



# **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*

## 1

# 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**

**+**

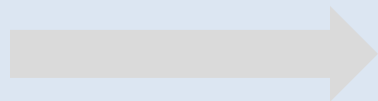
**Births  
and  
Immigrants**

**-**

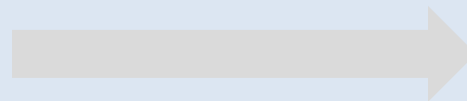
**Deaths  
and  
Emigrants**

**=**

**Future  
Population**



**Aging**

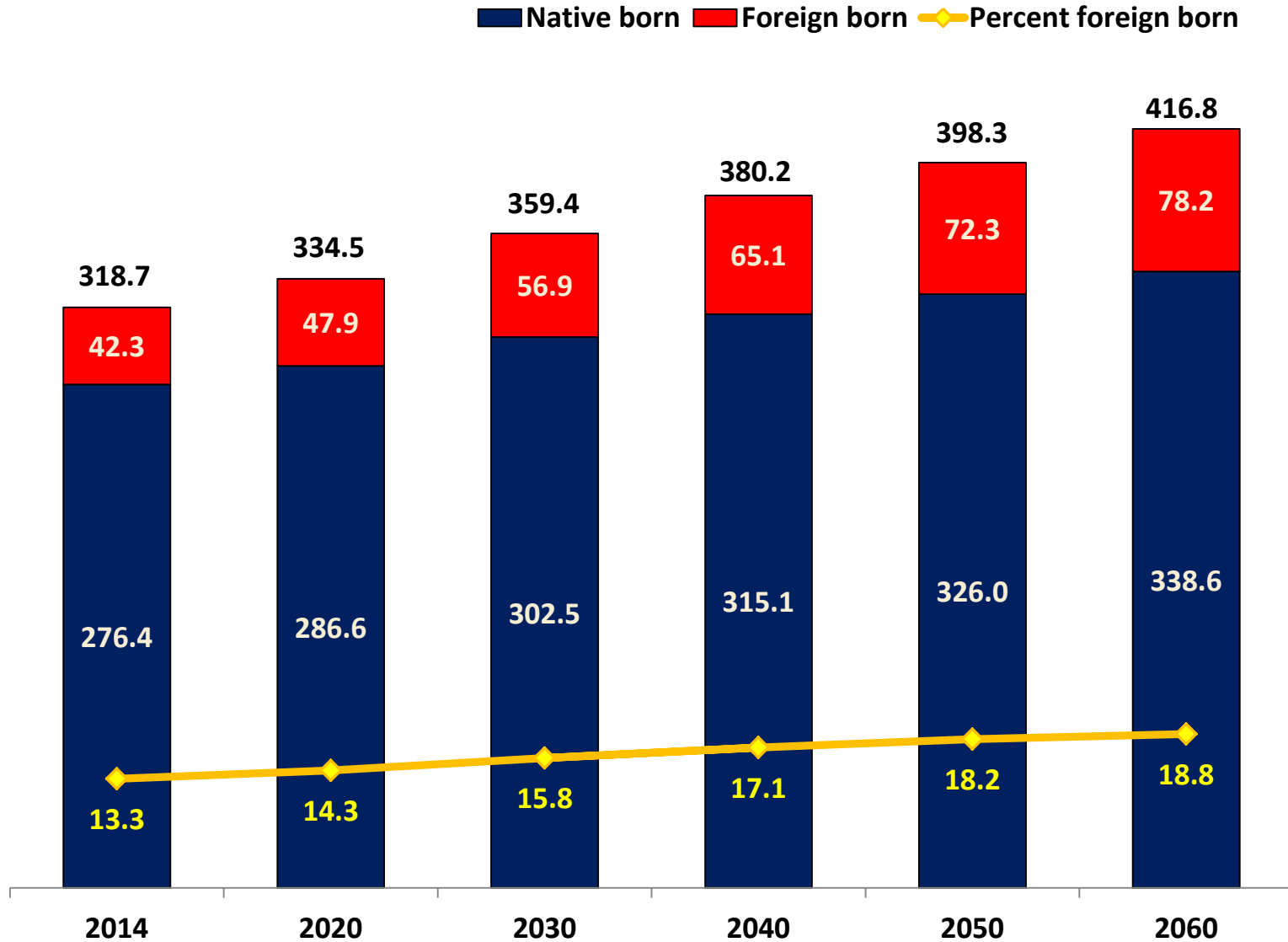


# 2014 National Projections

- 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

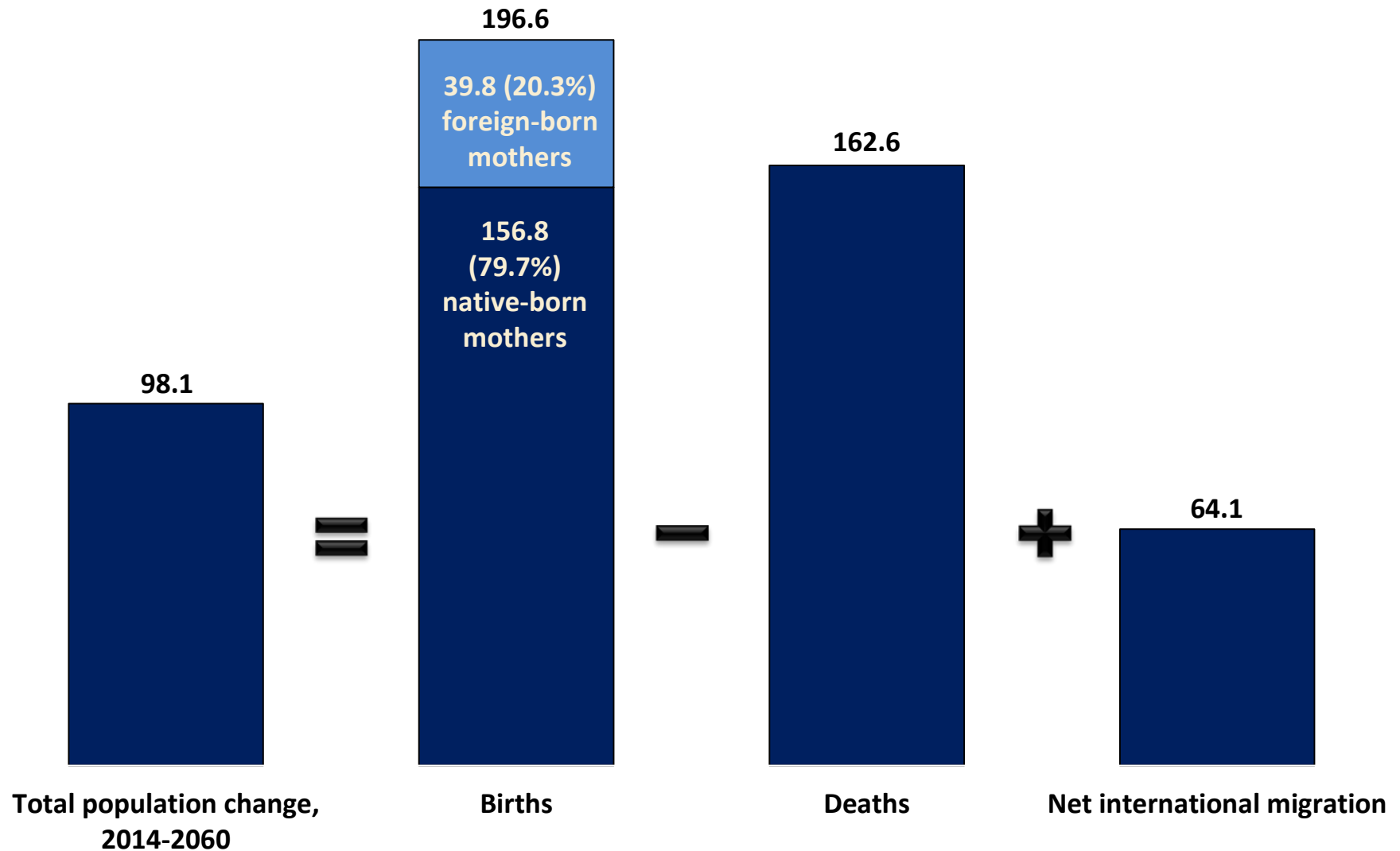
# United States Population by Nativity: 2014 to 2060

(Population in millions)



# Numeric Change in Population and Components of Population Change: 2014-2060

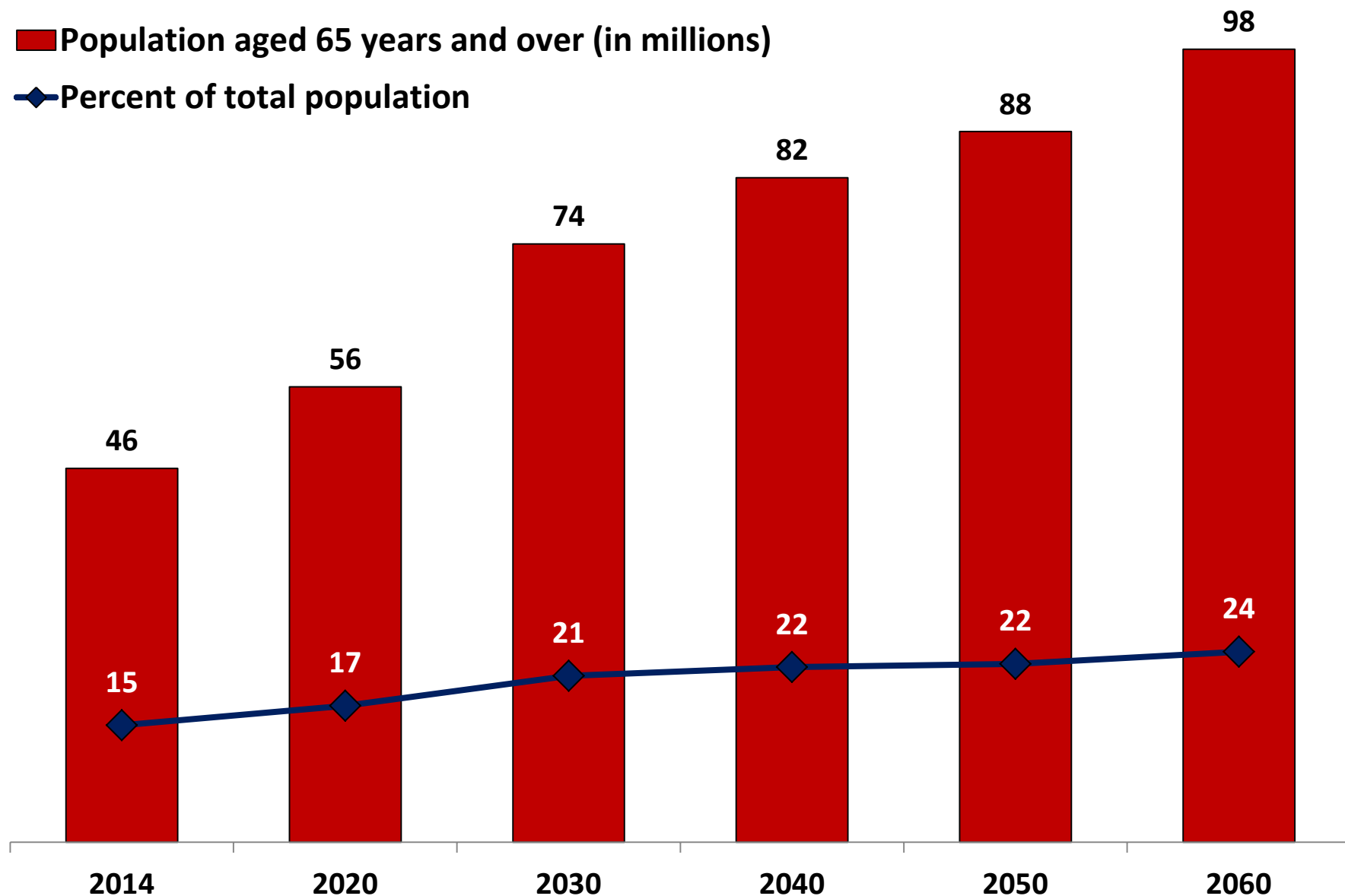
(In millions)



# Population Aged 65 and Over: 2014 to 2060

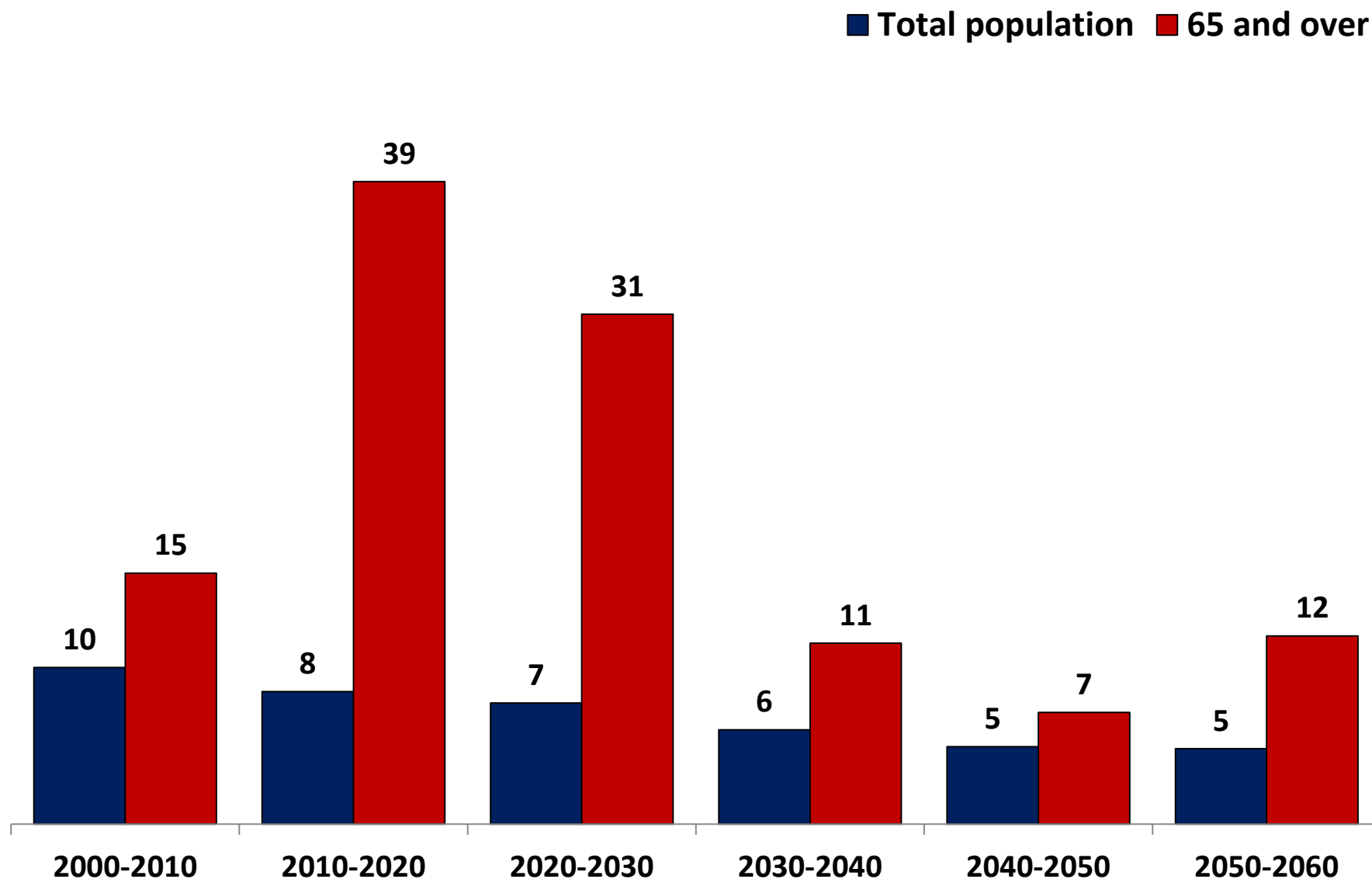
■ Population aged 65 years and over (in millions)

◆ Percent of total population



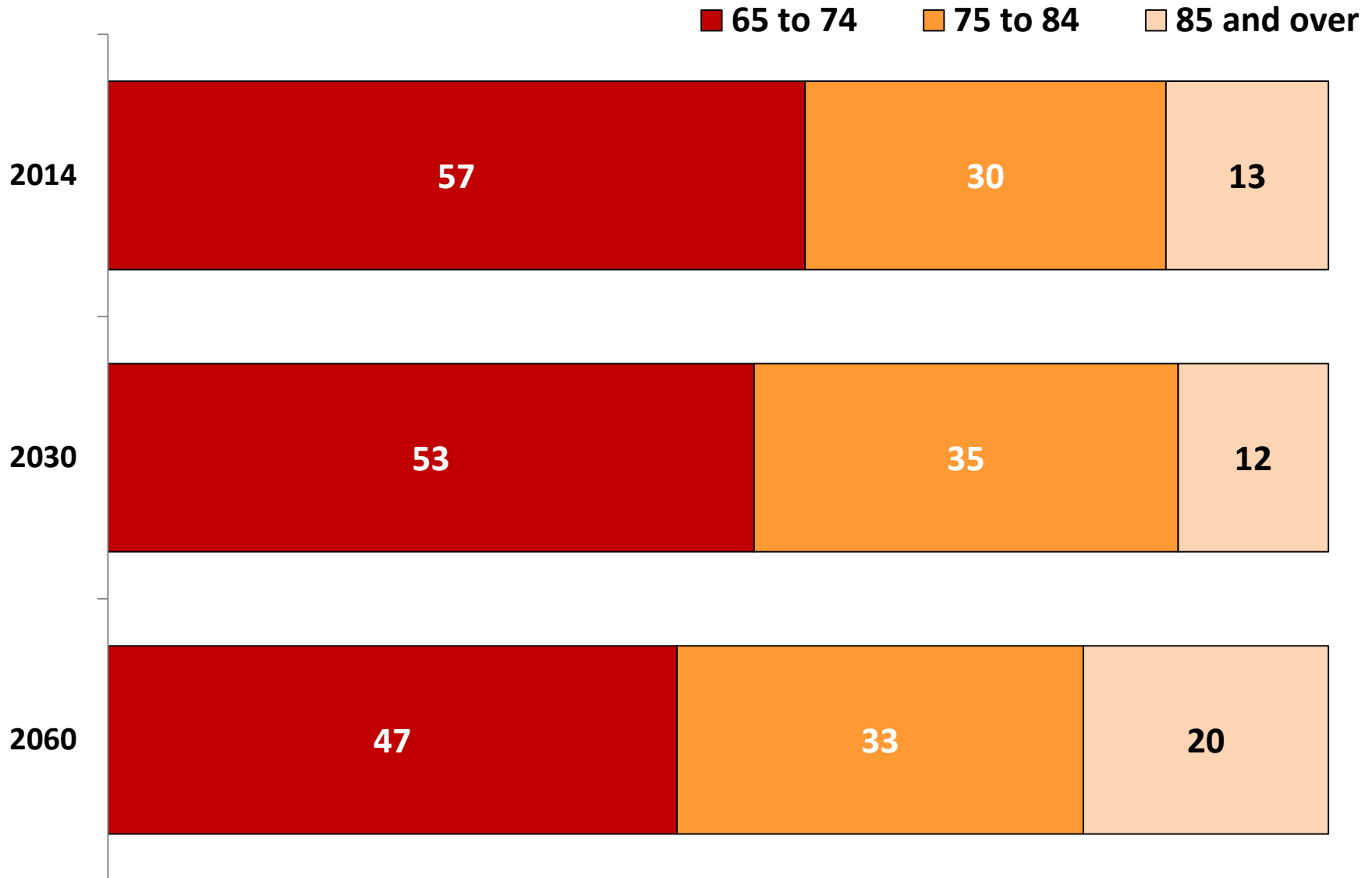


# Percent Change in Population Size by Decade: 2000-2010 to 2050-2060

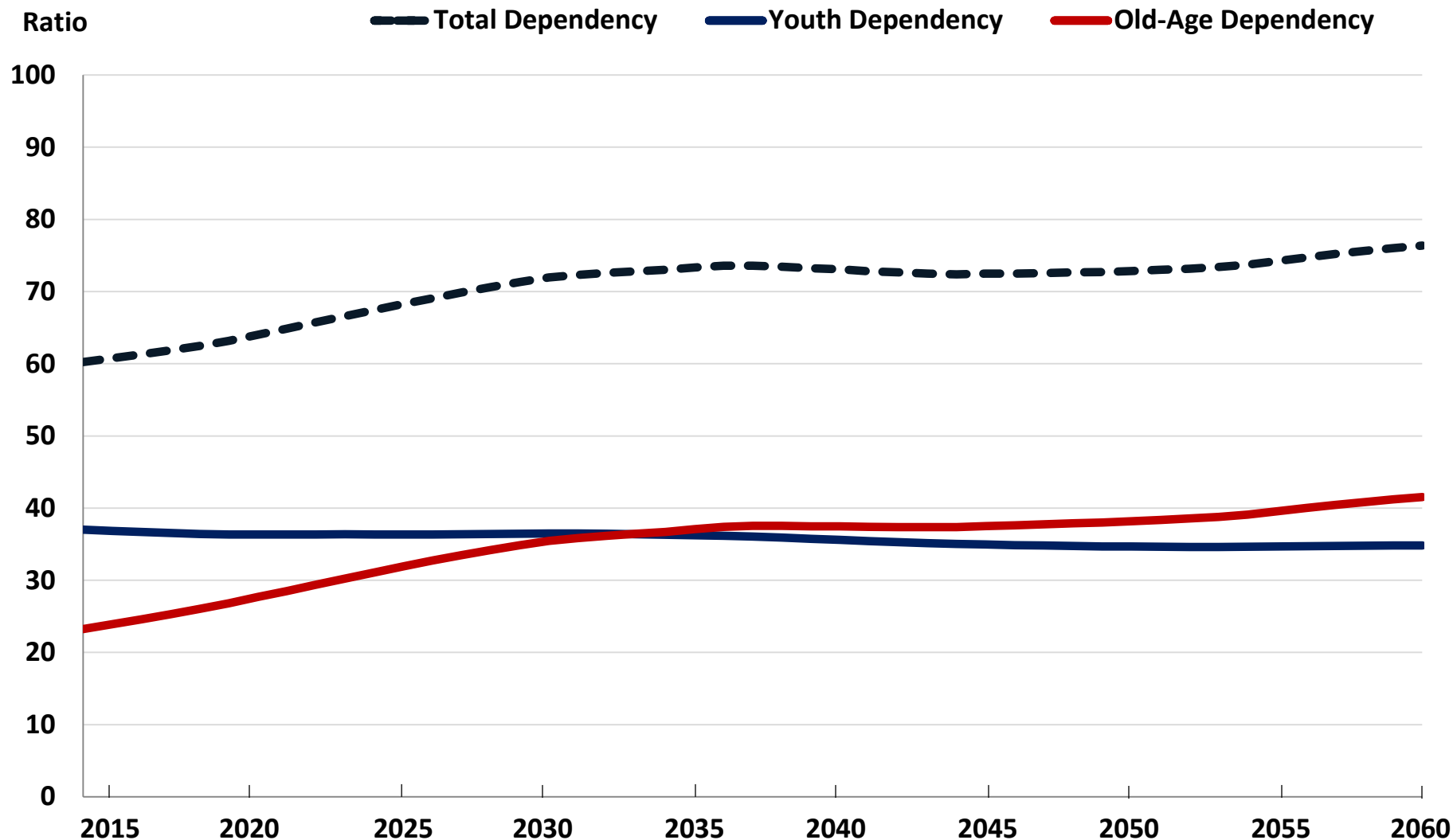


# Distribution of the Older Population by Age Group: 2014 to 2060

(Percent of population 65 and over)



# Projected Dependency Ratios: 2014 to 2060

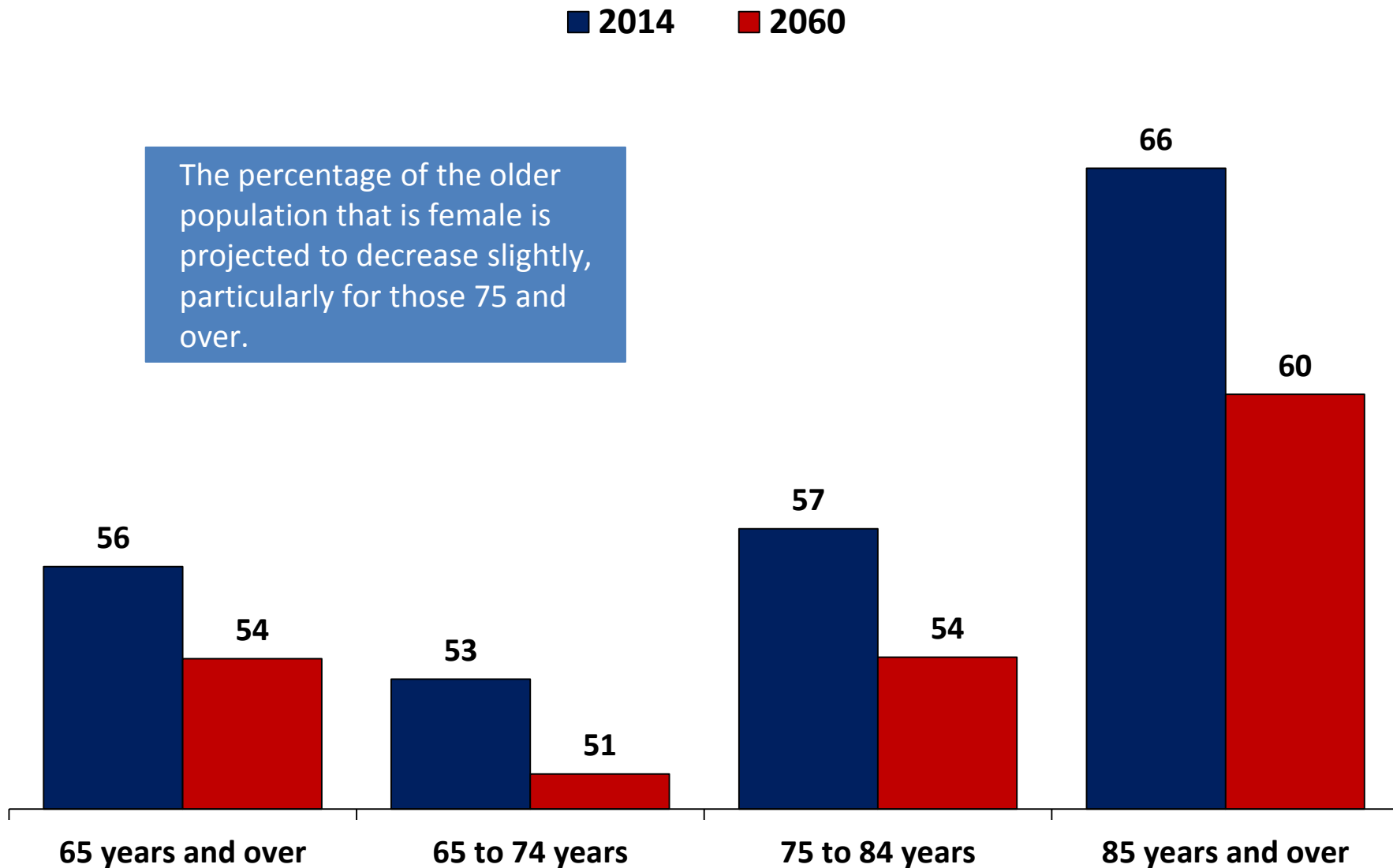


Note: Old-age dependency = (Population aged 65 and over/Population aged 18 to 64)\*100.

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

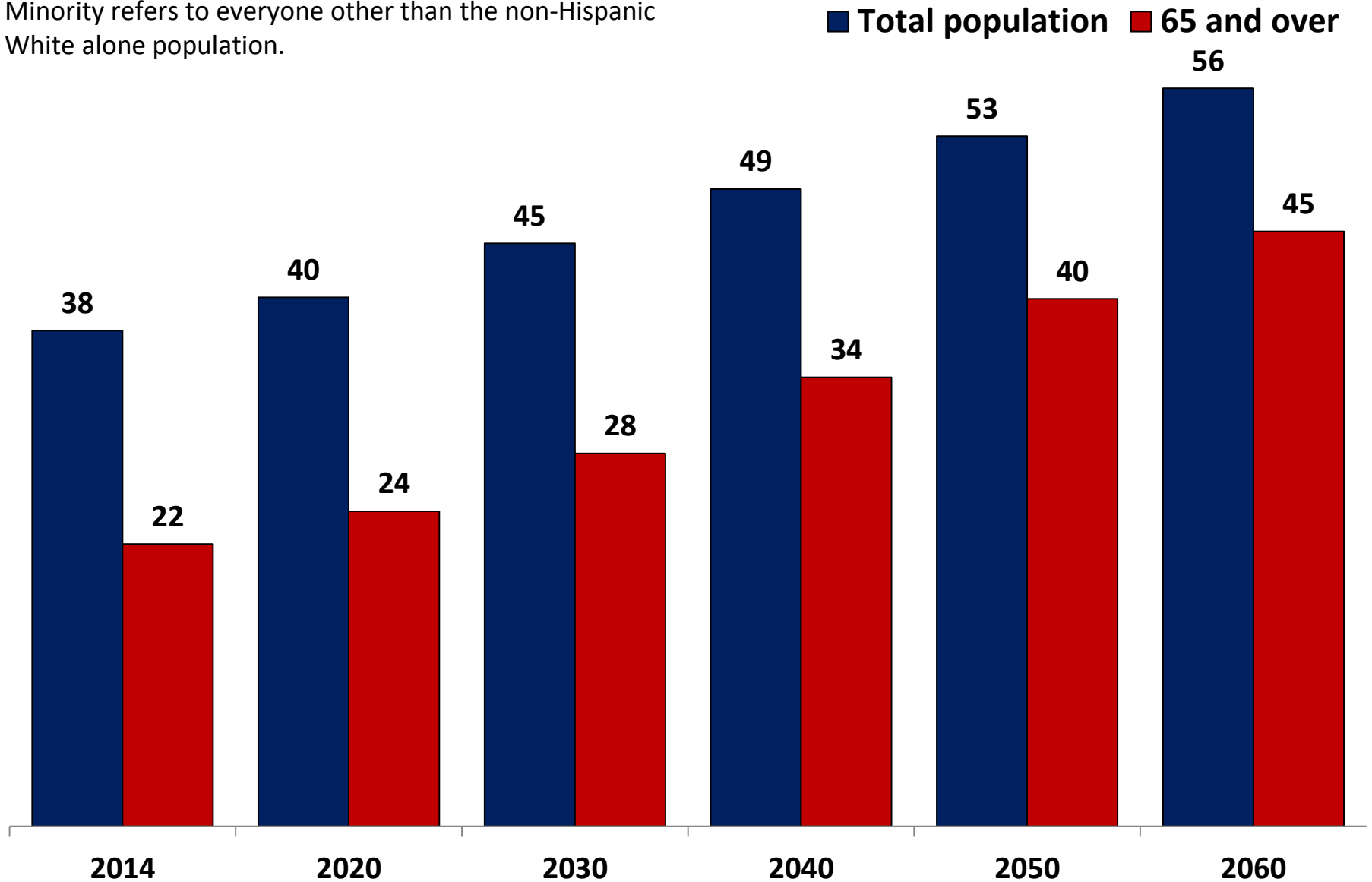
# Percent Female for the Older Population by Age: 2014 and 2060



Note: The scale begins at 50 percent, rather than zero.

# Percent Minority: 2014 to 2060

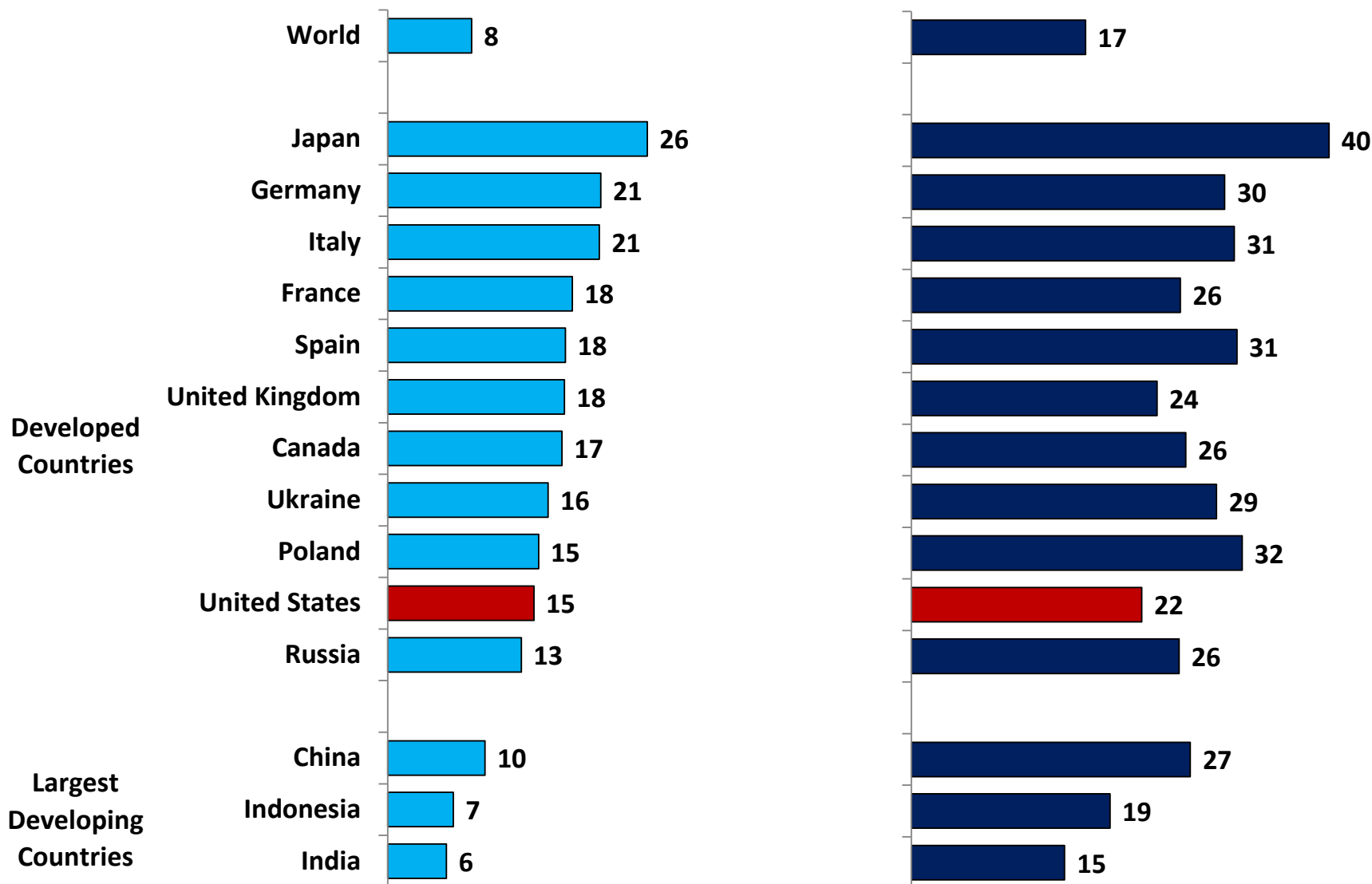
Minority refers to everyone other than the non-Hispanic White alone population.



# Percent 65 Years and Over in Selected Countries: 2014 and 2050

2014

2050



# 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>



## Population Projections

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Population projections are estimates of the population for future dates. They are typically based on an estimated population consistent with the most recent decennial census and are produced using the cohort-component method.

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Data



### New Census Bureau Report Analyzes U.S. Population Projections

March 03, 2015

A new report provides an in-depth analysis of the nation's population looking forward to 2060.



### Census Bureau Projects U.S. and World Populations on New Year's Day

December 29, 2014

As our nation prepares to ring in the new year, the U.S. Census Bureau today projected the United States population will be 320,090,857 on Jan. 1, 2015.



### U.S. Population Projections: 2014-2060

December 10, 2014

Projections of the U.S. resident population by age, sex, race, and Hispanic/Latino ethnicity from 2014 to 2060.

# Contact Information

**Jennifer Ortman**

[jennifer.m.ortman@census.gov](mailto: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**

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PewResearchCenter

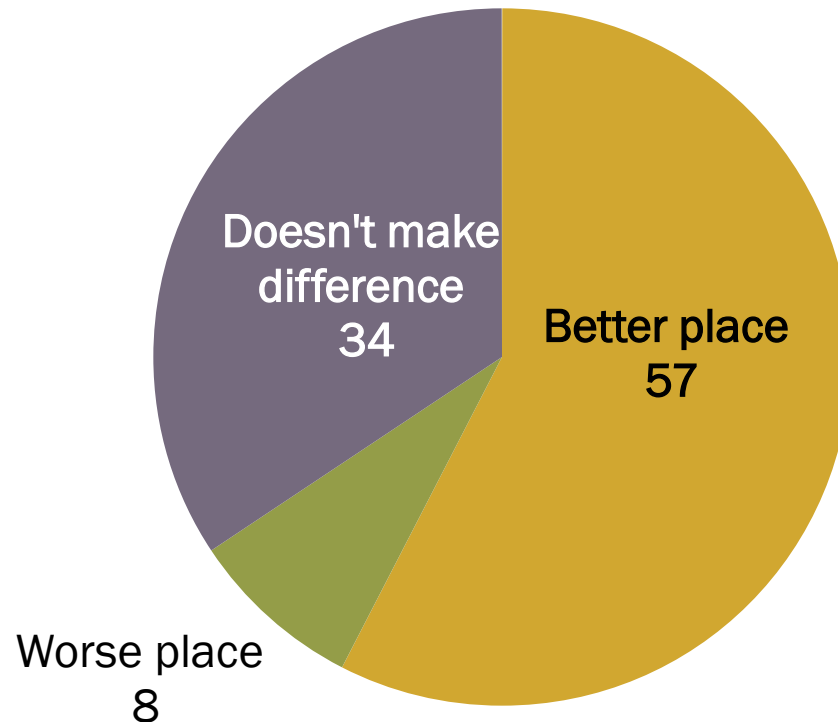
# **Big Trends That Are Reshaping Key U.S. Communities**

**Mark Hugo Lopez**

*Director of Hispanic Research*

# Most Say Racial, Ethnic Diversity Makes the U.S. a Better Place to Live

*Increasing number of people of many different races, ethnic groups and nationalities in U.S. make country a ...*



Source: Pew Research Center survey of U.S. adults conducted Aug. 27-Oct. 4, 2015

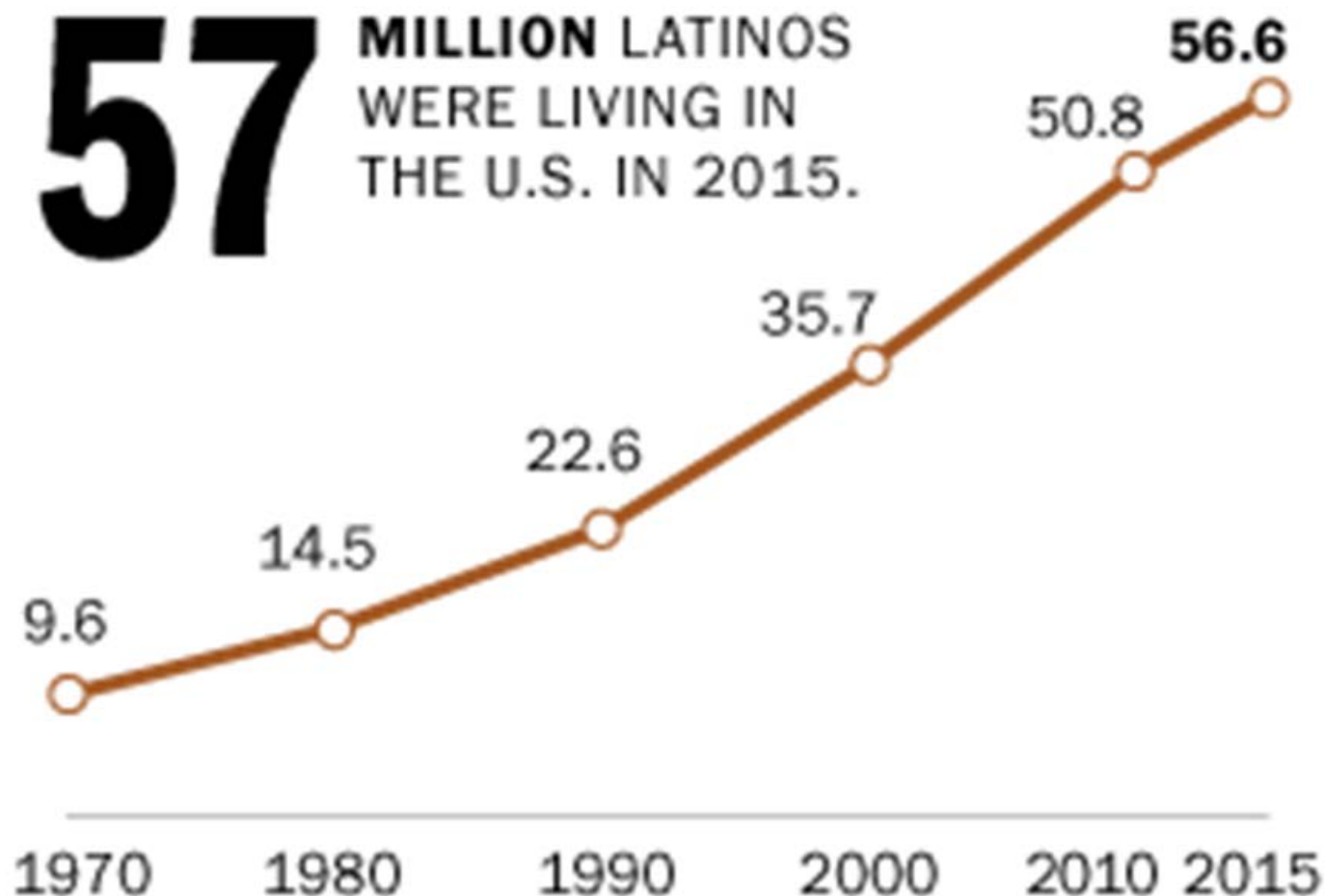


# Big Trends among U.S. Hispanics

- 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

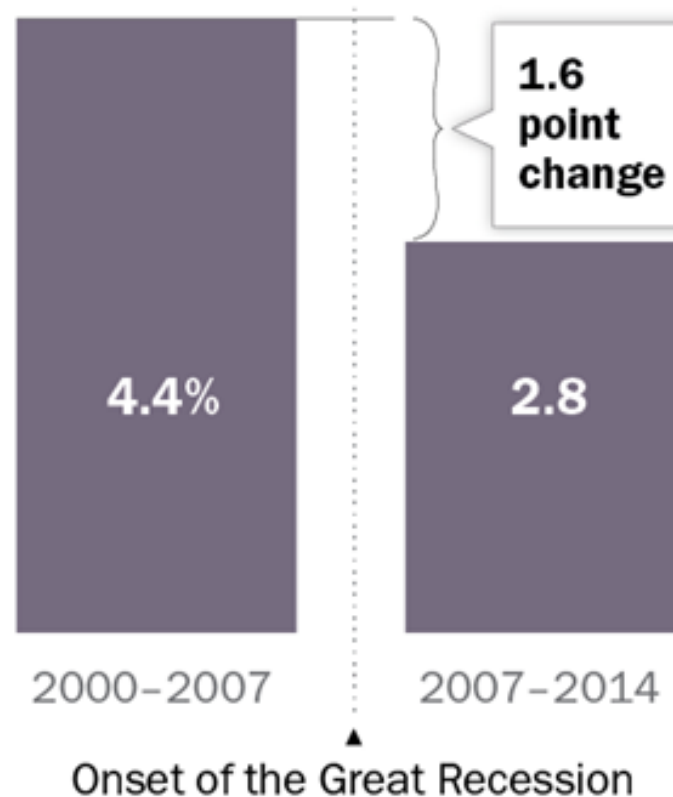
# U.S. Hispanic Population Reaches New High

*In millions*



# U.S. Hispanic Population Growth Slows Sharply Since 2007

*Average annual growth rate*



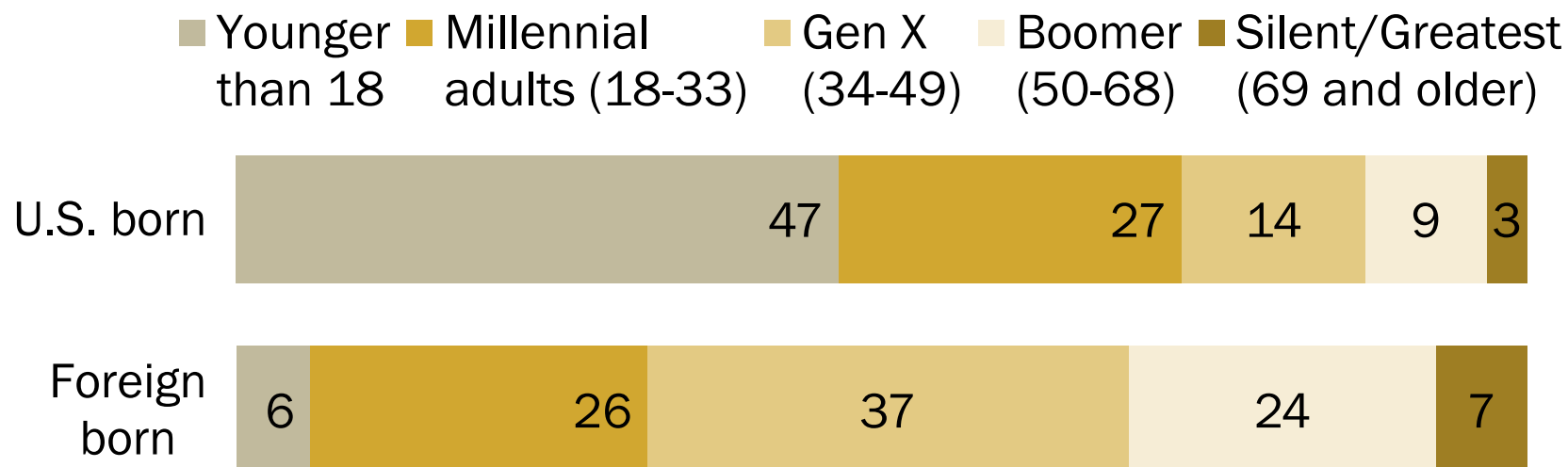
Note: The Great Recession began in December 2007 and ended in June 2009.

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

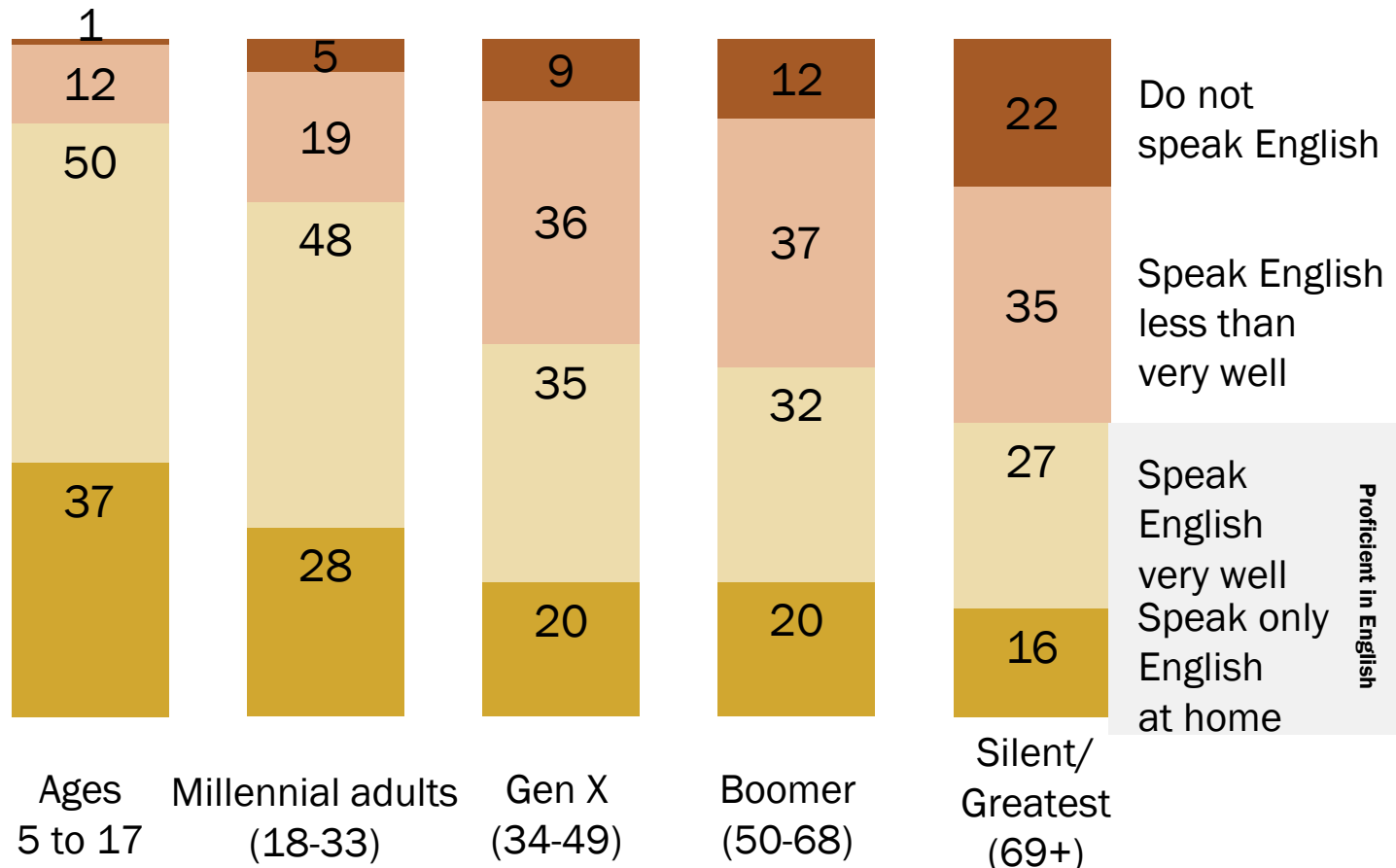
*% among Hispanics*



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*



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).

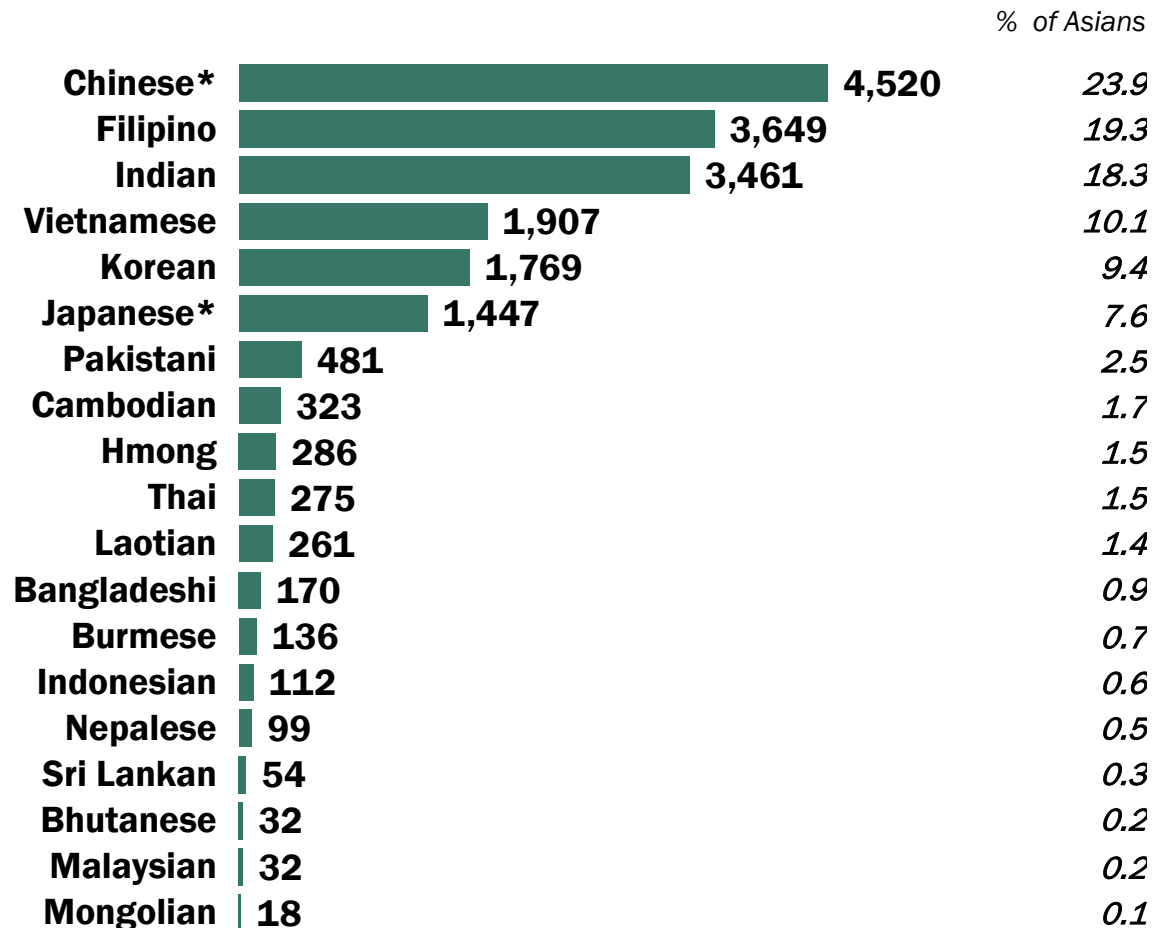
"The Nation's Latino Population Is Defined by Its Youth"

# 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*

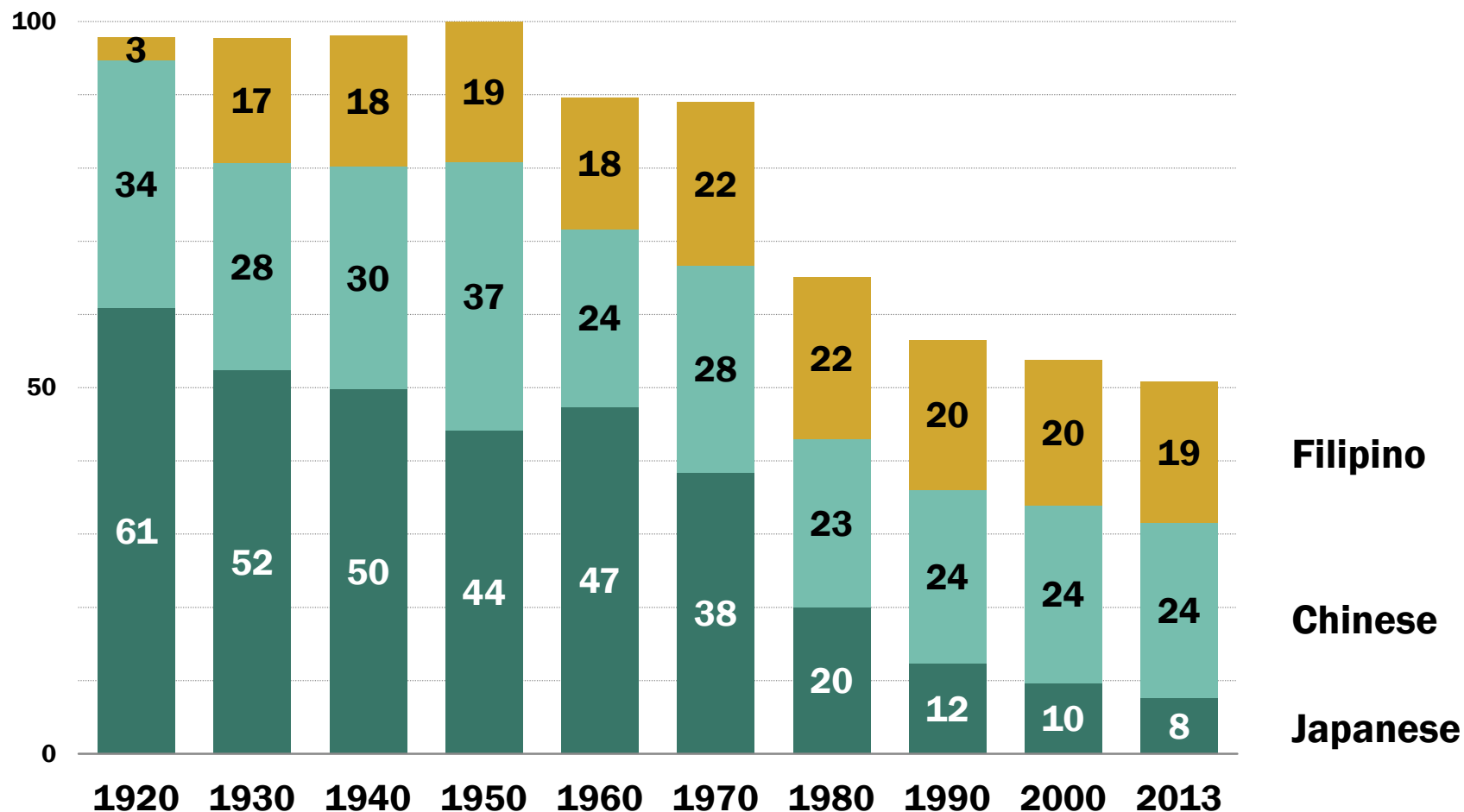


Source: Pew Research Center analysis of Census Bureau data.



# A Century of Change for Three of the Nation's Oldest Asian Origin Groups

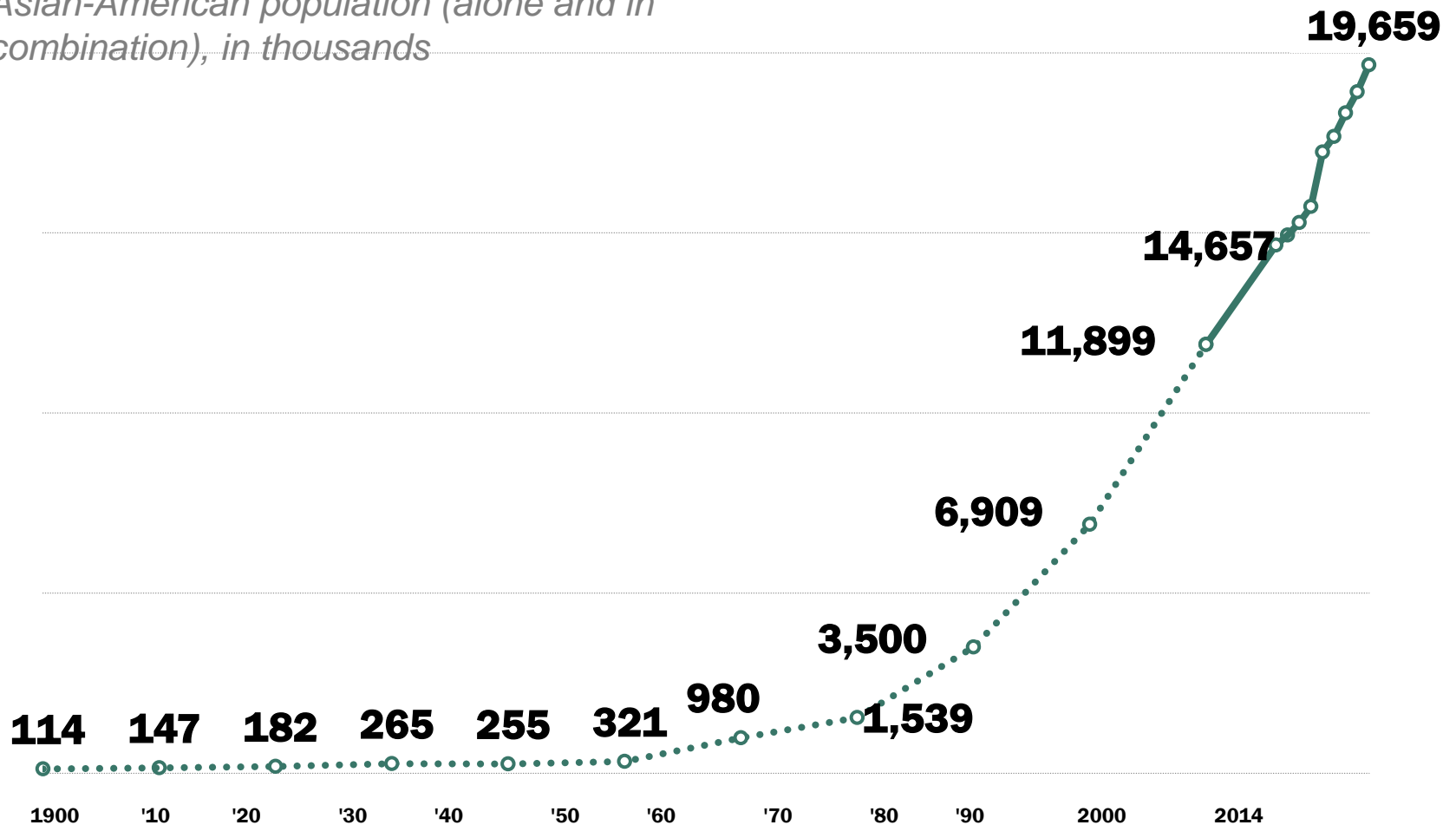
*% of the Asian-American population that is ...*



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*

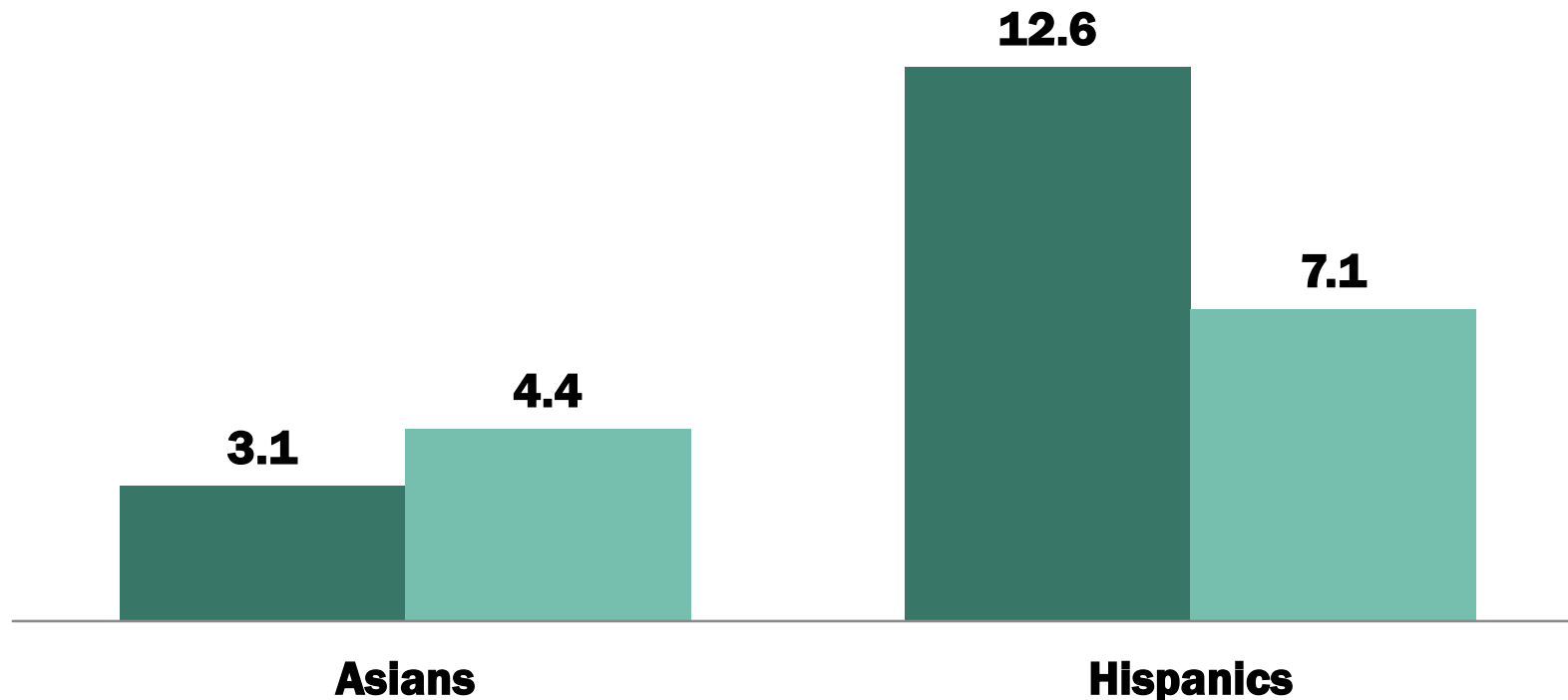


Source: Pew Research Center analysis of Census Bureau data.

# Over 1 million more Asian Immigrants than Asian Newborns from 2000-2013

*Sources of population change from 2000-2013, in millions*

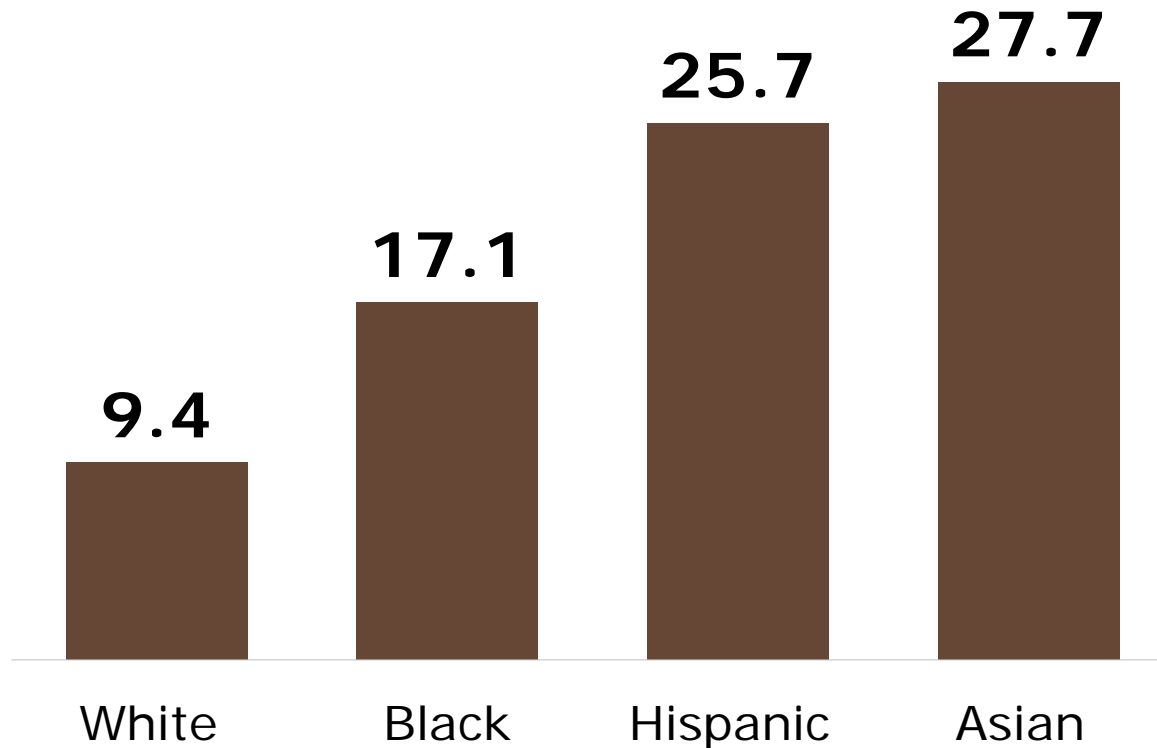
■ U.S. births    ■ Immigration



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

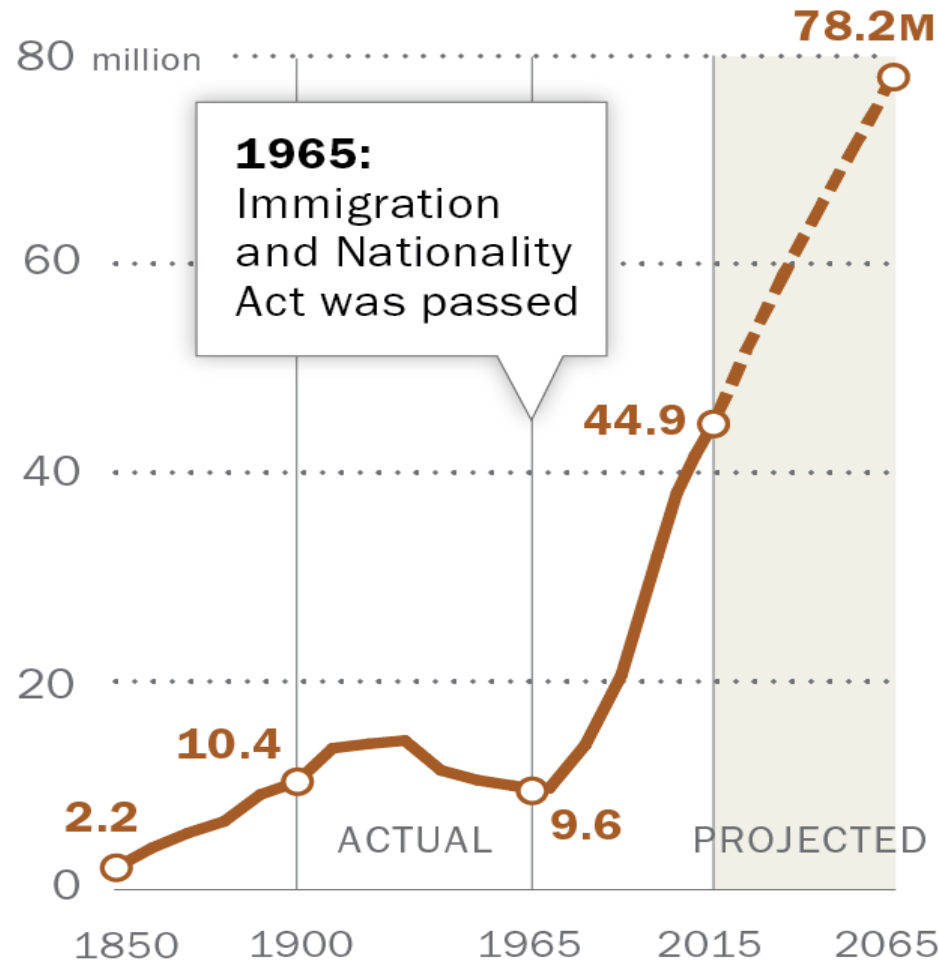


Source: Pew Research Center analysis of 2010 ACS Integrated Public Use Microdata Sample (IPUMS) files

# Big Trends among Immigrants

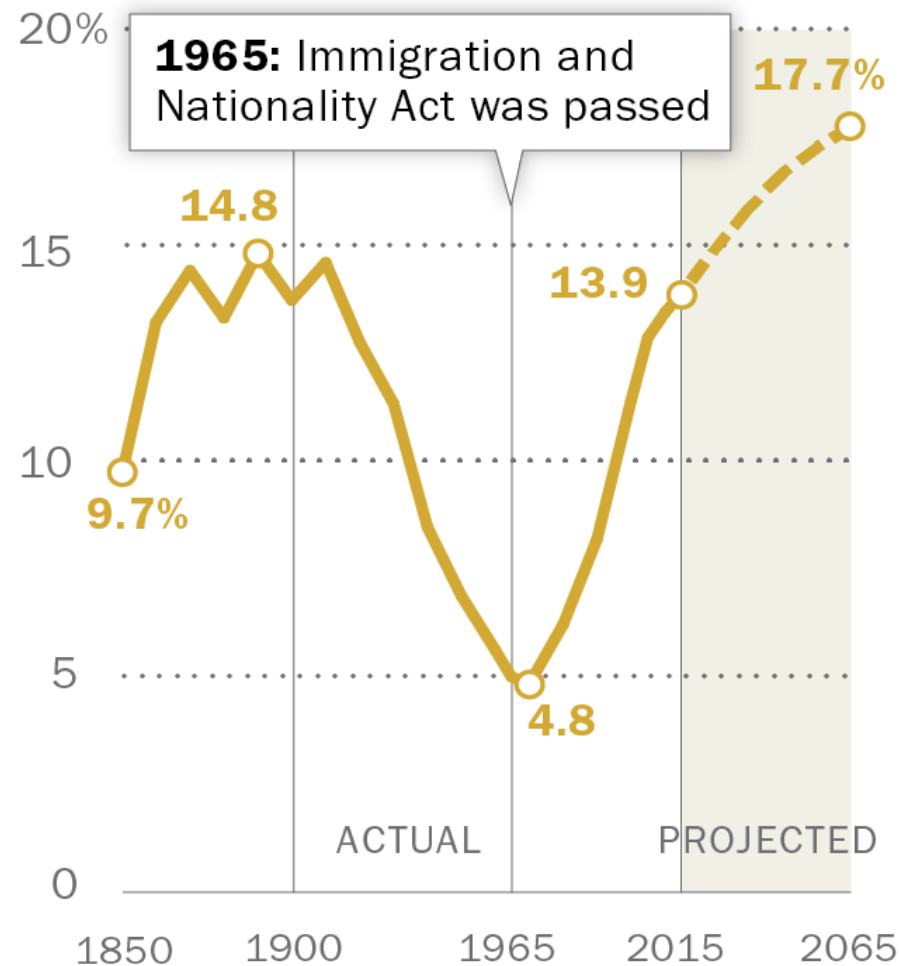
- U.S. immigrant population is growing – in number and share
- Asia is now the biggest sender of immigrants
- Most immigrants are in the U.S. legally
- U.S. unauthorized immigrant population has stabilized
- Immigrants from Asia are better educated than immigrants from Mexico or Central America

# U.S. Immigrant Population Reached 45 million in 2015; Projected to be 78.2 Million in 2065



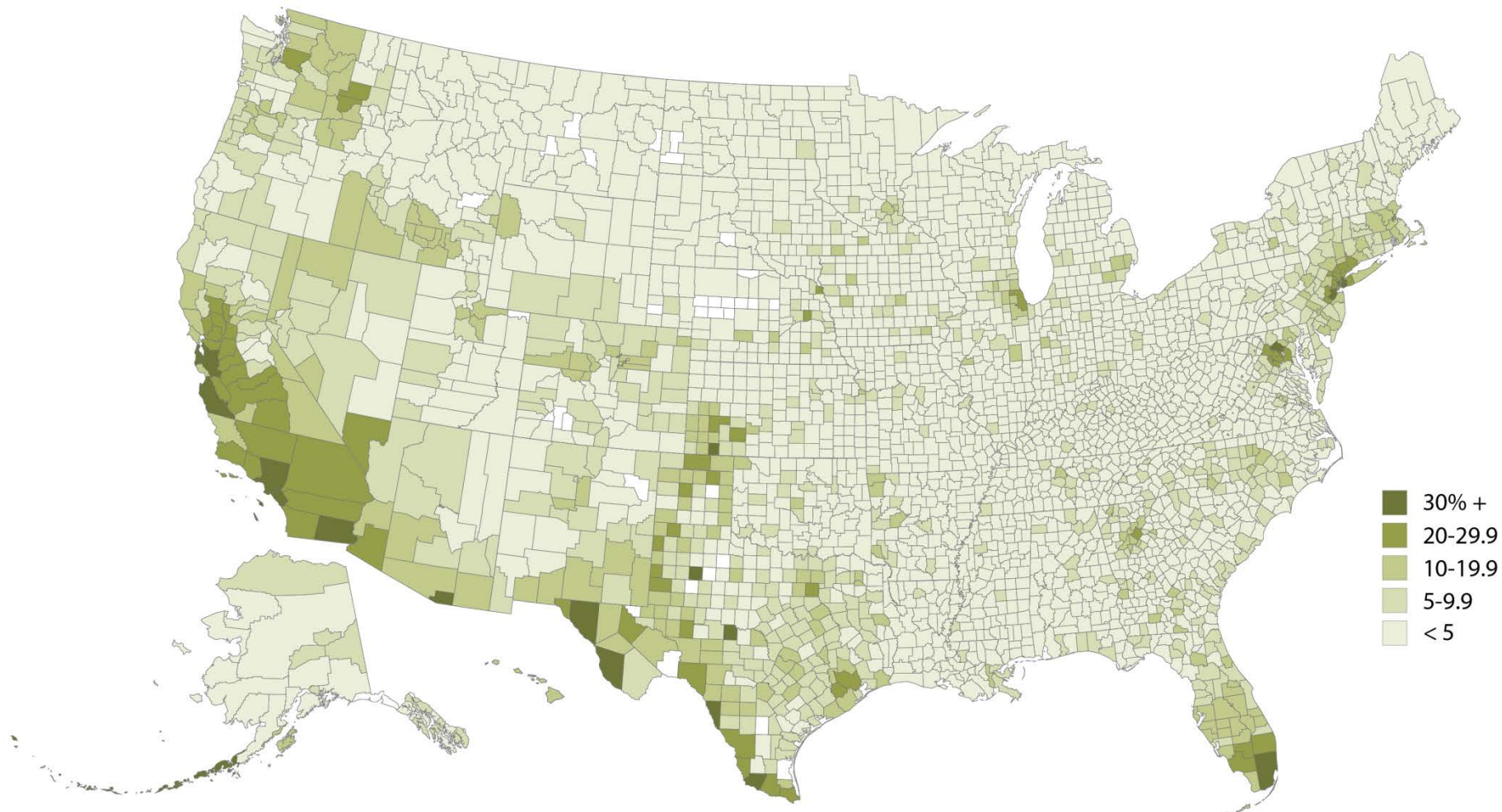
Source: Gibson and Jung (2006) for 1850 to 1890. Edmonston and Passel (1994) estimates for 1900-1955; Pew Research Center estimates for 1960-2015 based on adjusted census data; Pew Research Center projections for 2015-2065

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



Source: Gibson and Jung (2006) for 1850 to 1890. Edmonston and Passel (1994) estimates for 1900-1955; Pew Research Center estimates for 1960-2015 based on adjusted census data; Pew Research Center projections for 2015-2065

# Highest share of immigrants in Southwest, large cities

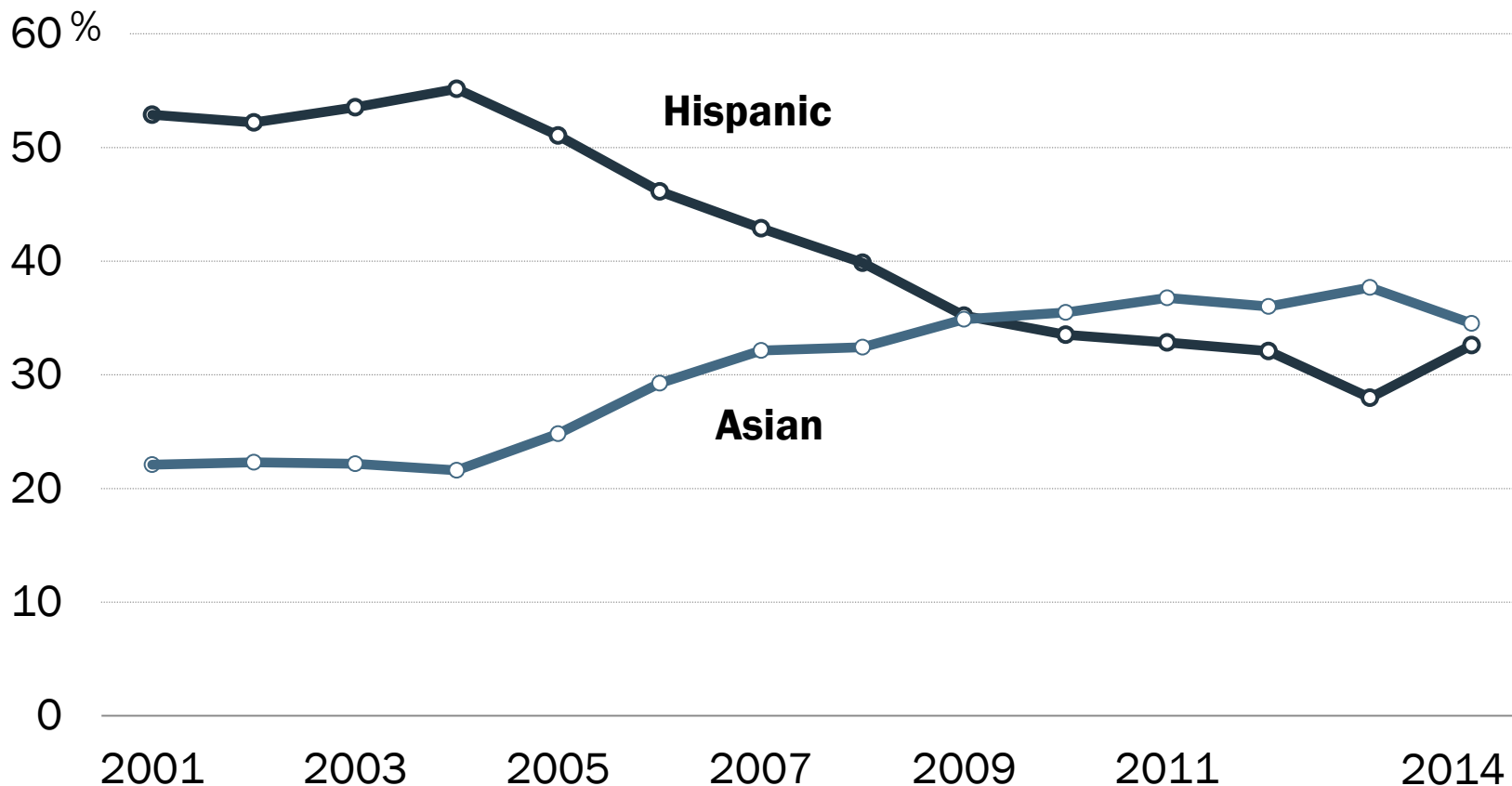


Source: American Community Survey 2010-2014 5-year estimates via American FactFinder



# Among new immigrant arrivals, Asians outnumber Hispanics

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

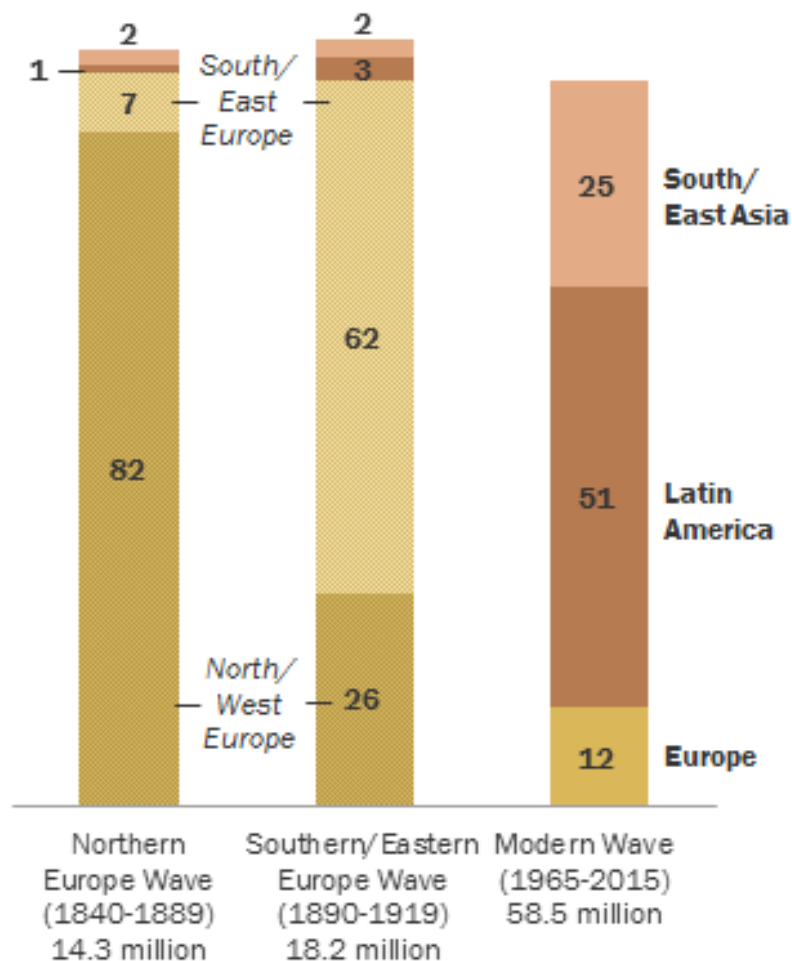


Note: Figures for 2001-2005 based on household population, excluding group quarters. 2014 figure includes arrivals from Jan. 1-Apr. 1, 2014. Race and ethnicity based on self-reports. Asians include only non-Hispanics. Hispanics are of any race.

Source: Pew Research Center tabulations of 2001-2014 American Community Surveys (IPUMS).

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

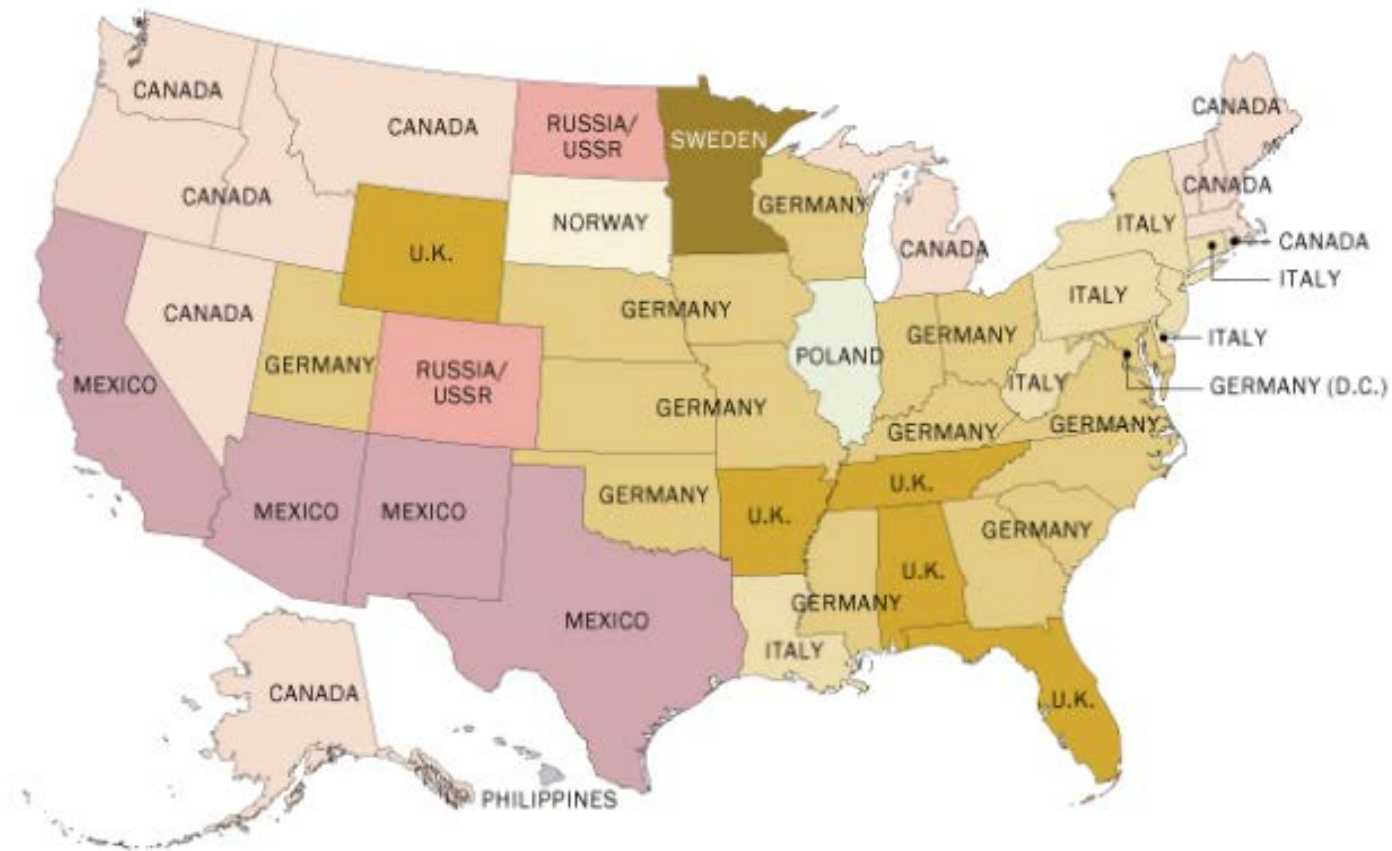
%



Source: For 1965-2015, Pew Research Center estimates based on adjusted census data; for 1840-1919, Office of Immigration Statistics, *Yearbook of Immigration Statistics*, 2008, Table 2

# Largest Immigrant Group in Each State

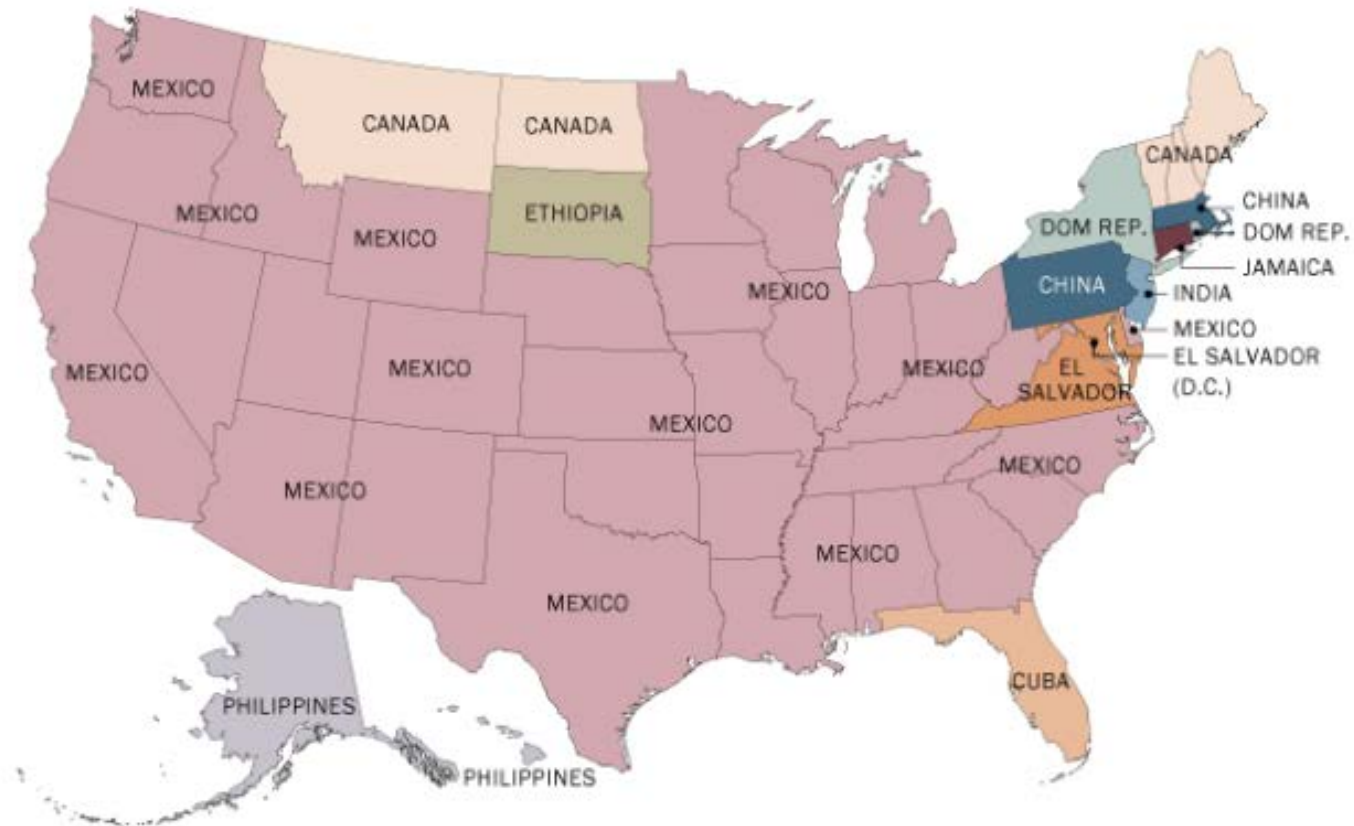
**1960**



Source: Estimates for the countries of origin come from Pew Research Center tabulations of the 1950 decennial census. Total population and foreign-born population estimates come from the U.S. Census Bureau, "Statistics on the Foreign-Born Population of the United States: 1850-2000."

# Largest Immigrant Group in Each State

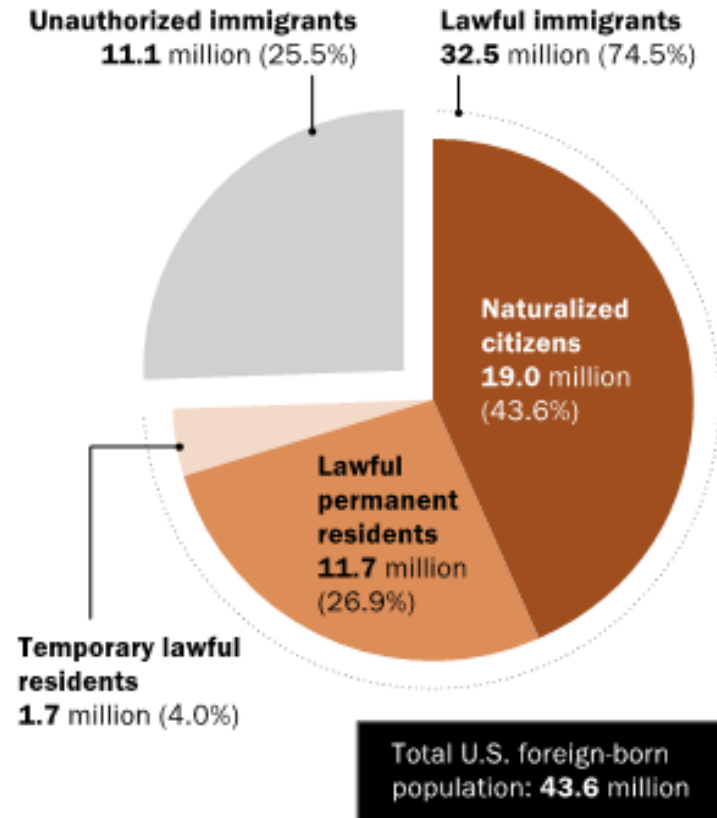
**2013**



Source: Pew Research Center tabulations of the 2013 American Community Survey (IPUMS)

# U.S. foreign-born population includes variety of groups

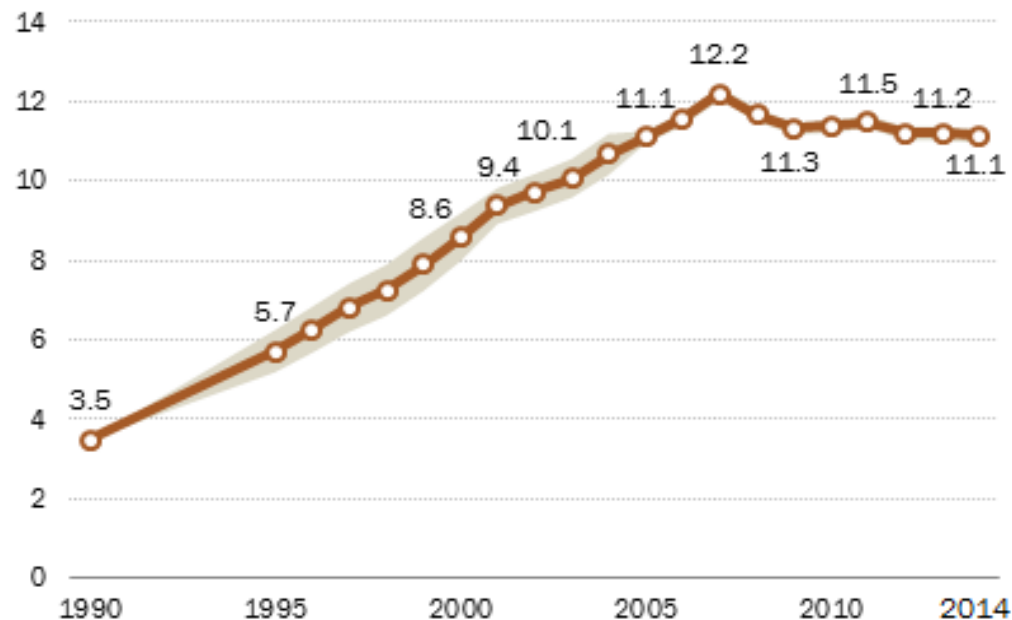
*Foreign-born population estimates, 2014*



Source: Pew Research Center estimates based on residual methodology, applied to 2014 American Community Survey

# U.S. Unauthorized immigrant population stable since 2009

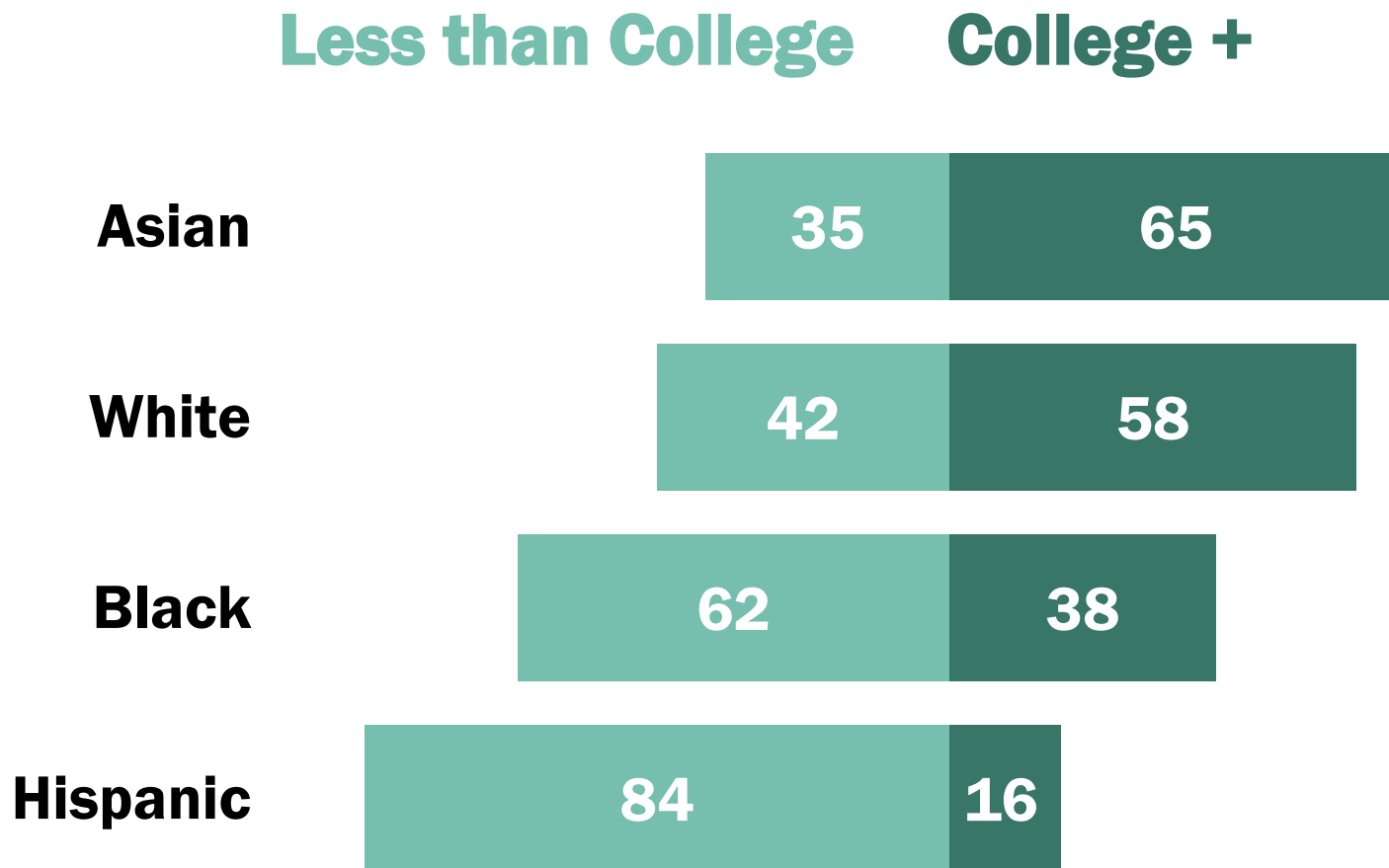
*In millions*



Note: Shading surrounding line indicates low and high points of the estimated 90% confidence interval. The 2009-2014 change is not statistically significant at 90% confidence interval. Data labels are for 1990, 1995, 2000, 2001, 2003, 2005, 2007, 2009, 2011, 2013 and 2014.

Source: Pew Research Center estimates for 2005-2014 based on augmented American Community Survey data (IPUMS); for 1995-2004 based on March Supplements of the Current Population Survey. Estimates for 1990 from Warren and Warren (2013).  
"Overall Number of U.S. Unauthorized Immigrants Holds Steady Since 2009"

# Education Characteristics of Recent Immigrants, by Race and Ethnicity, 2010



PewResearchCenter

# Contact Information

**Mark Hugo Lopez**

*Director of Hispanic Research*

[mlopez@pewresearch.org](mailto:mlopez@pewresearch.org)



# **THE CHANGING DEMOGRAPHICS OF U.S. CONSUMERS**

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# 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

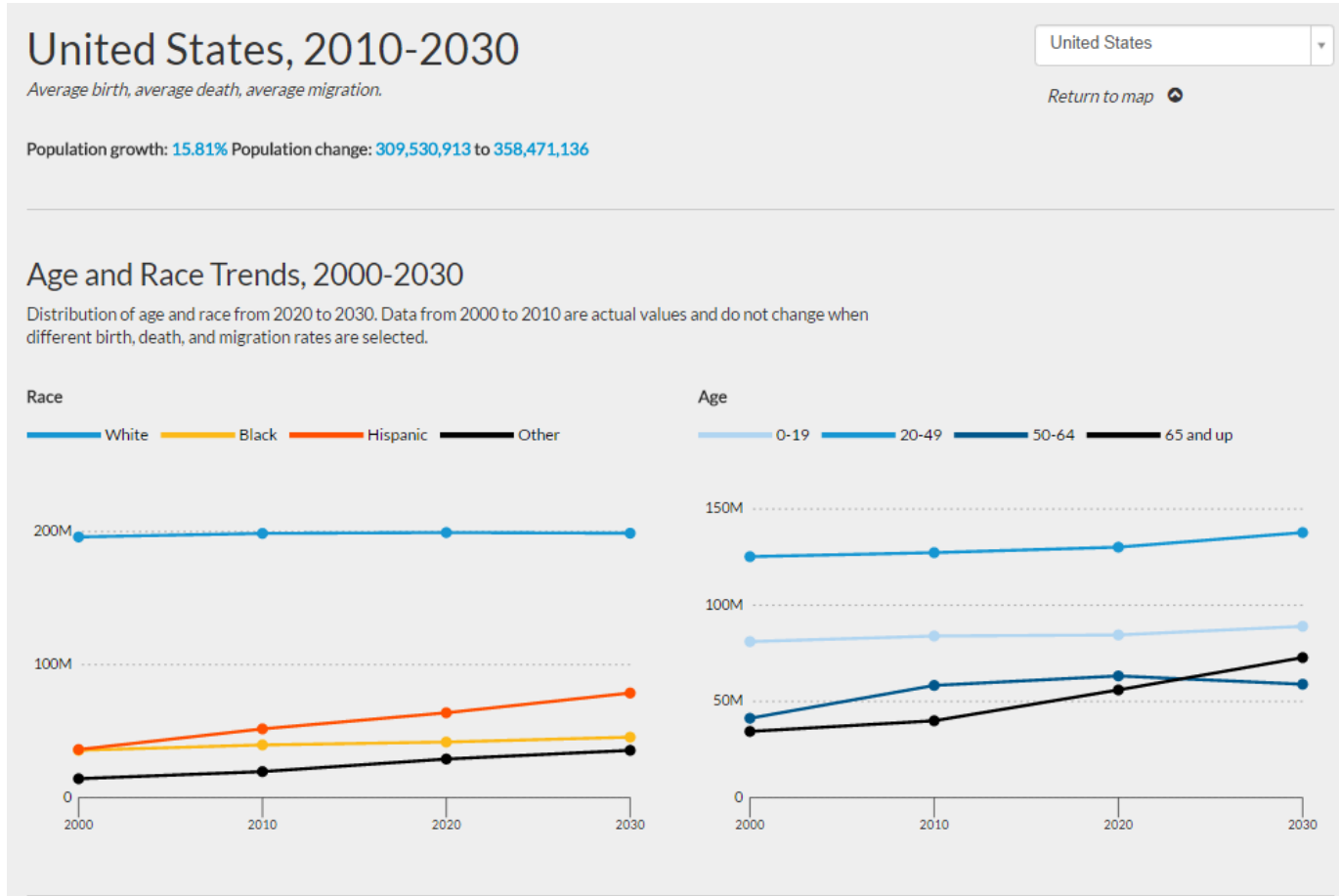
- How the Urban Institute uses Census Bureau projections to provide insights about local population change

## 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

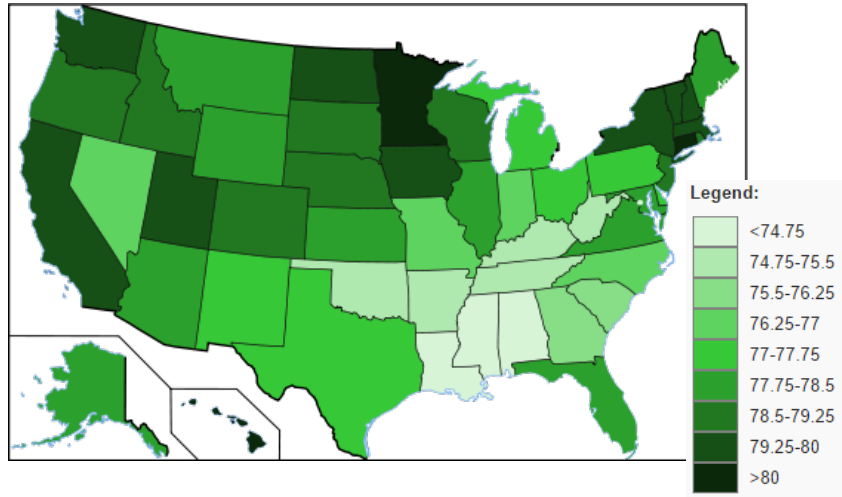
# We start with the Census Bureau's mid-range population projections...



<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).

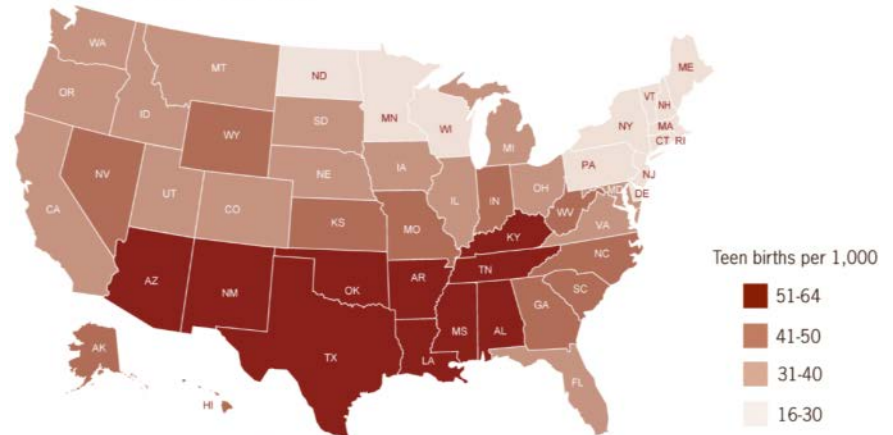
US states by life expectancy at birth, 2005



Sources: life expectancy original data from "[Measure of America](#)" 2008-09; map by Tasty Cakes, CC-BY-3.0, [https://commons.wikimedia.org/wiki/File:US\\_states\\_by\\_life\\_expectancy.svg](https://commons.wikimedia.org/wiki/File:US_states_by_life_expectancy.svg). Teen birth rates: Centers for Disease Control, Preventing Teen Pregnancy in the US-CDC Vital Signs-April 2011.pdf, available at [https://commons.wikimedia.org/wiki/File:US\\_teen\\_birth\\_rates\\_by\\_state\\_per\\_1000\\_girls\\_aged\\_15-19\\_years\\_2009.png](https://commons.wikimedia.org/wiki/File:US_teen_birth_rates_by_state_per_1000_girls_aged_15-19_years_2009.png). Migration: US Census 2000, American Community Survey 2015, via Steven Ruggles, Katie Genadek, Ronald Goeken, Josiah Grover, and Matthew Sobek. Integrated Public Use Microdata Series: Version 6.0 [Machine-readable database]. Minneapolis: University of Minnesota, 2015.

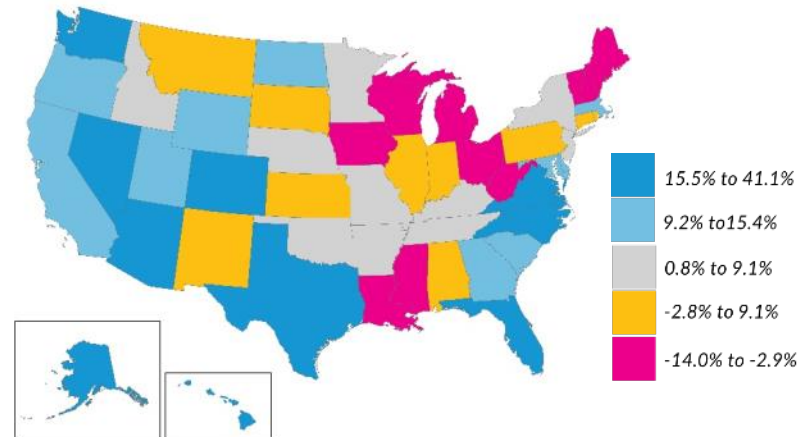
Teen birth rates by state per 1,000 girls aged 15-19 years, 2009

Teen birth rates were lowest in the Northeast and upper Midwest and highest across the southern states.

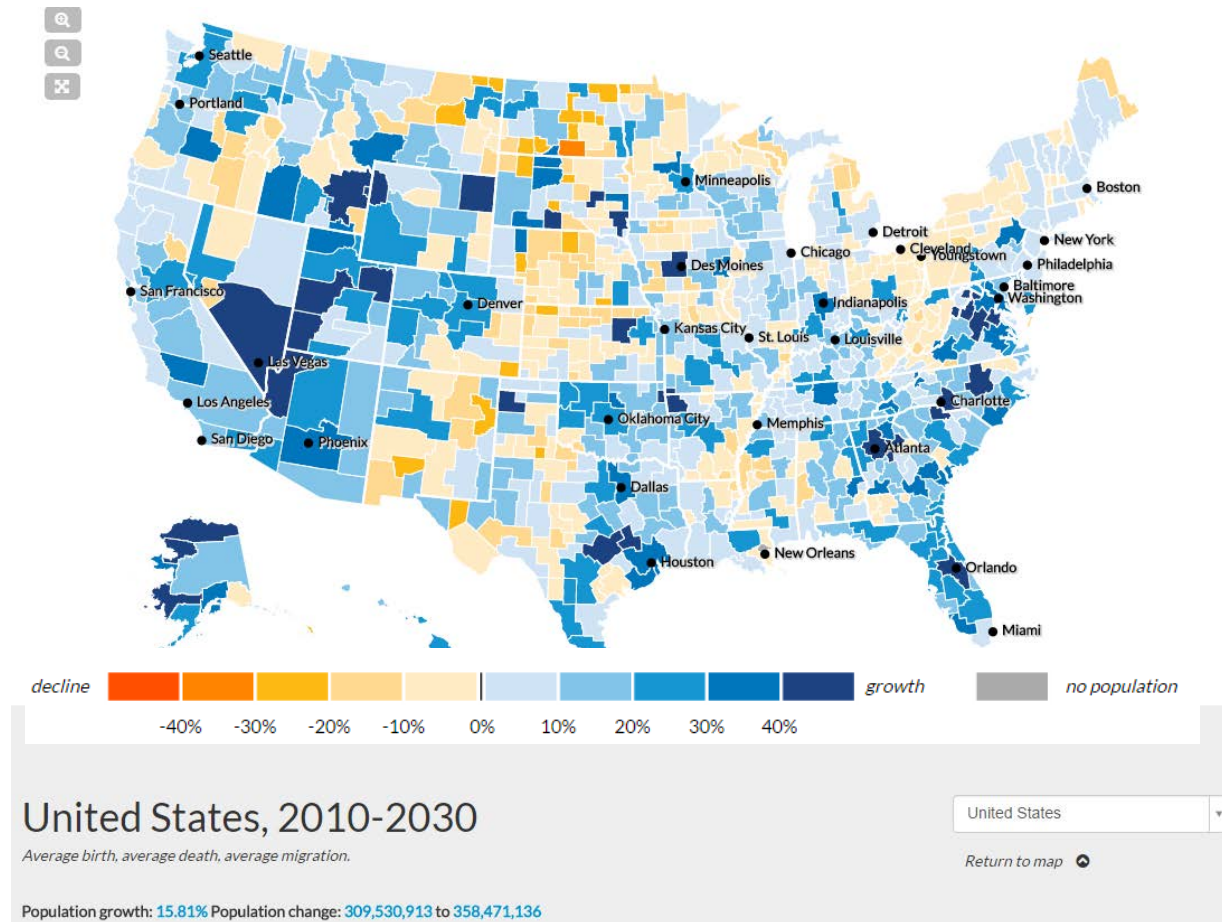


SOURCE: National Center for Health Statistics; 2009.

Net % migration of people born 1976-95 from 2000-15



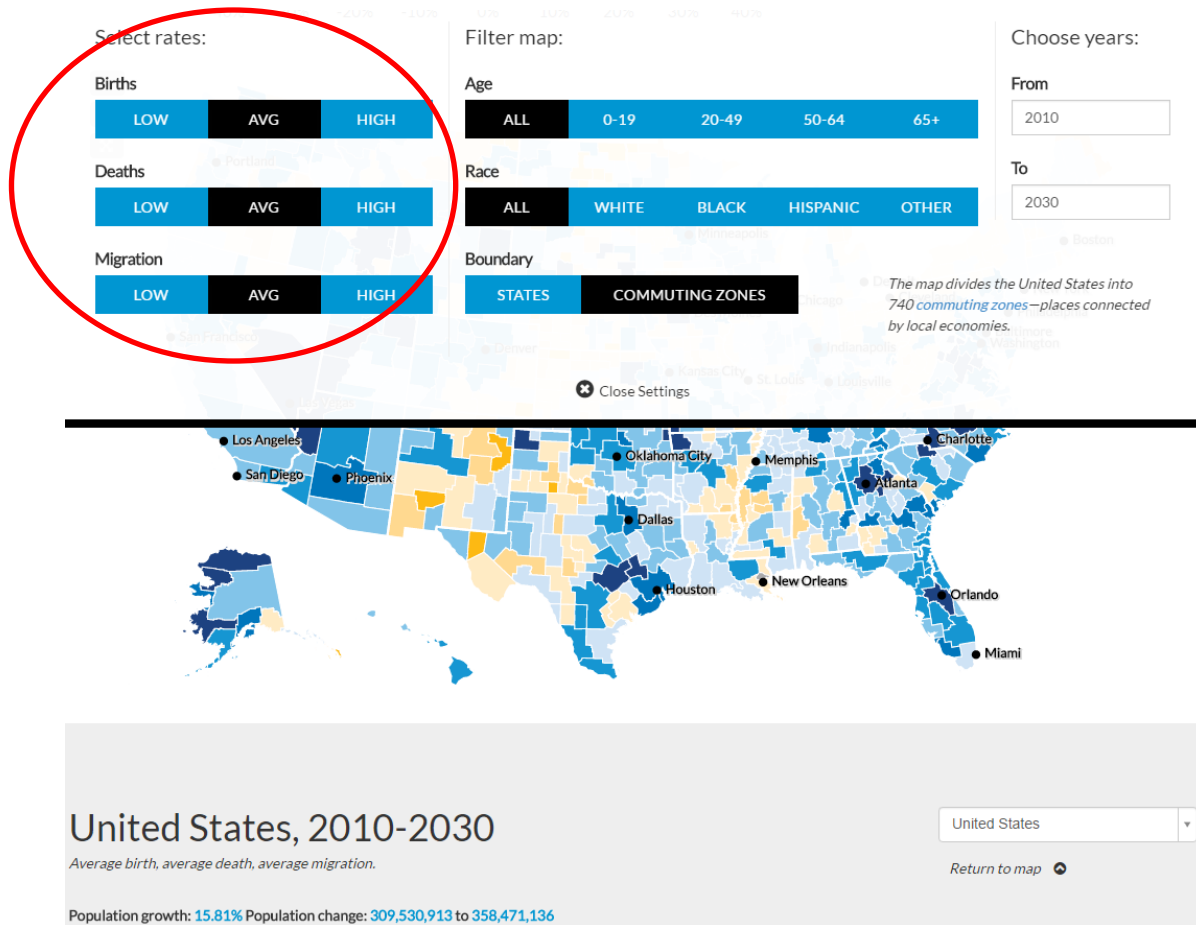
Accounting for variations in birth, death, and migration, we distribute Census projections to counties, aggregating to 740 “commuting zones”



Note: Images from on-line 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/>

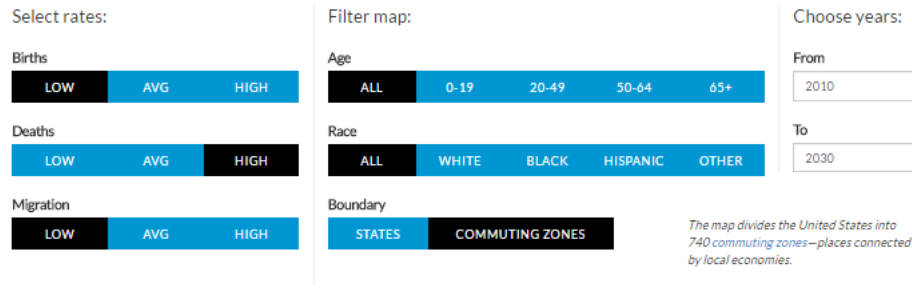
# We then vary our assumptions about birth, death, and migration rates to create 27 scenarios...



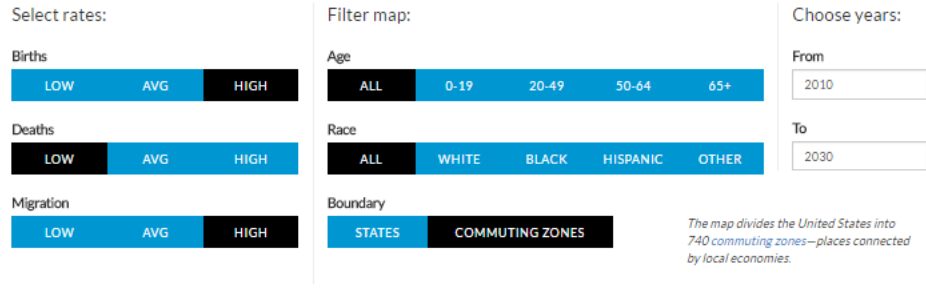
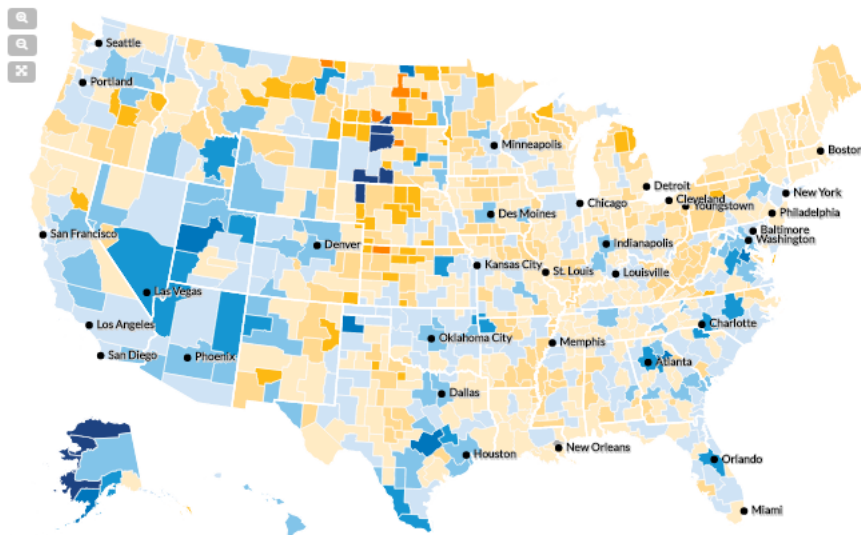
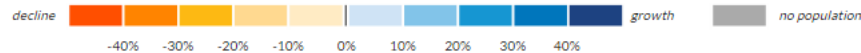
<http://apps.urban.org/features/mapping-americas-futures/>



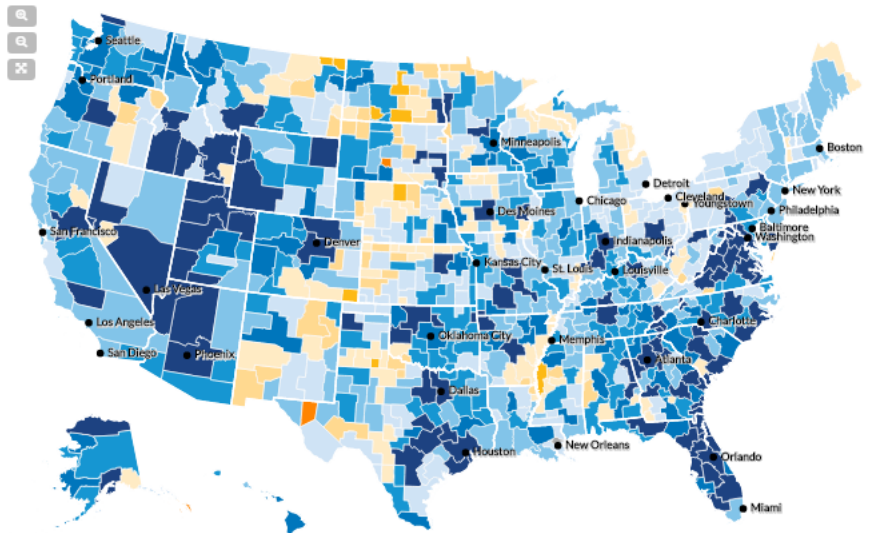
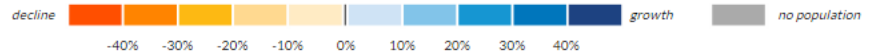
# ...so users can explore the impact of changing assumptions on population change.



Rollover key to isolate population change range on the map.

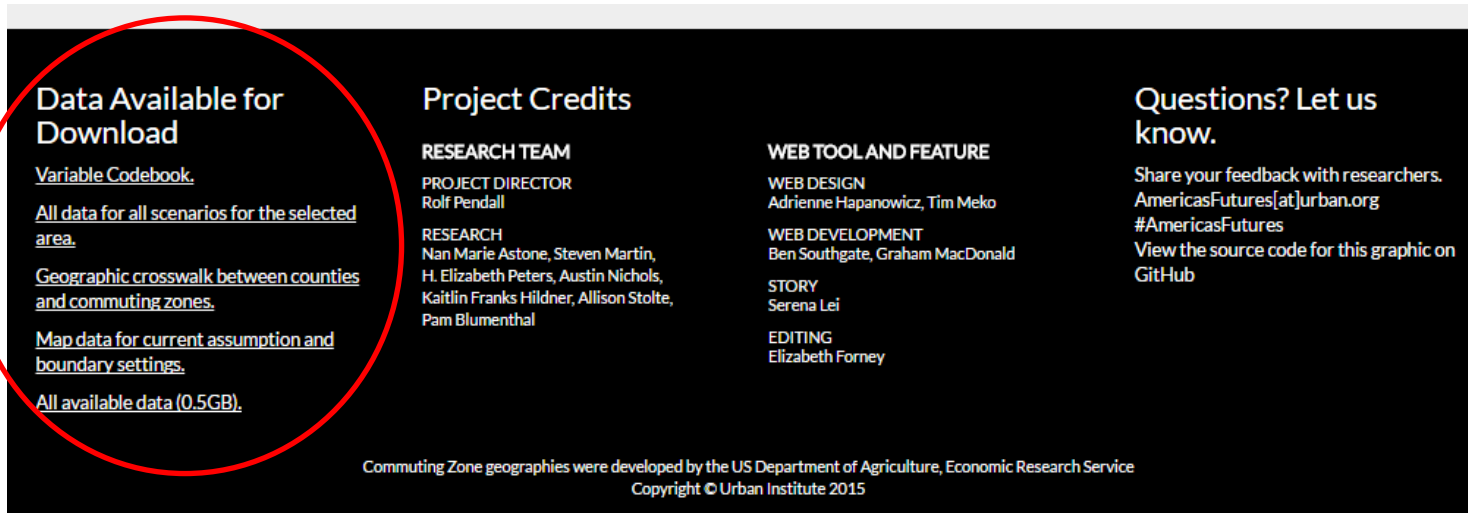


Rollover key to isolate population change range on the map.



<http://apps.urban.org/features/mapping-americas-futures/>

# All the data are freely downloadable.



**Data Available for Download**

- [Variable Codebook.](#)
- [All data for all scenarios for the selected area.](#)
- [Geographic crosswalk between counties and commuting zones.](#)
- [Map data for current assumption and boundary settings.](#)
- [All available data \(0.5GB\).](#)

**Project Credits**

**RESEARCH TEAM**

**PROJECT DIRECTOR**  
Rolf Pendall

**RESEARCH**  
Nan Marie Astone, Steven Martin, H. Elizabeth Peters, Austin Nichols, Kaitlin Franks Hildner, Allison Stolte, Pam Blumenthal

**WEB TOOL AND FEATURE**

**WEB DESIGN**  
Adrienne Hapanowicz, Tim Meko

**WEB DEVELOPMENT**  
Ben Southgate, Graham MacDonald

**STORY**  
Serena Lei

**EDITING**  
Elizabeth Forney

**Questions? Let us know.**

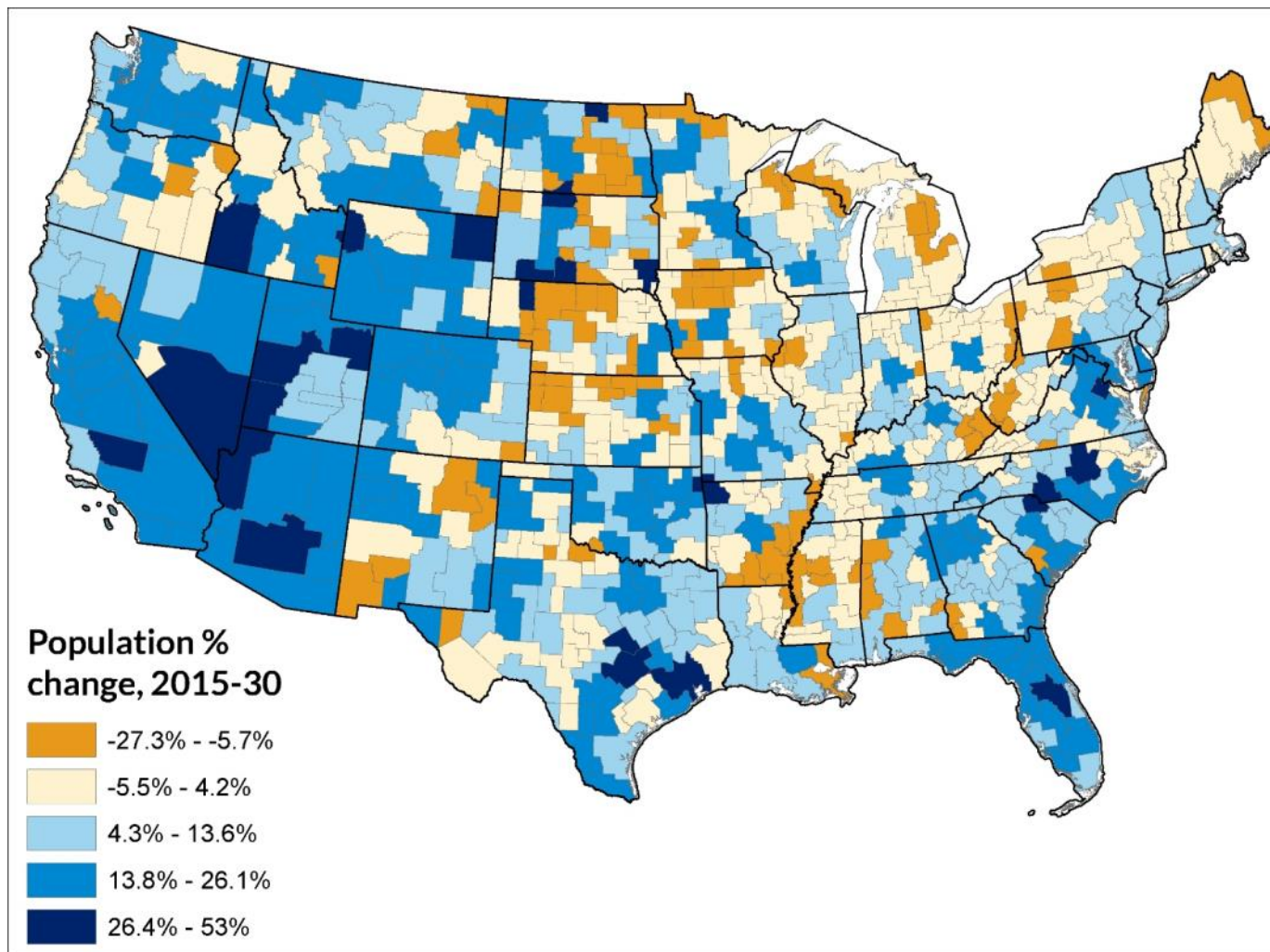
Share your feedback with researchers.  
[AmericasFutures\[at\]urban.org](mailto:AmericasFutures[at]urban.org)  
[#AmericasFutures](#)  
View the source code for this graphic on [GitHub](#)

Commuting Zone geographies were developed by the US Department of Agriculture, Economic Research Service  
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<http://apps.urban.org/features/mapping-americas-futures/>

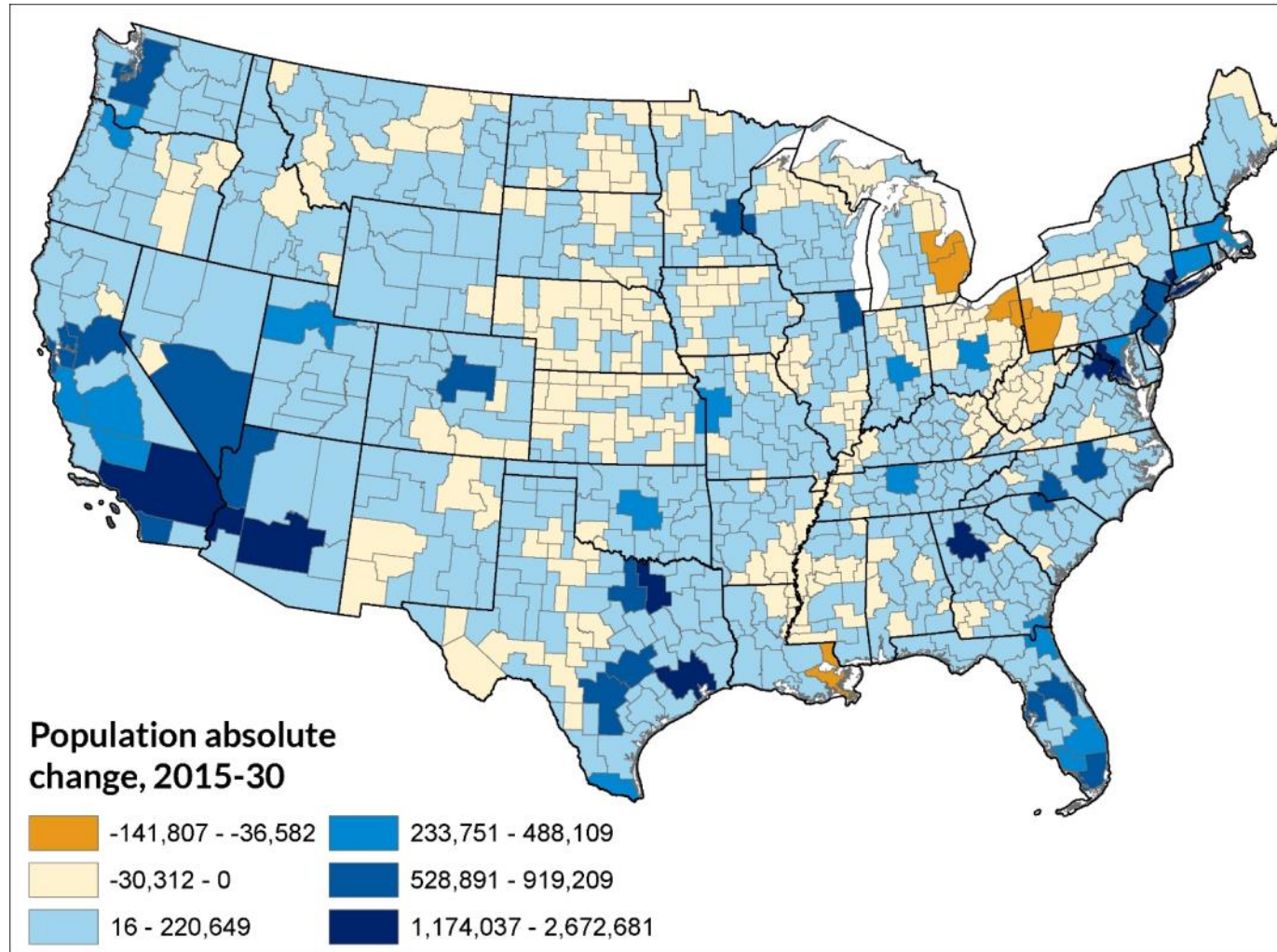
What the latest update of Mapping America's Futures suggests about aging and racial/ethnic diversity across the U.S.

# Variation in growth rates, with Midwest & rural loss, gains in coastal areas, Sunbelt and the Rockies



Source: Mapping America's Futures, 8/2015  
vintage, all average scenario

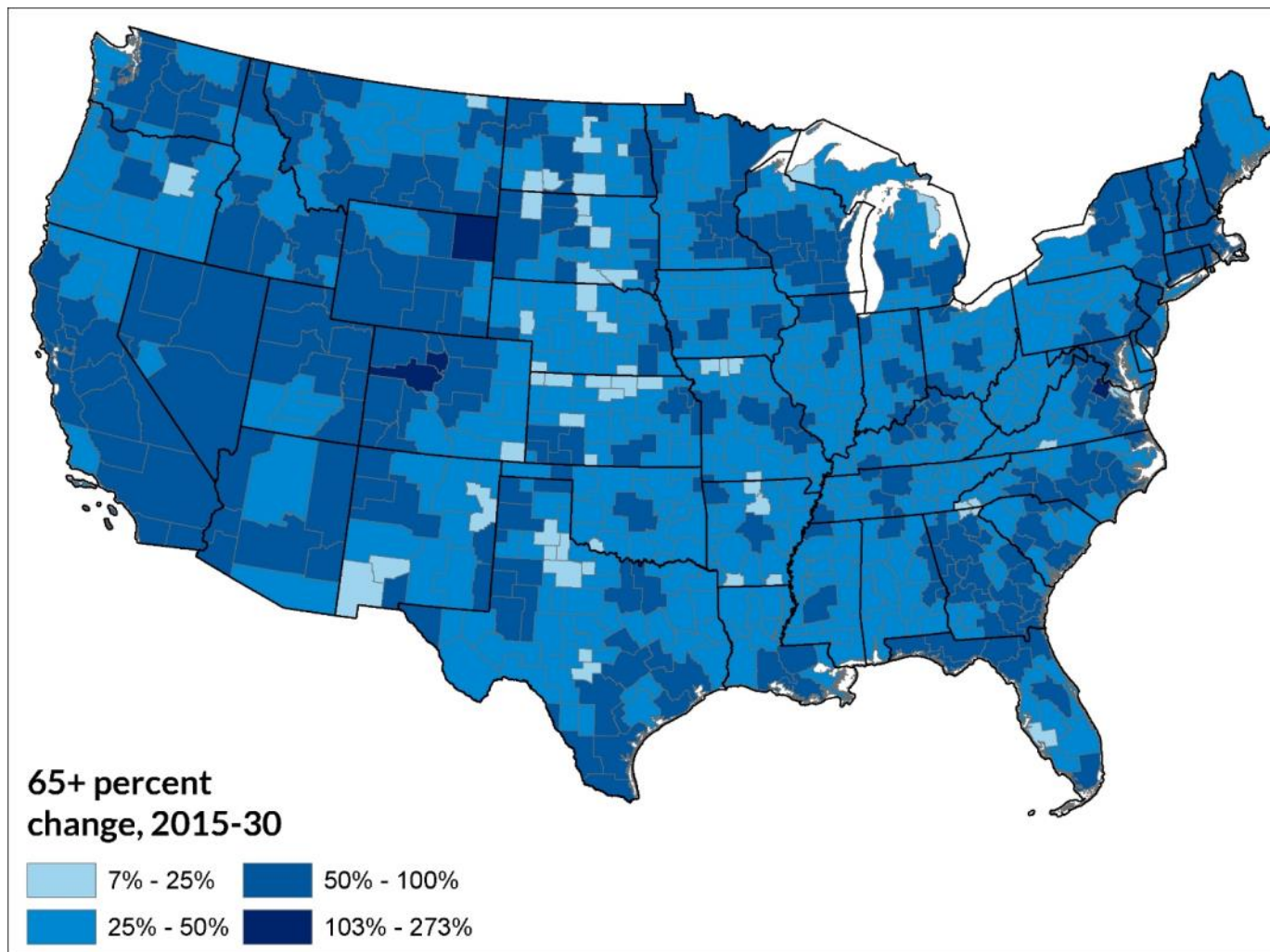
# A few big metropolitan areas expect 1-2.5M new residents between 2015 and 2030



Source: Mapping America's Futures, 8/2015 vintage, all average scenario

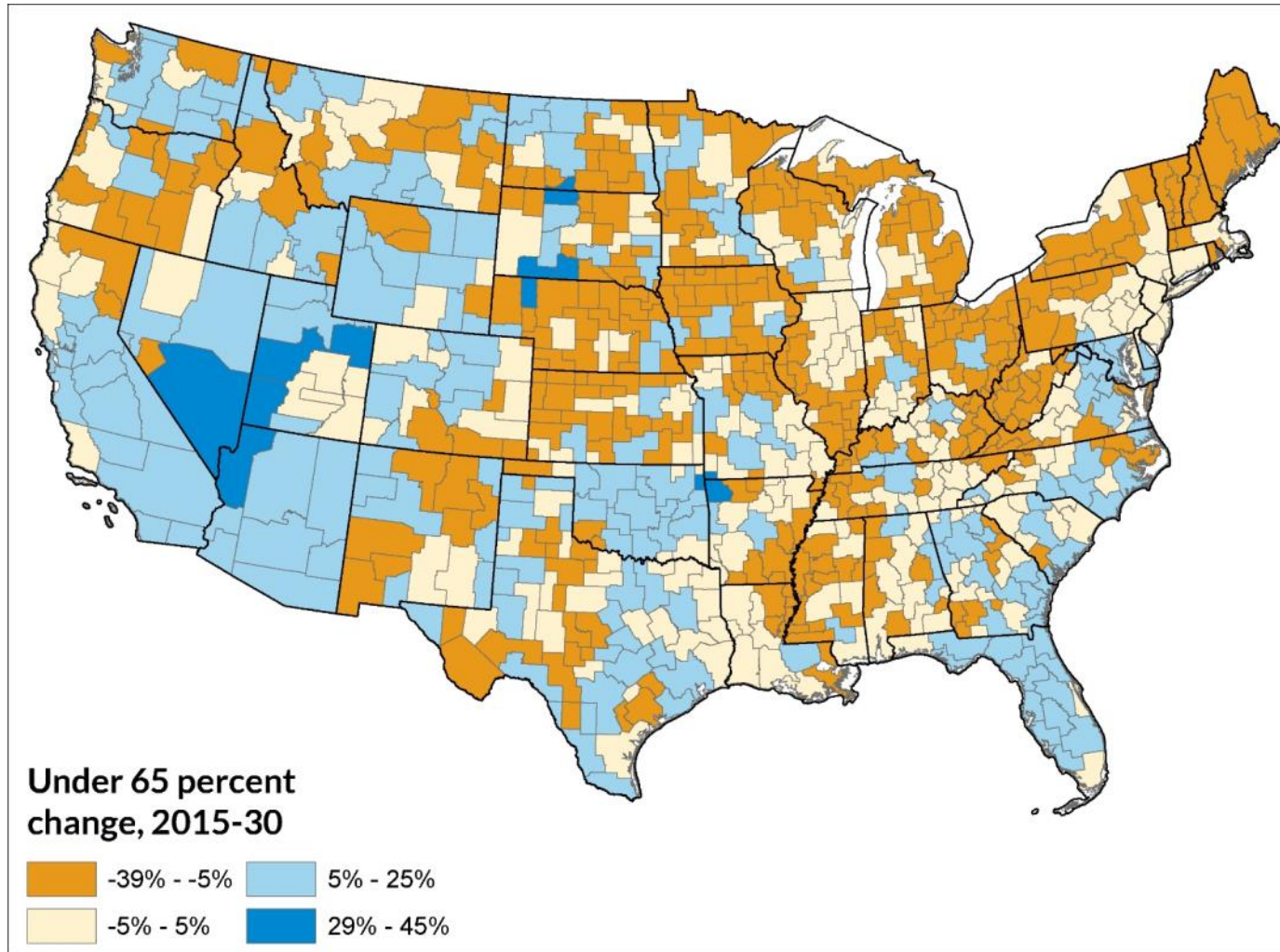


Senior population will rise everywhere 2015-30, often by over 50%, sometimes more than doubling



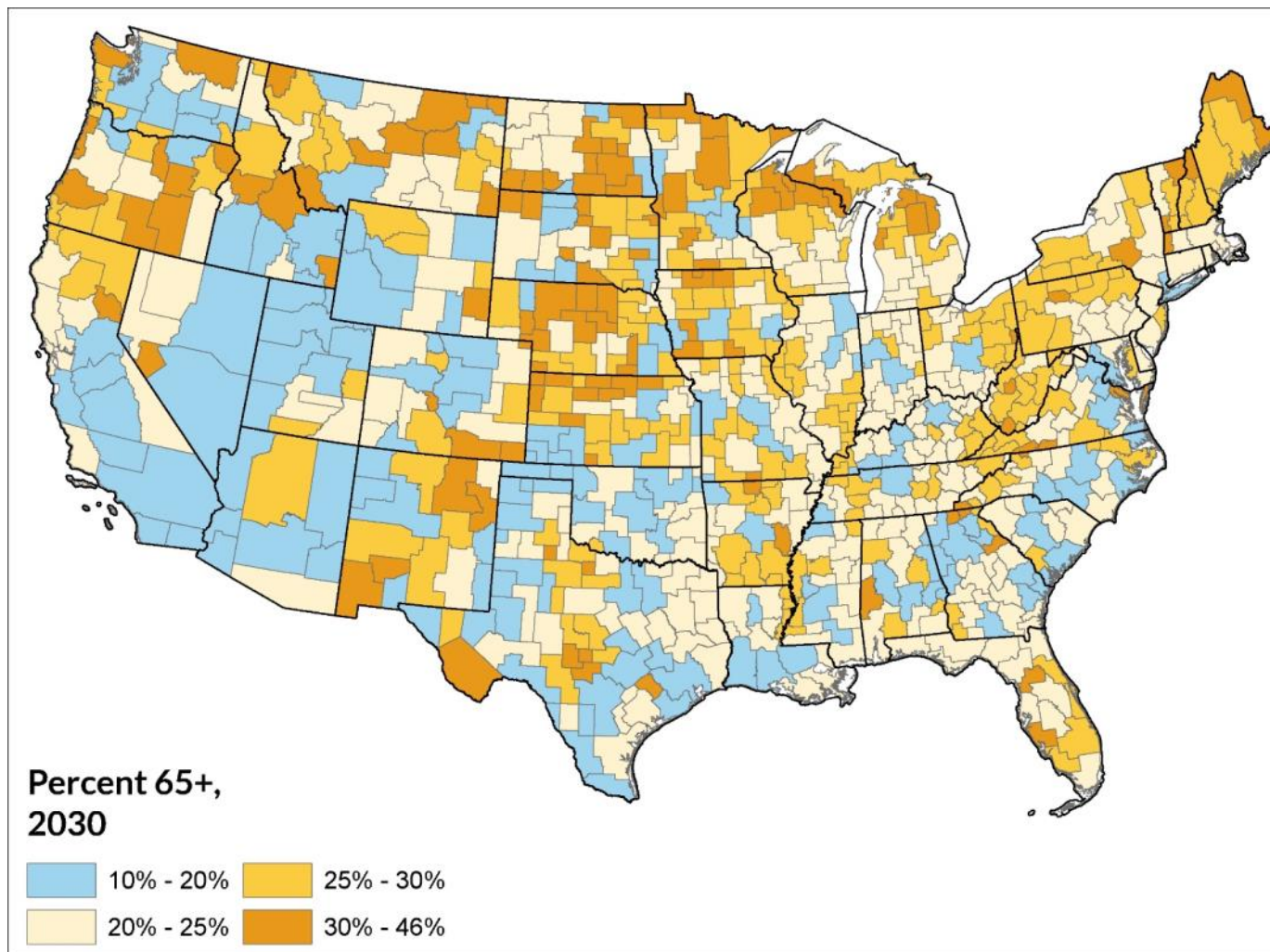
Source: Mapping America's Futures, 8/2015  
vintage, all average scenario

But under-65 population will decline or grow very little  
in large swaths of the US



Source: Mapping America's Futures, 8/2015  
vintage, all average scenario

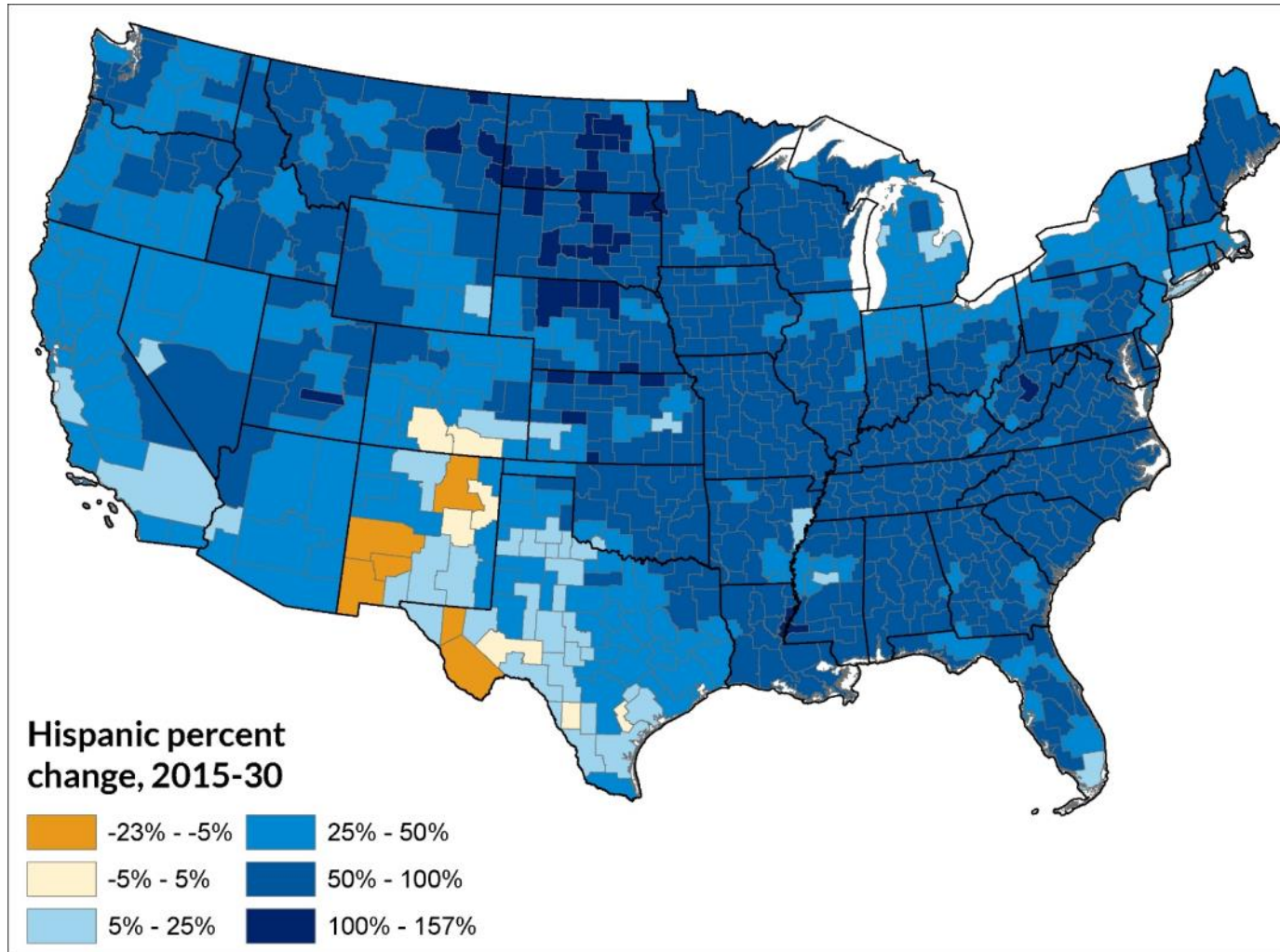
# Resulting in great diversity in the percent seniors by the year 2030



Source: Mapping America's Futures, 8/2015  
vintage, all average scenario

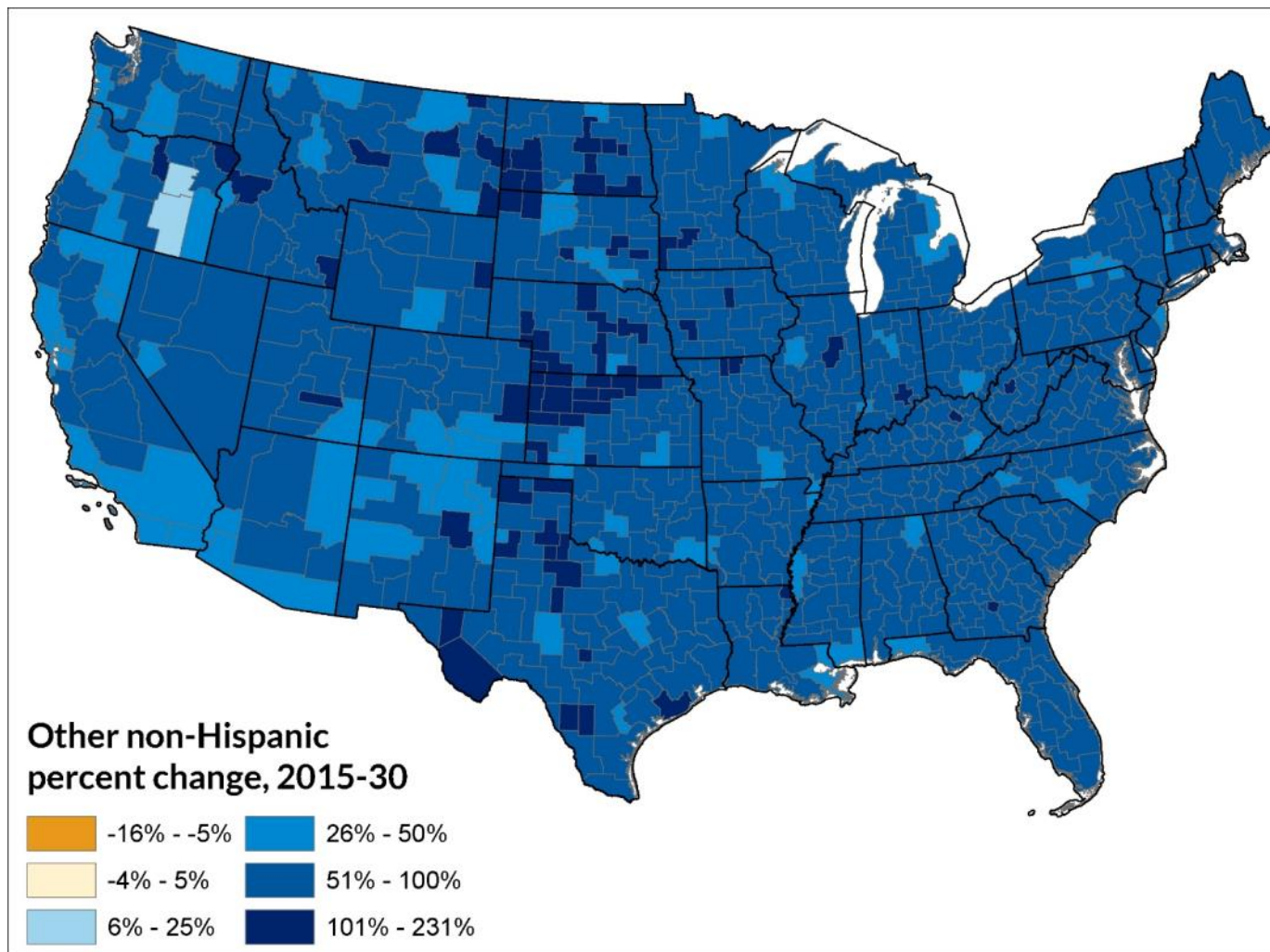


# Hispanics are growing everywhere except rural areas with older predominantly Hispanic populations



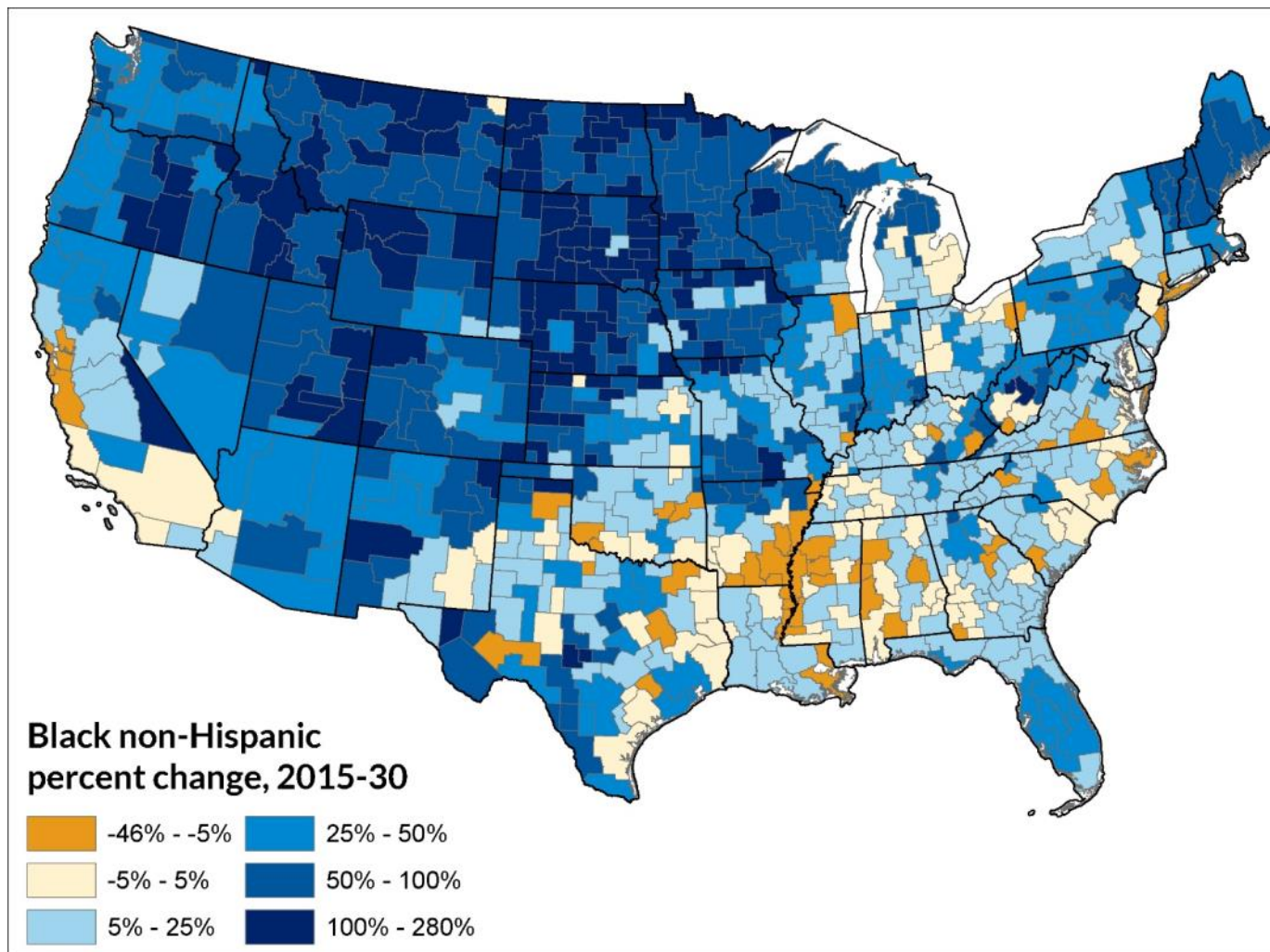
Source: Mapping America's Futures, 8/2015  
vintage, all average scenario

# Broad growth in the (small) “other non-Hispanic” population—many complex reasons



Source: Mapping America's Futures, 8/2015  
vintage, all average scenario

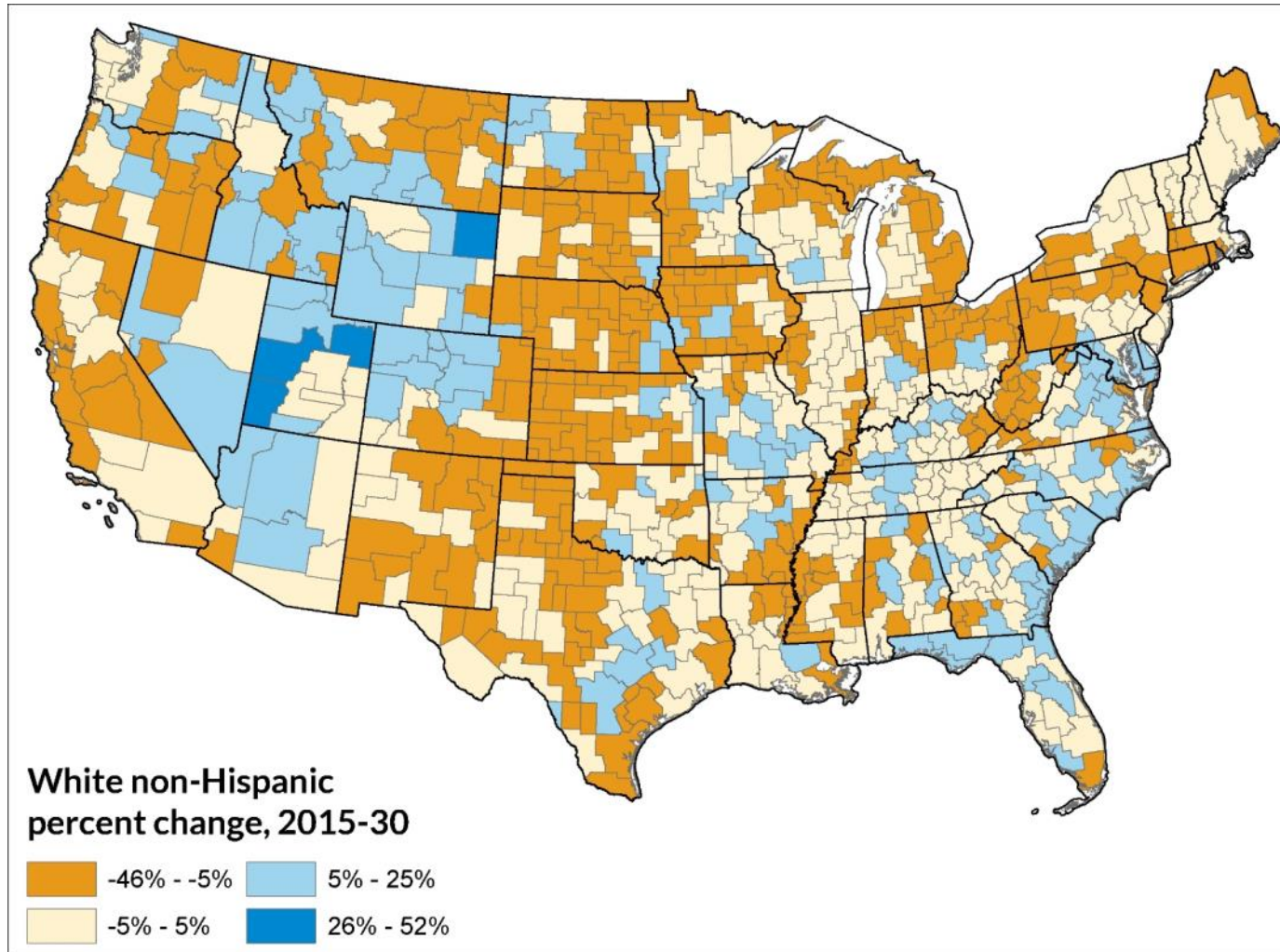
Black non-Hispanic growth fastest in TX, FL, ATL, Charlotte, and rural areas with few black residents



Source: Mapping America's Futures, 8/2015  
vintage, all average scenario

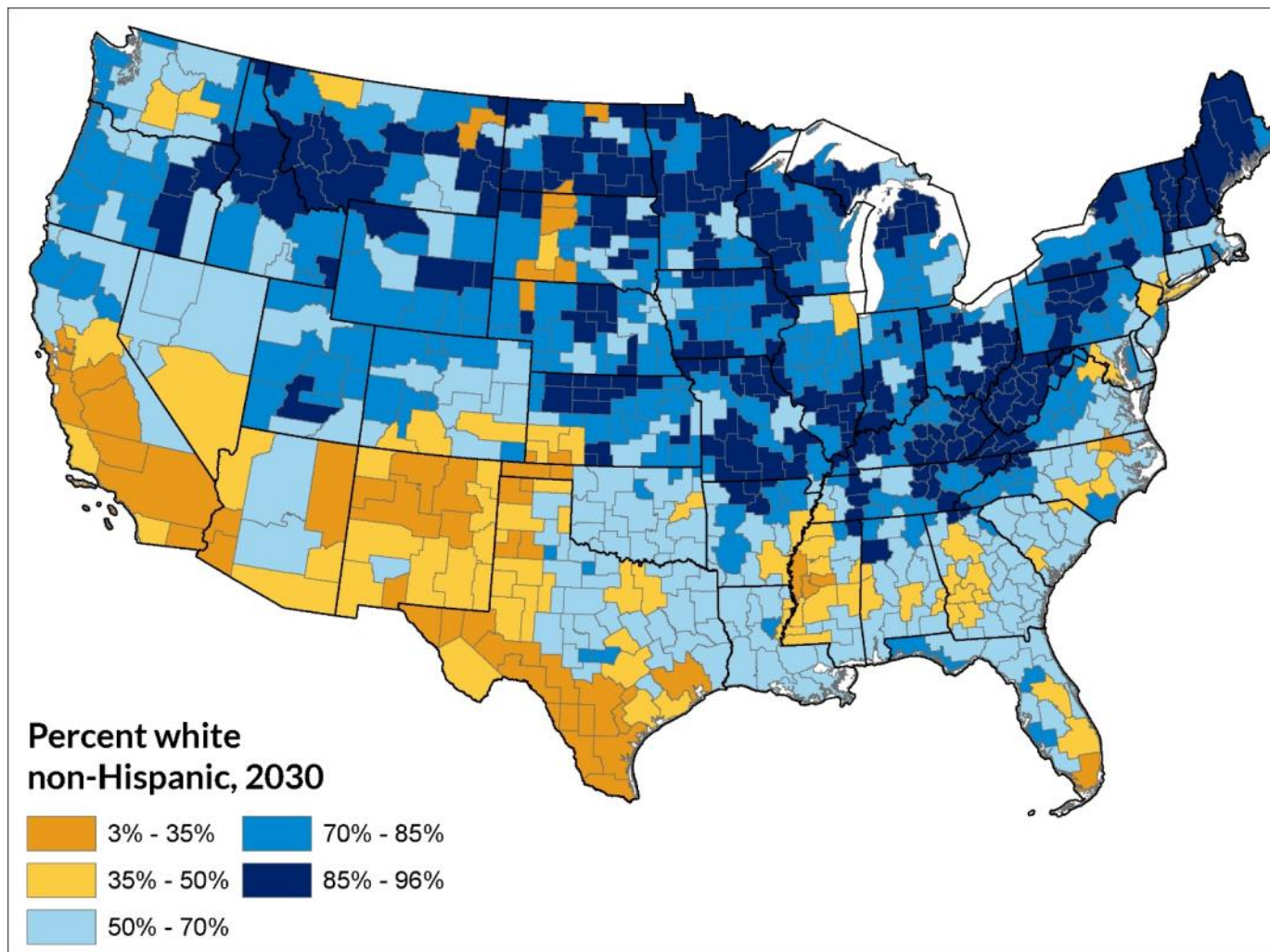


# White non-Hispanic population will decline in much of the US from 2015 to 2030



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 DEMOGRAPHICS OF U.S. CONSUMERS**

**Jennifer Ortman, U.S. Census Bureau**

**Mark Lopez, Pew Research Center**

**Rolf Pendall, Urban Institute**





# **THE CHANGING CONSUMER DEMOGRAPHICS:**

**An FTC Workshop - December 6, 2016**