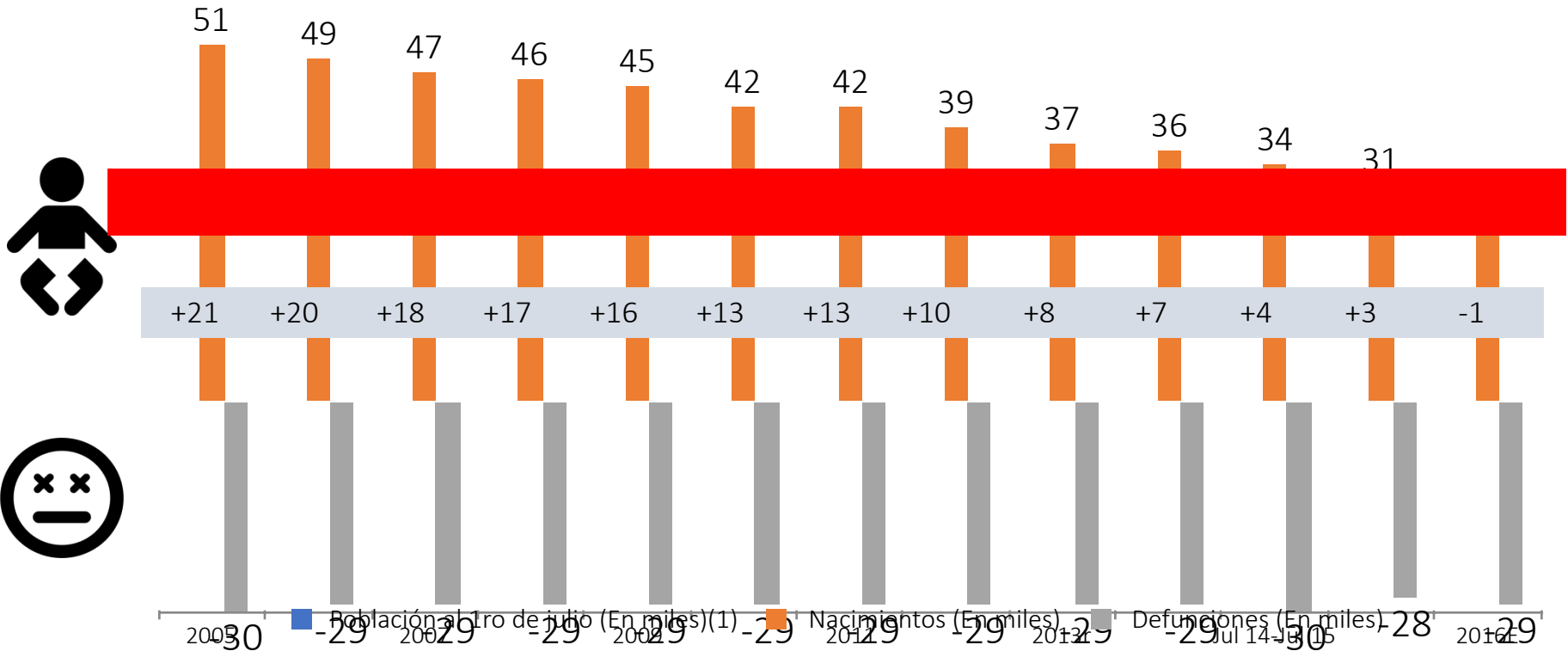
Relación de Entrada y Salidas por los Aeropuertos de Nacionales Puertorriqueños desde 2010 hasta Abril 2014

AÑO	ENTRADAS	SALIDAS	NETO
2010	46,181	43,554	2,627
2011	56,083	49,059	7,024
2012	70,008	51,516	18,492
2013	74,580	55,452	19,128
2014	16,091		

El subadministrador del Consulado de República Dominicana en Puerto Rico, Golfris Tatis dijo a Primera Hora que **las solicitudes de residencia de boricuas** que se quieren ir a vivir a Quisqueya han aumentado drásticamente.

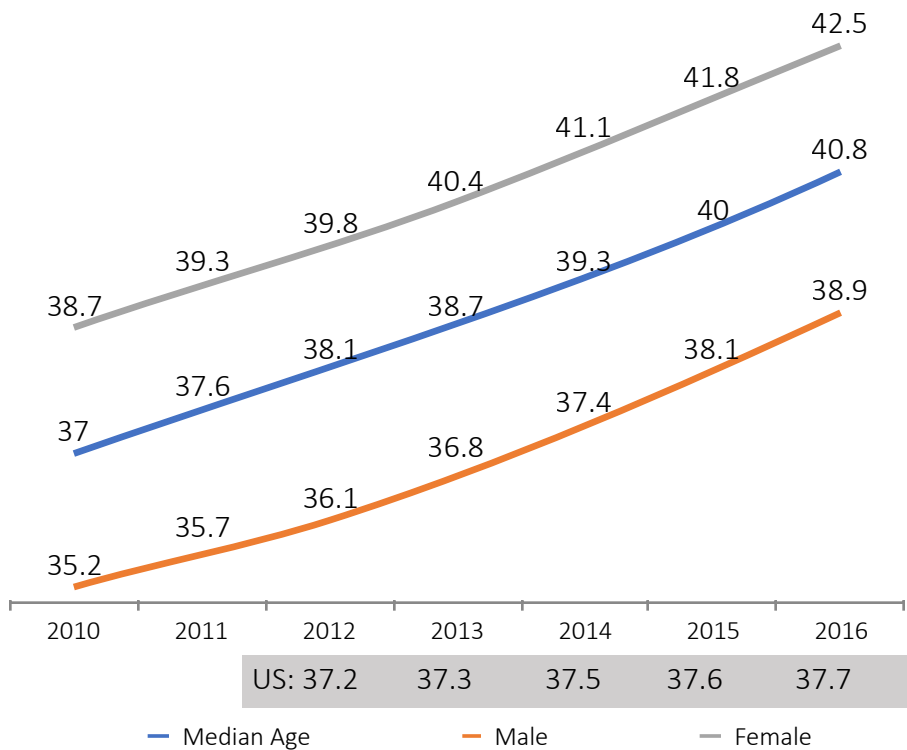


Selected Demographic Statistics



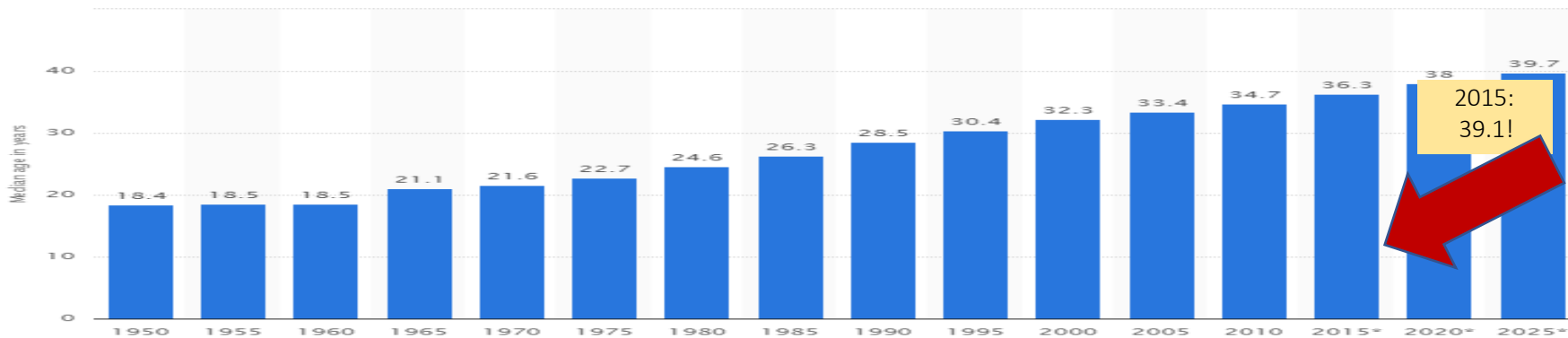
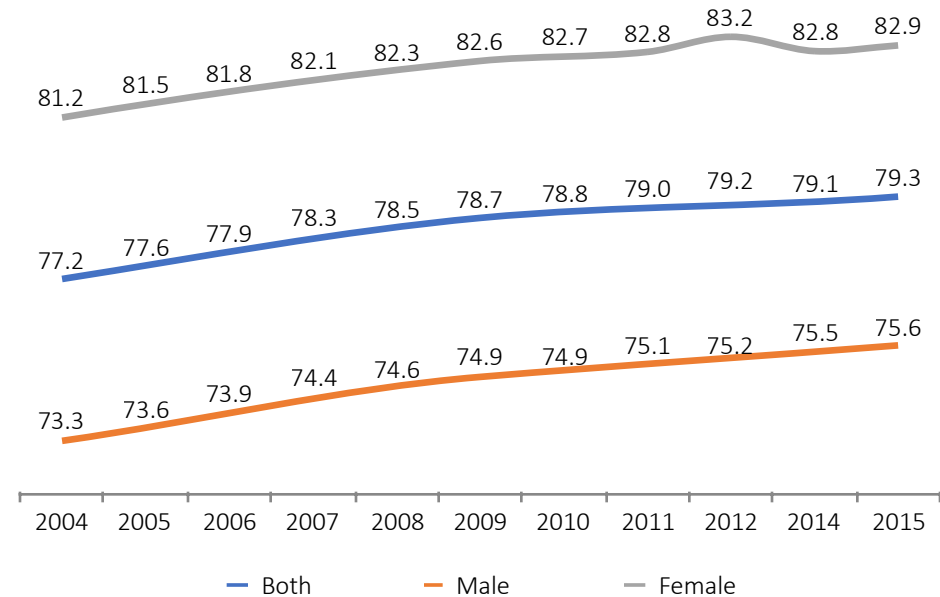
Median Age

Median Age

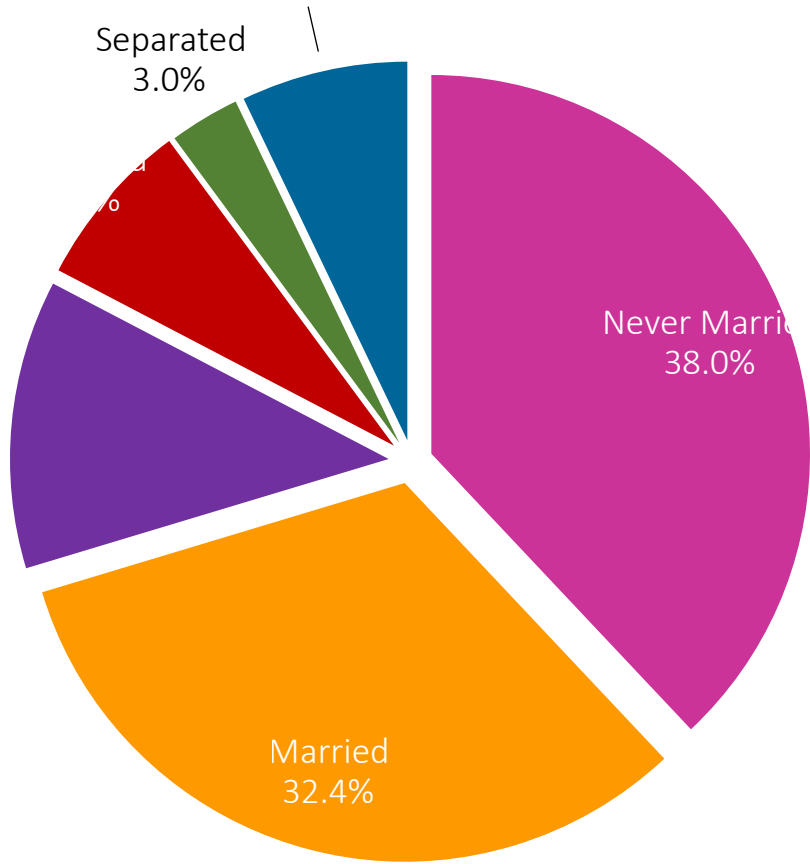


Life Expectancy

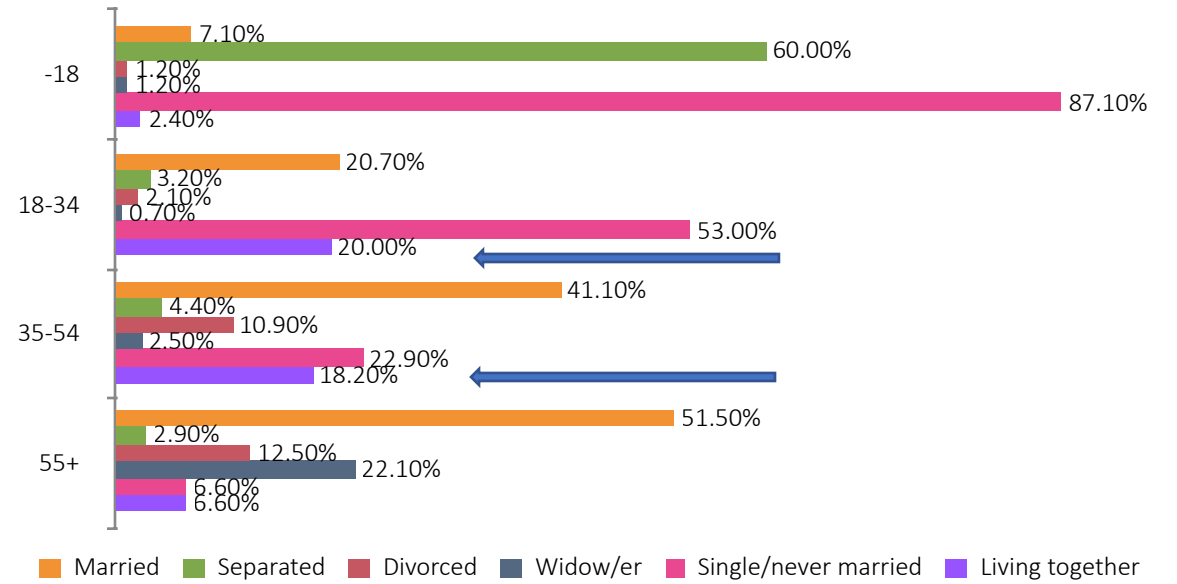
Life Expectancy



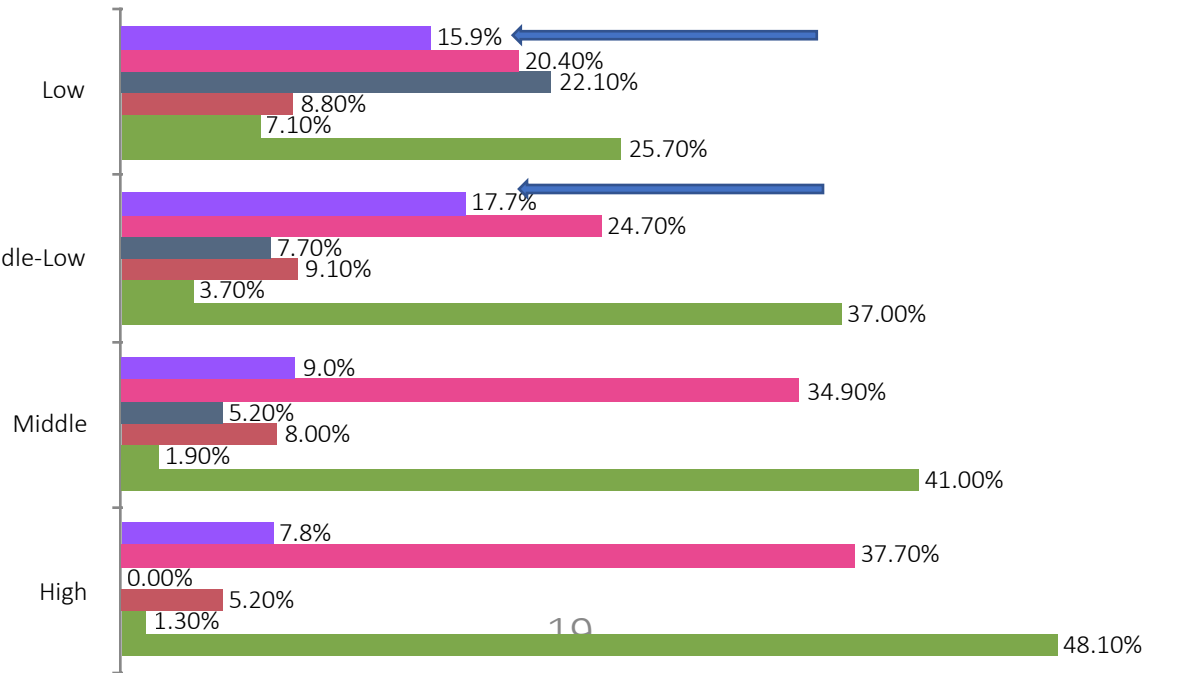
Civil Status / Adults 18+



By Age Group



By Lifestyle Tier

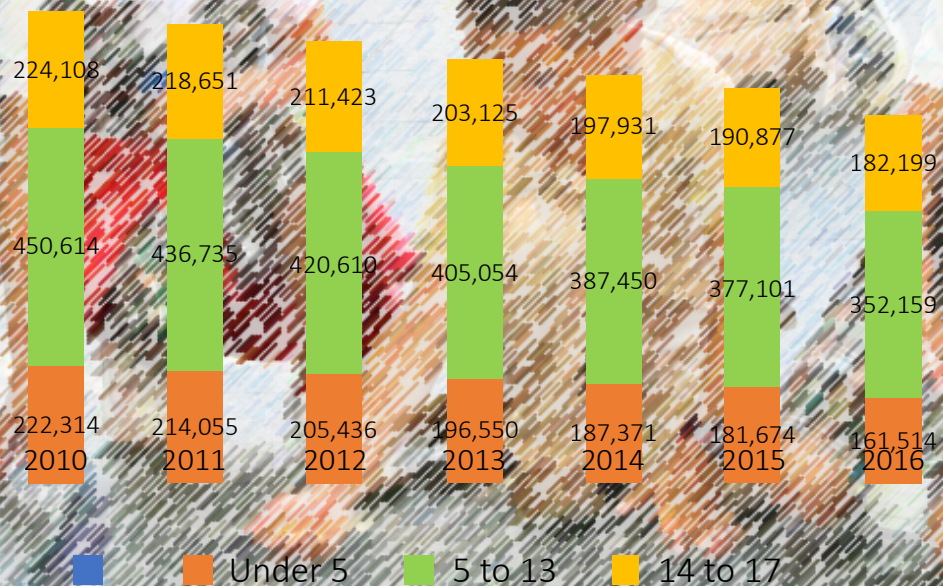


Children 0-17

21.6% of the Total Population (-201,164)

897,036

695,872



12-17: Relationship to Head-of-Household

- Son/daughter: 79.2 (Total PR 22.6%)
- Grandchild: 9.2% (2.3%)
- Other: 0.5% (1.1%)
- Spouse: 2.9% (9.4%)
- Head-of-Household: 4.3% (62.3%)

Financial Aid Received by HH with minors at home

- MiSalud: **82.6% YTD '17** 63.8% (55.7%)
- PAN: 60.4% (49.8%)
- None: 17.4% (18.9%)
- WIC: 4.8% (6.7%)
- Social Security: 11.1% (34.8%)
- Plan 8: 3.9% (3.2%)

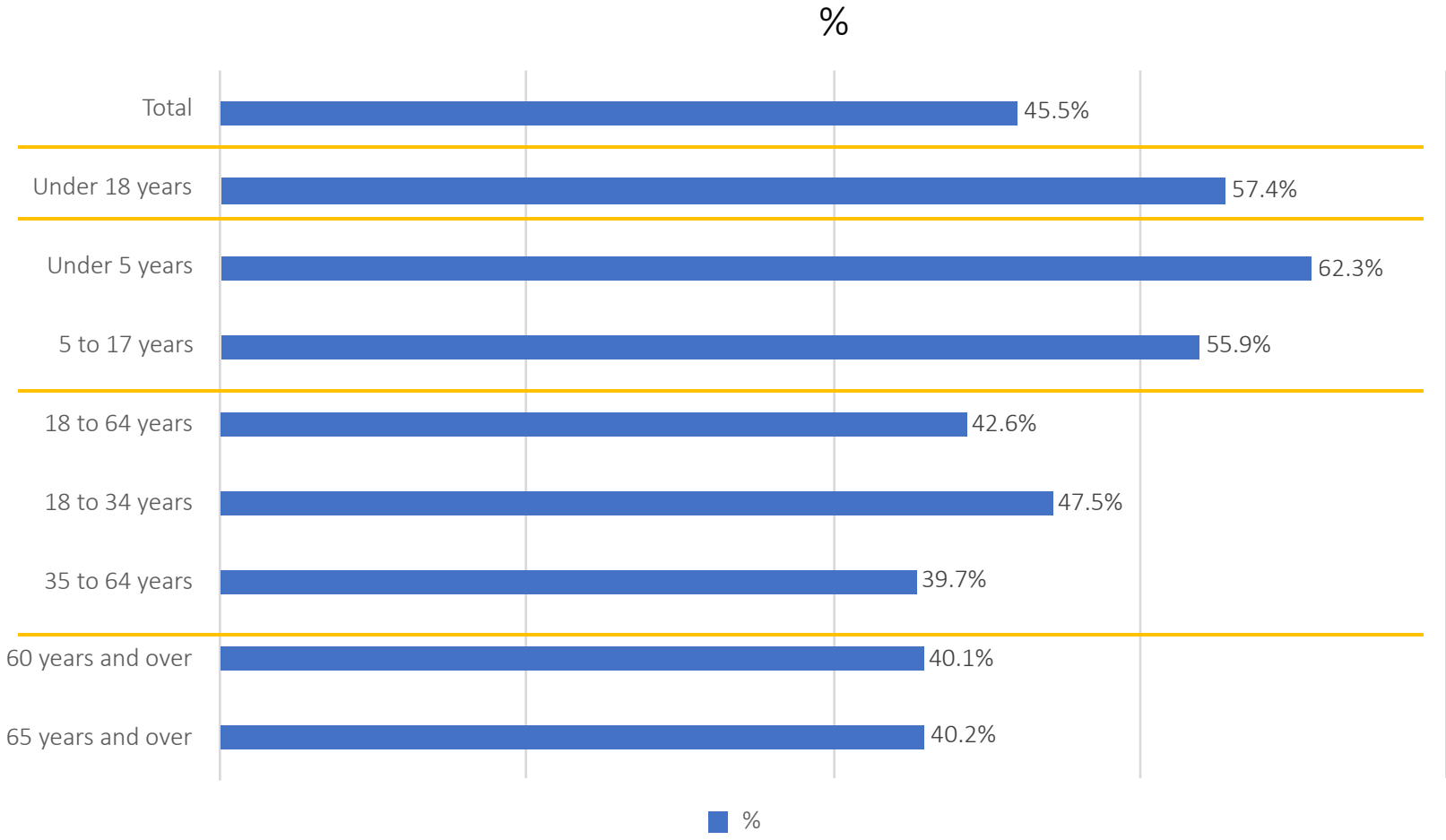
of Persons at home in HH with minors at home

- 2-3: 34.9% (53.7%)
- 4: 37.8% (20.0%)
- 5+: 27.2% (12.4%)

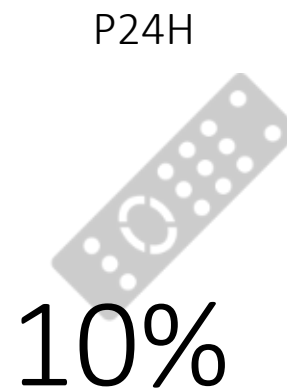
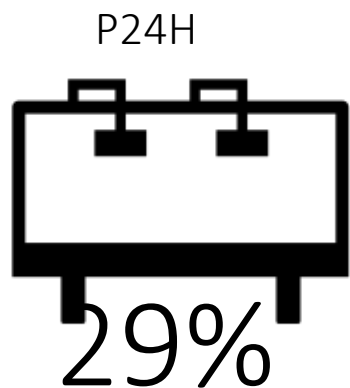
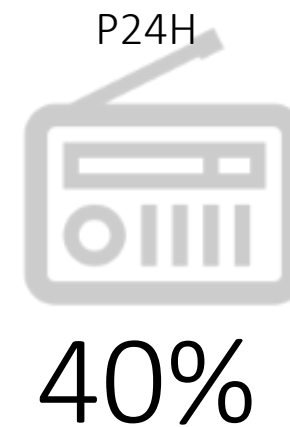
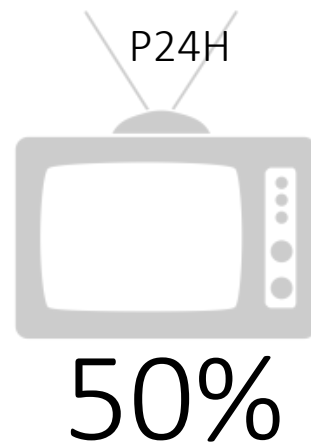
Education Level Attained

- Elementary School Incomplete: 2.9%
- Elementary School complete: 9.7%
- Middle School Incomplete: 34.3%
- Middle School complete: 12.1%
- High School Incomplete: 39.6%
- High School diploma: 1.9%

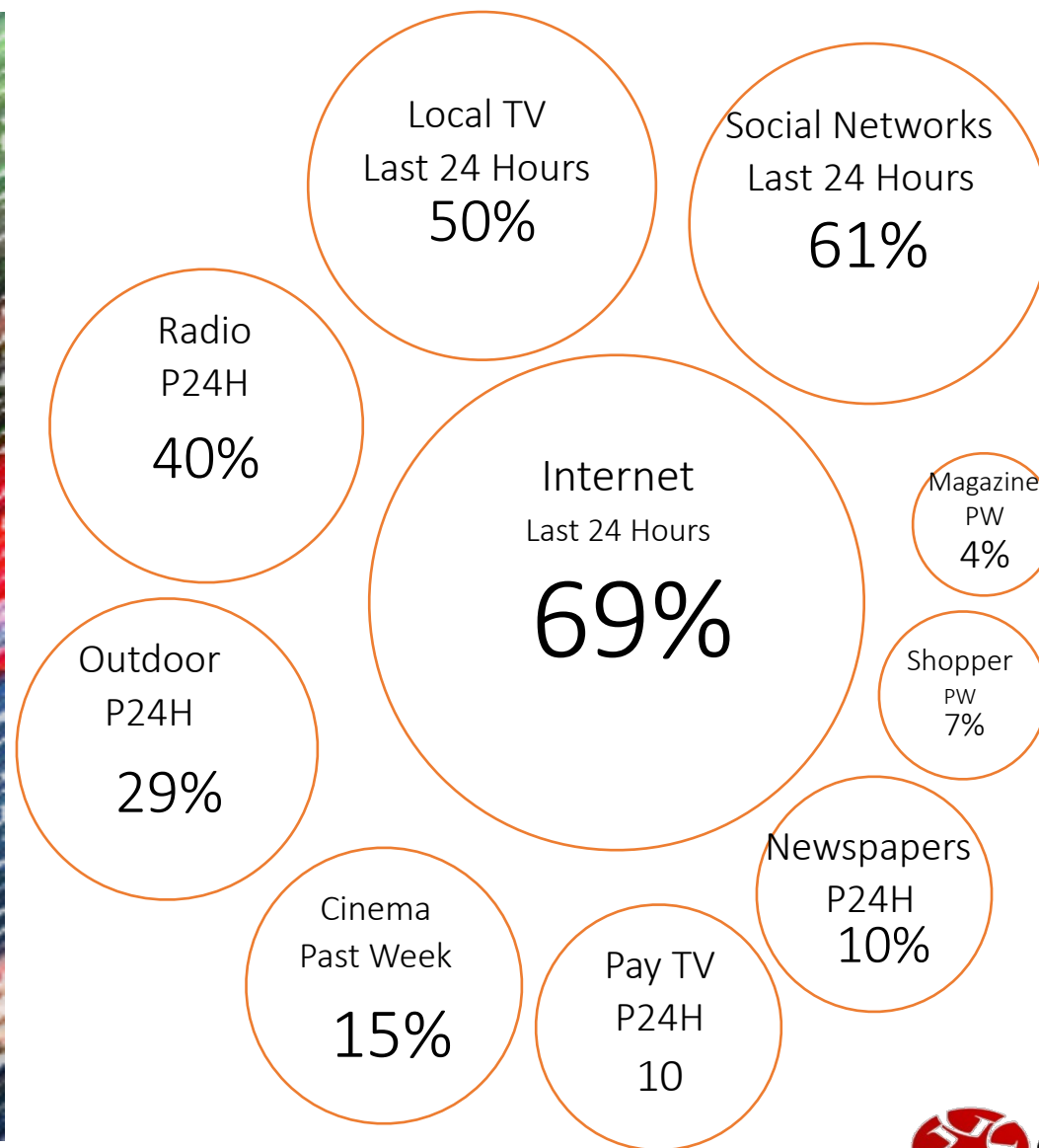
Poverty Levels



2018 MEDIA EXPOSURE: POPULATION 12-17



2018 MEDIA EXPOSURE: POPULATION 12-17



Adults 45-64

25.8% of the Total Population (-5.2%)

- Type of employment

- Housewife: 27.1% (23.1%)
- Retired: 10.8% (15.6%)
- Pensioner: 6.3% (7.6%)
- Disabled: 8.2% (5.4%)
- Self-employed: 7.8% (8.7%)
- Full-time employee: 18.6% (13.1%)
- Part Time employee: 7.1%
- Unemployed: 12.3% (7.6%)

- Sources of income

- Social Security: 35.7% (35.9%)
- Retirement: 6.7% (5.0%)
- Family help: 7.4% (5.5%)
- Salaried with benefits: 17.1% (21.5%)
- Self-employed: 10.0% (11.4%)
- Salaried, no benefits: 11.2% (13.4%)

Annual HH Income

<\$5K	12.3%
\$5K-\$9,999	14.1%
\$10K-\$14,999	18.2%
\$15K-\$19,999	6.3%
\$20K-\$24,999	7.1%
\$25K+	9.3%

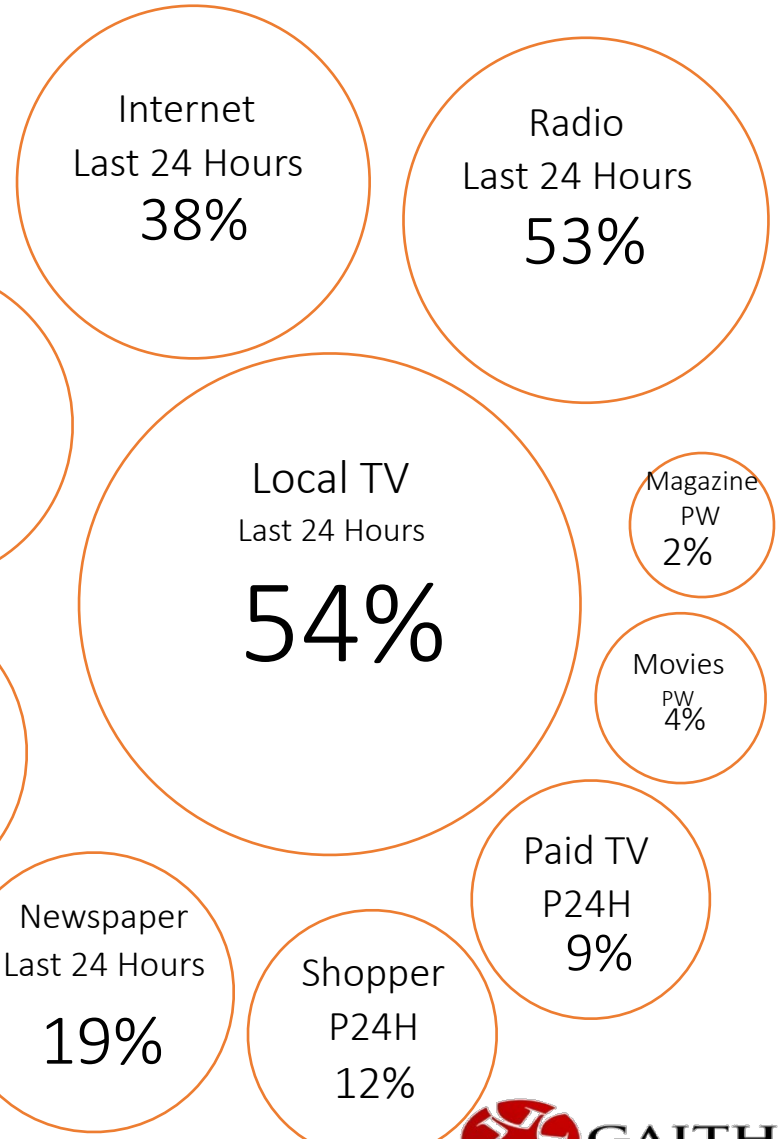
Government aid:

77.3% (47.1%)

Education-wise, similar to general population

- Incomplete high School: 15.9
- Complete high school : 36.1% (34.9%)
- Incomplete bachelor's: 7.1% (11.2%)
- Bachelor's Degree: 20.8% (12.0%)
- Post graduate: 3.7% (1.7%)
- Technical course: 7.1%

2018 MEDIA EXPOSURE: Adults 45-64

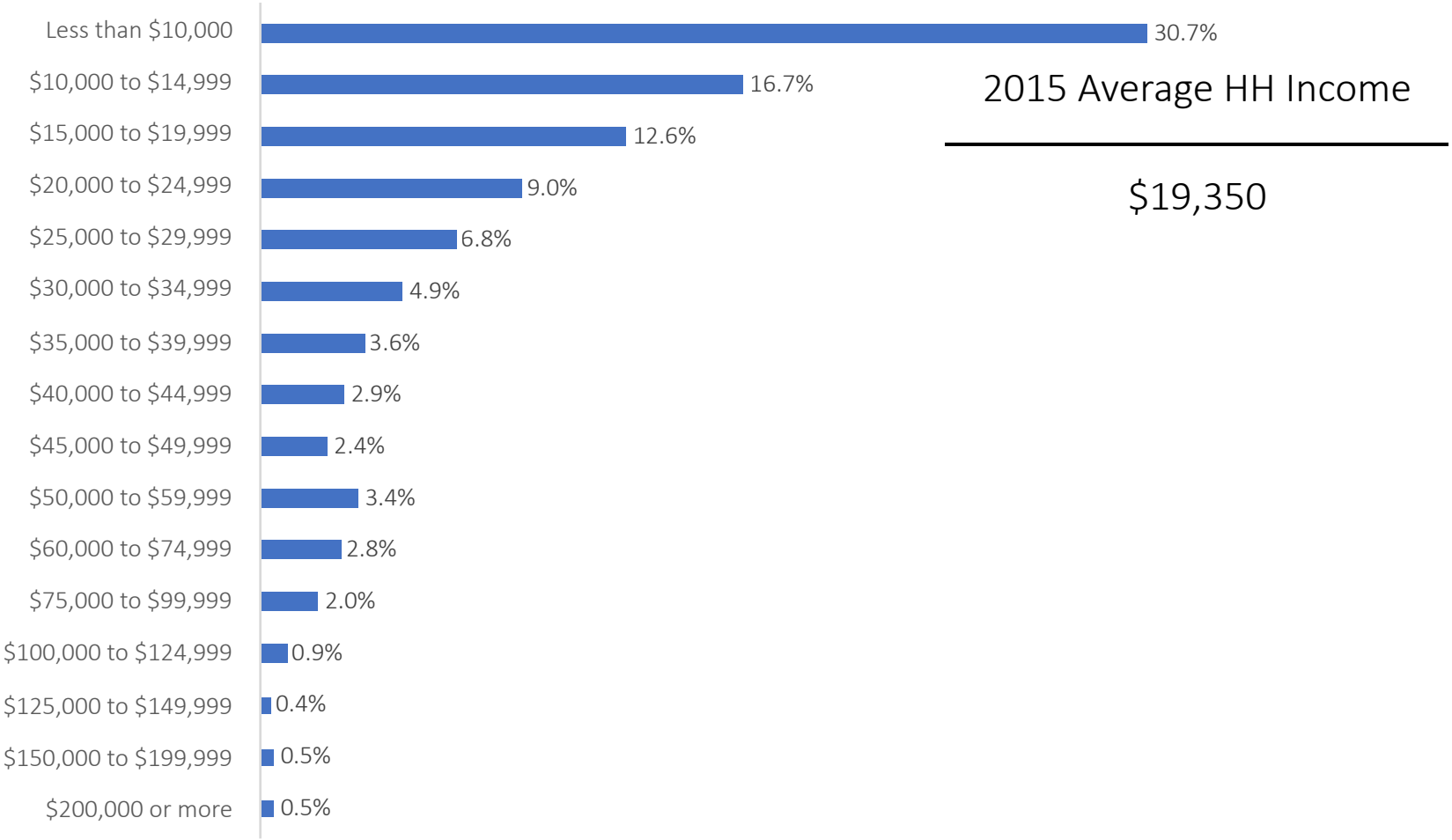




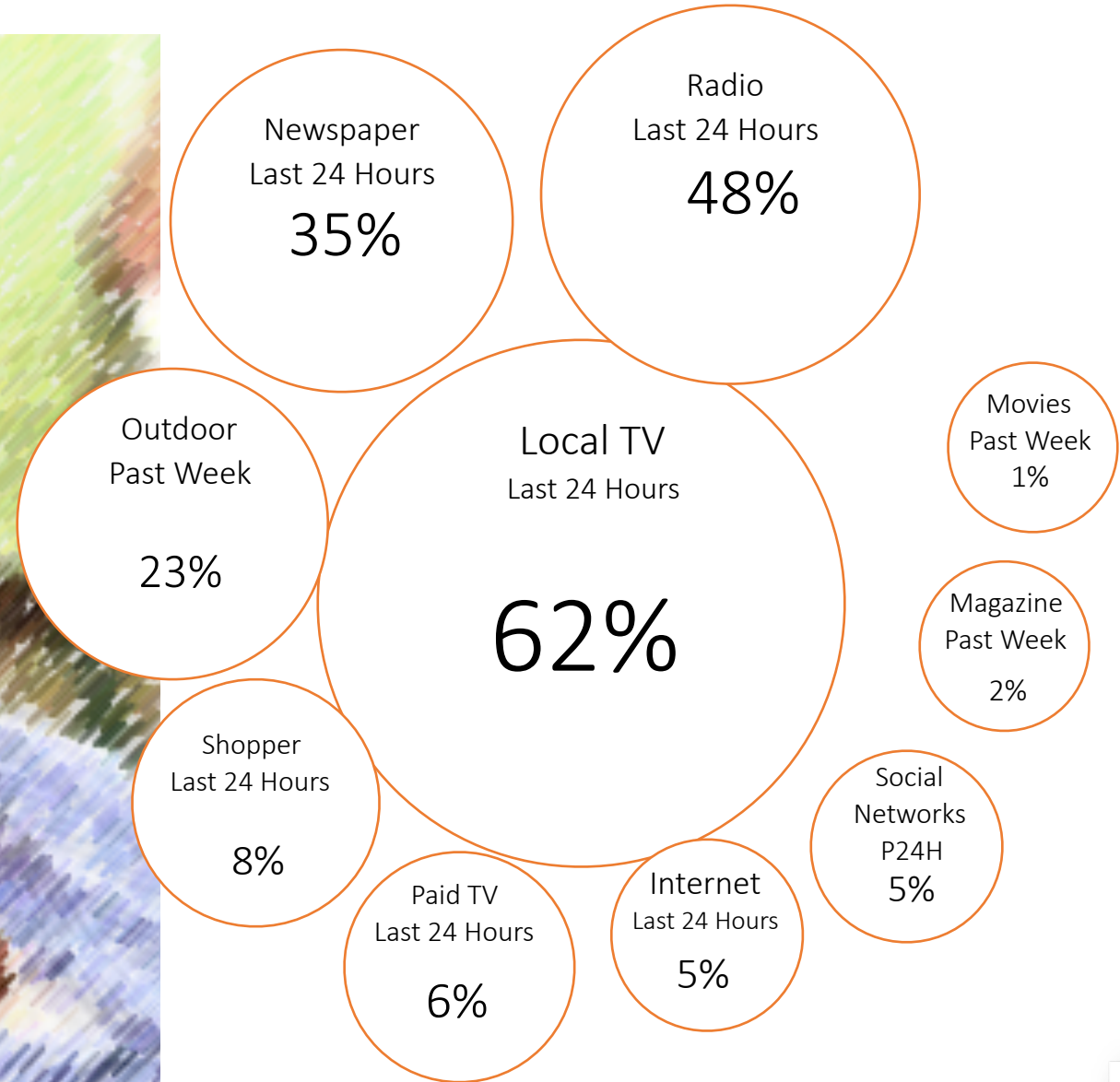
Adults 65+

- 56.6% Female / 43.4% Male
- Median age: 73.6
- 86.1% live in their own homes
 - 83.2% own their homes / 16.8% rent
 - Median value of homes > \$106,800
- 48.9% are married / 25.4% widowed / 14.5% divorced
- 46.8% have less than high school
- 1.9% are responsible for grandchildren
- 7.7% are veterans
- 48.1% have any disability
- 7.0% are in labor force
- Income
 - 25.2% have HH earnings ave. \$28,633
 - 88.5% receive SS ave. \$12,727
 - 32.9% retirement income ave. \$15,706
 - 38.9% receive PAN benefits
- 38.1% are below poverty line

HH Income among 65+ HHers



2018 MEDIA EXPOSURE: POPULATION 65+



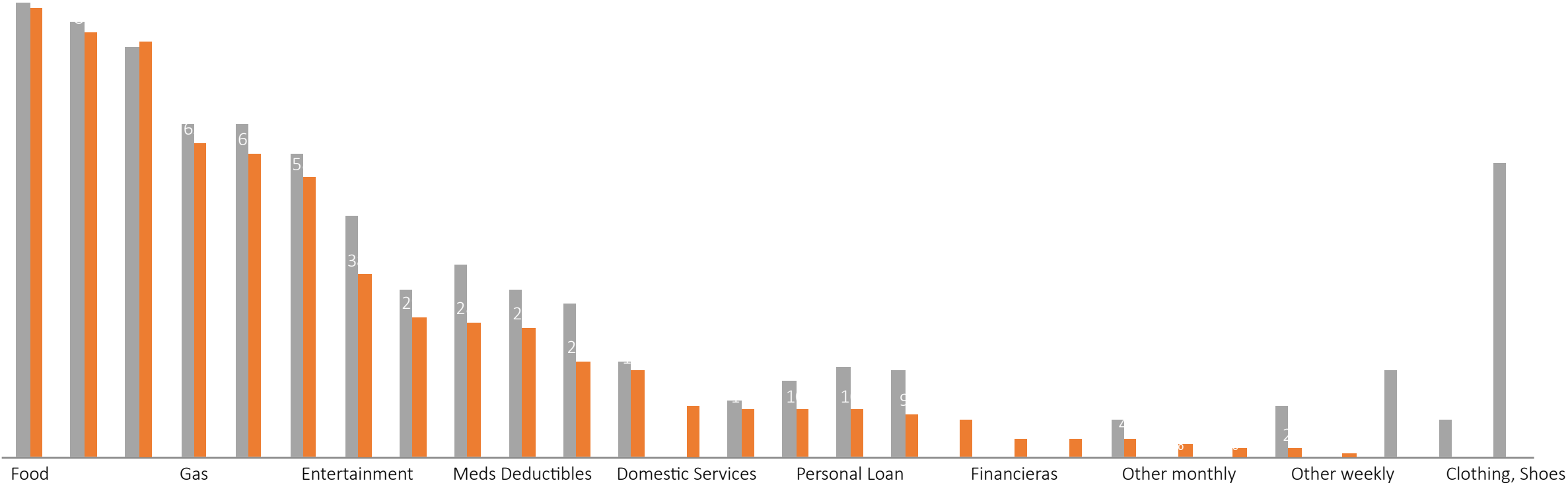


Consumo

Gaither Community Omnibus

% Incidence of Expense

Among categories measured



n: 683

■ 2016 ■ 2017

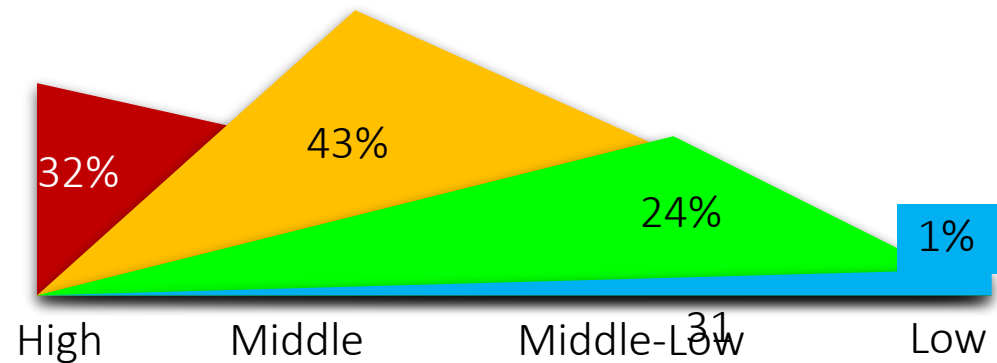
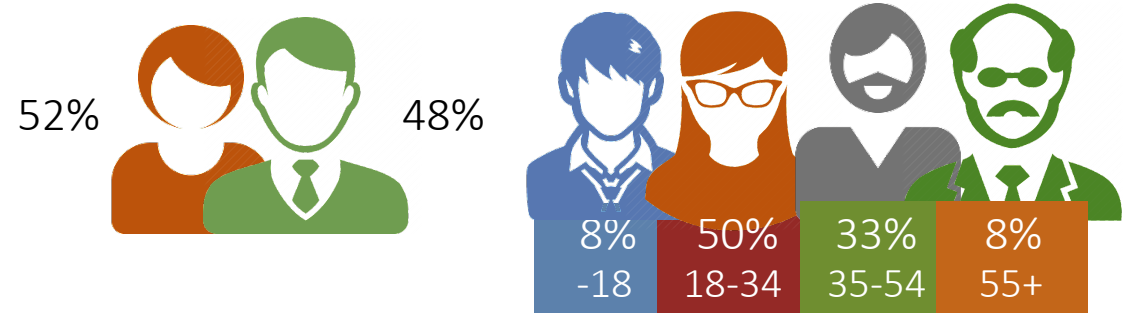
Purchasing Online Goods



Last time that Purchased Goods Online

Past Week	1 to 2 Weeks Ago	2 to 4 Weeks Ago	Over a Month Ago
7%	6%	4%	11%

Demographics



Purchasing Online Goods

June- July		Nov- Dec
28%	Clothing	41%
34%	Electronics Accessories	23%
13%	Electronics	12%
10%	Automobile	11%
10%	Home Accessories	7%
1%	Toys	7%
7%	Sporting Goods	3%
6%	Music, Series and Movies	3%
4%	Books	3%
6%	Video Games	3%
1%	Ticket Events	3%

Services at Home



Target: Women 30-55
Ave. Expense: \$185
Coverage: SJ, Guaynabo,
Trujillo Alto, Carolina



Cost: \$5 per delivery
Coverage: Condado,
Miramar
Items: food,
prescriptions, laundry

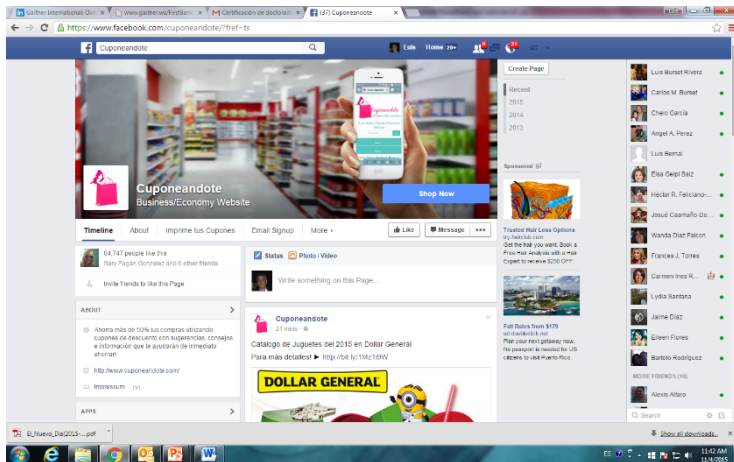
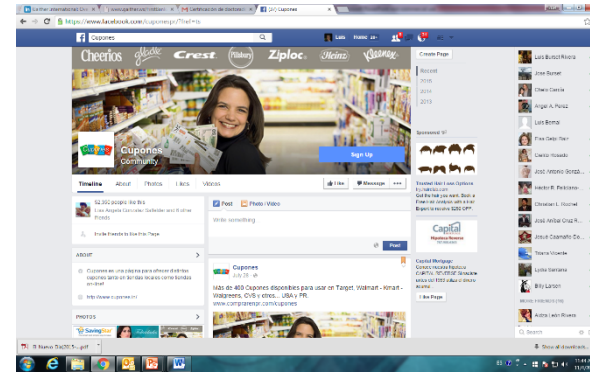
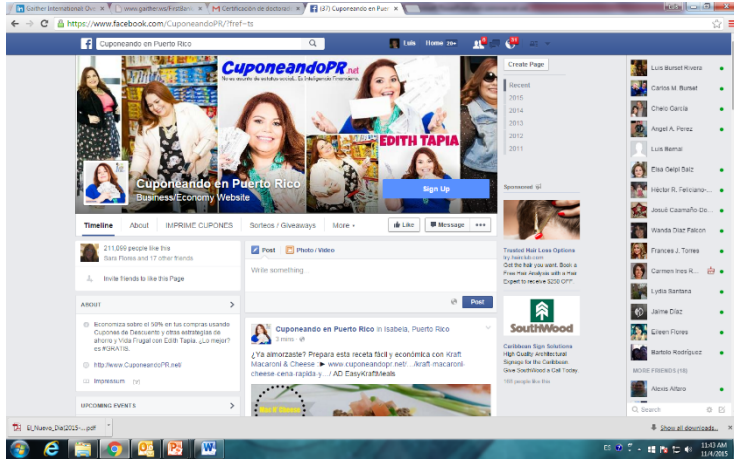


Costs
Medical care: \$40
Nutritionist: \$40
Mental Health: \$55



Restaurant Food
45-55 minute delivery





Coupons Strike Back

Cierran tres tiendas de Sam's Club en la isla

No se ha determinado la cantidad de empleados que serían cesanteados



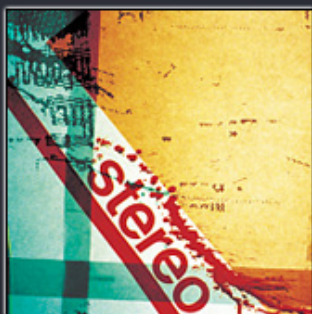
Walgreens anuncia el cierre de 12 tiendas en la isla

"Los empleados de estas 12 tiendas seguirán trabajando para la empresa y conservarán sus beneficios mientras trabajamos para colocarlos en otras posiciones", indicó la empresa a través de un comunicado



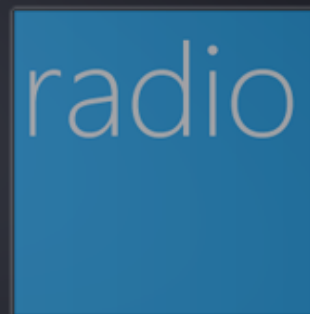
Los 12 establecimientos cerrados ubican en diferentes puntos de la isla. (Archivo)

Retail Environment
Mega stores leaving the Island; opportunity for
local businesses



categories

ratings



2015

MBP

MEDIA BRAND PROFILES

Reports

0:00



1:54

Welcome to the MBP

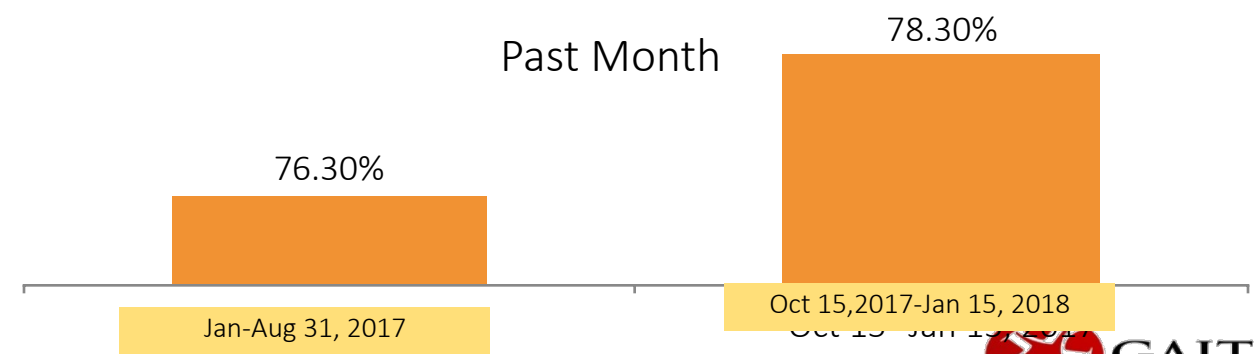
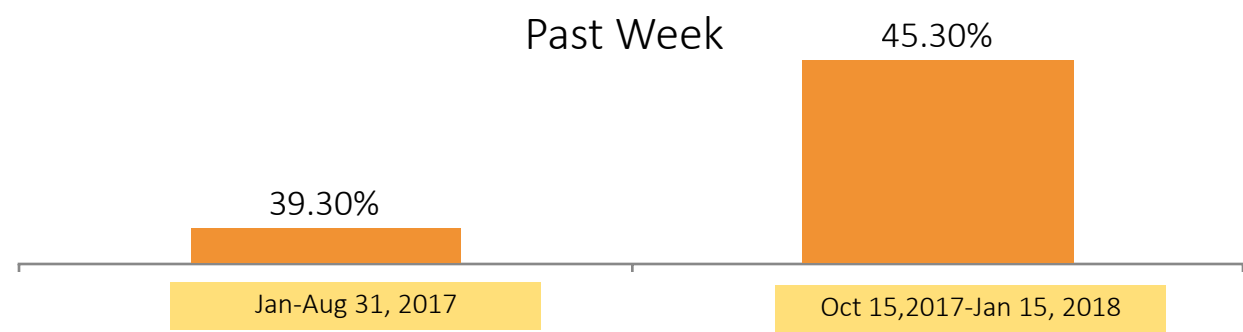
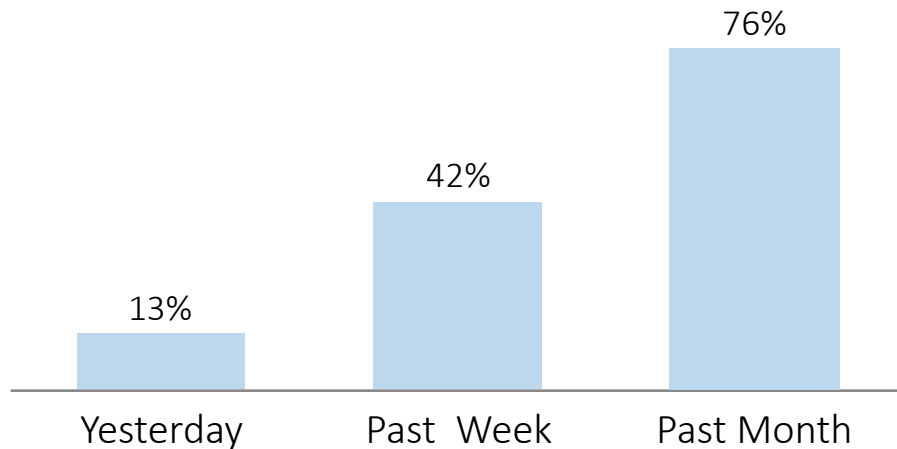


Welcome to the revolutionary world of MBP, where the possibilities are endless. We are very proud to present the first media and brand tracker that gives you reliable, accurate and precise market information on an on-going, continuous basis with real-time, web-based results.

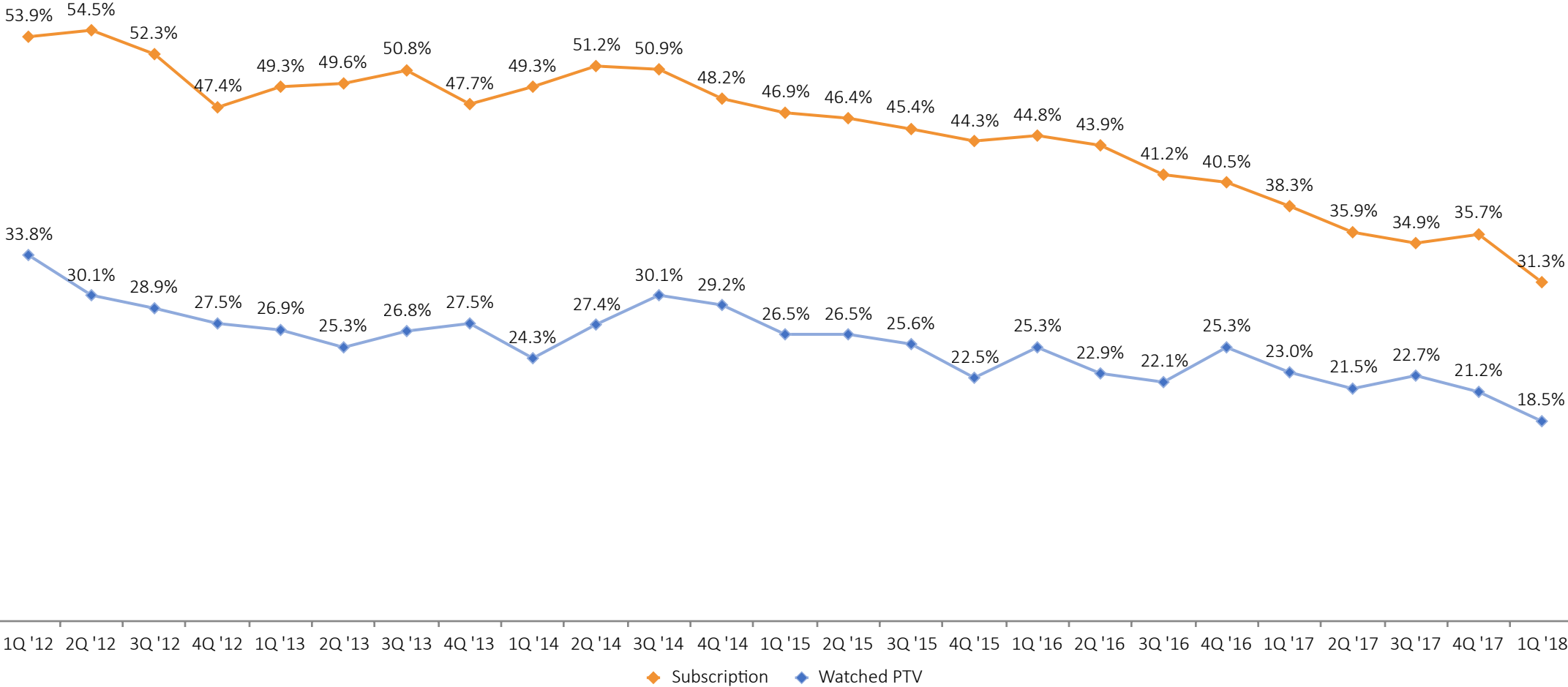
With the MBP you will be able to track your target consumers' changing profiles, their media preferences, and their favorite brands. Understand, for instance, what type of activities and hobbies your target consumers enjoy, what type of music they listen to and where they last recalled seeing a commercial for your brand. Get all this

Visited a Quick Service Restaurant

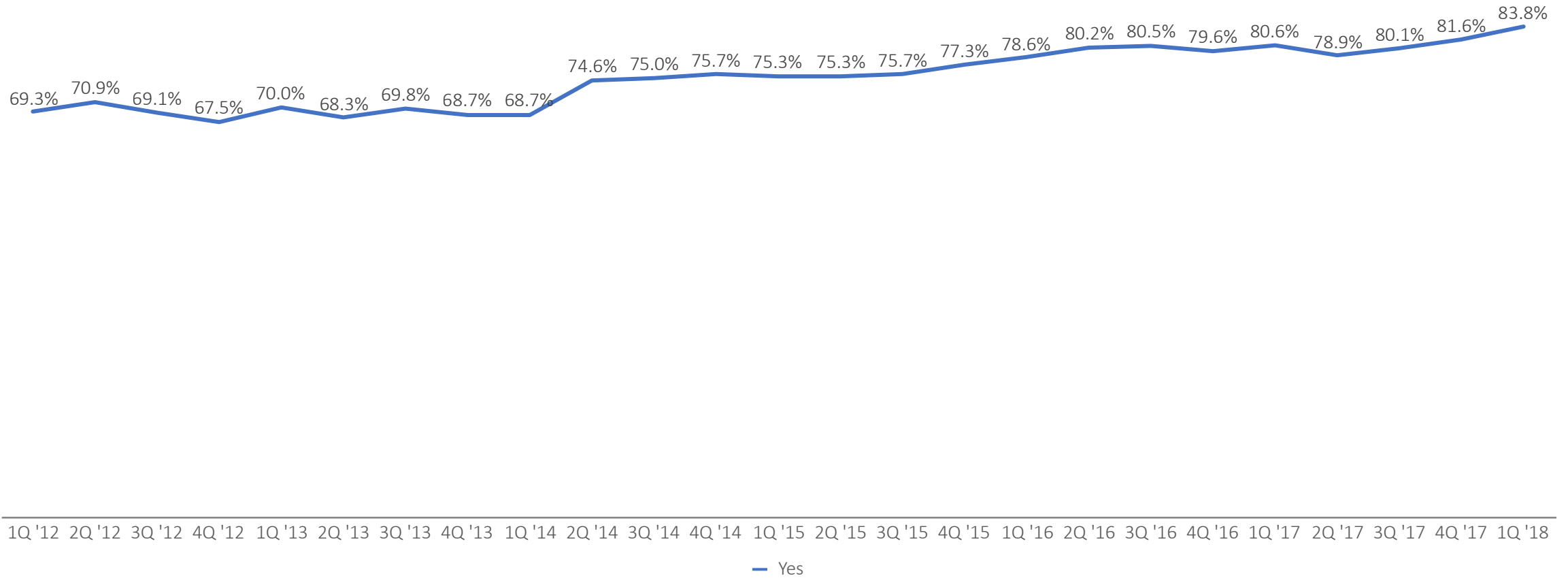
Visited a QSR n: 27,803
Ytd Dec. 31, 2016



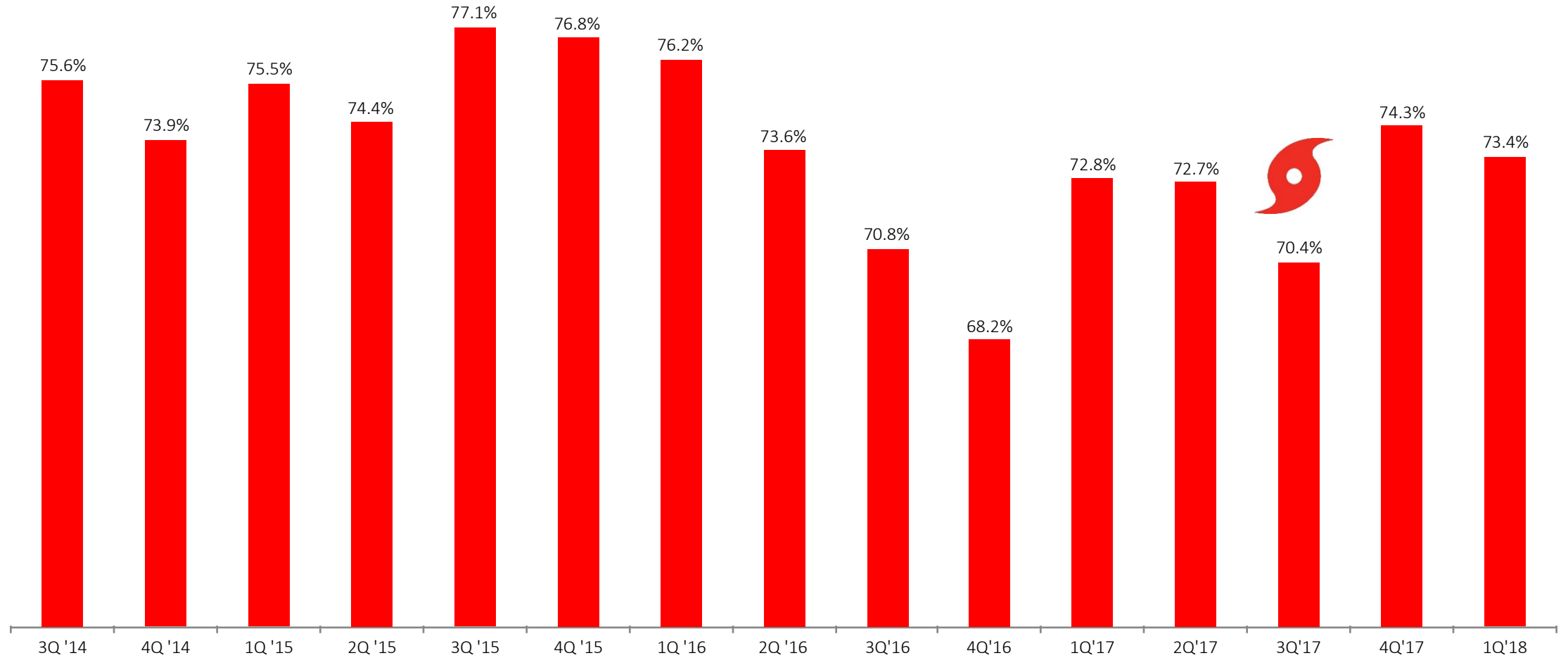
Pay TV: Subscription vs. Incidence



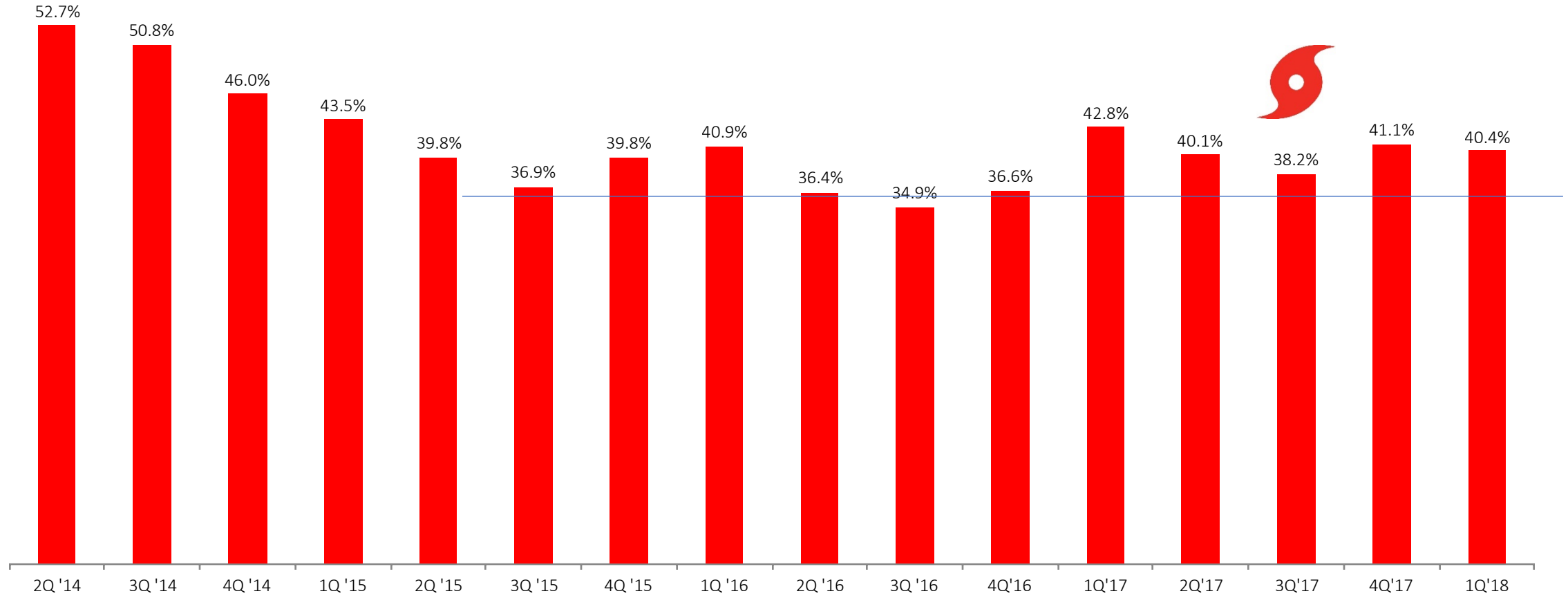
Mobile Phones



Food Stores



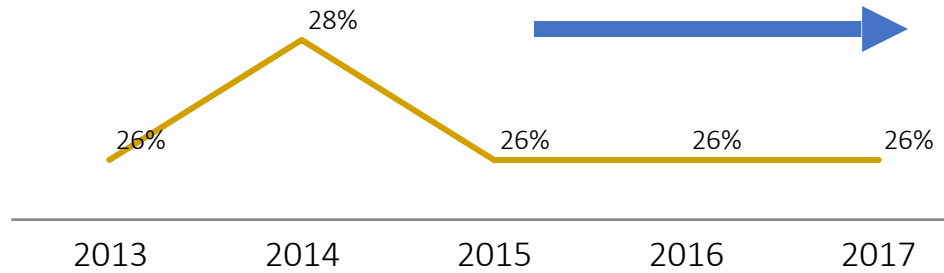
Drug Stores



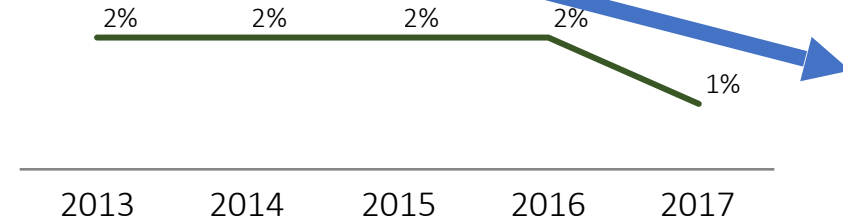
Consumer Categories



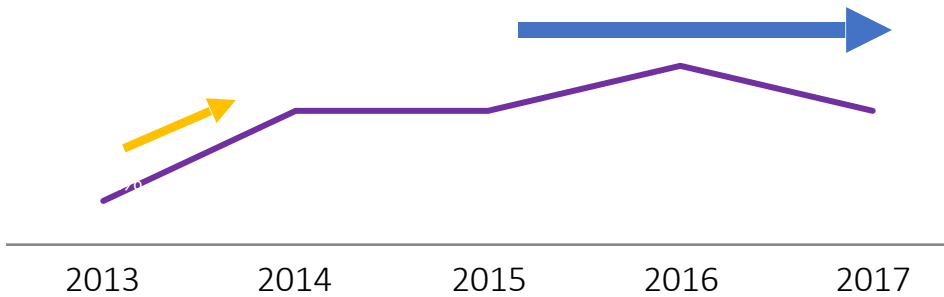
Beer



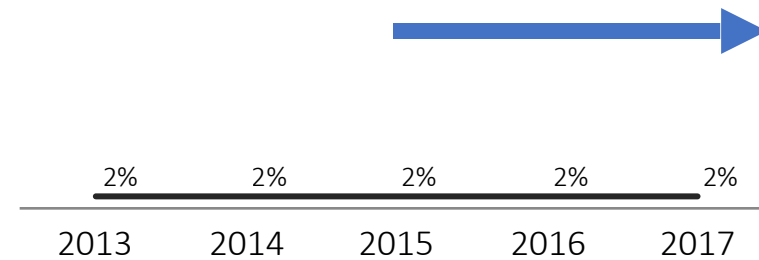
Whiskey



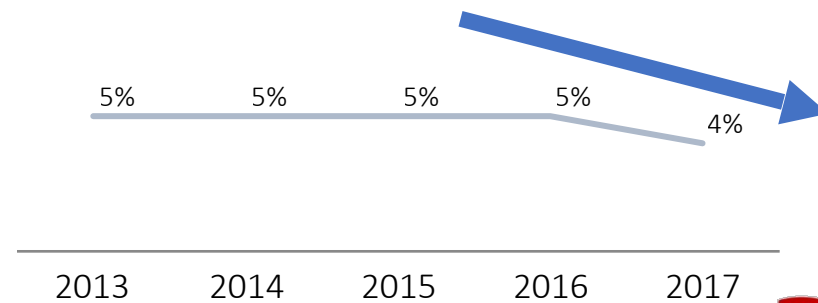
Ready-to-Drink Liquors



Vodka



Rum

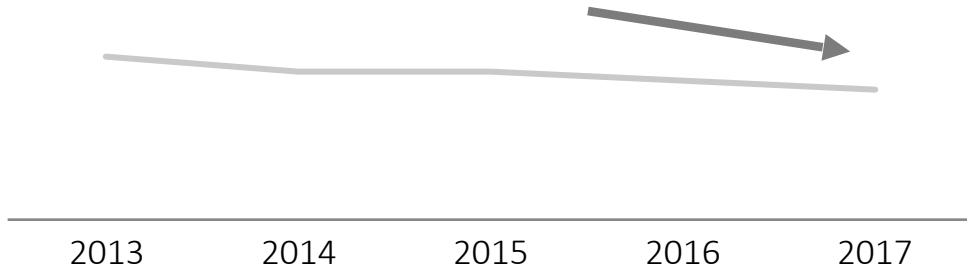


Consumer Categories



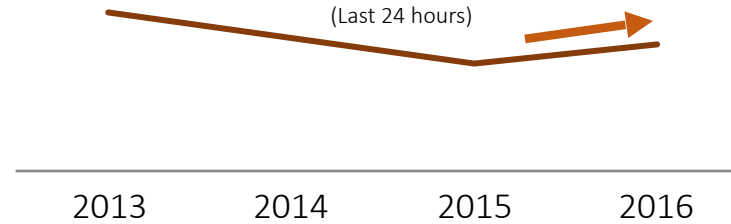
Crackers

(Past 30 Days)



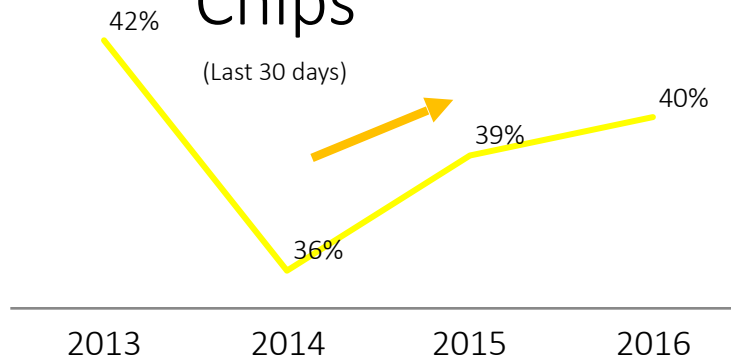
Chocolates/ candy

(Last 24 hours)



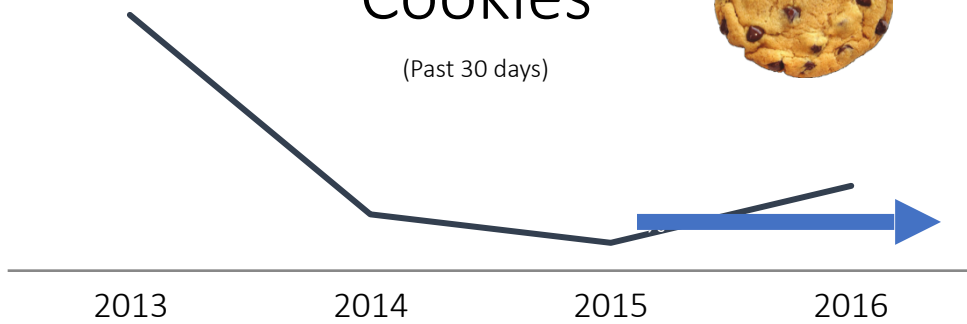
Chips

(Last 30 days)



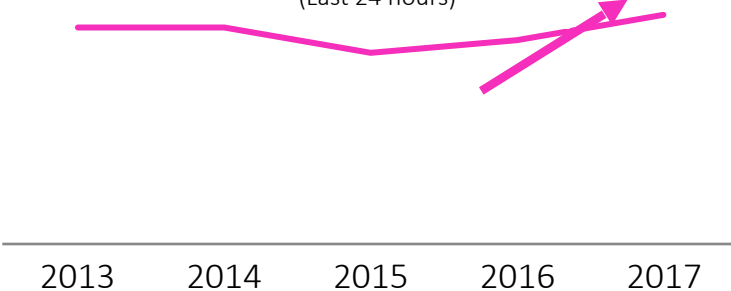
Cookies

(Past 30 days)



Chewing Gum

(Last 24 hours)

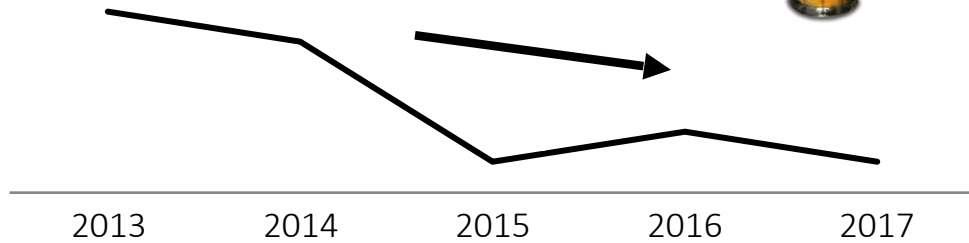


Consumer Categories

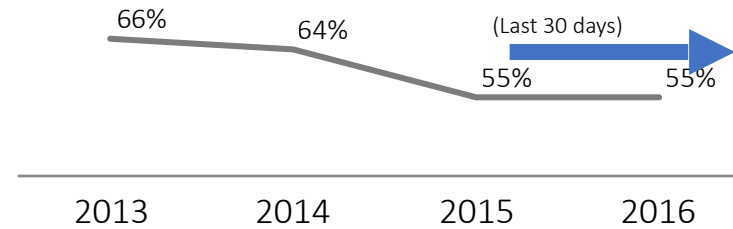


Sodas

(Past 7 Days)

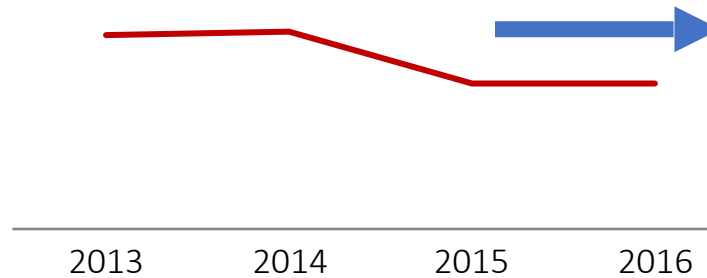


Cold Cereal



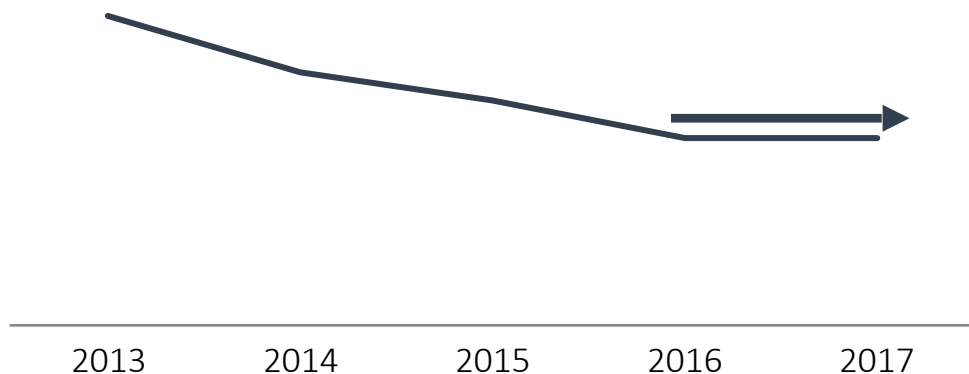
Chips

(Last 30 days)



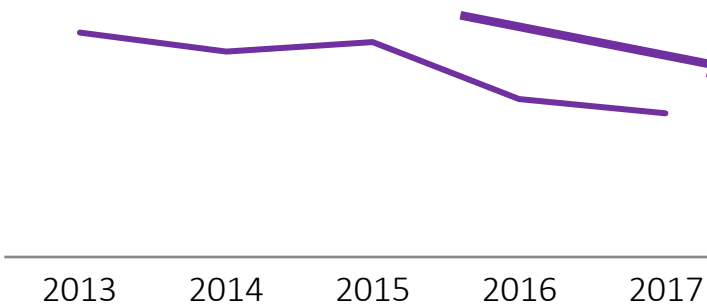
Sliced Bread

(Past 7 days)



Powdered Beverages

(Past 30 days)

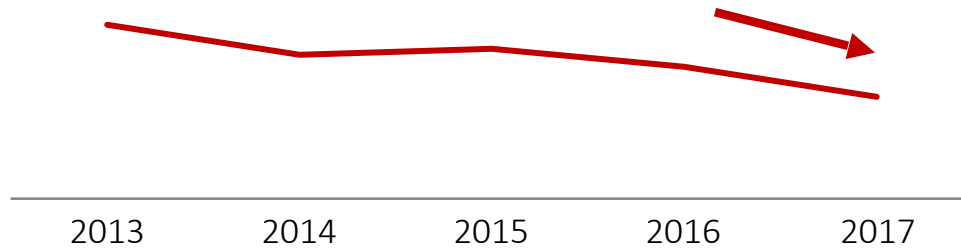


Consumer Categories



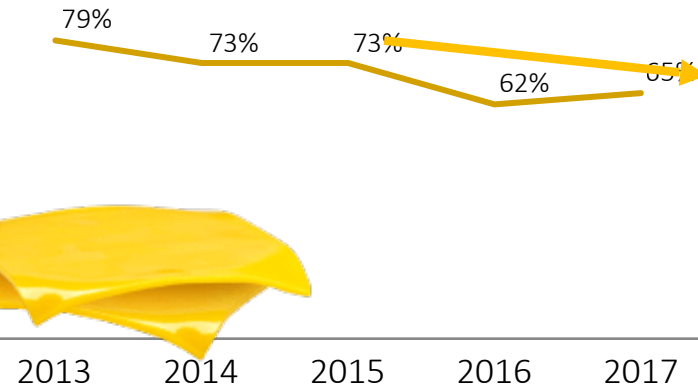
Fresh Milk

(Last 7 days)



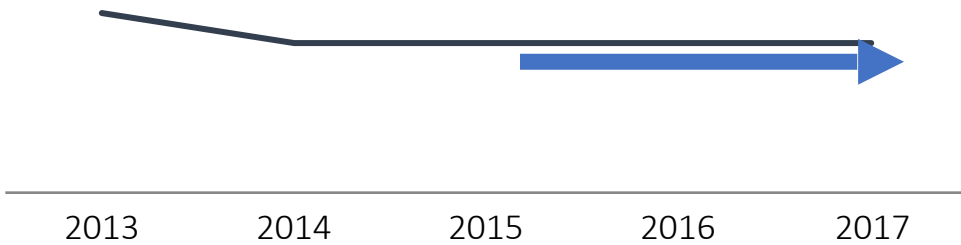
Sliced Cheese

(Last 30 days)



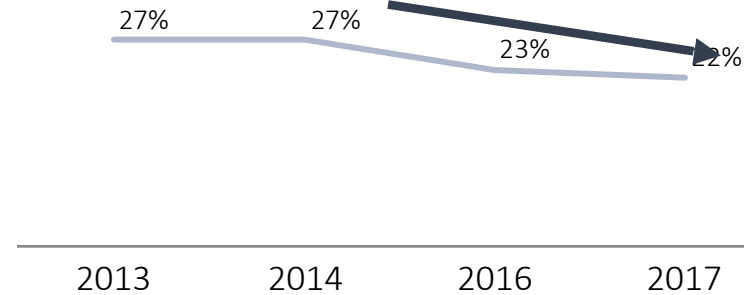
Boxed Milk

(Last 7 days)



Yogurt

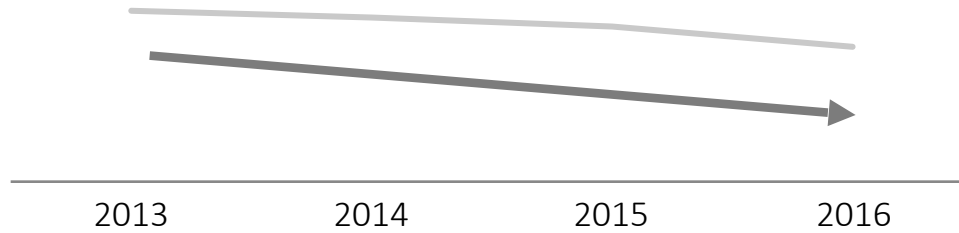
(Last 30 days)



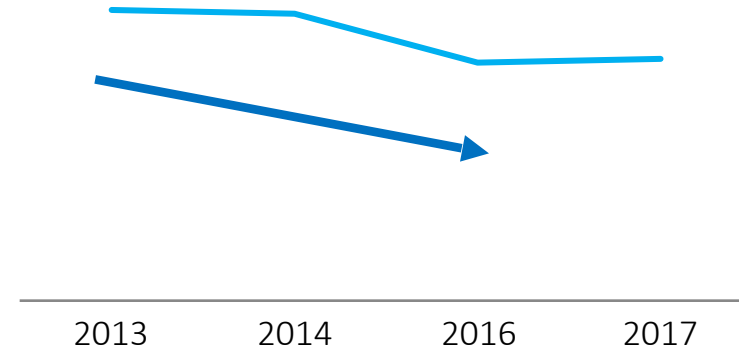
Consumer Categories



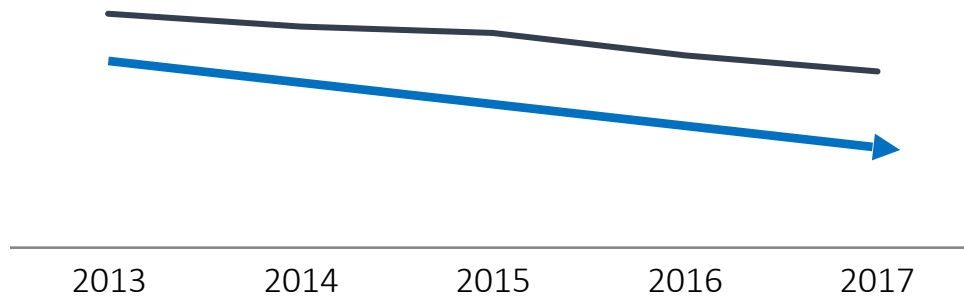
All-Purpose Cleaners



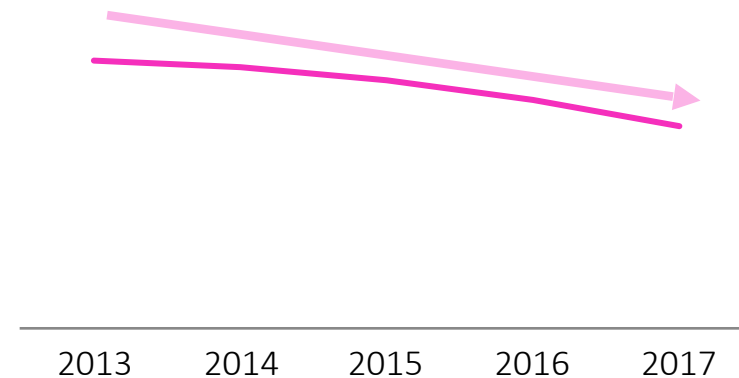
Bleach



Bathroom Cleaners



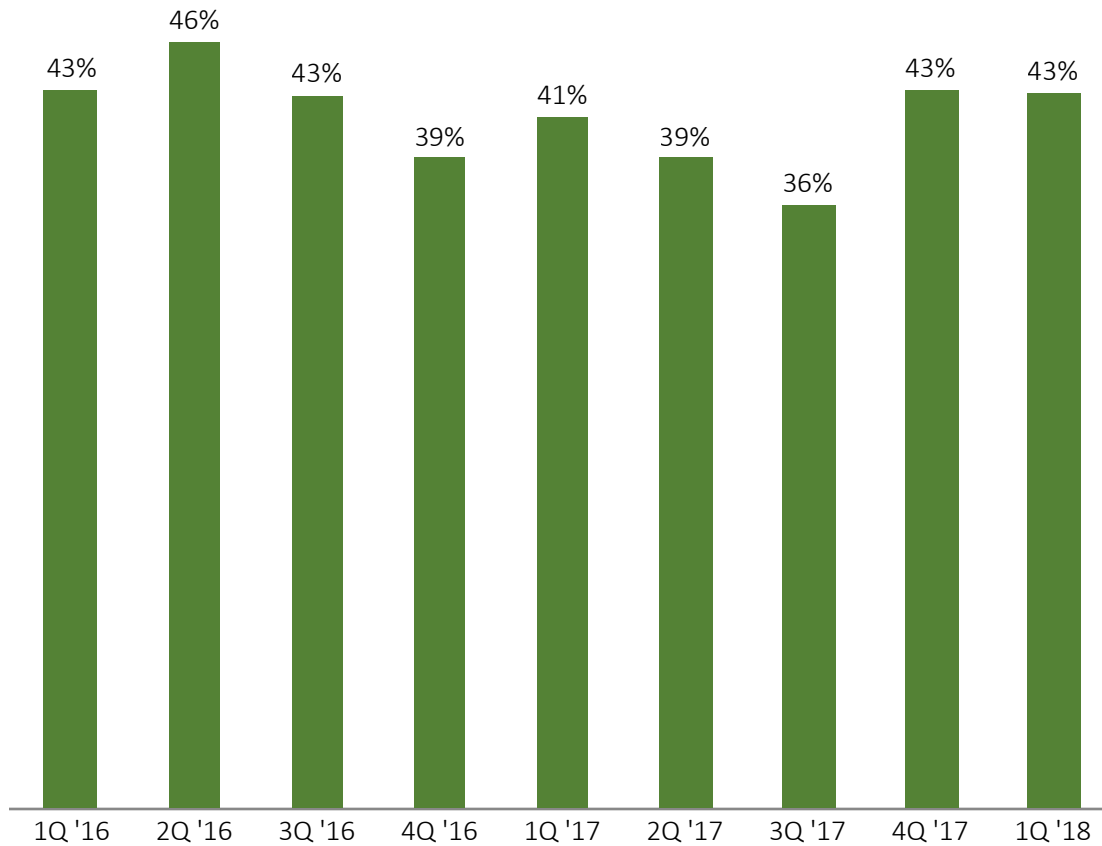
Air Fresheners



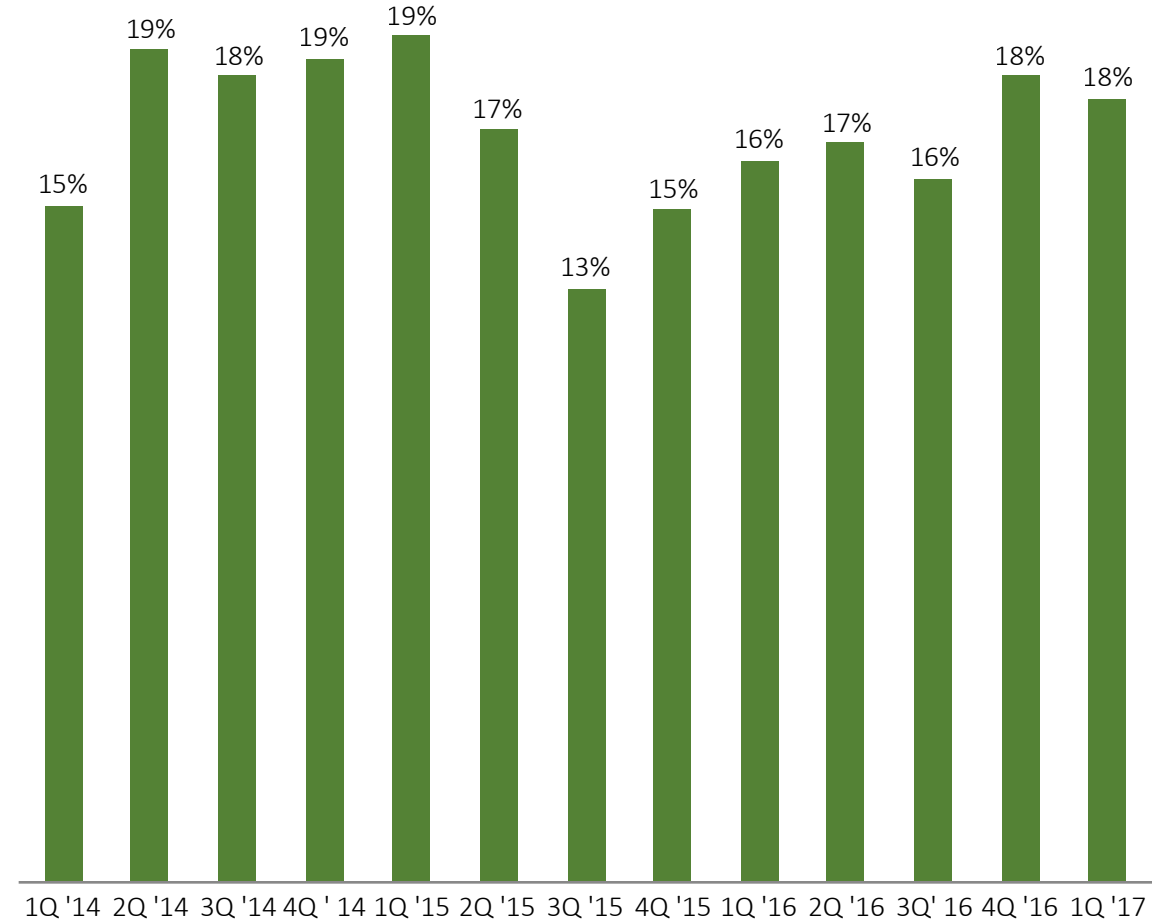
Consumer Categories



Juices



Chewing Gum



January 29, 2017 – January 13, 2018

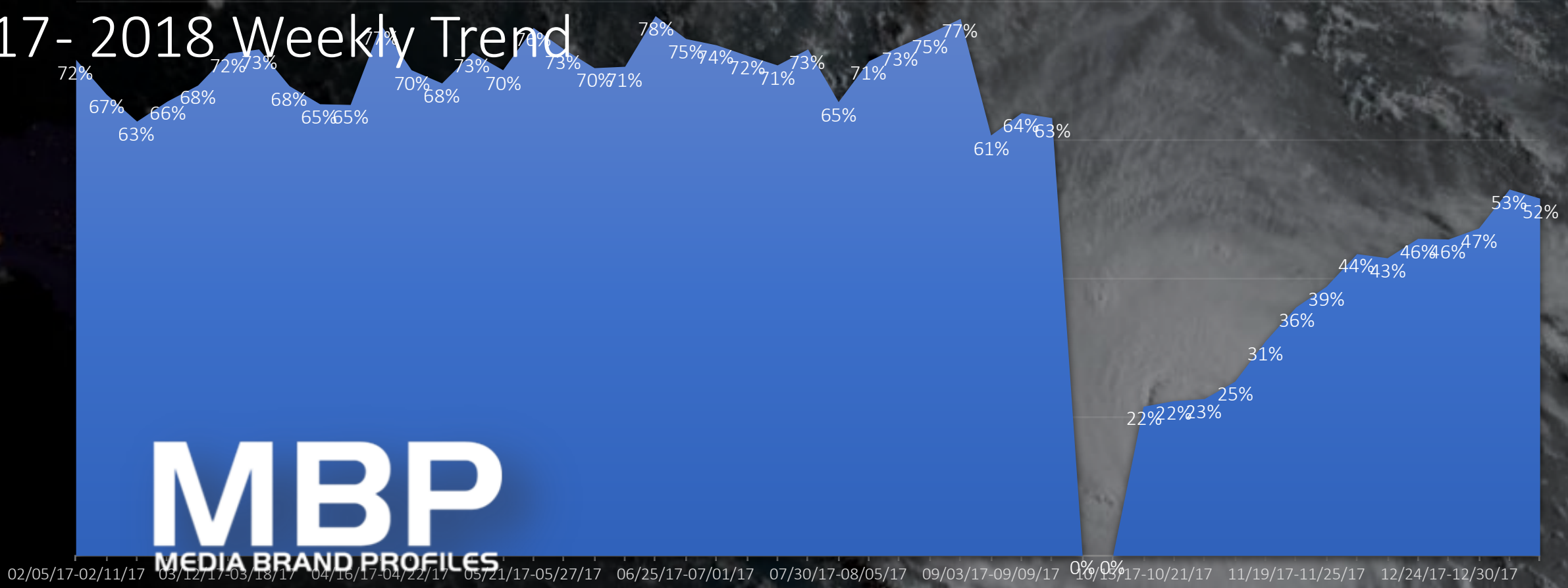
Gaither's Post-Hurricane Media Watch Report



MBP Media Consumption Watch

Local TV (Last 24 Hours)

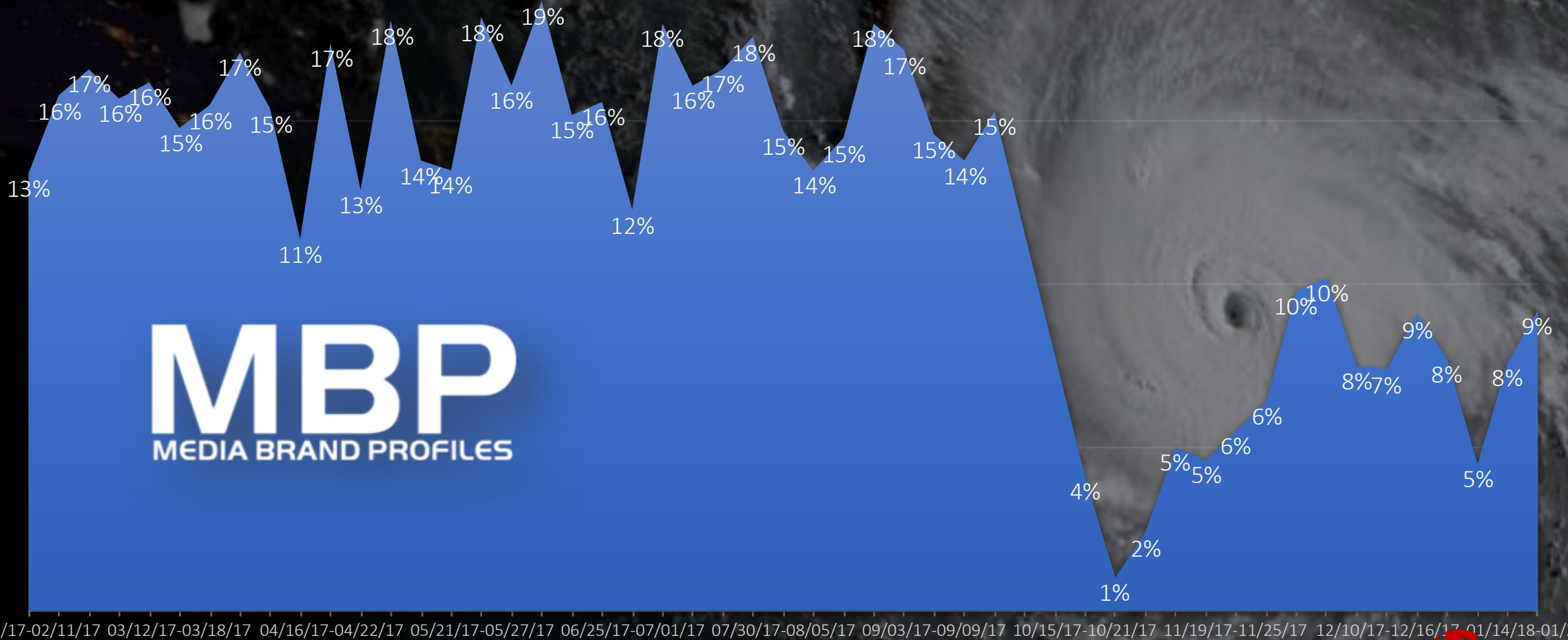
2017-2018 Weekly Trend



MBP Media Consumption Watch

Paid TV (Last 24 Hours)

2017- 2018 Weekly Trend



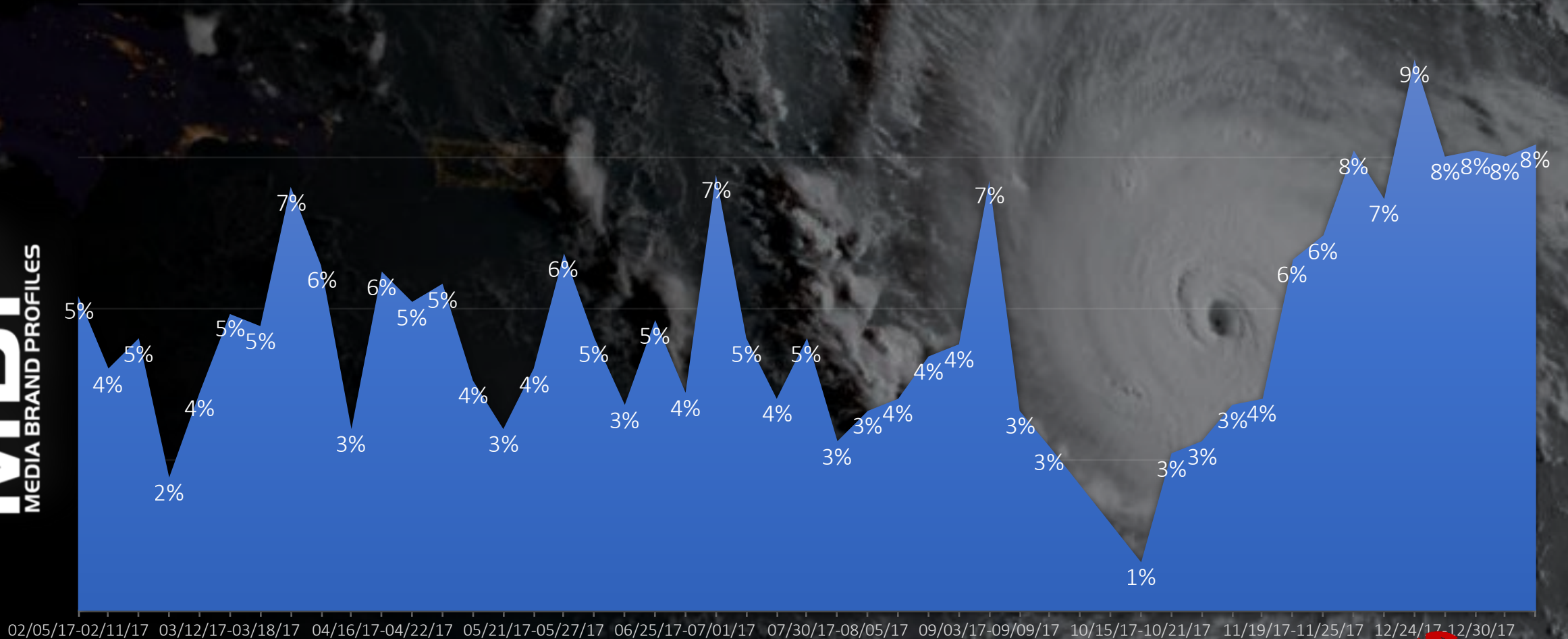
MBP
MEDIA BRAND PROFILES

02/05/17-02/11/17 03/12/17-03/18/17 04/16/17-04/22/17 05/21/17-05/27/17 06/25/17-07/01/17 07/30/17-08/05/17 09/03/17-09/09/17 10/15/17-10/21/17 11/19/17-11/25/17 12/10/17-12/16/17 01/14/18-01/20/18

February 5, 2017 – January 20, 2018

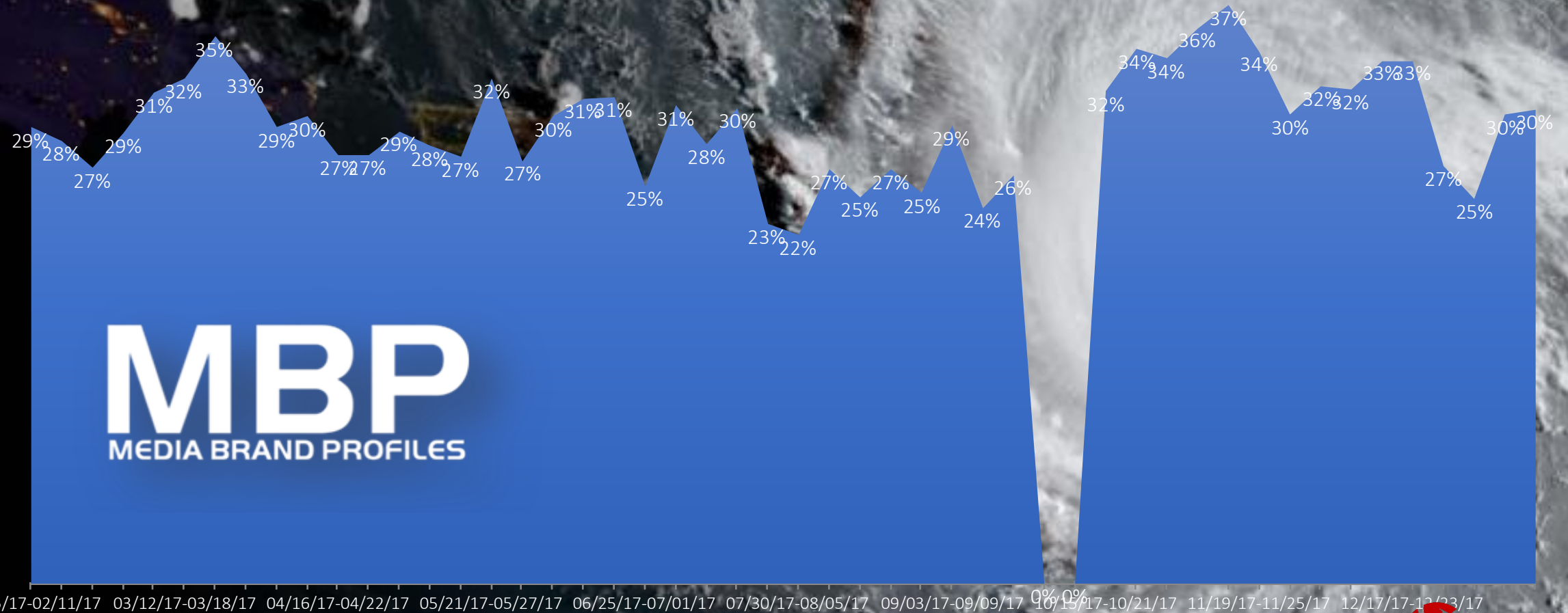
MBP Media Consumption Watch Cinema (Past Week) 2017- 2018 Weekly Trend

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MEDIA BRAND PROFILES



February 5, 2017 – January 20, 2018

MBP Media Consumption Watch Newspaper (Past Week) 2017- 2018 Weekly Trend



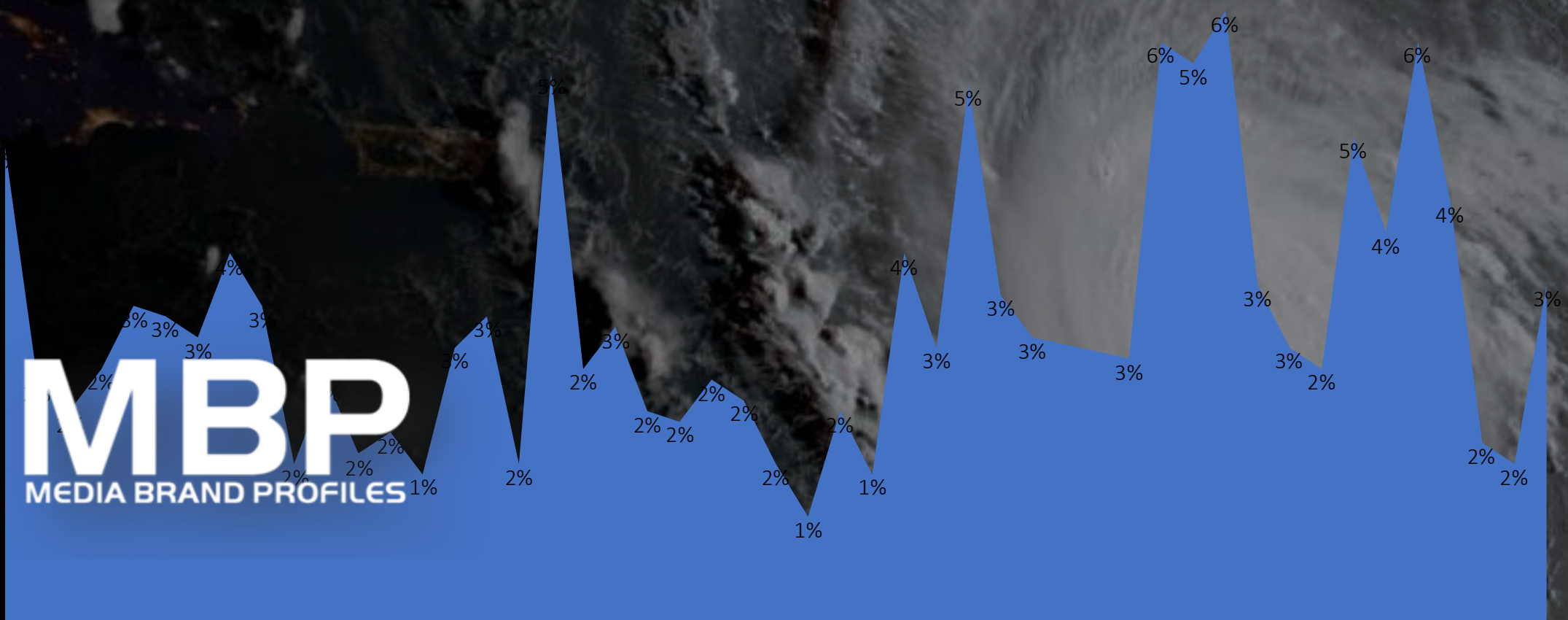
MBP
MEDIA BRAND PROFILES

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February 5, 2017 – January 20, 2018

MBP Media Consumption Watch Magazine (Past Week)

2017- 2018 Weekly Trend

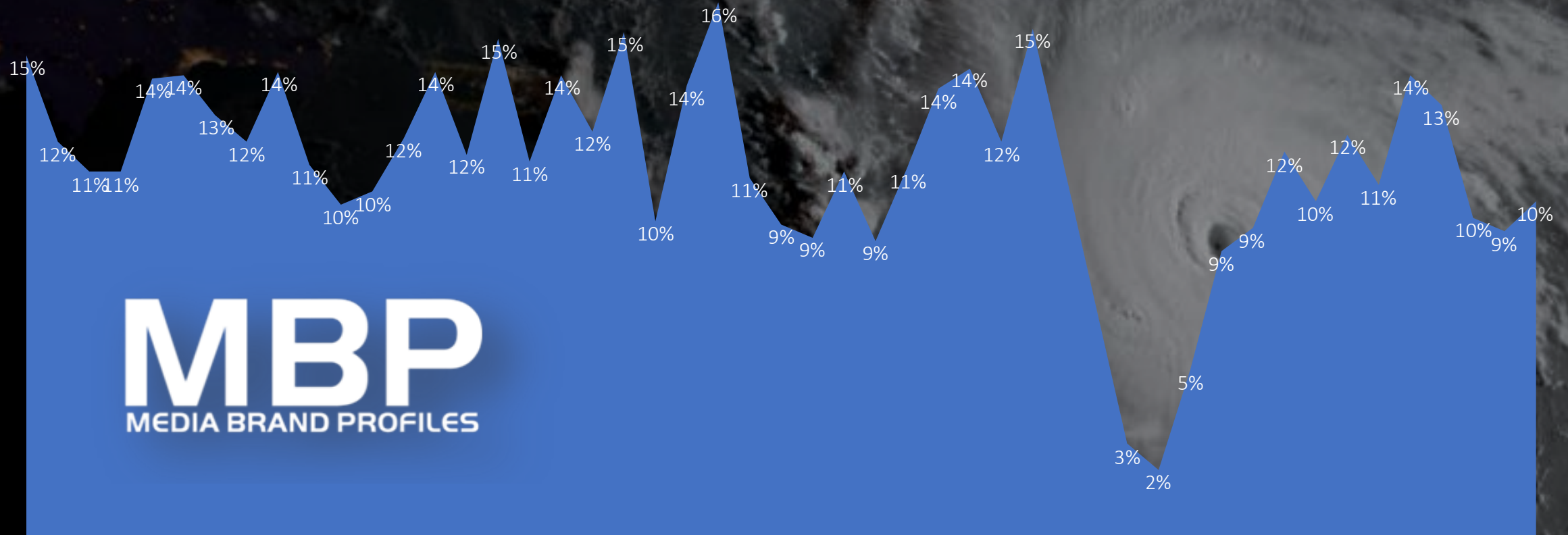


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MEDIA BRAND PROFILES

02/05/17-02/11/17 03/12/17-03/18/17 04/16/17-04/22/17 05/21/17-05/27/17 06/25/17-07/01/17 07/30/17-08/05/17 09/03/17-09/09/17 10/15/17-10/21/17 11/19/17-11/25/17 12/24/17-12/30/17

February 5, 2017 – January 20, 2018

MBP Media Consumption Watch Shopper (Last 24 Hours) 2017- 2018 Weekly Trend



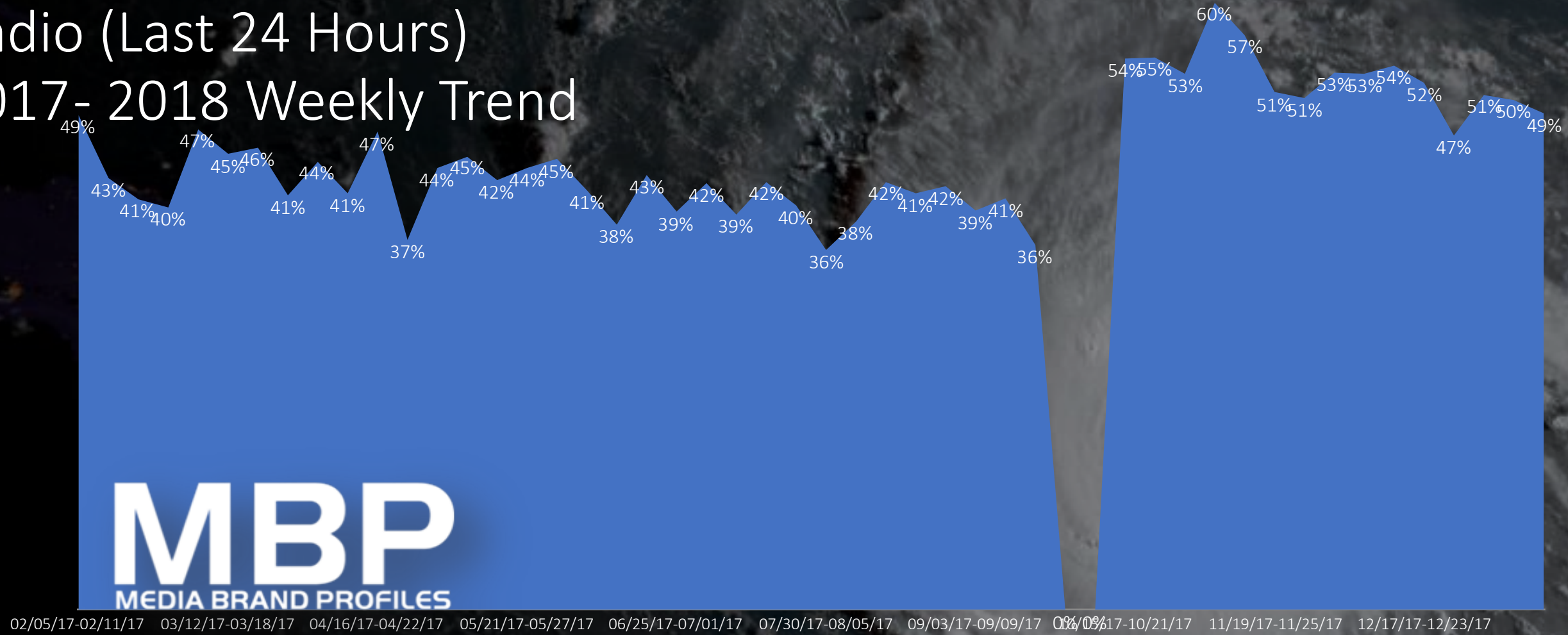
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MEDIA BRAND PROFILES

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February 5, 2017 – January 20, 2018

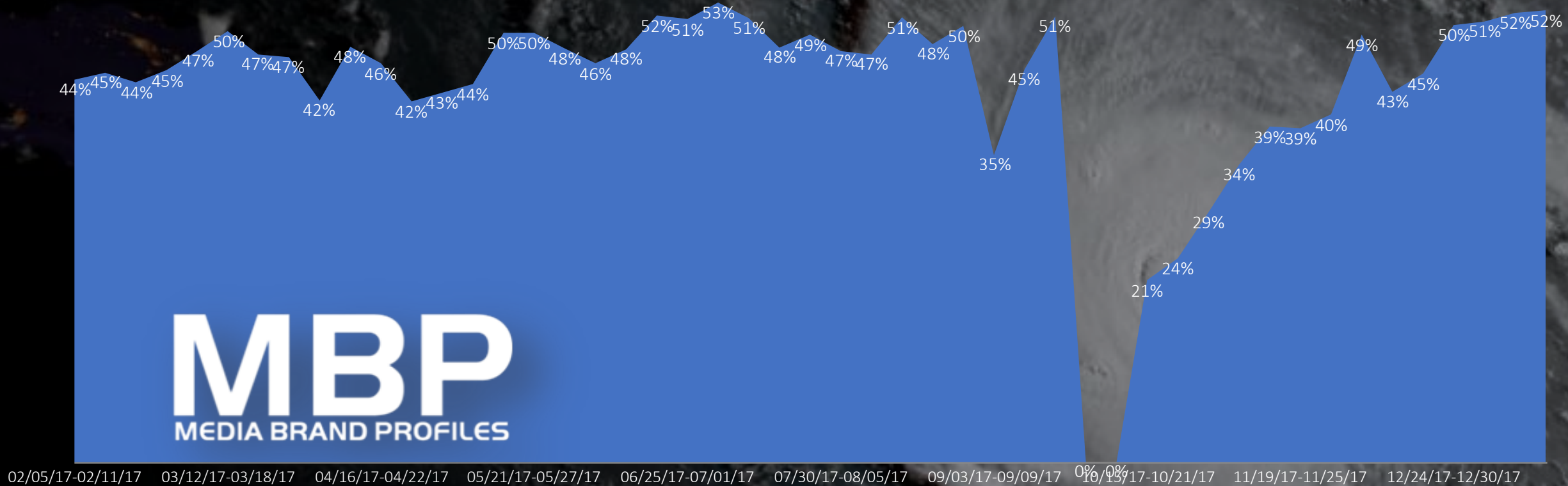
55

MBP Media Consumption Watch Radio (Last 24 Hours) 2017-2018 Weekly Trend

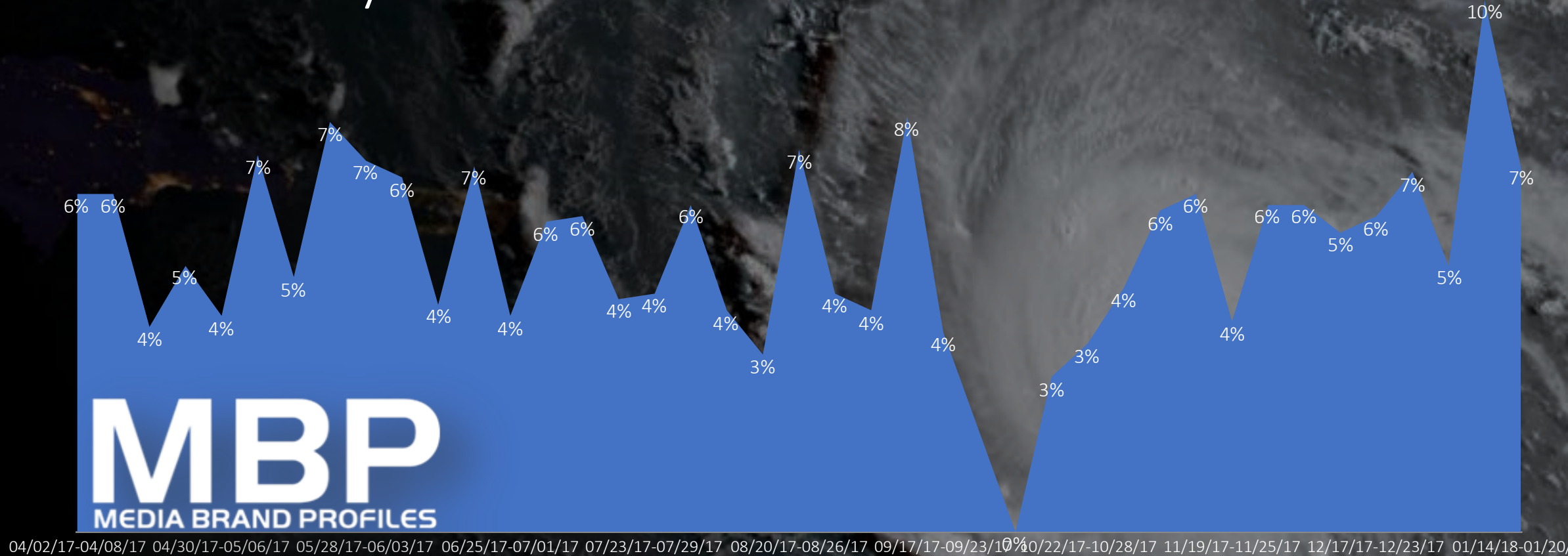


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MBP Media Consumption Watch Internet Users (Last 24 Hours) 2017- 2018 Weekly Trend



MBP Media Consumption Watch Read Online News (Yesterday) 2017- 2018 Weekly Trend

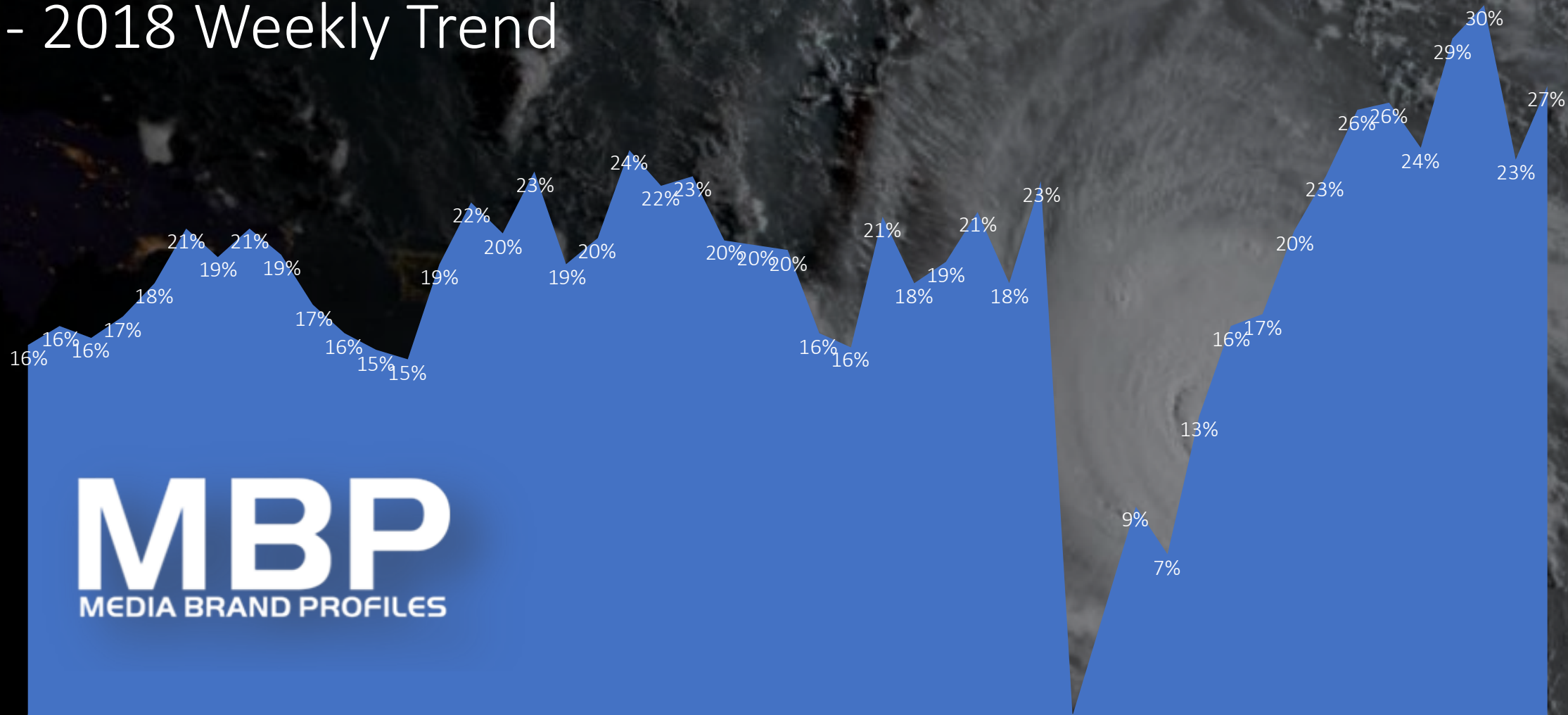


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MBP Media Consumption Watch

Listened to Internet Radio (Past Week)

2017- 2018 Weekly Trend



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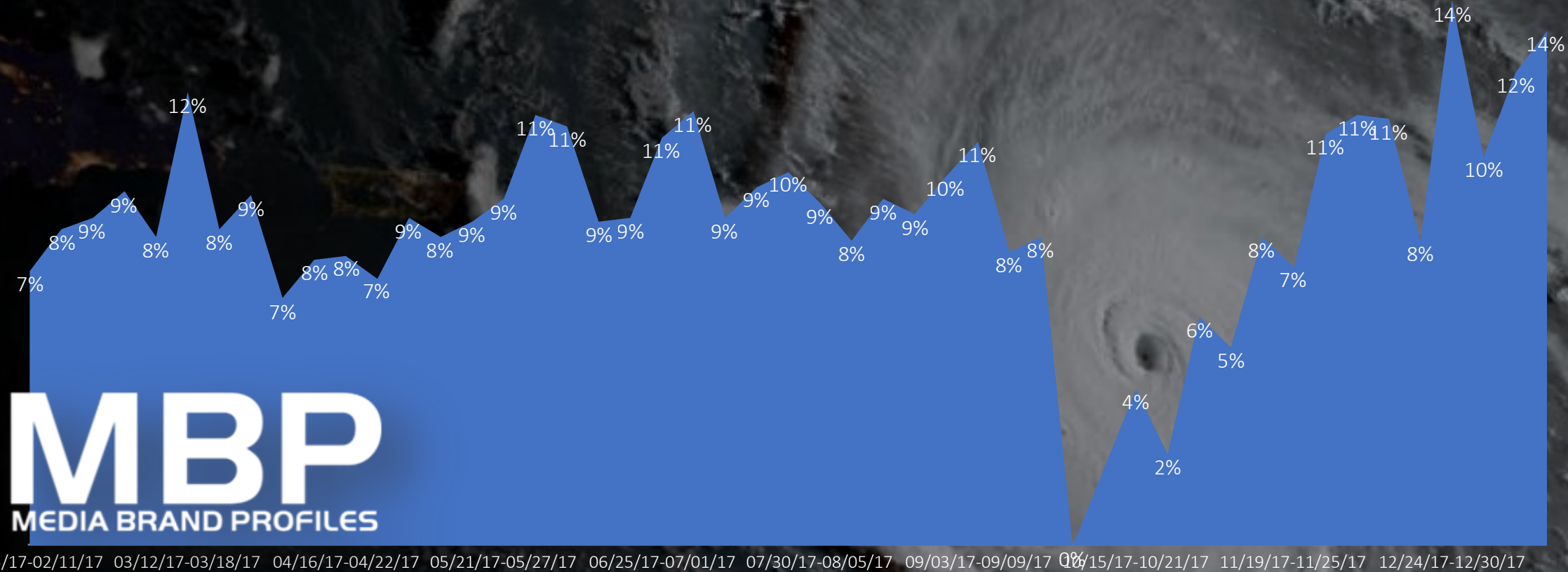
02/05/17-02/11/17 03/12/17-03/18/17 04/16/17-04/22/17 05/21/17-05/27/17 06/25/17-07/01/17 07/30/17-08/05/17 09/03/17-09/09/17 10/15/17-10/21/17 11/19/17-11/25/17 12/24/17-12/30/17

February 5, 2017 – January 20, 2018

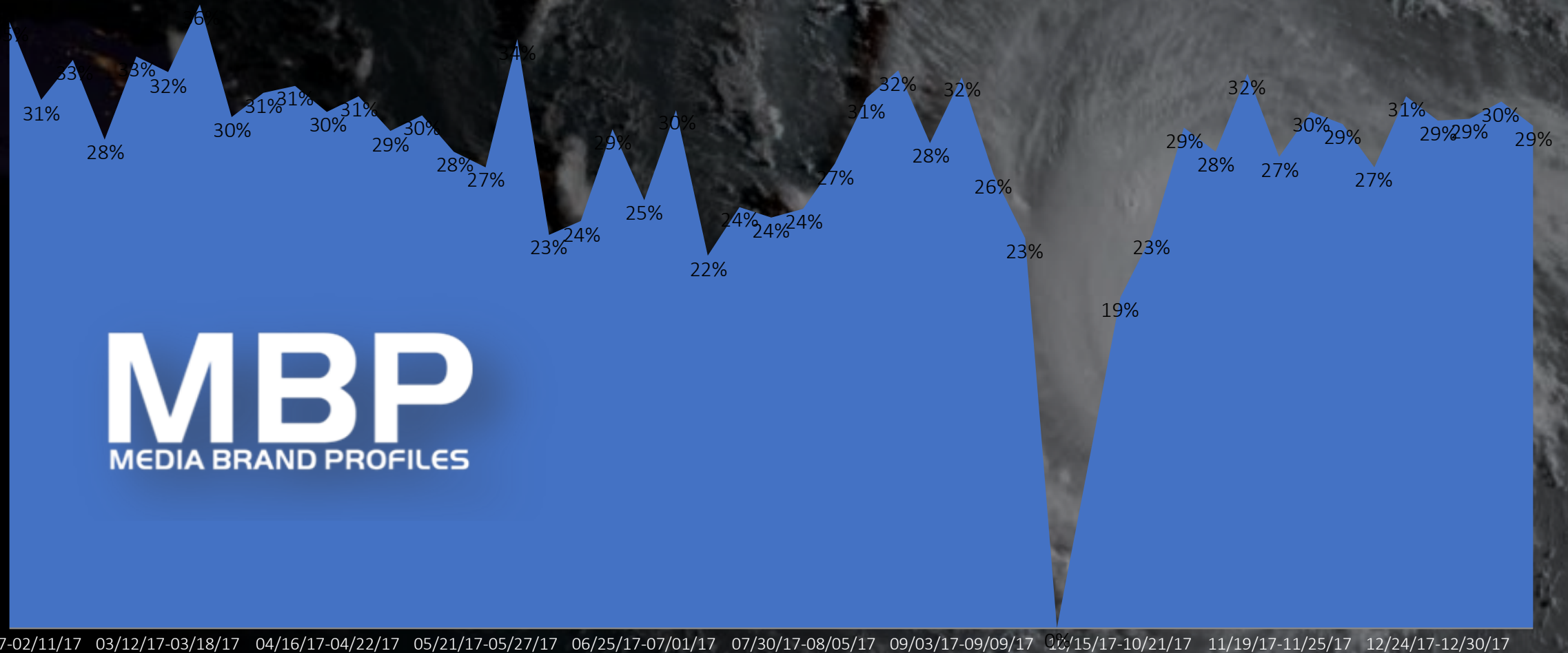
MBP Media Consumption Watch

Watched Video Stream (Yesterday)

2017- 2018 Weekly Trend



MBP Media Consumption Watch Recalls Outdoor Media (Past Week) 2017- 2018 Weekly Trend



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02/05/17-02/11/17 03/12/17-03/18/17 04/16/17-04/22/17 05/21/17-05/27/17 06/25/17-07/01/17 07/30/17-08/05/17 09/03/17-09/09/17 10/15/17-10/21/17 11/19/17-11/25/17 12/24/17-12/30/17

February 5, 2017 – January 20, 2018

Conclusiones

- La “nueva” realidad está tomando forma día a día.
- El consumidor del 2018 puede ser considerablemente diferente...
o no
- Por lo tanto, hay que:
 - Monitorear | Segmentar | Planificar | Actuar

¡Muchas Gracias!



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