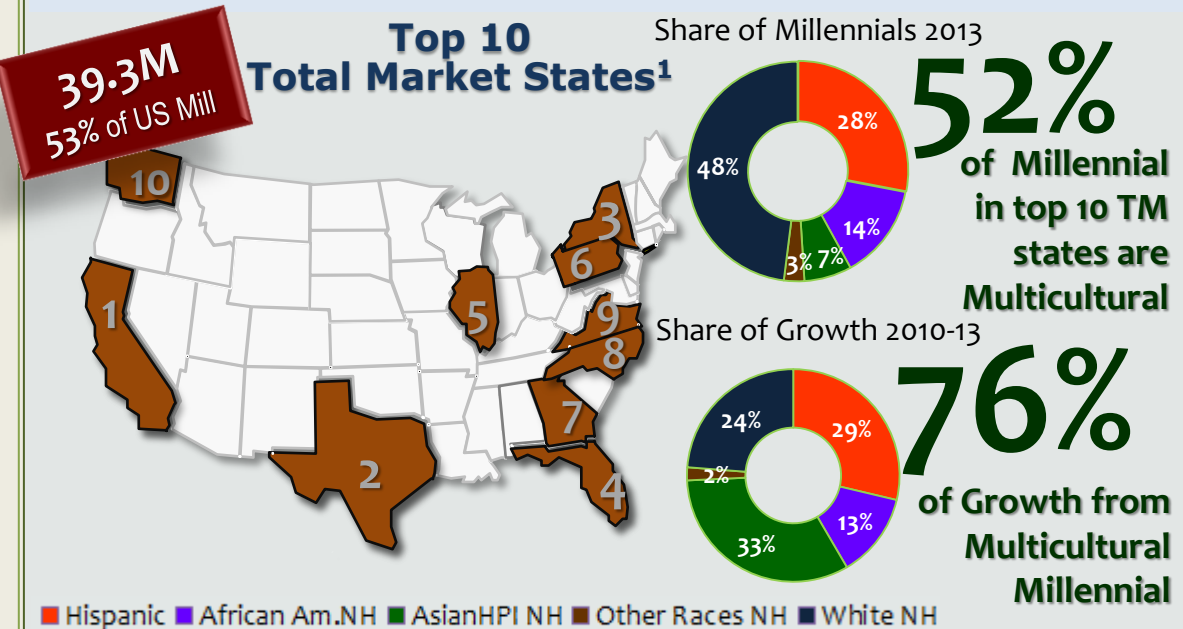


Seven 2014 Multicultural Millennial Economic Power Insights You Can't Forget

Multicultural Millennials are already the majority in the top 10 Total Market states. While the last 'class' of Millennials turned 18 years of age in 2014, the U.S. Millennial adult population continues to expand due to positive net migration, mostly from Multicultural Millennials. Multicultural Millennials also generated HALF of the incremental Millennial income in the U.S. reflecting that they are behind Gen Y's economic tipping point. This accelerating power has catapulted their confidence yet they are purchasing in Value retail formats. Many are choosing to stay at mom's rather than take on additional debt to live independently... at least until the student loans are repaid.



52%
of Millennial in top 10 TM states are Multicultural

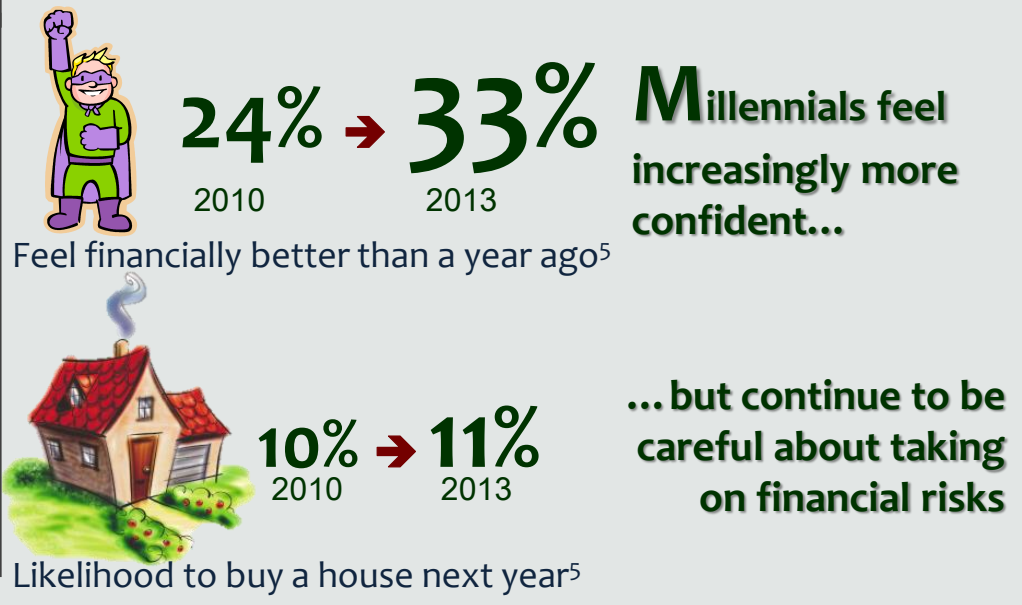
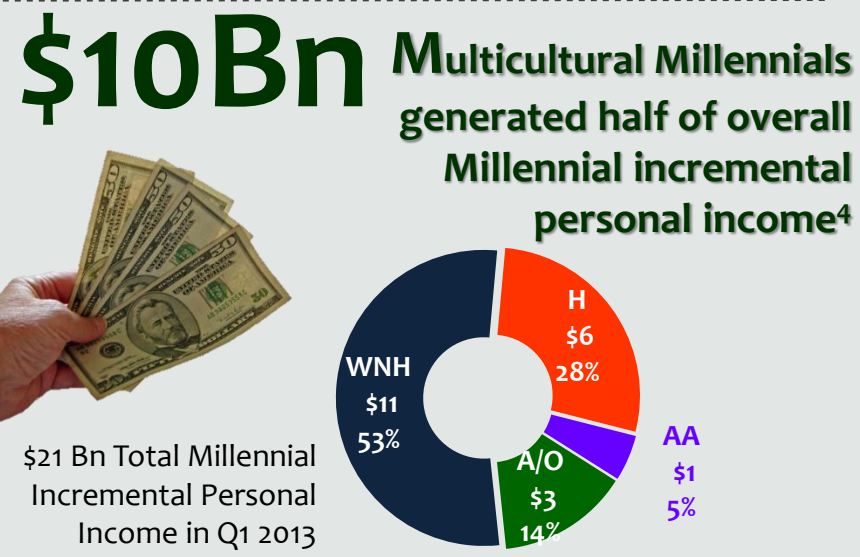
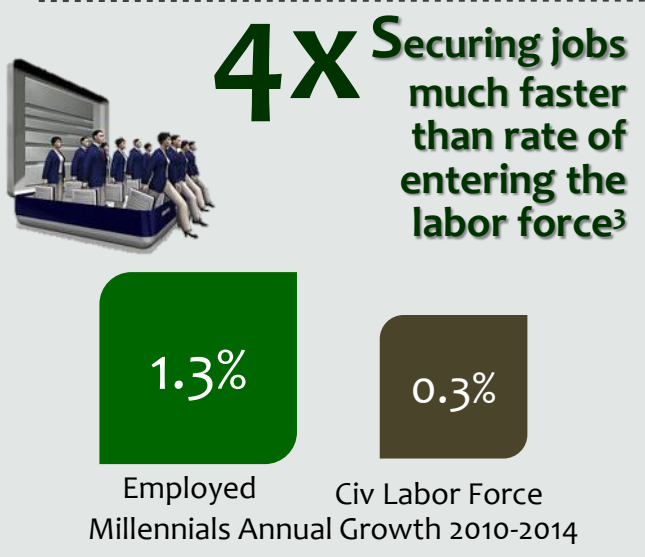
76%
of Growth from Multicultural Millennial

TIPPING POINT

The U.S. is on the verge of a Millennial economic tipping point



*CAGR: Compound Annual Growth Rate



1: "SSG 10 Most Influential States In TM" is based on SSG proprietary model which includes Census, BLS, and other state data. 2: Scarborough USA+ 2011 & 2013 3: BLS Quarterly Census of Labor Force Statistics Quarter 2 2010-2014 (Age25-34) 4: BLS Quarterly Census of Employment & Wages and Annual Social & Economic Supplement 5: GfK MRI 2010-2013 Doublebase survey of the American Consumers. • Mill: Millennials 18-34 NH: Non-Hispanic

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For questions or comments please call SSG at 818-905-5666