THE CHANGING CONSUMER DEMOGRAPHICS:
An FTC Workshop - December 6, 2016
Welcome

Chairwoman Edith Ramirez
Federal Trade Commission
THE CHANGING DEMOGRAPHICS OF U.S. CONSUMERS

Jennifer Ortman, U.S. Census Bureau
Mark Lopez, Pew Research Center
Rolf Pendall, Urban Institute
Changing Demographics of the U.S. Population

Jennifer M. Ortman

The Changing Consumer Demographics: An FTC Workshop
December 6, 2016

This presentation is released to inform interested parties of ongoing research and to encourage discussion of work in progress. Any views expressed on statistical, methodological, or technical issues are those of the author and not necessarily those of the U.S. Census Bureau.
Non-whites to make up nearly 60 percent of U.S. by 2060: Census

By Susan Heavey
WASHINGTON (Reuters) - A surge in Hispanics and Asians is set to dramatically change the face of the United States over the next 50 years, with no one ethnic group the majority, according to U.S. figures.

Census Officials, Citing Increasing Diversity, Say U.S. Will Be a ‘Plurality Nation’

By MICHAEL COOPER
The term “minority,” at least as used to describe racial and ethnic groups in the United States, may need to be retired or rethought soon: by the end of this decade, according to Census Bureau projections released Wednesday, no single racial or ethnic group will constitute a majority of children under 18. And in about three

Census: White Population Will Lose Majority In U.S. By 2043

WASHINGTON -- White people will no longer make up a majority of Americans by 2043, according to new census projections. That's part of a historic shift that is reshaping the nation's schools, workforce and electorate, and is redefining long-held notions of race.

Immigration to fuel future population growth

By Carol Morello, Published: May 15
Immigration will be the primary driver of population growth in the United States within a few decades, a milestone not seen in almost two centuries, the Census Bureau projected Wednesday.

The Census Bureau said immigration will outstrip natural increase — the difference between births and deaths for the total population — by as early as 2027, but no later than 2038. The immigrants continue coming to the U.S.

If immigration levels are high, the census said, non-Hispanic whites will not have a majority again as early as 2041.

In 2012, minorities made up 37 percent of the population. Under all levels, minorities are expected to make up an ever-larger share of the population.

Immigrants To Be Largest Driver Of U.S. Population Growth

by HANSI LO WANG
May 15, 2013 3:40 PM

New immigrants will be the main driver of population growth in the U.S. by as early as 2027, according to new Census Bureau projections.

Over 50% of Americans Will Be Nonwhite Within 30 Years

Rachel Jank @rachel_jank March 3, 2015

U.S. Census Bureau finds today's minorities will be in the majority by 2044

Half of all children in the U.S. will be nonwhite by 2050, according to new census data released Tuesday, and more than half the entire population by 2044.

The U.S. Census Bureau's 2044 projections looked ahead at the national population up to 2060, making various predictions on the
Overview

- Background
  - What? Why? How?
- Results from the 2014 National Projections
- How to access projections data
What data do we produce?

National Projections

- More frequently produced
- Demographic detail includes age, sex, race, Hispanic origin, and nativity (in 2014)
- Projections for 50-year horizon
What data do we produce?

**National Projections**
- More frequently produced
- Demographic detail includes age, sex, race, Hispanic origin, and nativity (in 2014)
- Projections for 50-year horizon

**State Projections**
- Less frequently produced
- Fewer series with full demographic detail
- Haven’t released full detail since 1997
- Haven’t released any projections since 2004
- Links to states producing their own projections on our website
Why do we produce projections?

- Used as the base for projections of specific populations by other federal agencies
  - *National Institute on Aging*: elderly population for health planning
  - *Bureau of Labor Statistics*: working-age population for labor force projections
  - *National Cancer Institute*: projection of deaths to project the incidence of cancer
- Also used for resource planning and academic research
How are estimates different from projections?

- Estimates
  - For dates in the past and present
  - Based on existing data

- Projections
  - For dates in the future
  - Based on assumptions about future demographic trends

- When both an estimate and projection are available for the same date, estimates are the preferred data.
Making National Projections

Starting Population + Births and Immigrants = Future Population

Deaths and Emigrants

Aging
2014 National Projections

- Second series of projections based on the 2010 Census
- Projections of the U.S. population by age, sex, race, Hispanic origin, and nativity
- Covers the period from 2014 to 2060
- First series of projections to incorporate separate assumptions about the fertility of native and foreign-born women
United States Population by Nativity: 2014 to 2060
(Population in millions)

- Native born
- Foreign born
- Percent foreign born

<table>
<thead>
<tr>
<th>Year</th>
<th>Native born</th>
<th>Foreign born</th>
<th>Percent foreign born</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>318.7</td>
<td>42.3</td>
<td>13.3</td>
</tr>
<tr>
<td>2020</td>
<td>334.5</td>
<td>47.9</td>
<td>14.3</td>
</tr>
<tr>
<td>2030</td>
<td>359.4</td>
<td>56.9</td>
<td>15.8</td>
</tr>
<tr>
<td>2040</td>
<td>380.2</td>
<td>65.1</td>
<td>17.1</td>
</tr>
<tr>
<td>2050</td>
<td>398.3</td>
<td>72.3</td>
<td>18.2</td>
</tr>
<tr>
<td>2060</td>
<td>416.8</td>
<td>78.2</td>
<td>18.8</td>
</tr>
</tbody>
</table>
Numeric Change in Population and Components of Population Change: 2014-2060
(In millions)

- Total population change, 2014-2060: 196.6
  - Births: 162.6
  - Deaths: 98.1
  - Net international migration: 64.1

- Breakdown:
  - Native-born mothers: 156.8 (79.7%)
  - Foreign-born mothers: 39.8 (20.3%)
Population Aged 65 and Over: 2014 to 2060

- Population aged 65 years and over (in millions)
- Percent of total population
Percent Change in Population Size by Decade: 2000-2010 to 2050-2060

<table>
<thead>
<tr>
<th>Decade</th>
<th>Total Population</th>
<th>65 and over</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000-2010</td>
<td>10</td>
<td>15</td>
</tr>
<tr>
<td>2010-2020</td>
<td>8</td>
<td>39</td>
</tr>
<tr>
<td>2020-2030</td>
<td>7</td>
<td>31</td>
</tr>
<tr>
<td>2030-2040</td>
<td>6</td>
<td>11</td>
</tr>
<tr>
<td>2040-2050</td>
<td>5</td>
<td>7</td>
</tr>
<tr>
<td>2050-2060</td>
<td>5</td>
<td>12</td>
</tr>
</tbody>
</table>
Distribution of the Older Population by Age Group: 2014 to 2060
(Percent of population 65 and over)

- **2014**
  - 65 to 74: 57
  - 75 to 84: 30
  - 85 and over: 13

- **2030**
  - 65 to 74: 53
  - 75 to 84: 35
  - 85 and over: 12

- **2060**
  - 65 to 74: 47
  - 75 to 84: 33
  - 85 and over: 20
Projected Dependency Ratios: 2014 to 2060

Note: Old-age dependency = (Population aged 65 and over/Population aged 18 to 64)*100.
Youth dependency = (Population under 18/Population aged 18 to 64)*100.
Total dependency = ((Population aged 65 and over + Population under 18)/Population aged 18 to 64)*100
The percentage of the older population that is female is projected to decrease slightly, particularly for those 75 and over.

Note: The scale begins at 50 percent, rather than zero.
Percent Minority: 2014 to 2060

Minority refers to everyone other than the non-Hispanic White alone population.
### Percent 65 Years and Over in Selected Countries: 2014 and 2050

<table>
<thead>
<tr>
<th>Country</th>
<th>2014</th>
<th>2050</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Developed</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>World</td>
<td>8</td>
<td>17</td>
</tr>
<tr>
<td>Japan</td>
<td>26</td>
<td>40</td>
</tr>
<tr>
<td>Germany</td>
<td>21</td>
<td>30</td>
</tr>
<tr>
<td>Italy</td>
<td>21</td>
<td>31</td>
</tr>
<tr>
<td>France</td>
<td>18</td>
<td>26</td>
</tr>
<tr>
<td>Spain</td>
<td>18</td>
<td>31</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>18</td>
<td>24</td>
</tr>
<tr>
<td>Canada</td>
<td>17</td>
<td>26</td>
</tr>
<tr>
<td>Ukraine</td>
<td>16</td>
<td>29</td>
</tr>
<tr>
<td>Poland</td>
<td>15</td>
<td>32</td>
</tr>
<tr>
<td>United States</td>
<td>15</td>
<td>22</td>
</tr>
<tr>
<td>Russia</td>
<td>13</td>
<td>26</td>
</tr>
<tr>
<td><strong>Largest</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>China</td>
<td>10</td>
<td>27</td>
</tr>
<tr>
<td>Indonesia</td>
<td>7</td>
<td>19</td>
</tr>
<tr>
<td>India</td>
<td>6</td>
<td>15</td>
</tr>
</tbody>
</table>
Summary

 The U.S. population is projected to increase from 319 million to 417 million between 2014 and 2060, growing more slowly in future decades than in the recent past.

 By 2060, nearly one-in-five of the nation’s total population is projected to be foreign born.
Summary (continued)

- The older population is projected to more than double, growing from 46 million in 2014 to 98 million in 2060.
- Growth in the older population will be driven by the aging of the baby boomers over the next two decades.
  - By 2030, one in five people living in the United States will be 65 years or older.
Summary (continued)

- Despite the increase in the share of the U.S. population that is in the older ages, the nation is projected to remain one of the youngest developed countries in the world.
Accessing Projections Data

http://www.census.gov/topics/population/population-projections.html
Contact Information

Jennifer Ortman
jennifer.m.ortman@census.gov

Projections Branch
(301) 763-2428

http://www.census.gov/topics/population/population-projections.html
THE CHANGING DEMOGRAPHICS OF U.S. CONSUMERS

Jennifer Ortman, U.S. Census Bureau
Mark Lopez, Pew Research Center
Rolf Pendall, Urban Institute
Big Trends That Are Reshaping Key U.S. Communities

Mark Hugo Lopez
Director of Hispanic Research
Big Trends among U.S. Hispanics

- U.S. Latino population growth, dispersion slowing
- U.S. births to Hispanic parents now drive Hispanic population growth, not immigration
- Foreign-born share among Hispanics is in decline
- Half of U.S.-born Latinos are under age 19
- A growing share of Latinos live in English only households
- Record number of young Latinos are attending college
U.S. Hispanic Population Reaches New High

57 million Latinos were living in the U.S. in 2015.

Average annual growth rate

Note: The Great Recession began in December 2007 and ended in June 2009.
Source: Pew Research Center tabulations of U.S. Census Bureau population estimates.
“U.S. Latino Population Growth and Dispersion Has Slowed Since Onset of the Great Recession”
Nearly Three-Quarters of U.S.-born Latinos are Millennials—or Younger

% among Hispanics

- Younger than 18
- Millennial adults (18-33)
- Gen X (34-49)
- Boomer (50-68)
- Silent/Greatest (69 and older)

U.S. born
- 47% Millennials
- 27% Gen X
- 14% Boomers
- 9% Silent/Greatest

Foreign born
- 6% Millennials
- 26% Gen X
- 37% Boomers
- 24% Silent/Greatest
- 7% Younger than 18

Source: Pew Research Center analysis of 2014 American Community Survey (IPUMS).
“The Nation’s Latino Population Is Defined by Its Youth”
About Three-Quarters of Hispanic Millennials are Proficient in English

% among Hispanics

<table>
<thead>
<tr>
<th>Ages/Generations</th>
<th>Do not speak English</th>
<th>Speak English less than very well</th>
<th>Speak English very well</th>
<th>Proficient in English</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 to 17</td>
<td>1</td>
<td>5</td>
<td>37</td>
<td>37</td>
</tr>
<tr>
<td>Millennial adults (18-33)</td>
<td>12</td>
<td>5</td>
<td>36</td>
<td>32</td>
</tr>
<tr>
<td>Gen X (34-49)</td>
<td>5</td>
<td>9</td>
<td>35</td>
<td>27</td>
</tr>
<tr>
<td>Boomer (50-68)</td>
<td>9</td>
<td>12</td>
<td>32</td>
<td>20</td>
</tr>
<tr>
<td>Silent/Greatest (69+)</td>
<td>12</td>
<td>12</td>
<td>22</td>
<td>16</td>
</tr>
</tbody>
</table>

Note: Respondents are asked if they speak a language besides English at home. If they answer yes, they are asked how well they speak English. Figures may not add to 100% due to rounding.
Source: Pew Research Center analysis of 2014 American Community Survey (IPUMS).
“The Nation’s Latino Population Is Defined by Its Youth”
Big Trends among Asian Americans

- Asian Americans are diverse
- Asian community is country’s fastest growing group
- Among Asian American adults, three-quarters are immigrants
- Arrival of new immigrants from Asia is driving population growth, not births
- Asian Americans have the highest intermarriage rate
U.S. Asian Groups, 2013

Population in thousands

<table>
<thead>
<tr>
<th>Group</th>
<th>Population (in thousands)</th>
<th>% of Asians</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chinese*</td>
<td>4,520</td>
<td>23.9</td>
</tr>
<tr>
<td>Filipino</td>
<td>3,649</td>
<td>19.3</td>
</tr>
<tr>
<td>Indian</td>
<td>3,461</td>
<td>18.3</td>
</tr>
<tr>
<td>Vietnamese</td>
<td>1,907</td>
<td>10.1</td>
</tr>
<tr>
<td>Korean</td>
<td>1,769</td>
<td>9.4</td>
</tr>
<tr>
<td>Japanese*</td>
<td>1,447</td>
<td>7.6</td>
</tr>
<tr>
<td>Pakistani</td>
<td>481</td>
<td>2.5</td>
</tr>
<tr>
<td>Cambodian</td>
<td>323</td>
<td>1.7</td>
</tr>
<tr>
<td>Hmong</td>
<td>286</td>
<td>1.5</td>
</tr>
<tr>
<td>Thai</td>
<td>275</td>
<td>1.5</td>
</tr>
<tr>
<td>Laotian</td>
<td>261</td>
<td>1.4</td>
</tr>
<tr>
<td>Bangladeshi</td>
<td>170</td>
<td>0.9</td>
</tr>
<tr>
<td>Burmese</td>
<td>136</td>
<td>0.7</td>
</tr>
<tr>
<td>Indonesian</td>
<td>112</td>
<td>0.6</td>
</tr>
<tr>
<td>Nepalese</td>
<td>99</td>
<td>0.5</td>
</tr>
<tr>
<td>Sri Lankan</td>
<td>54</td>
<td>0.3</td>
</tr>
<tr>
<td>Bhutanese</td>
<td>32</td>
<td>0.2</td>
</tr>
<tr>
<td>Malaysian</td>
<td>32</td>
<td>0.2</td>
</tr>
<tr>
<td>Mongolian</td>
<td>18</td>
<td>0.1</td>
</tr>
</tbody>
</table>

Source: Pew Research Center analysis of Census Bureau data.
A Century of Change for Three of the Nation’s Oldest Asian Origin Groups

% of the Asian-American population that is …

Source: Pew Research Center analysis of Census Bureau data.
U.S. Asian Population Grew 65% Since 2000

Asian-American population (alone and in combination), in thousands

Source: Pew Research Center analysis of Census Bureau data.
Over 1 million more Asian Immigrants than Asian Newborns from 2000-2013

Sources of population change from 2000-2013, in millions

- U.S. births
- Immigration

Asians

- U.S. births: 3.1
- Immigration: 4.4

Hispanics

- U.S. births: 12.6
- Immigration: 7.1

Source: Pew Research Center analysis of Census Bureau data.
Intermarriage Rates by Race and Ethnicity

% of Newlyweds Married to Someone of a Different Race or Ethnicity

- White: 9.4%
- Black: 17.1%
- Hispanic: 25.7%
- Asian: 27.7%

Source: Pew Research Center analysis of 2010 ACS Integrated Public Use Microdata Sample (IPUMS) files
**Big Trends among Immigrants**

- U.S. immigrant population is growing – in number and share
- Asia is now the biggest sender of immigrants
- Most immigrants are in the U.S. legally
- U.S. unauthorized immigrant population has stabilized
- Immigrants from Asia are better educated than immigrants from Mexico or Central America
U.S. Immigrant Population Reached 45 million in 2015; Projected to be 78.2 Million in 2065

1965: Immigration and Nationality Act was passed

U.S. Foreign-Born Share Projected to Hit Record Milestone in 2065

1965: Immigration and Nationality Act was passed

Highest share of immigrants in Southwest, large cities

Source: American Community Survey 2010-2014 5-year estimates via American FactFinder
Among new immigrant arrivals, Asians outnumber Hispanics

% of immigrants arriving to the U.S. in each year who are...


Latin American, Asian Immigrants Make Up Most of Post-1965 Immigration

Largest Immigrant Group in Each State

1960

Largest Immigrant Group in Each State

2013

Source: Pew Research Center tabulations of the 2013 American Community Survey (IPUMS)
U.S. foreign-born population includes variety of groups

Source: Pew Research Center estimates based on residual methodology, applied to 2014 American Community Survey
U.S. Unauthorized immigrant population stable since 2009


“Overall Number of U.S. Unauthorized Immigrants Holds Steady Since 2009”
Education Characteristics of Recent Immigrants, by Race and Ethnicity, 2010

<table>
<thead>
<tr>
<th>Race</th>
<th>Less than College</th>
<th>College +</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asian</td>
<td>35</td>
<td>65</td>
</tr>
<tr>
<td>White</td>
<td>42</td>
<td>58</td>
</tr>
<tr>
<td>Black</td>
<td>62</td>
<td>38</td>
</tr>
<tr>
<td>Hispanic</td>
<td>84</td>
<td>16</td>
</tr>
</tbody>
</table>

Source: Pew Research Center 2012 Asian-American Survey
Contact Information

Mark Hugo Lopez

Director of Hispanic Research

mlopez@pewresearch.org
THE CHANGING DEMOGRAPHICS OF U.S. CONSUMERS

Jennifer Ortman, U.S. Census Bureau
Mark Lopez, Pew Research Center
Rolf Pendall, Urban Institute
Mapping America’s Futures:
The Growing Diversity of Diversity in the United States

Rolf Pendall, Ph.D., Co-director, Metropolitan Housing & Communities Policy Center
Presentation to the Federal Trade Commission
December 6, 2016
Overview

Methods

- How the Urban Institute uses Census Bureau projections to provide insights about local population change

Looking toward 2030

- Seniors are growing everywhere, but non-seniors aren’t.
- Non-whites are growing everywhere, but white non-Hispanics aren’t.
- The result in 2030 will be a nation whose sub-national population landscape remains “diversely diverse.”
How *Mapping America’s Futures* works
We start with the Census Bureau’s mid-range population projections…

http://apps.urban.org/features/mapping-americas-futures/
then assess variations in county and state age- and race-specific birth, deaths, and net migration (2000s).

US states by life expectancy at birth, 2005

Accounting for variations in birth, death, and migration, we distribute Census projections to counties, aggregating to 740 “commuting zones”.

Note: Images from online tool still are based on the first version of Mapping America’s Futures, which uses 2012 US Census Bureau projections. An updated version of Mapping America’s Futures will be released in 2017.

http://apps.urban.org/features/mapping-americas-futures/
We then vary our assumptions about birth, death, and migration rates to create 27 scenarios…

http://apps.urban.org/features/mapping-americas-futures/
...so users can explore the impact of changing assumptions on population change.

http://apps.urban.org/features/mapping-americas-futures/
All the data are freely downloadable.

http://apps.urban.org/features/mapping-americas-futures/
What the latest update of Mapping America’s Futures suggests about aging and racial/ethnic diversity across the U.S.
Variation in growth rates, with Midwest & rural loss, gains in coastal areas, Sunbelt and the Rockies

Population % change, 2015-30
-27.3% - -5.7%
-5.5% - 4.2%
4.3% - 13.6%
13.8% - 26.1%
26.4% - 53%

Source: Mapping America’s Futures, 8/2015 vintage, all average scenario
A few big metropolitan areas expect 1-2.5M new residents between 2015 and 2030

Source: Mapping America’s Futures, 8/2015
vintage, all average scenario
Senior population will rise everywhere 2015-30, often by over 50%, sometimes more than doubling.
But under-65 population will decline or grow very little in large swaths of the US

Under 65 percent change, 2015-30
-39% - -5%  5% - 25%
-5% - 5%   29% - 45%

Source: Mapping America’s Futures, 8/2015 vintage, all average scenario
Resulting in great diversity in the percent seniors by the year 2030

Source: Mapping America’s Futures, 8/2015 vintage, all average scenario
Hispanics are growing everywhere except rural areas with older predominantly Hispanic populations.
Broad growth in the (small) “other non-Hispanic” population—many complex reasons

Source: Mapping America’s Futures, 8/2015 vintage, all average scenario
Black non-Hispanic growth fastest in TX, FL, ATL, Charlotte, and rural areas with few black residents

Source: Mapping America’s Futures, 8/2015 vintage, all average scenario
White non-Hispanic population will decline in much of the US from 2015 to 2030

Source: Mapping America’s Futures, 8/2015 vintage, all average scenario
Resulting in great diversity in the percent white non-Hispanic by 2030

Source: Mapping America’s Futures, 8/2015 vintage, all average scenario
Concluding thoughts about aging and diversity

The U.S. is aging everywhere...

- But some areas have been rejuvenated by migration, especially from abroad, while others are markedly older because more young people have moved out than in.
- And apart from a few rural areas, over two-thirds of residents will still be under 65, making the future one of *age diversity*.

The U.S. is getting more racially and ethnically diverse...

- But areas with faster growth from migration and births are diversifying faster than those with persistent outmigration and higher percentages of seniors.
THE CHANGING CONSUMER DEMOGRAPHICS:
An FTC Workshop - December 6, 2016