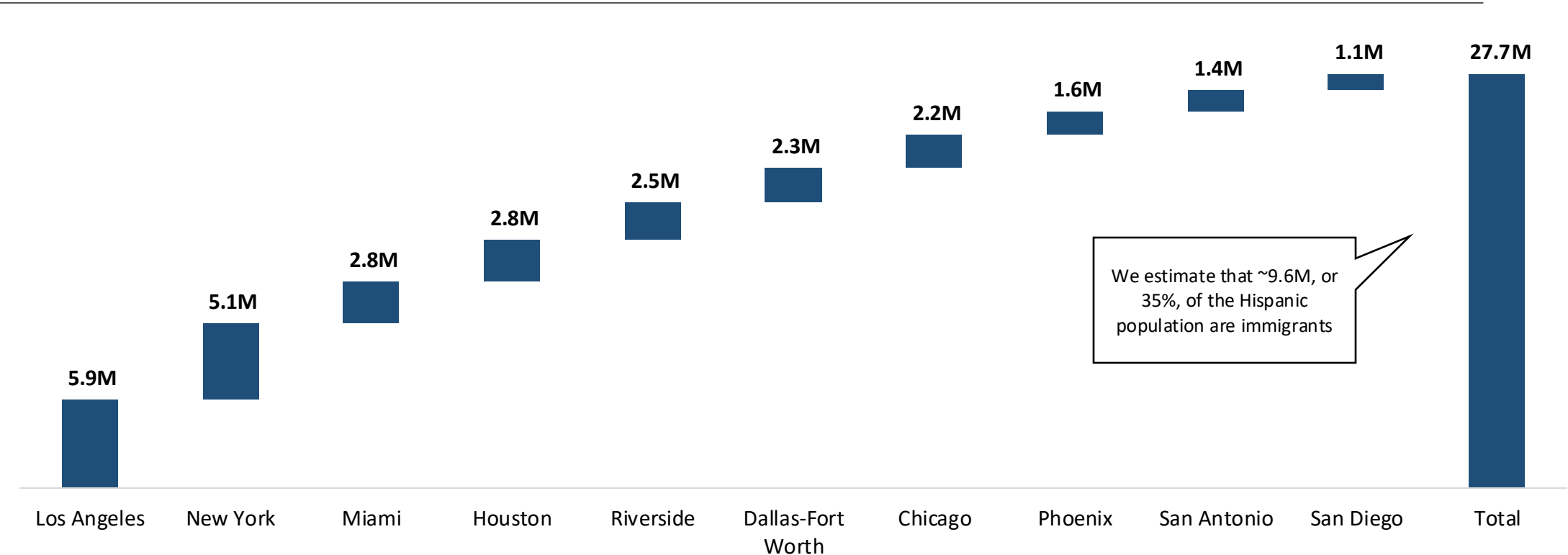


Top 10 metro areas in the U.S. are home to ~27.7M Hispanics, representing ~44% of total U.S. Hispanic population

### U.S. Metro Area Hispanic Population

*#, 2023*

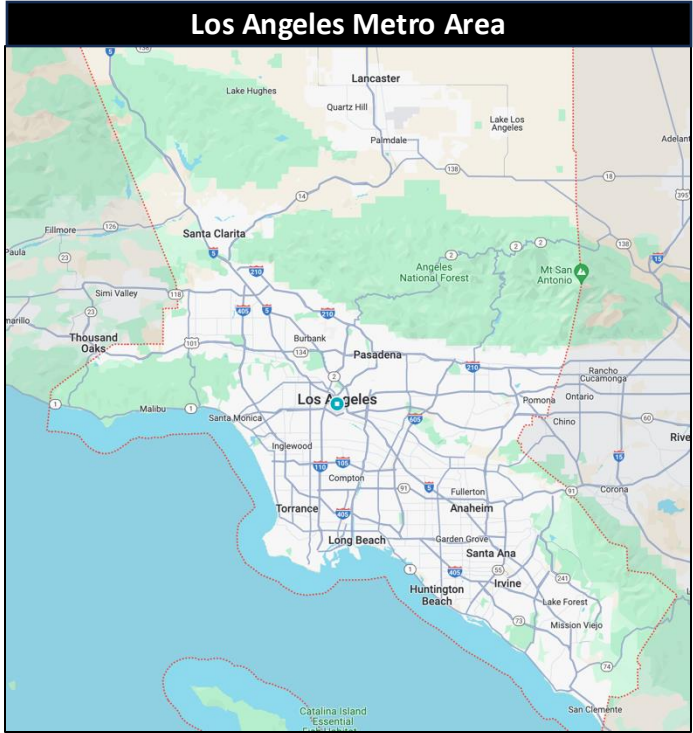


# Community colleges offering courses in Spanish

College	Location	Spanish course(s) description	Tuition
Los Angeles Community College District	Los Angeles, California	In 2019, the LACCD, a district managing 9 community colleges in the Los Angeles area, launched a program to offer classes in Spanish in non-credit courses: vocational or G.E.D. prep. This is offered in 6 of 9 campuses.	\$800 per term (tuition only)
Dallas College	Dallas, Texas	Dallas College has a continuing education program and traditional technical pathways; their continuing education program offers all their courses in Spanish: G.E.D. preparation, computation, first aid, auto mechanics, and restaurant management. Dallas College also offers WorkReadyU for free (ESL classes, GED classes, job training)	\$237 per course
Joliet Junior College	Joliet, Illinois	Joliet Junior College offers continuing education in Spanish, helping them learn English and prepare for citizenship. Additionally, their program for adults includes computation, civics, skills building classes in Spanish (although with little detail on curriculum)	\$4,000
Los Angeles Trade-Technical College (LATTC)	Los Angeles, California	In 2019, LATTC launched an initiative to teach introductory classes in general construction, electricity, computer literacy, fashion, automotive, fitness, and culinary in Spanish. However, there is no update about the program since the launch.	The pilot was free of charge

Source(s): XXX XXX Analysis, LA Times, School Websites

LA metro area is home to ~2 million Hispanic immigrants and 608 potential partners



Population	Hispanic Population	Hispanic Immigrant Population	Catholic Churches	Trade schools	Public Libraries	Average Rent Price	Minimum Wage	Rent % of minimum wage
12.9M	5.9M	2.0M	343	160	105	\$2,742	\$16.78	102%

Includes schools that offer certificates / degrees in construction, cosmetology, vocational skills

Commentary

- Most common frontline occupational groups in the LA metro area are food service (537K), retail (507K) warehousing and transportation (498K), and healthcare support (457K)
- The largest non-Government employers in the Los Angeles area are Kaiser Permanente, UCLA, USC, Amazon, Providence Health, Target, Ralphs, and Cedars-Sinai.
- Los Angeles Trade Technical College, is one of the largest community colleges that specializes in technical education with approximately 16K students enrolled; they have an initiative, Avanza Los Angeles, an introductory course for immigrants that want to learn about the construction trade
- The LA metro area is approximately 88,000 km^2, making it the largest metro area by size; while Hispanics are dispersed throughout the city, they make over 90% of the population in many communities: Pico Rivera, South Gate, Bell Gardens, Florence-Graham, Huntington Park, and Maywood

NY metro area is home to ~1.8 million Hispanic immigrants and 675 potential partners

Includes schools that offer certificates / degrees in construction, cosmetology, vocational skills



Population	Hispanic Population	Hispanic Immigrant Population	Catholic Churches	Trade schools	Public Libraries	Average Rent Price	Minimum Wage	Rent % of minimum wage
19.6M	5.1M	1.8M	484	98	93	\$3,350	\$16.00	131%

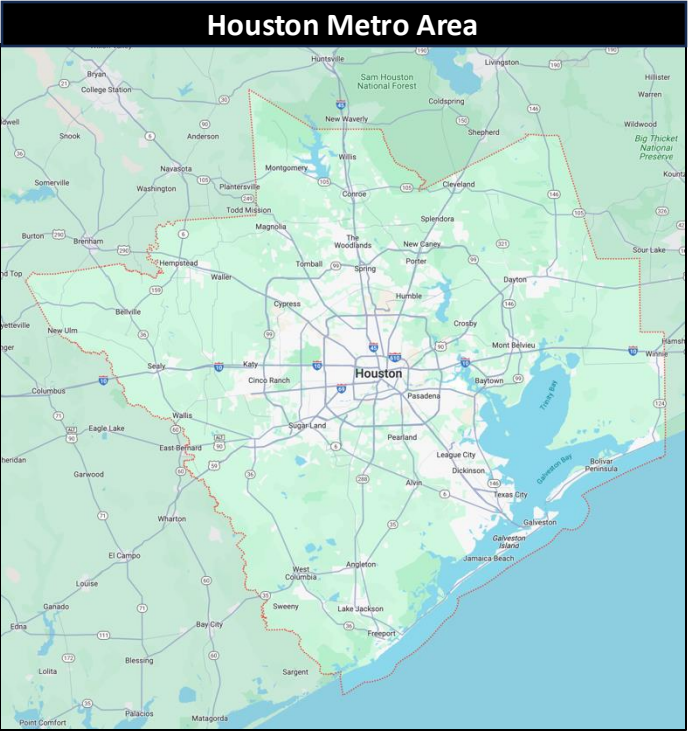
Commentary

- Most common frontline occupational groups in the NY metro area are retail (787K), warehousing and transportation (728K), healthcare support (686K), and food service (614K)
- The largest non-Government employers in the New York area are Duane Read, PepsiCo, Amazon, Wakefern, Walmart, UPS
- The NY metro area is approximately 34,000 km^2. Communities with the largest Hispanic populations are Haverstraw, Port Chester, Newburgh, West Haverstraw, Sleepy Hollow, Hempstead, Ossining, Peekskill, Freeport, Yonkers



Houston metro area is home to ~966K Hispanic immigrants and 318 of potential partners

Includes schools that offer certificates / degrees in construction, cosmetology, vocational skills



Population	Hispanic Population	Hispanic Immigrant Population	Catholic Churches	Trade schools	Public Libraries	Average Rent Price	Minimum Wage	Rent % of minimum wage
7.3M	2.8M	966K	146	51	121	\$1,342	\$7.25	116%

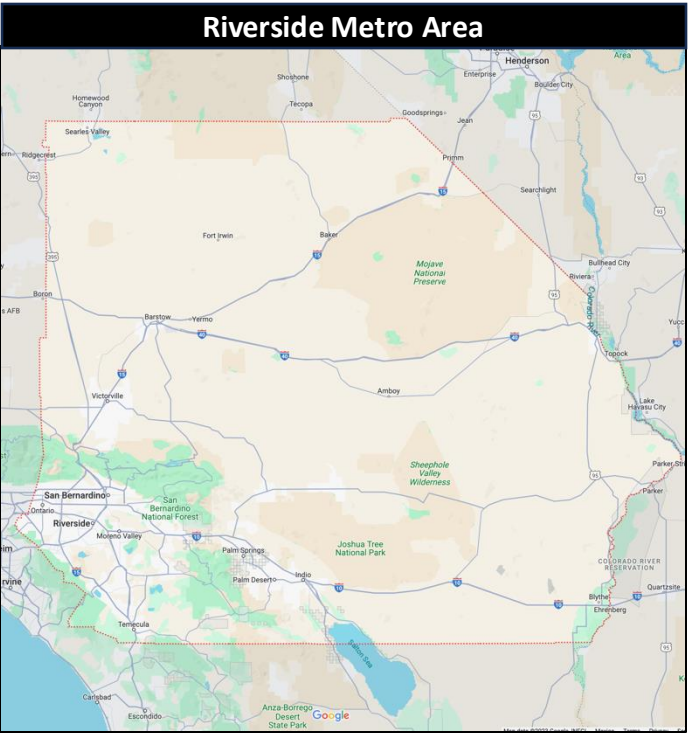
Commentary

- Most common frontline occupational groups in the Houston metro area are warehousing and transportation (292K), food service (276K), retail (265K), and healthcare practitioners / technical occupations (169K)
- The largest non-Government employers in the Houston area are Walmart, H.E.B., Memorial Herman Health, Houston Methodist, MD Anderson Cancer Center, Amazon, Kroger, Texas Children’s Hospital, HCA Health
- The Houston metro area is approximately 26,000 km^2. Communities with the largest Hispanic populations Alief, Sharpstown, Central Southwest, Ellington, Brays Oaks, Northside



Riverside metro area is home to ~863K Hispanic immigrants and 249 potential partners

Includes schools that offer certificates / degrees in construction, cosmetology, vocational skills



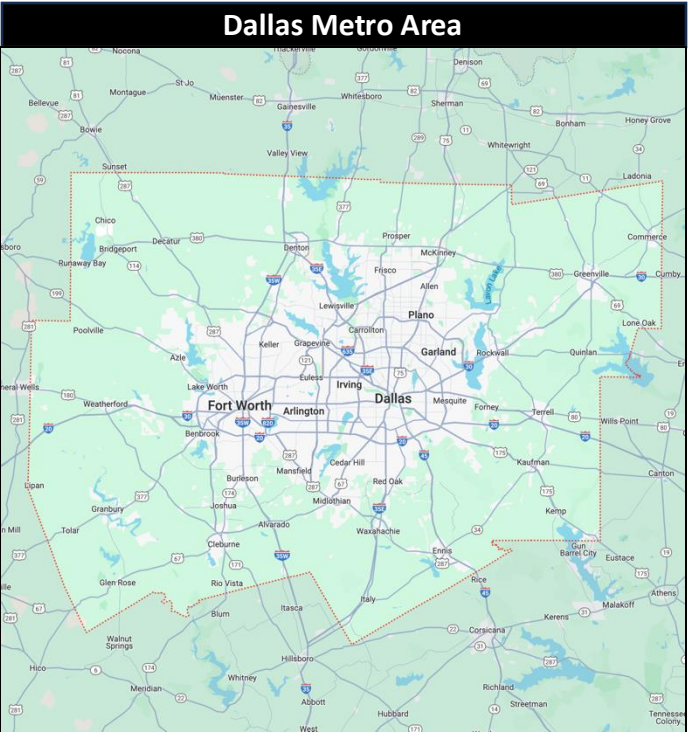
Population	Hispanic Population	Hispanic Immigrant Population	Catholic Churches	Trade schools	Public Libraries	Average Rent Price	Minimum Wage	Rent % of minimum wage
4.7M	2.5M	863K	92	122	35	\$2,138	\$15.50	86%

Commentary

- Most common frontline occupational groups in the Riverside metro area are warehousing and transportation (271K), food service (155K), retail (136K), and healthcare support (109K)
- The largest non-Government employers in the Riverside area are Kaiser Permanente, Riverside Community Hospital, Cal Baptist University, Riverside Medical Clinic, Stater Bros, Target, Mission Inn Hotel and Spa
- The Riverside metro area is approximately 12,000 km^2. Communities with the largest Hispanic populations are Riverside, Moreno Valley, Corona, Coachella, Jurupa Valley, Rialto, Colton, Ontario

Dallas metro area is home to ~794K Hispanic immigrants and 243 potential partners

Includes schools that offer certificates / degrees in construction, cosmetology, vocational skills



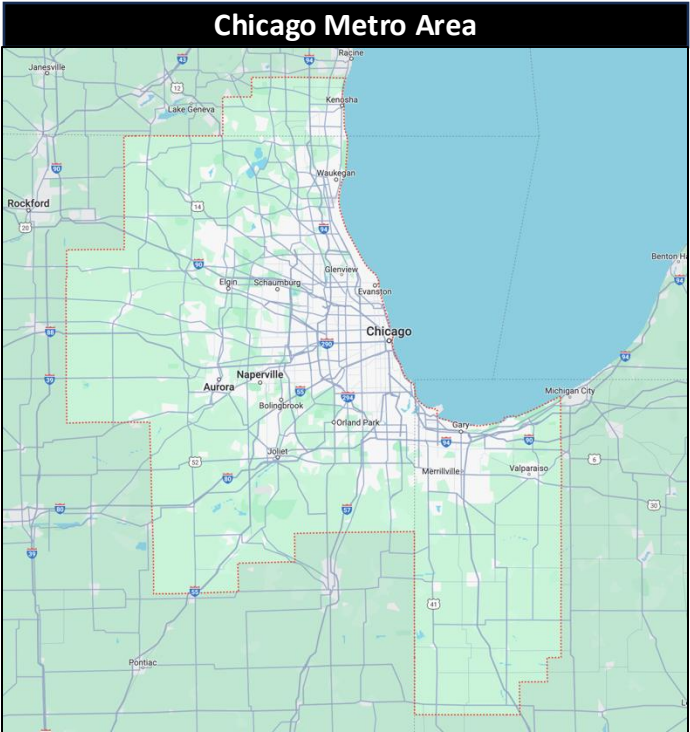
Population	Hispanic Population	Hispanic Immigrant Population	Catholic Churches	Trade schools	Public Libraries	Average Rent Price	Minimum Wage	Rent % of minimum wage
7.9M	2.3M	794K	161	54	28	\$1,592	\$7.25	137%

Commentary

- Most common frontline occupational groups in the Dallas metro area are warehousing and transportation (401K), retail (350K), food service (324K), and healthcare practitioners / technical occupations (196K)
- The largest non-Government employers in the Dallas area are Amazon, Baylor Scott & White, Kroger, Medical City Health, Parkland Hospital, UPS, Walmart, American Airlines, Lockheed Martin
- The Dallas metro area is approximately 24,000 km^2. Communities with the largest Hispanic populations are Pleasant Grove, Oak Cliff, Bachman Lake, Grand Prairie, Irving, Plano



Chicago metro area is home to ~759K Hispanic immigrants and 538 potential partners



Includes schools that offer certificates / degrees in construction, cosmetology, vocational skills

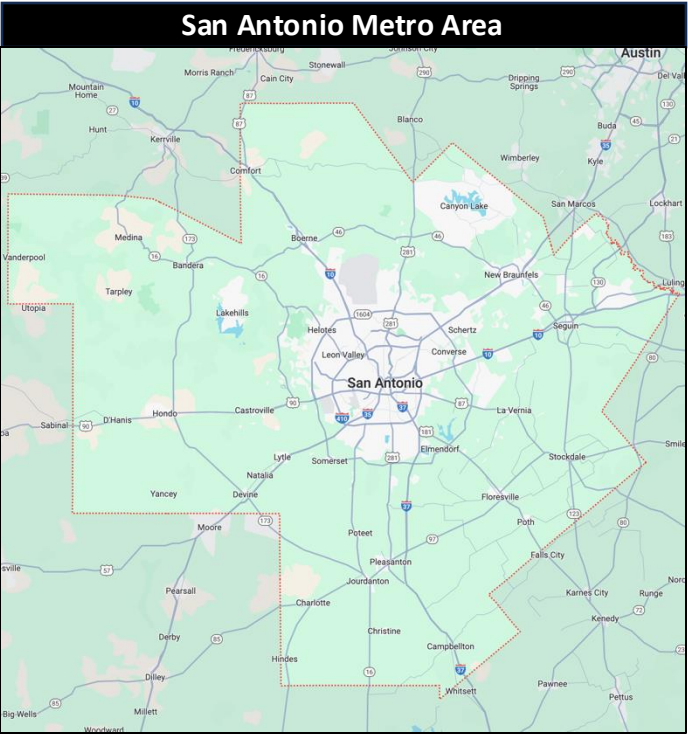
Population	Hispanic Population	Hispanic Immigrant Population	Catholic Churches	Trade schools	Public Libraries	Average Rent Price	Minimum Wage	Rent % of minimum wage
9.4M	2.2M	759K	363	94	81	\$2,309	\$15.80	91%

Commentary

- Most common frontline occupational groups in the Chicago metro area are warehousing and transportation (485K), retail (368K), food service (345K), and production occupations (286K)
- The largest non-Government employers in the Chicago area are Amazon, Walgreens, Mondelez, Illinois Tool Works, Archer Daniels Midland Company, AbbVie, Boeing
- The Chicago metro area is approximately 24,000 km^2. Communities with the largest Hispanic populations are Pilsen, Little Village, Humboldt Park, Austin, North Lawndale, McKinley Park, Albany Park, Logan Square

San Antonio metro area is home to ~483K Hispanic immigrants and 207 potential partners

Includes schools that offer certificates / degrees in construction, cosmetology, vocational skills



Population	Hispanic Population	Hispanic Immigrant Population	Catholic Churches	Trade schools	Public Libraries	Average Rent Price	Minimum Wage	Rent % of minimum wage
2.7M	1.4M	483K	139	40	28	\$1,304	\$7.25	112%

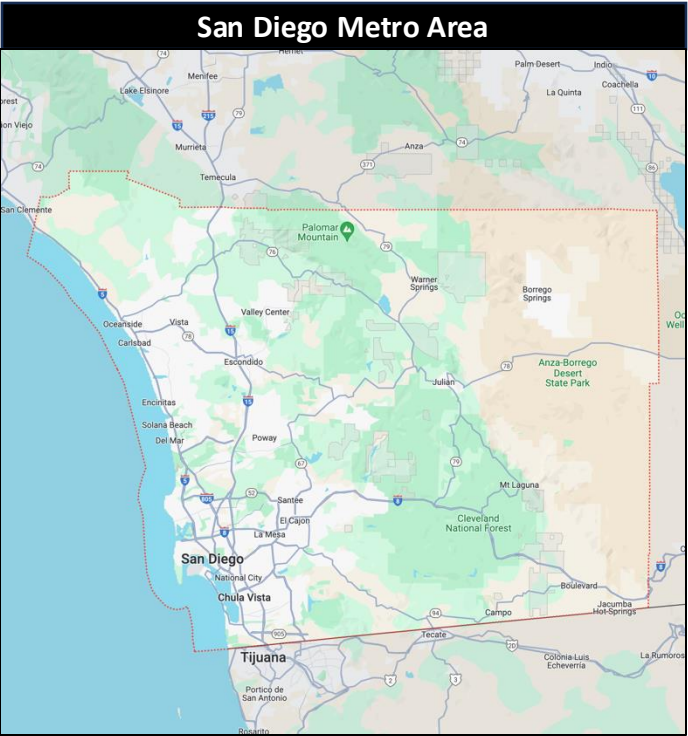
Commentary

- Most common frontline occupational groups in the San Antonio metro area are food service (103K), retail (95K) warehousing and transportation (94K), and healthcare practitioners / technical occupations (63K)
- The largest non-Government employers in the San Antonio area are HEB, USAA, UT Health, Whataburger, TaskUs, Rush Enterprises, Toyota, Bill Miller BBQ, Rackspace
- The San Antonio metro area is approximately 19,000 km^2. Communities with the largest Hispanic populations are Harlandale, Palm Heights, Columbia Heights, Hot Wells, Highland Hills, Indian Creek, Valley Hi, Palo Alto



San Diego metro area is home to ~380K Hispanic immigrants and 167 potential partners

Includes schools that offer certificates / degrees in construction, cosmetology, vocational skills



Population	Hispanic Population	Hispanic Immigrant Population	Catholic Churches	Trade schools	Public Libraries	Average Rent Price	Minimum Wage	Rent % of minimum wage
3.3M	1.1M	380K	98	34	35	\$3,016	\$16.85	112%

Commentary

- Most common frontline occupational groups in the San Diego metro area are food service (146K), retail (124K) warehousing and transportation (97K), and healthcare practitioners / technical occupations (83K)
- The largest non-Government employers in the San Diego area are Sharp Health, Scripps Health, Qualcomm, San Diego Community College, Kaiser Permanente,
- The San Diego metro area is approximately 11,000 km^2. Communities with the largest Hispanic populations are Barrio Logan, Logan Heights, City Heights, San Ysidro, Avenida de Portugal

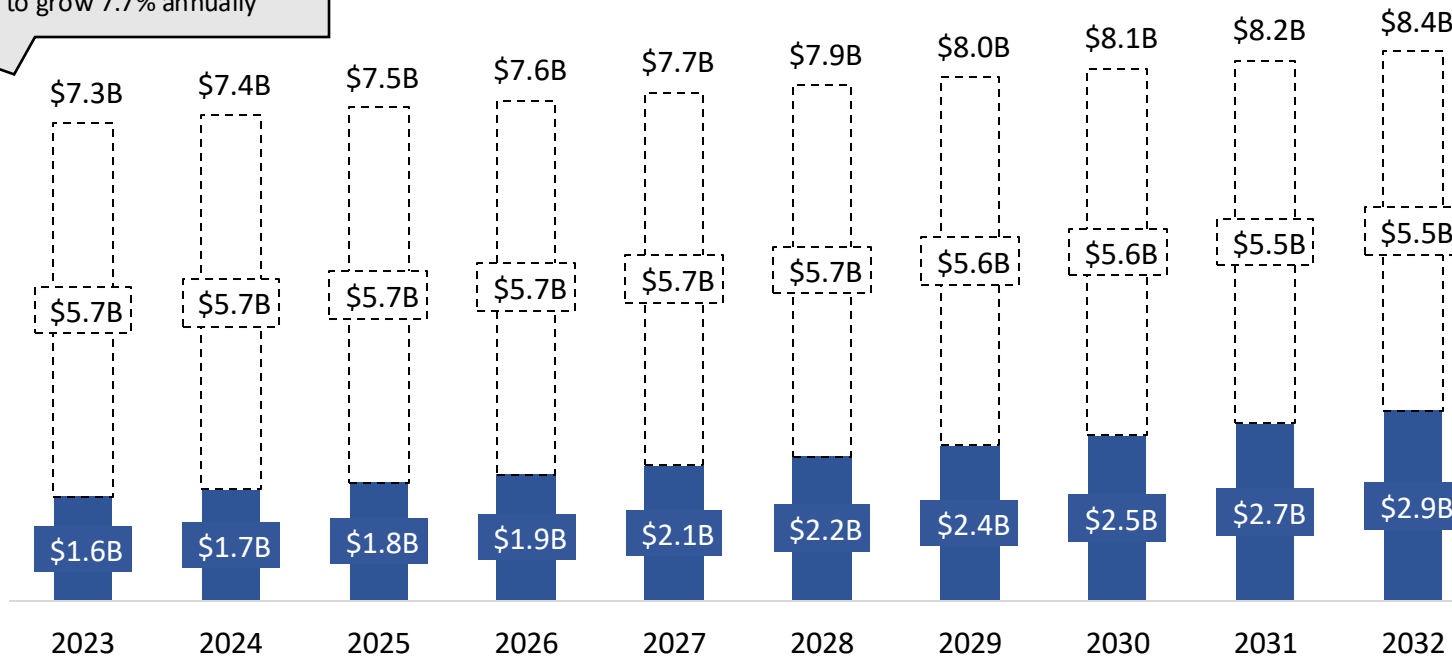
Allied healthcare market is \$7.4B today with 6.9% CAGR to 2032, ~22% of total healthcare frontline is currently Hispanic

### Addressable Frontline Healthcare Market

\$, 2023-2032

Hispanic opportunity (in blue) is 21% of total healthcare market today and expected to grow 7.7% annually

■ Hispanic □ Non-Hispanic



- Healthcare frontline roles of interest are: clinical medical assistant (patient care technician), nursing assistant, pharmacy technician, phlebotomist, and EKG technician
- Our market estimate is based on BLS estimates of job openings and growth outlook estimates over the next 10 years
- Our online courses preparing potential workers in these roles are priced at \$3k per student
- TAM calculated as projected job openings in the roles mentioned above x \$3,000 per student.

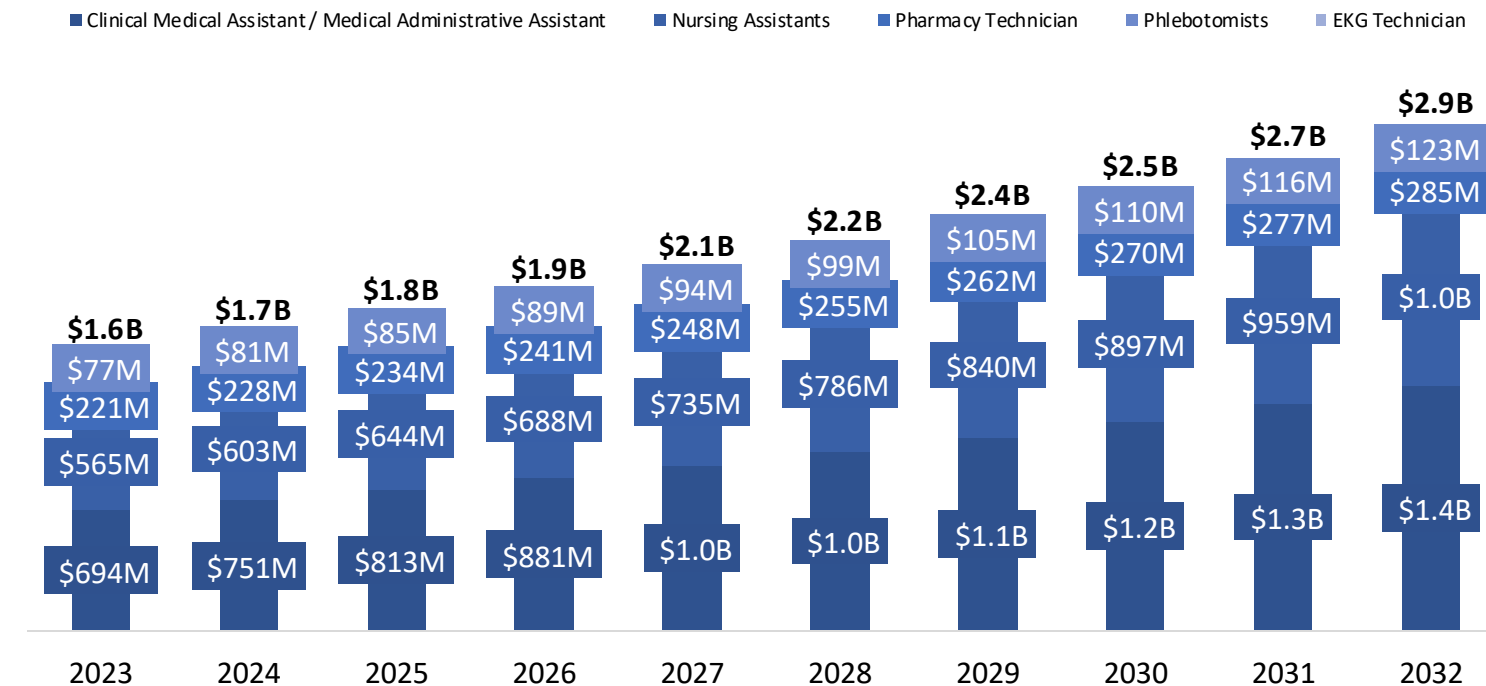
# Clinical medical assistants are the largest and fastest growing occupation today followed by nursing assistants

## Addressable Healthcare Market by Occupation

\$, 2023-2032

This is a base case view according to the BLS; there is an opportunity to expand this opportunity by filling a gap in the market of Spanish-taught training

## Commentary



- In the past 3 years, Hispanics have been the group with the highest growing share of healthcare occupations
  - Hispanics have gained share in nursing assistant, phlebotomist, EKG technician, and clinical medical assistant occupations
- Our estimates show that Hispanics will be most present in clinical medical assistant and nursing assistant roles
- Growing representation of Hispanics in healthcare guided by Historical BLS data and Zippia forecasts for Hispanic frontline worker representation

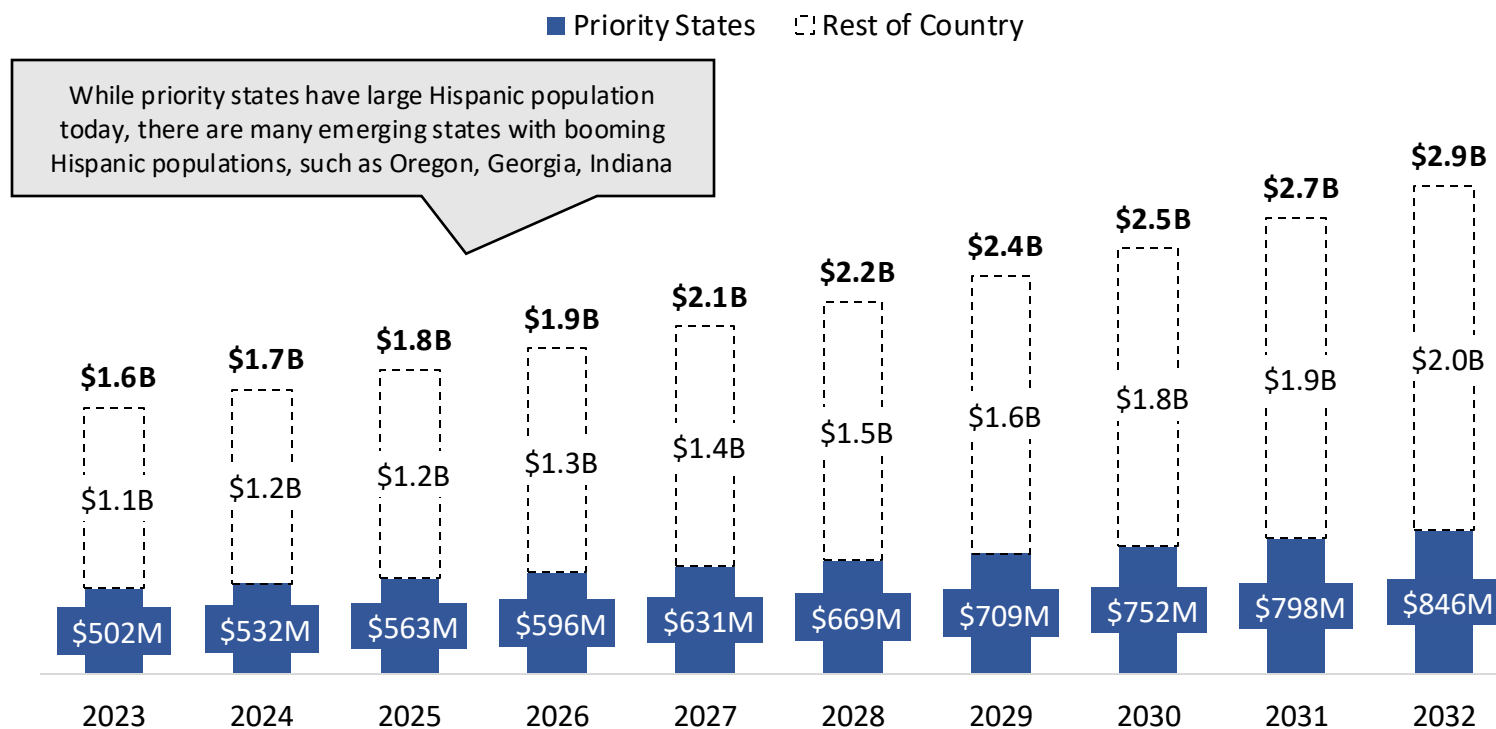


Priority states with high concentration of Hispanic opportunity represent ~\$502M of the national opportunity today, approx. 1/3 of total

## Addressable Hispanic Healthcare Opportunity by State Segment

\$, 2023-2032

## Commentary



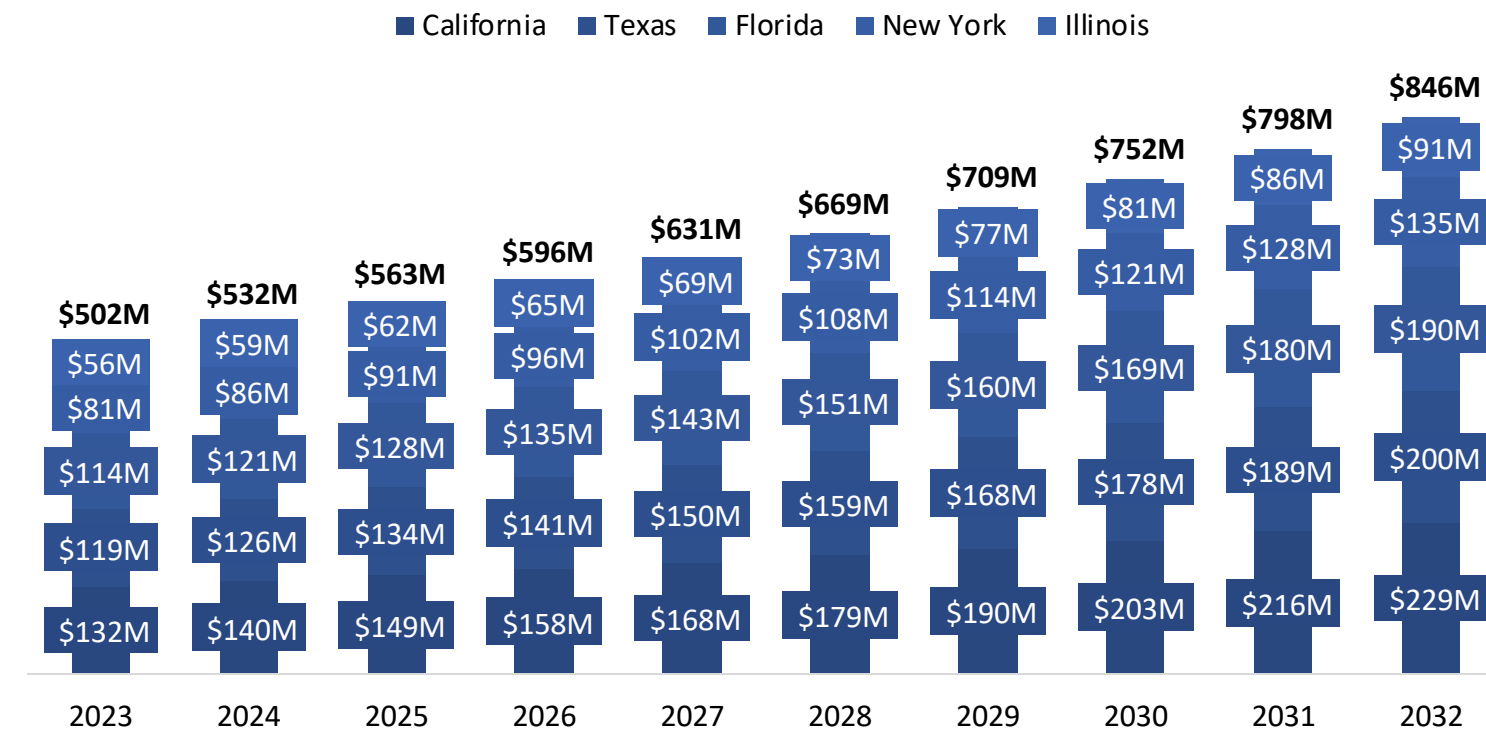
- Priority states represent ~1/3 of the national opportunity today
  - This includes California, Texas, Florida, New York, and Illinois
- In addition to serving potential Healthcare frontline employees through providers, there is also an opportunity to partner with community colleges and trade schools currently offering English-only programs for frontline roles
  - Research of trade schools in large metro areas validates that there is little supply of Spanish-taught courses

California, Texas, Florida represent approximately equal share among priority states, representing ~3/4 of the priority state opportunity

### Addressable Hispanic Market by Priority State

\$, 2023-2032

### Commentary



- California CAGR: 6.3%
- Texas CAGR: 5.9%
- Florida CAGR: 5.8%
- New York CAGR: 5.8%
- Illinois CAGR: 5.6%
- Overall CAGR: 6.0%
- States not shown, such as Georgia, Indiana, and Oregon are expected to grow more at least 8% YoY