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SCARBOROUGH RESEARCH

AUGUST 2 - 5, 2005

THE FAIRMONT COPLEY PLAZA, BOSTON



# The Hispanic Consumer





What do these numbers represent?

27,671,000,000

Amount Hispanics Plan to pay for New Cars next year

1,260,000,000

Hispanic HH's Weekly Grocery Spending

3,248,000,000

Hispanics Furniture Spending Past Year

8,998,000,000

Hispanics Home Improvement Spending Past Year

2,238,000,000

Hispanics Children's Clothing Purchases Past Year

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# Who is the Hispanic Consumer . . .

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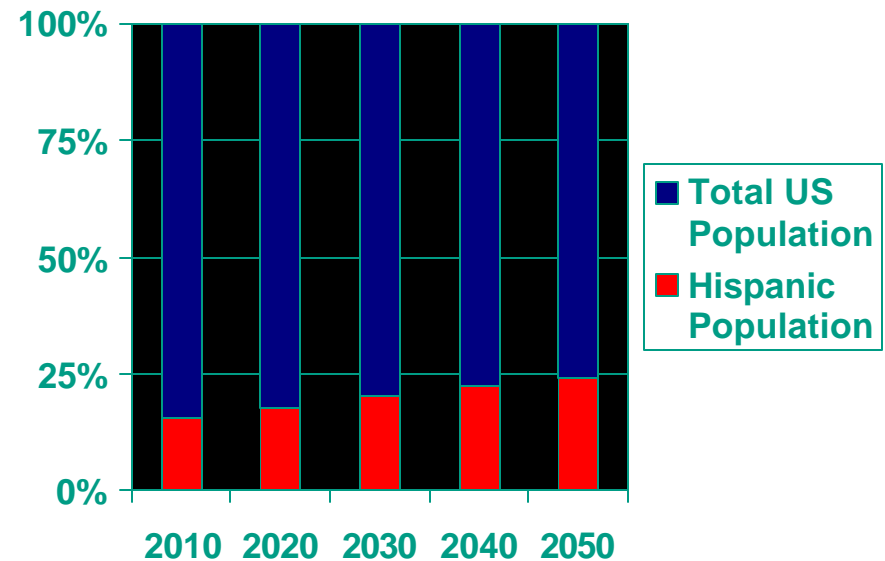
# U.S. Total Population

<b>A U.S. Snapshot: Population by Race and Ethnicity, 2004</b>		
	<b>Population</b>	<b>Percent Distribution</b>
Hispanic	40,424,528	14%
Native Born	22,381,207	7.7%
Foreign Born	18,043,321	6.2%
Non-Hispanic white	194,976,871	69%
Non-Hispanic black	34,919,473	12%
Non-Hispanic Asian	12,342,486	4%
Non-Hispanic other	5,717,109	2%
<b>Total Population</b>	<b>288,290,465</b>	<b>100%</b>

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# U.S. Hispanic Population

- 40.4 Million as of 2004
  - 14% of Total US Population
- By 2050 24.4% of US Population



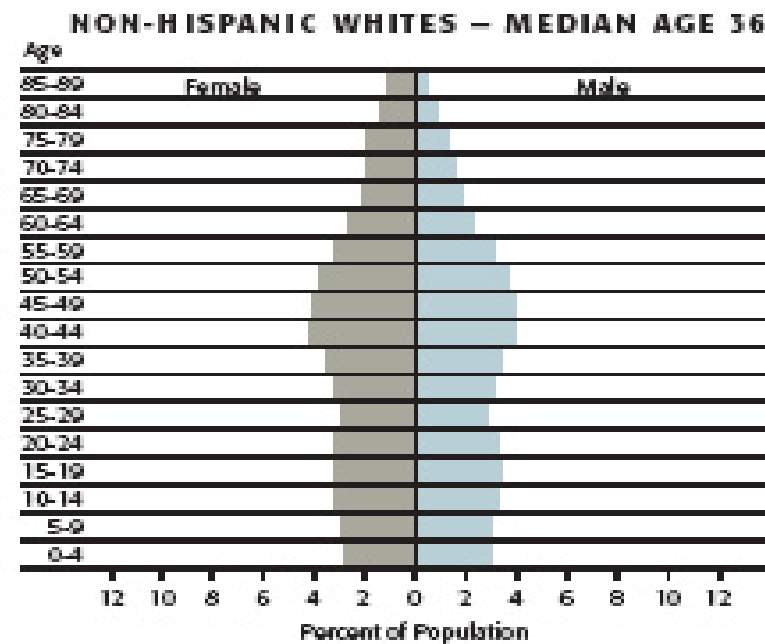
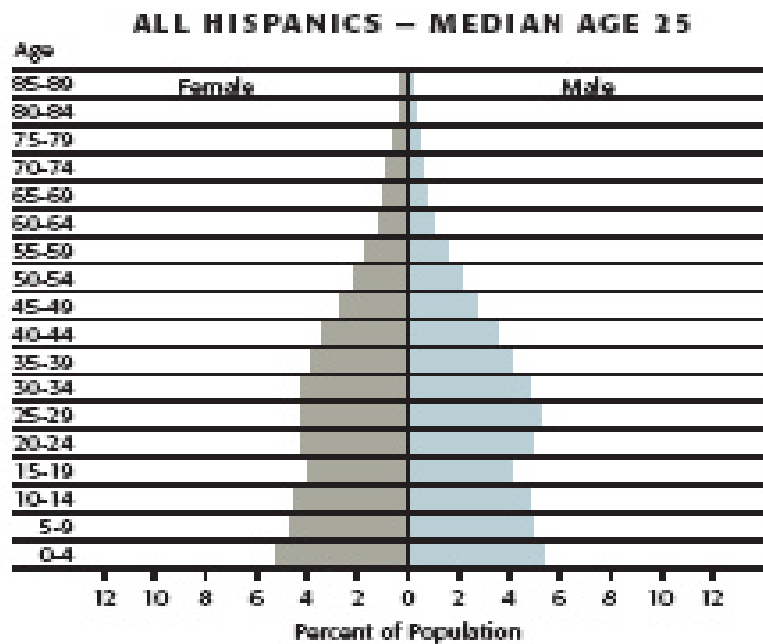
Source: Pew Hispanic Center tabulations from the Annual Social and Economic Supplement, Current Population Survey, March 2004

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# Age and Gender Distribution U.S. Hispanics

## Age and Gender Distribution of Hispanics and Non-Hispanic Whites

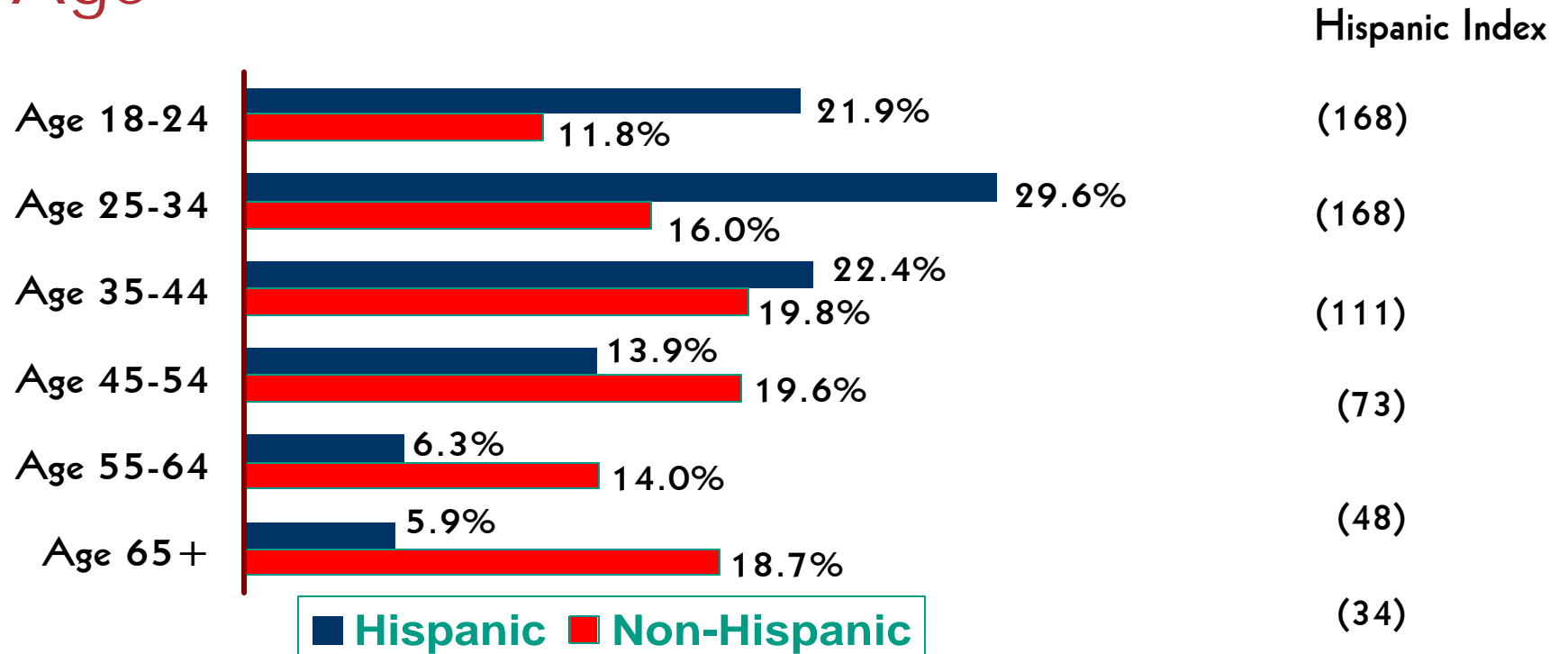


Source: Pew Hispanic Center tabulations from the Annual Social and Economic Supplement, Current Population Survey, March 2004

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# Age

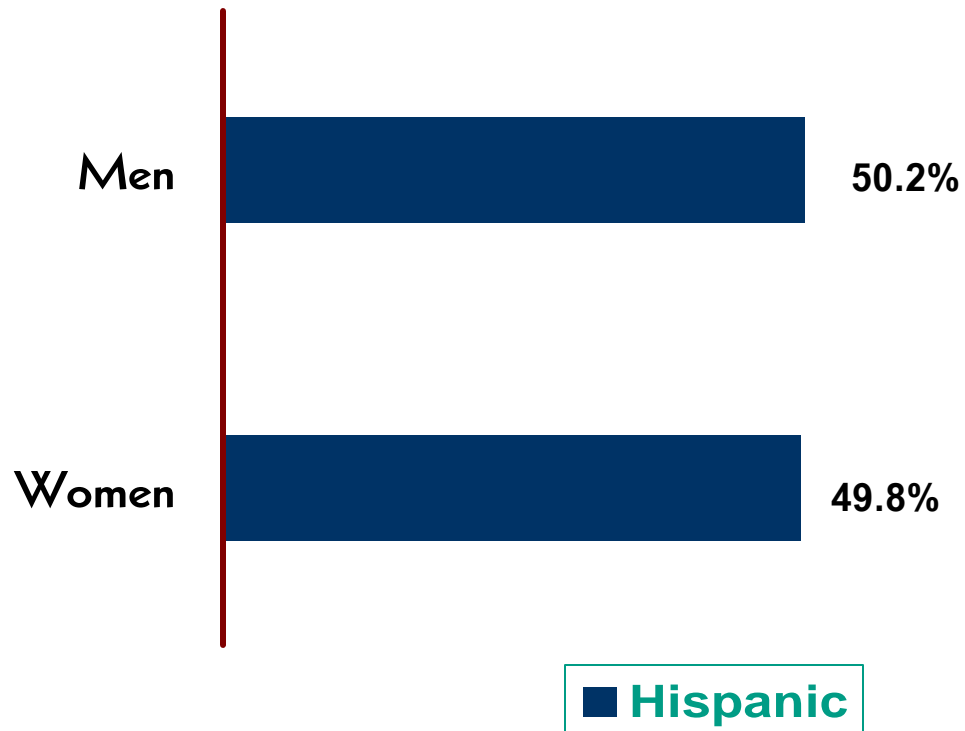


Source: Scarborough Research Scarborough USA+ R2 2004

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# Gender



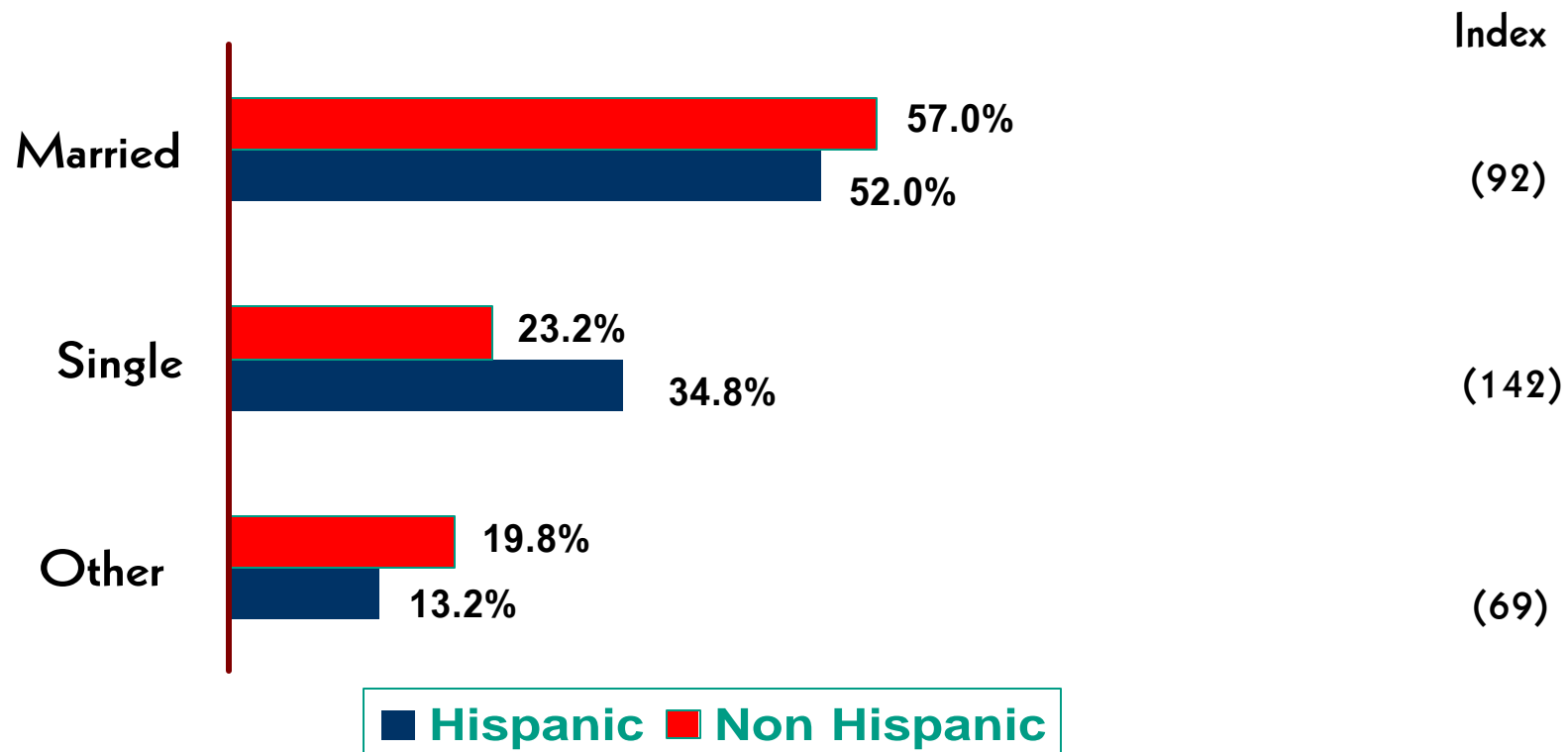
Source: Scarborough Research Hispanic Multi-Market+ R2 2004

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## Marital Status

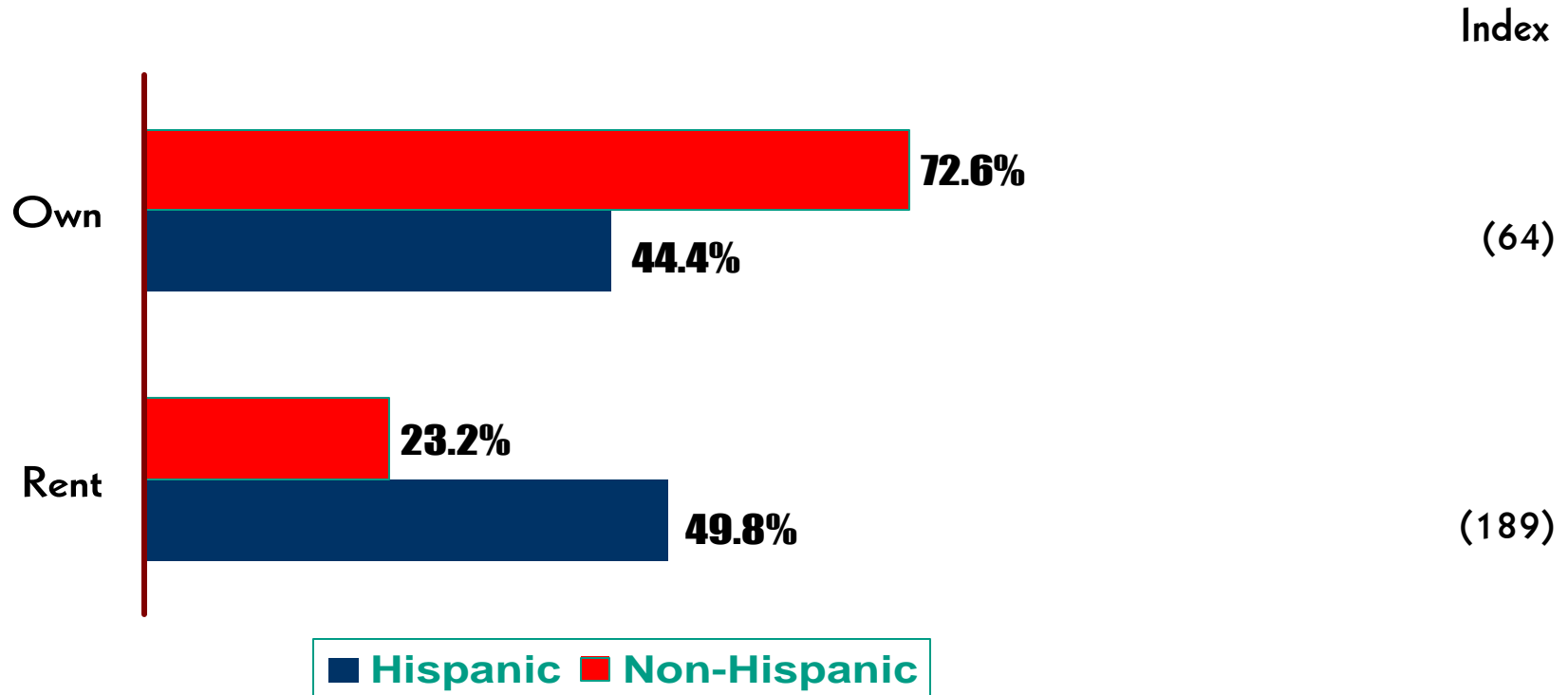


Source: Scarborough Research Scarborough USA+ R2 2004

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# Own/Rent Home



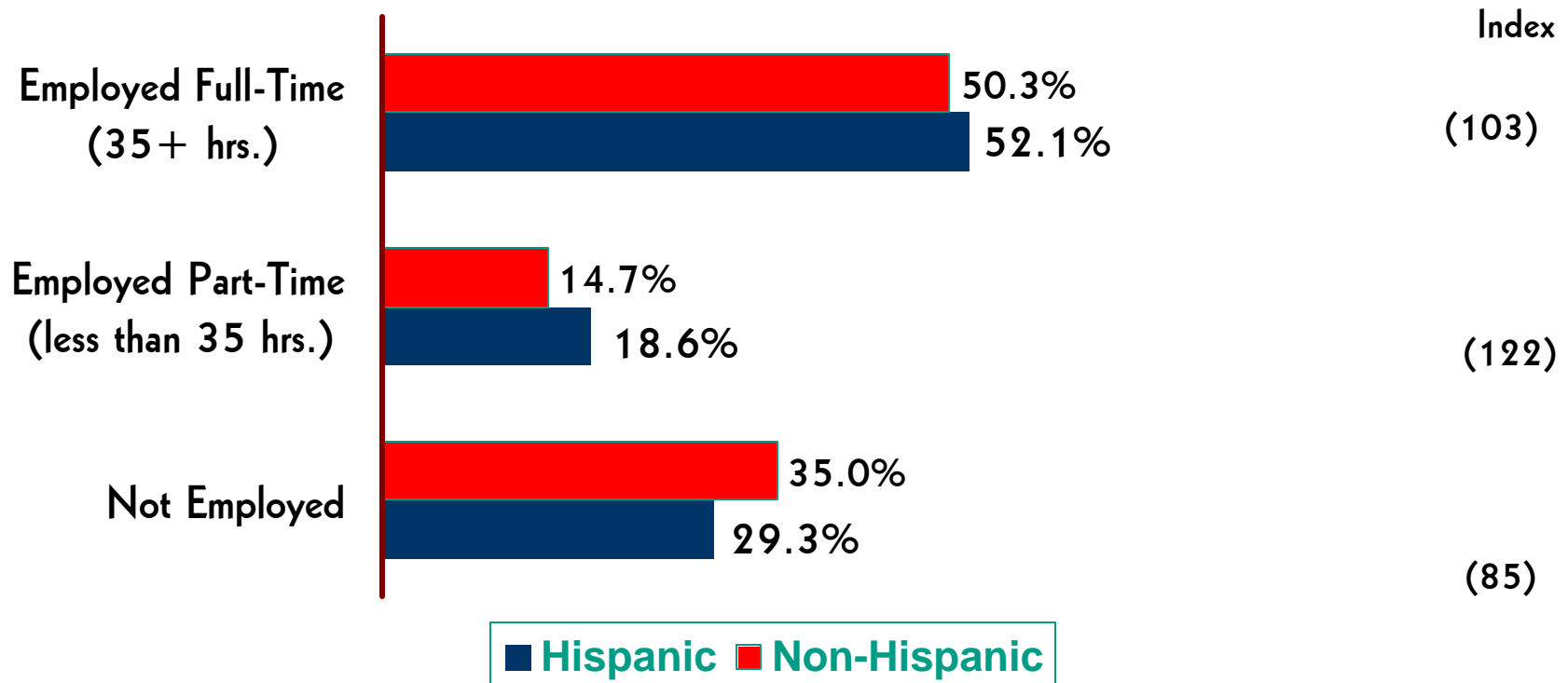
Source: Scarborough Research Scarborough USA+ R2 2004

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## Employment Status

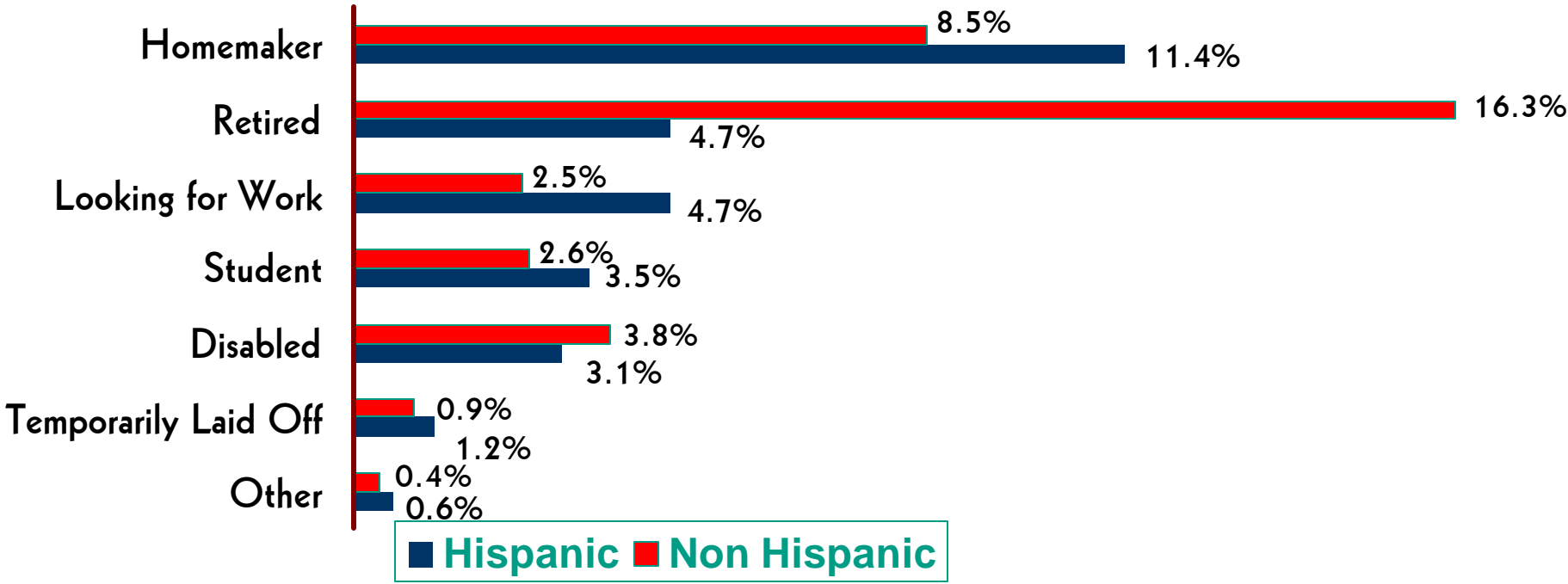


Source: Scarborough Research Scarborough USA+ R2 2004

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# Employment Status Reasons not employed



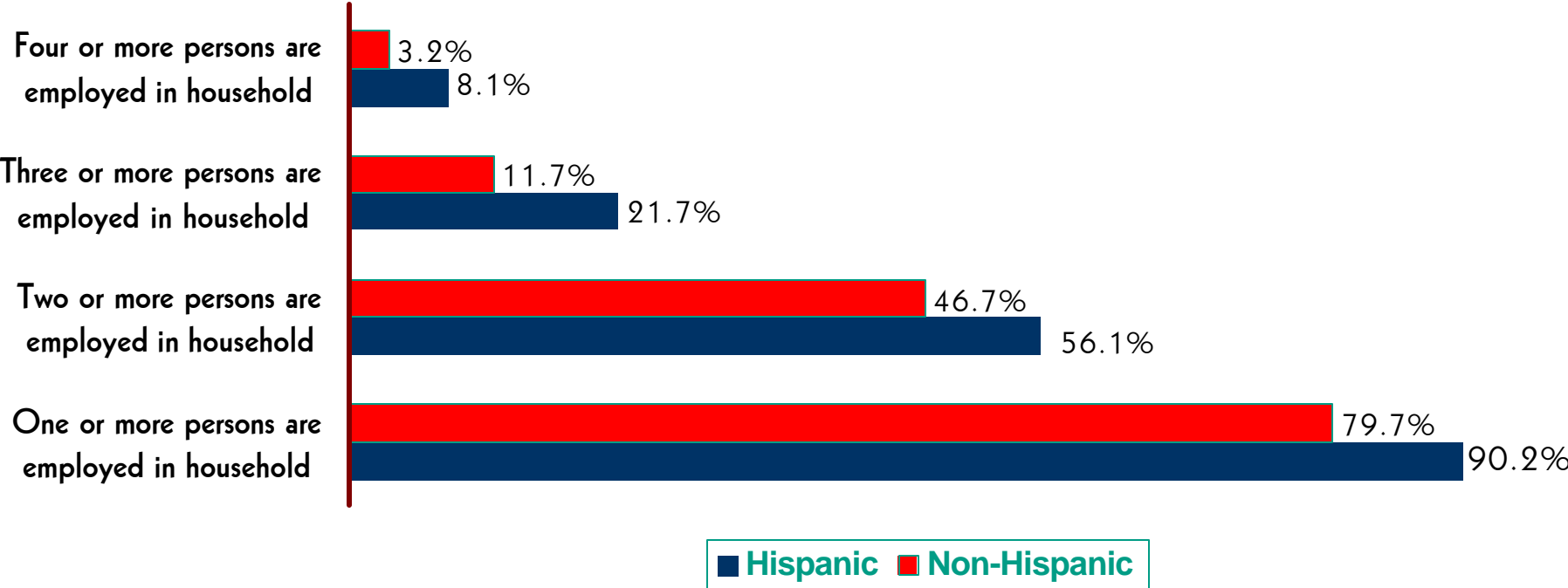
Source: Scarborough Research Scarborough USA+ R2 2004

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# Number of Adults 18+ Employed in Household



Source: Scarborough Research Scarborough USA+ R2 2004

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## Hispanic Consumers – Share of Employment Selected Industries

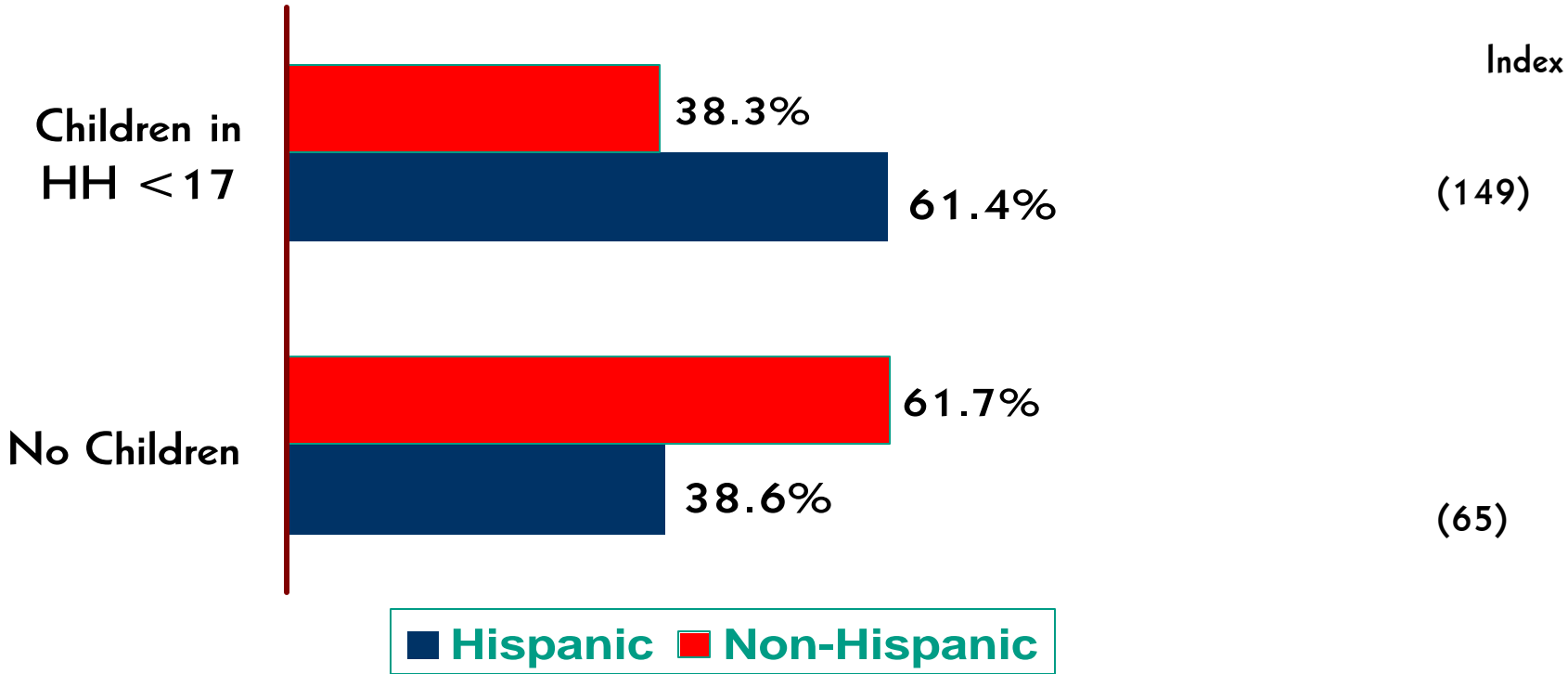
<b>A U.S. Snapshot: Hispanic Employment selected industries</b>		
	<b>Percent</b>	<b>Index</b>
Blue collar	39.7%	157
White collar	31.0%	77
Service	16.3%	164
Sales/office	14.6%	95
Production/transportation/material moving	12.0%	152
Construction/extraction/maintenance	10.4%	155
Professional/related occupations	9.0%	62
Management/business/financial ops	7.4%	69
Farming/fishing/forestry	0.7%	212
Military specific	0.3%	91

Source: Scarborough Research Scarborough USA+ R2 2004

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# Presence of Children

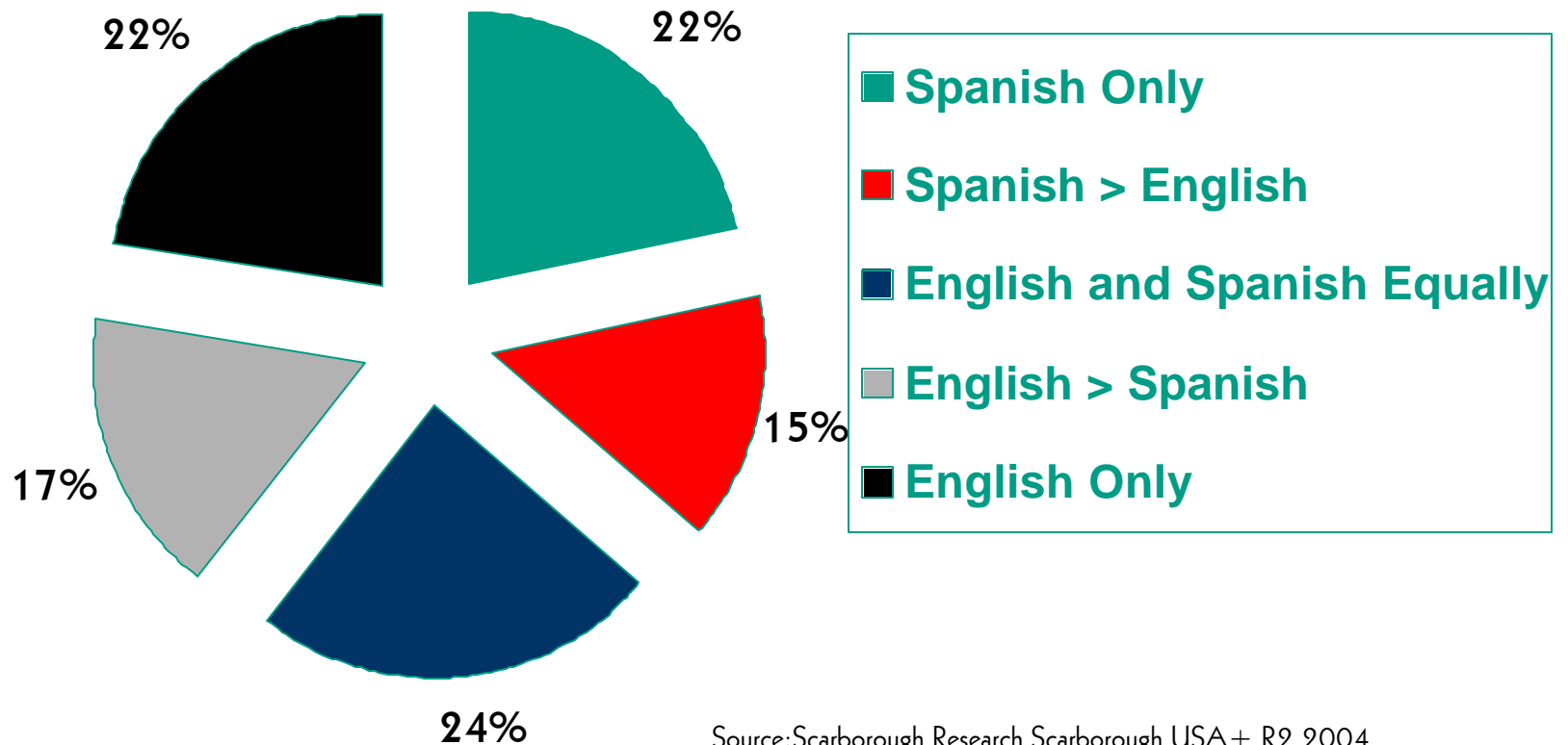


Source: Scarborough Research Scarborough USA+ R2 2004

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## Hispanic Consumers – Language Preference

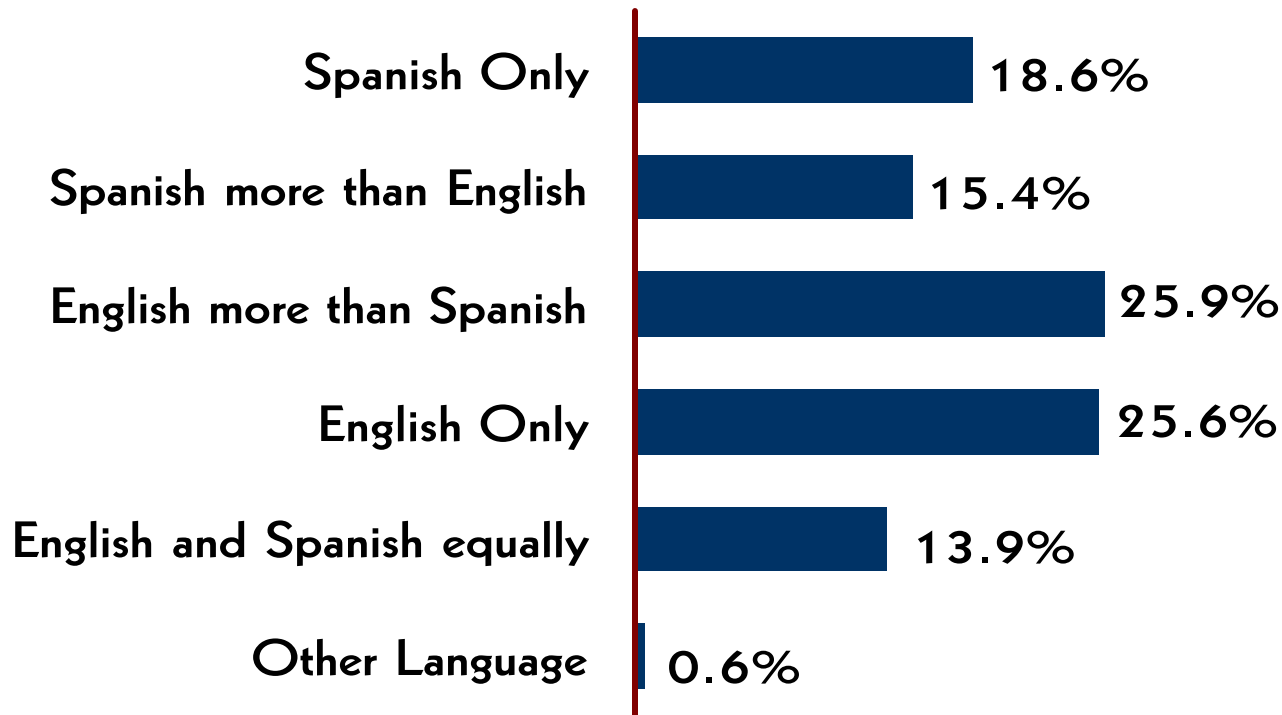


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# Hispanic Consumers Language Personally Speak Most away from Home

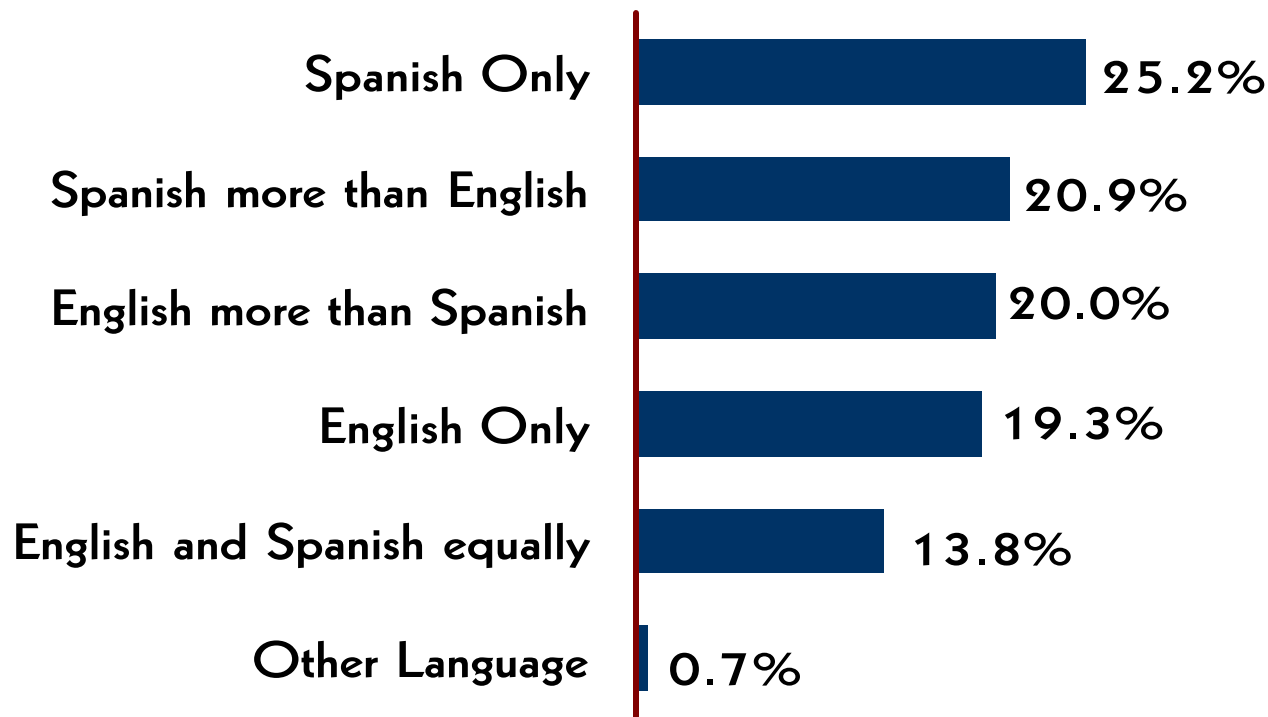


Source: Scarborough Research Scarborough USA+ R2 2004

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## Hispanic Consumers Language Personally Speak Most in Home

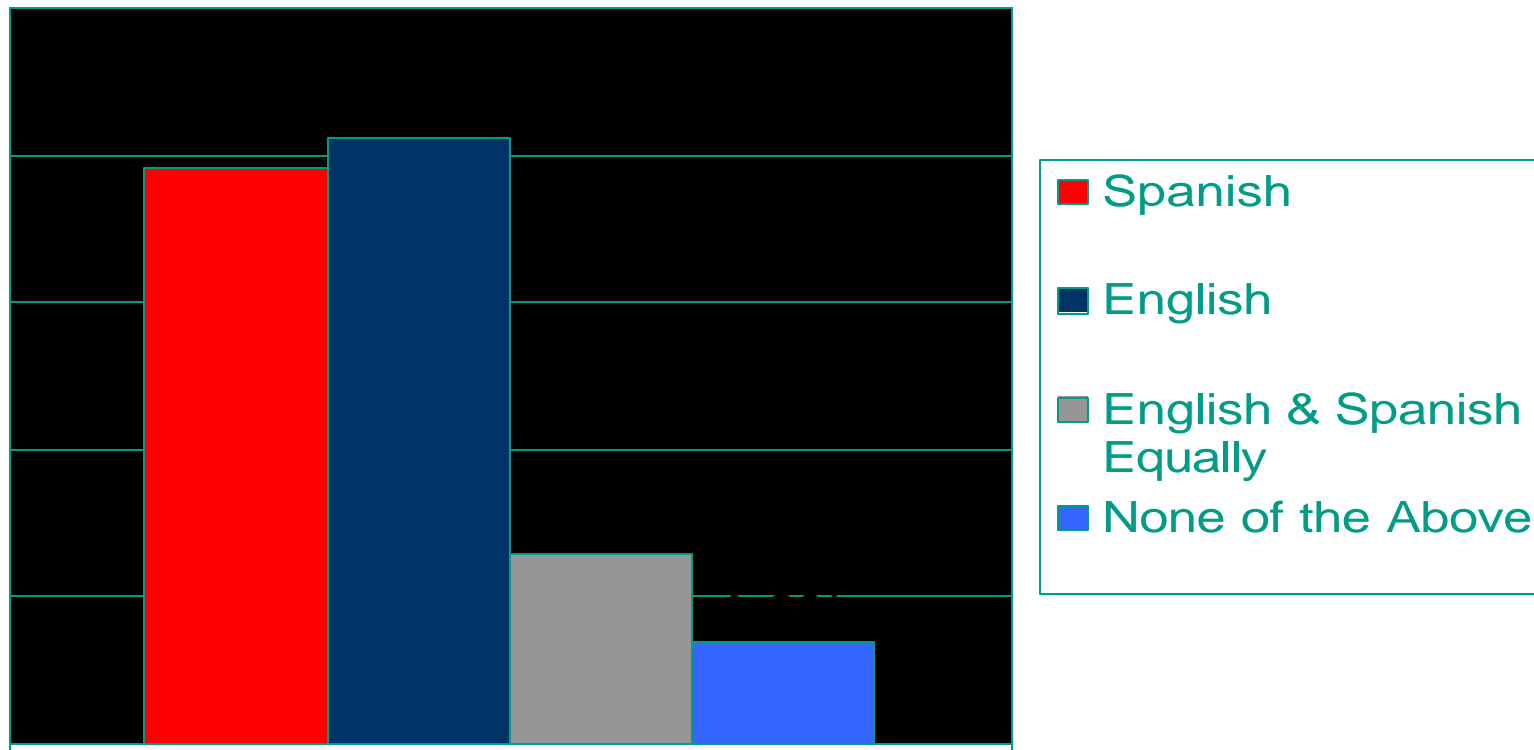


Source: Scarborough Research Scarborough USA+ R2 2004

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## Hispanic Consumers – Dominant Language



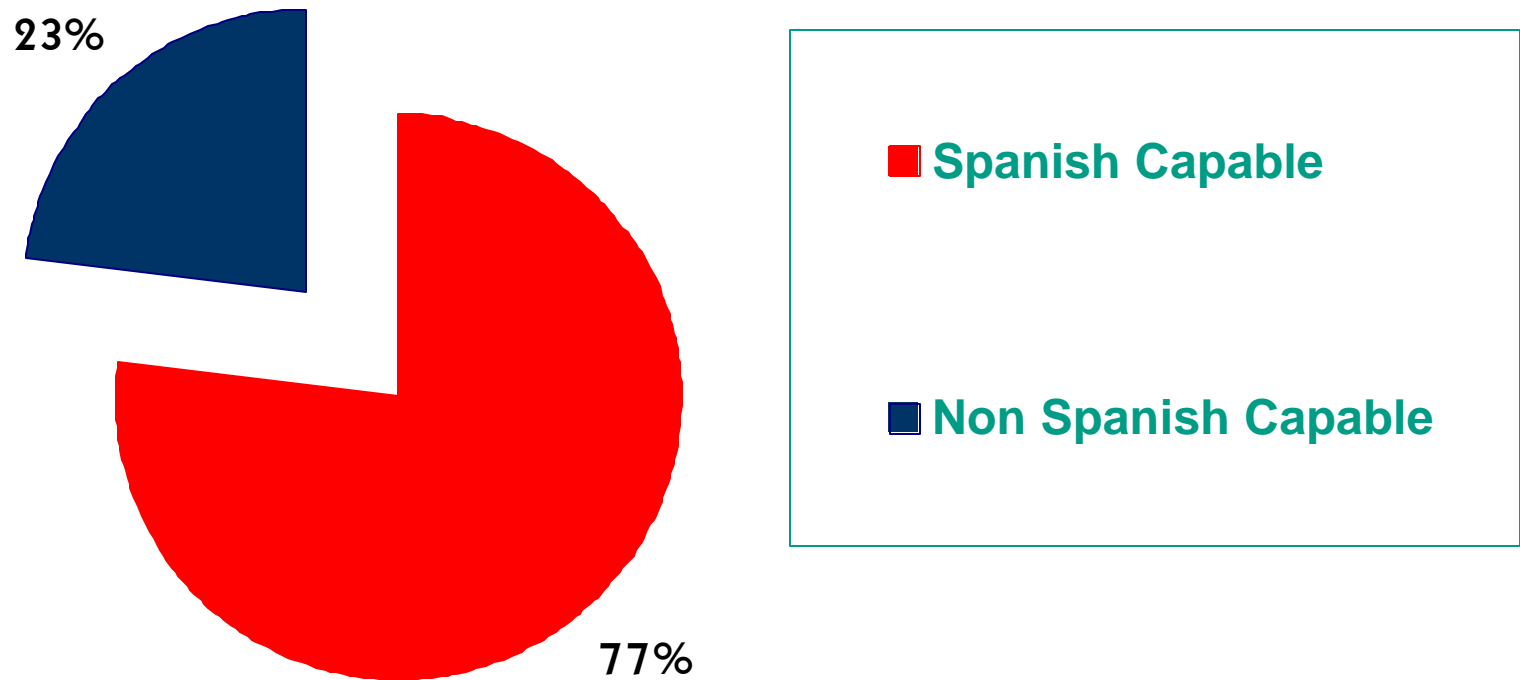
Dominant Language

Source: Scarborough Research Scarborough USA+ R2 2004

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## Hispanic Consumers – “Spanish Capable”



Source: Scarborough Research Scarborough USA+ R2 2004- based on preference

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Hispanic Consumers Language is a major indicator of lifestyle

**Hispanics By Primary Language**      **Non-Hispanics**

		<b>Spanish Primary</b>	<b>Bi-Lingual</b>	<b>English Primary</b>	
<b>Financial Services</b>	Mortgage	10.3%	23.3%	15.5%	31.1%
	Checking Account	49.0%	78.1%	63.3%	87.8%
	Online Bill Pay	4.5%	13.1%	8.2%	13.8%
	Used any Credit Card	50.5%	67.8%	58.7%	74.5%
<b>Cell Phone Services</b>	Subscribes to a wireless Service	48.9%	64.9%	59.3%	63.5%
	Plans to switch next year	9.8%	13.5%	15.3%	10.3%
<b>Occupation Summary</b>	Blue Collar	50.0%	29.0%	41.9%	23.3%
	White Collar	15.1%	44.4%	32.8%	41.8%
<b>Education Summary</b>	12th Grade or Less	48.1%	15.7%	27.3%	9.1%
	High School Graduate or GED	35.6%	38.6%	39.2%	35.8%
	Some College or more	16.3%	45.7%	33.5%	55.1%
<b>Events</b>	Very or Somewhat interested in				
	Major League Soccer	15.8%	11.1%	16.5%	5.1%
	NASCAR	11.1%	14.6%	12.1%	21.3%
	NBA	22.2%	29.1%	26.9%	21.8%
	NFL	24.3%	41%	33%	45%

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Source: Scarborough Research Scarborough USA+ R2 2004



# Top 25 U.S. Hispanic Markets

- |    |                |    |                |
|----|----------------|----|----------------|
| 1  | LOS ANGELES    | 16 | DENVER         |
| 2  | NEW YORK       | 17 | WASHINGTON, DC |
| 3  | MIAMI          | 18 | PHILADELPHIA   |
| 4  | HOUSTON        | 19 | ORLANDO        |
| 5  | CHICAGO        | 20 | TAMPA          |
| 6  | DALLAS         | 21 | AUSTIN         |
| 7  | SAN ANTONIO    | 22 | BOSTON         |
| 8  | SAN FRANCISCO- | 23 | ATLANTA        |
| 9  | PHOENIX        | 24 | TUCSON         |
| 10 | HARLINGEN-     | 25 | LAS VEGAS      |
| 11 | ALBUQUERQUE-   |    |                |
| 12 | SACRAMENTO-    |    |                |
| 13 | SAN DIEGO      |    |                |
| 14 | EL PASO        |    |                |
| 15 | FRESNO         |    |                |

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## Scarborough's Hispanic Procedures





# Scarborough Hispanic Procedures

- Bilingual interviewers available in all markets
- Bilingual materials available in 27 markets
  - Markets with 7.5% Hispanic population 18+ or 250,000 Hispanic persons 18+ receive Differential Survey Treatment (DST)
    - Additional incentives with mailing of booklets and TV diaries
    - Additional contacts to return materials
    - Hispanic sample balancing

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# Scarborough Hispanic Procedures

- Similar Questions asked in all 75 markets
  - Hispanic/Latino origin question
    - Are you Spanish, Hispanic or Latino, for example: Central or South American, Mexican, Cuban, Puerto Rican or Spanish?
  - Language Preference questions (asked of all Hispanic respondents)
    - “What language is spoken in your home most often?”
    - “What language do you personally speak most frequently at home?”
    - “What language do you personally speak most frequently when you are away from home?”
    - Of the languages you speak, what language do you personally prefer to speak?”

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# Scarborough Hispanic Procedures

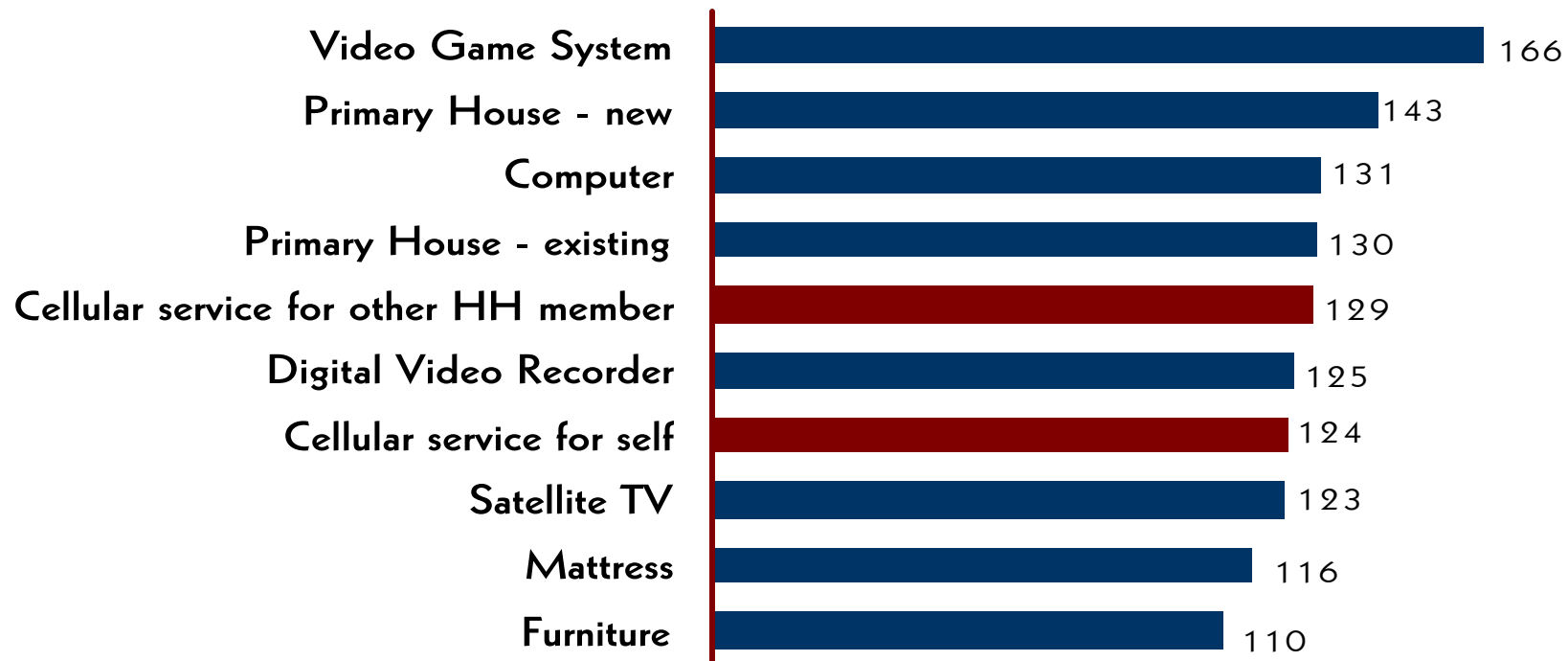
- Beginning with Release 1 2005, two additional questions are now being asked to all Hispanic respondents
  - Where were you born?
    - In the United States
    - Outside United States
  - How long have you lived in the United States?
    - Only asked if respondent selects outside U.S. or “don’t know”

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# Hispanic Consumers Items/Services HHld plans to buy

Index

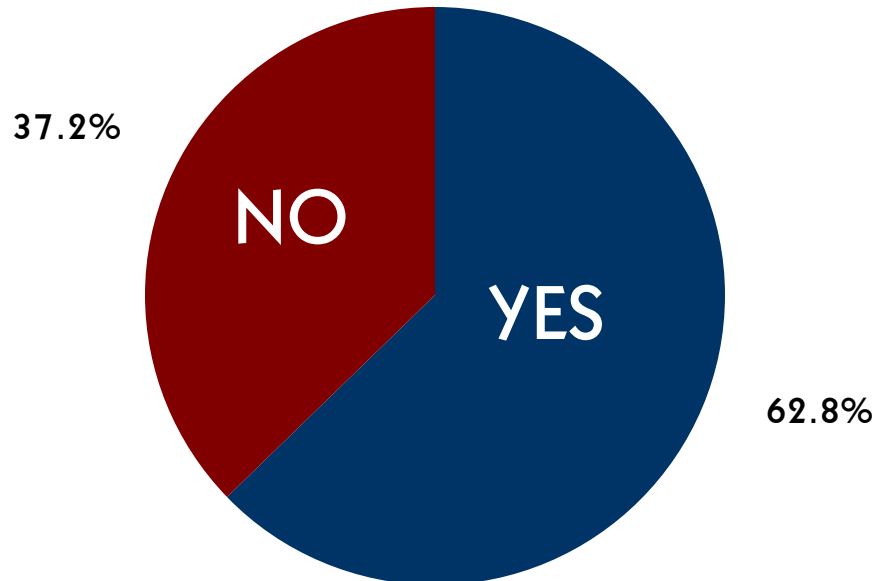


Source: Scarborough Research Scarborough USA+ R2 2004

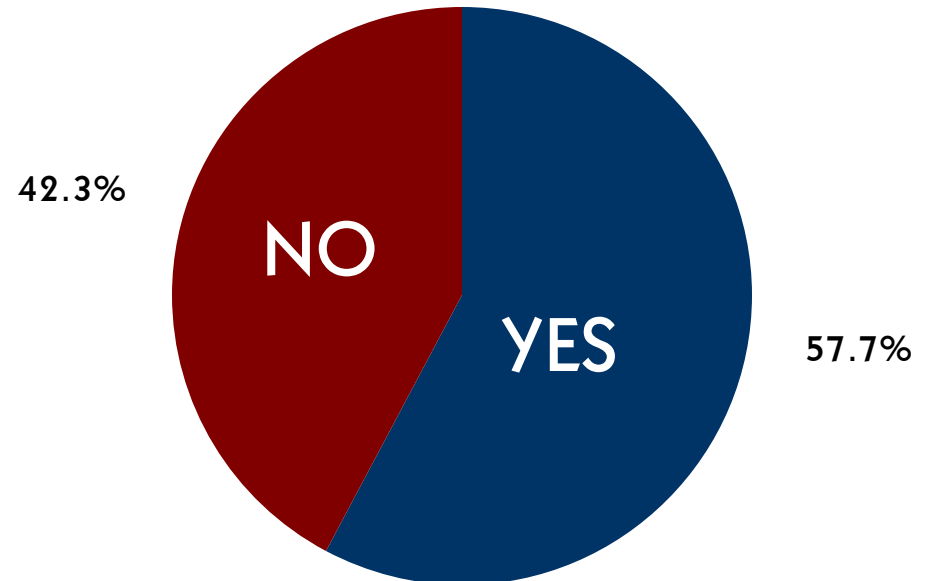
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# Wireless/Cell Phone

Adults 18+



Hispanics

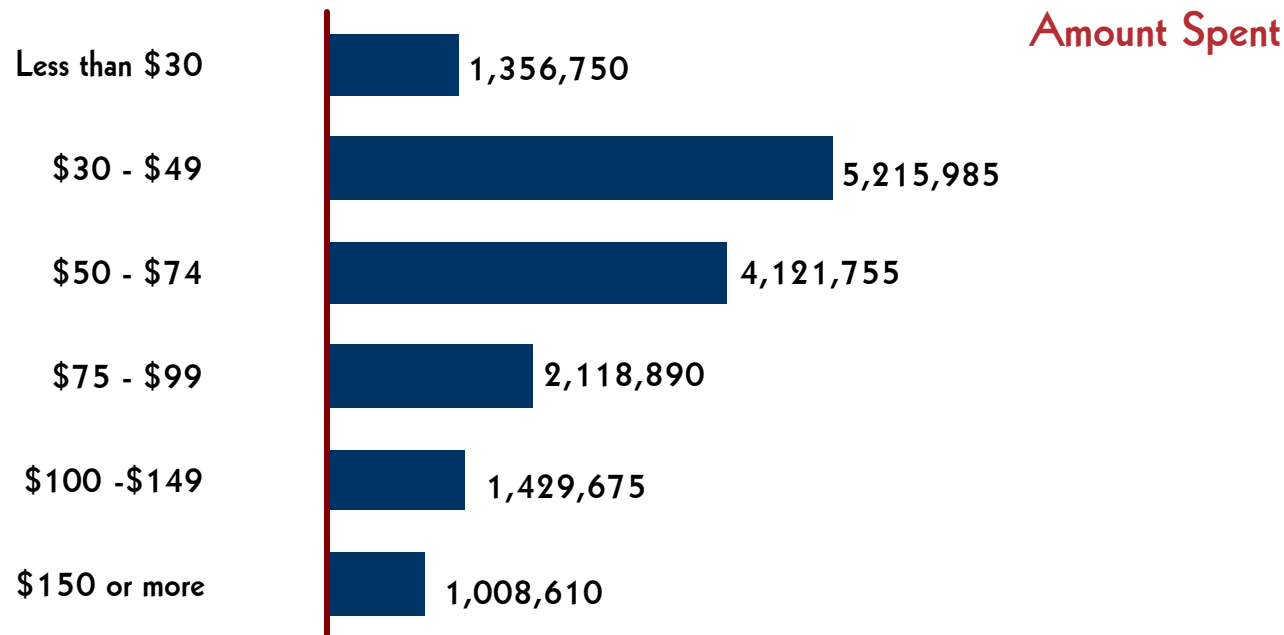


Source: Scarborough Research Scarborough USA+ R2 2004

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# Hispanics subscribers spent more than \$995 million on their cell phone bill last month!



Source: Scarborough Research Scarborough USA+ R2 2004

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# The Value of Hispanics in the Media

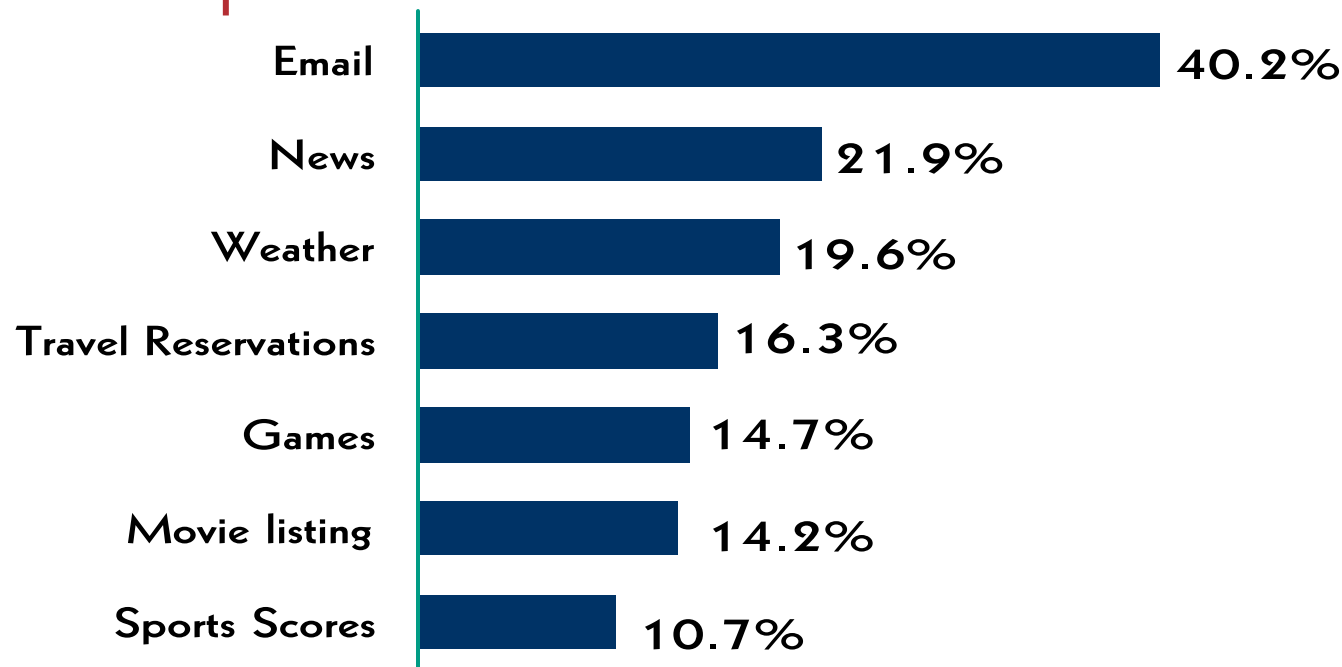
- Internet
- Cable
- Television
- Radio

Source: Scarborough Research Scarborough USA+ R2 2004

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## Ways online services were used by Hispanics

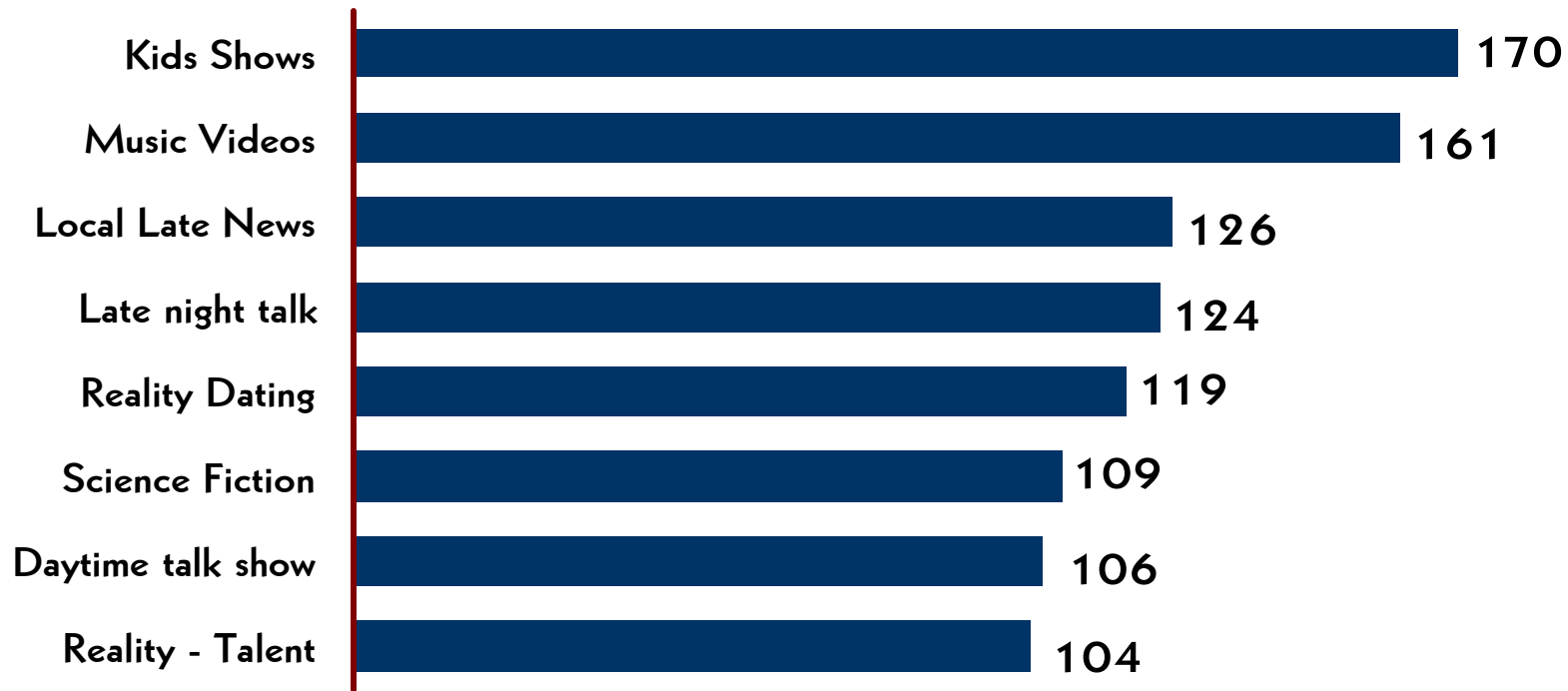


Source: Scarborough Research Scarborough USA+ R2 2004

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## Types of Programs Hispanics Viewers typically watch



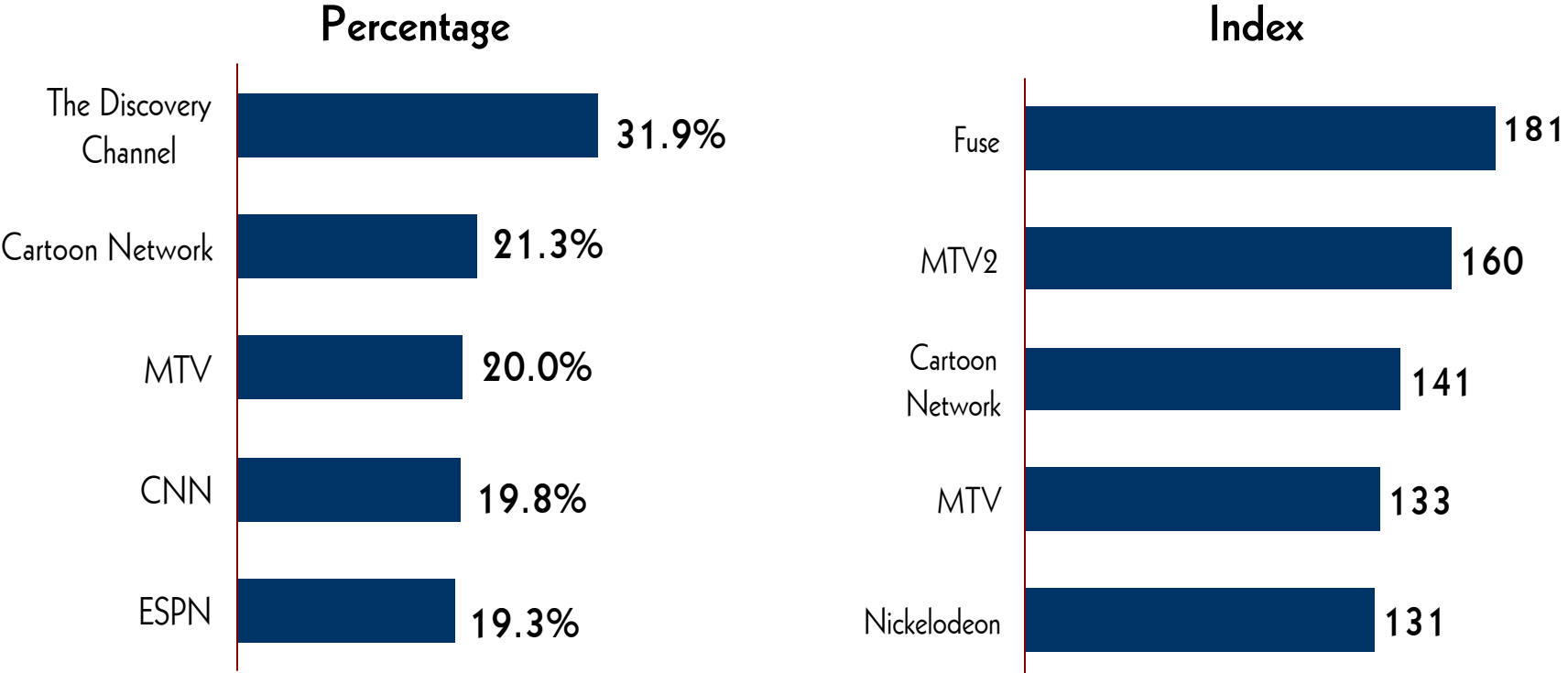
Source: Scarborough Research Scarborough USA+ R2 2004

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# Hispanic Viewers are Watching Cable



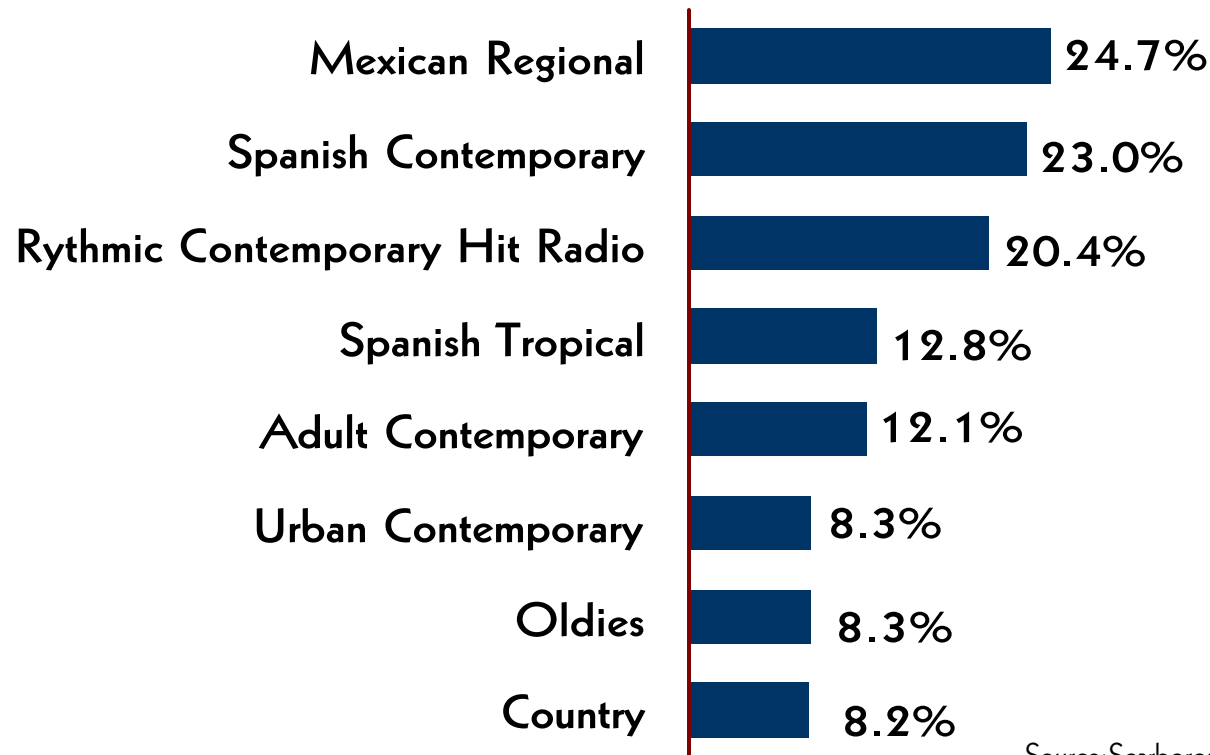
Source: Scarborough Research Scarborough USA+ R2 2004

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## Hispanics listeners tune into these radio formats



Source: Scarborough Research Scarborough USA+ R2 2004

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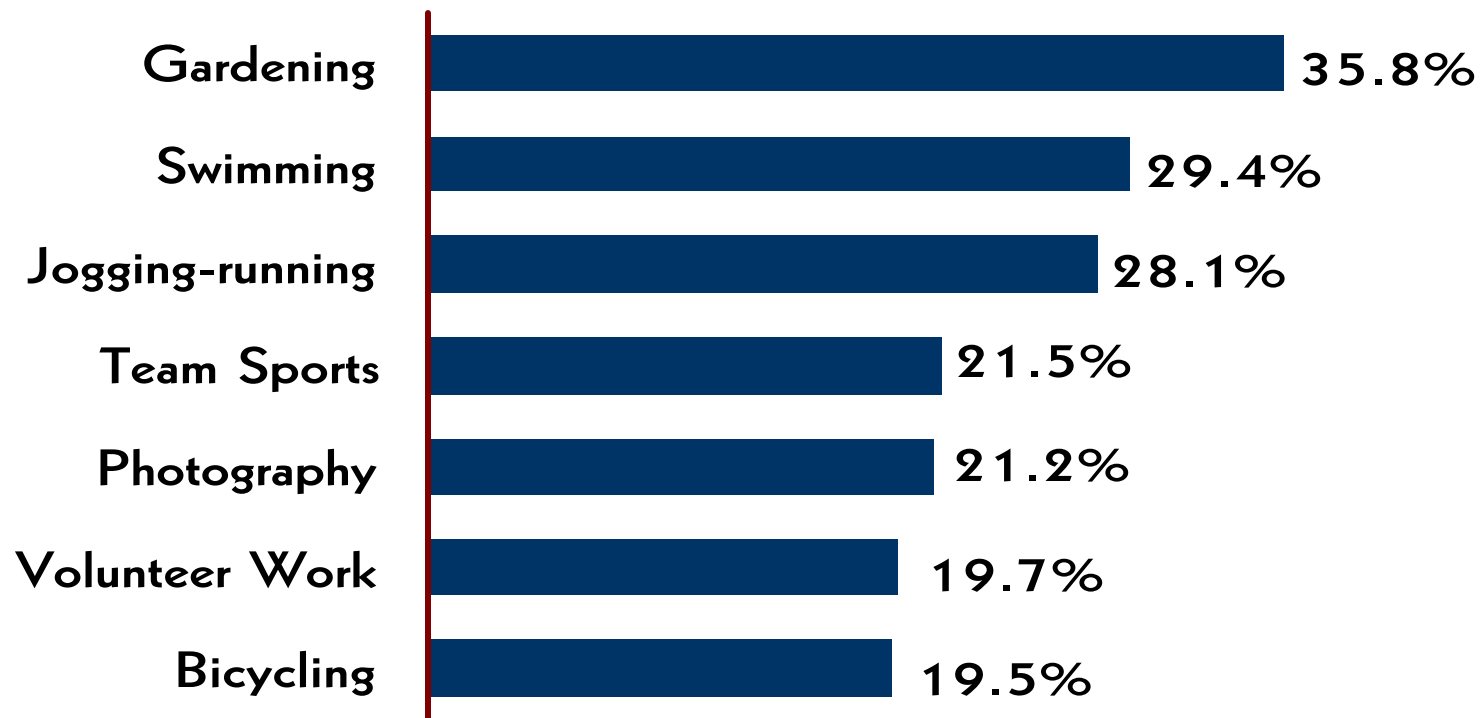


Promotion/Sponsorship  
Opportunities





## Hispanics - Leisure Activities

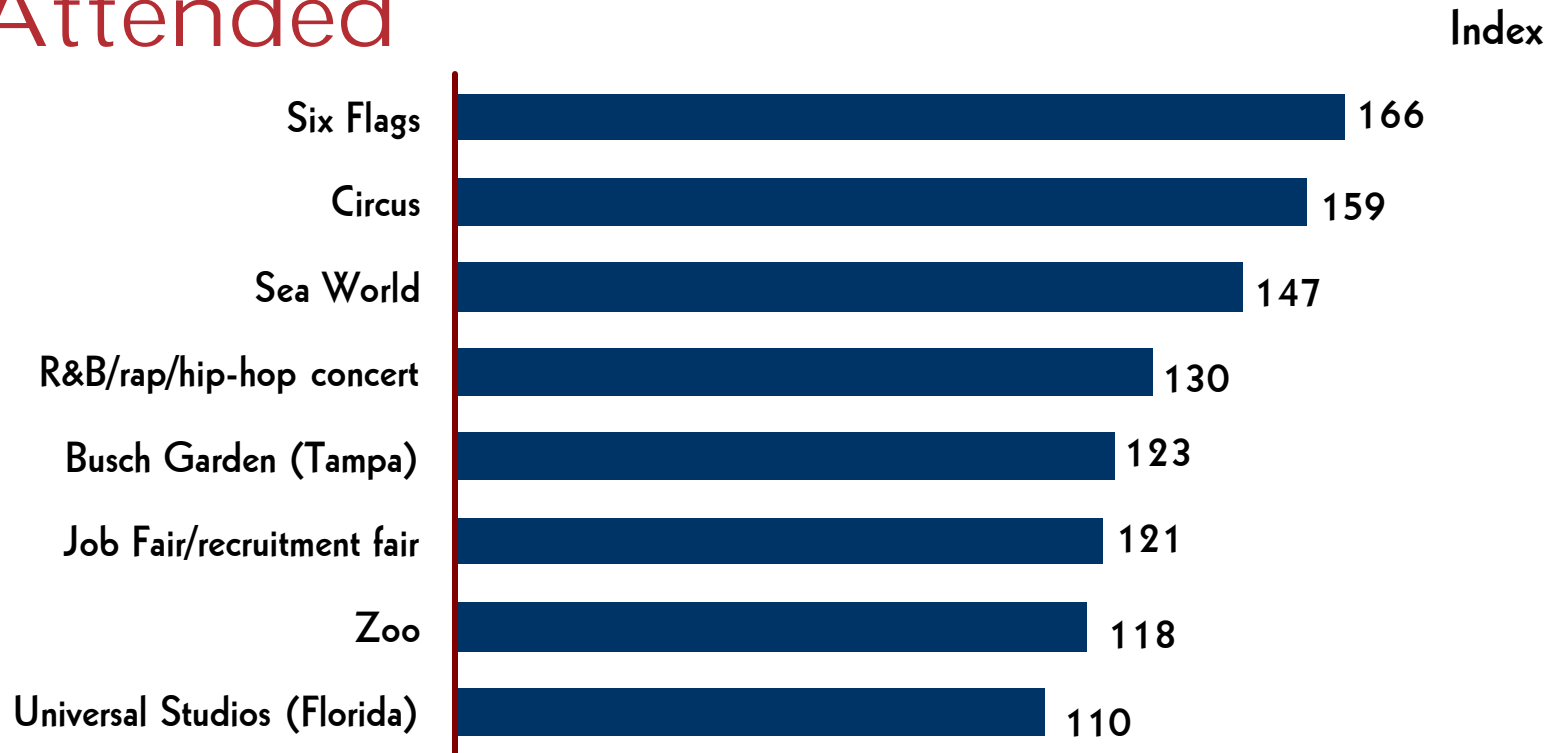


Source: Scarborough Research Scarborough USA+ R2 2004

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# Hispanics and Events They've Attended



Source: Scarborough Research Scarborough USA+ R2 2004

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## Promotional/Sponsorship Opportunities

- Hispanics are 67% more likely to play teams sports, so perhaps a team sponsorship in a local league (i.e. soccer, softball, etc) could help an advertiser expand their presence among the Hispanic community.
- Since amusements parks are high on the list of events attended by Hispanics, a Radio or TV Station could help coordinate a promotion between Six Flags and an advertiser to reach Hispanics.

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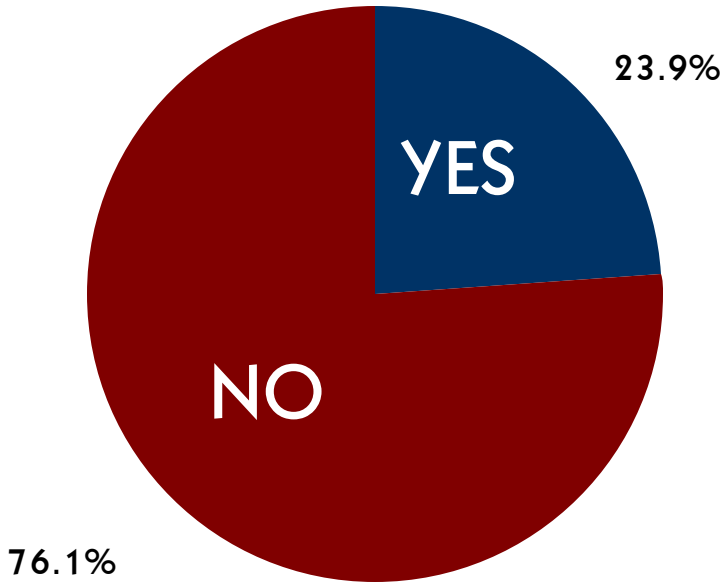
## Looking at Hispanics in Local Markets



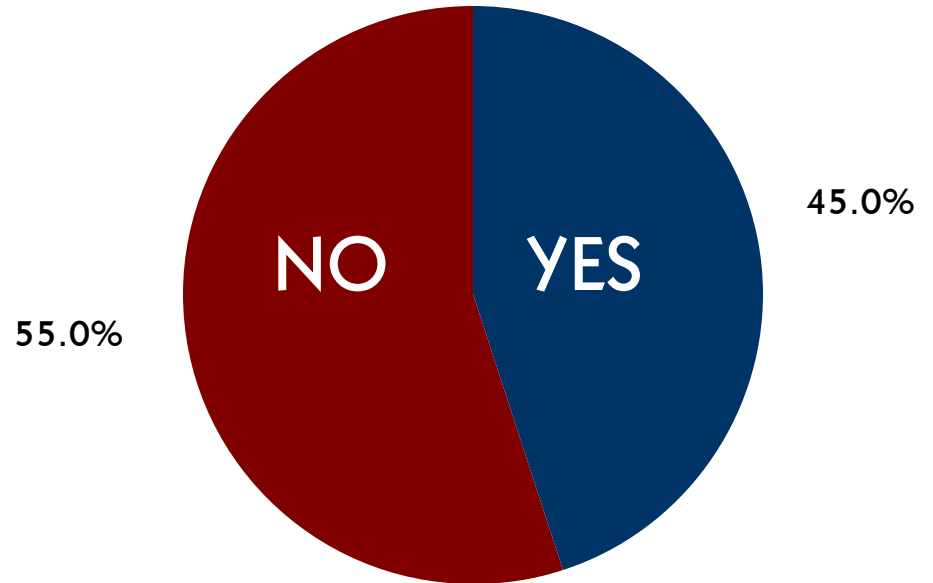


# Born in the U.S.?

Miami



Los Angeles



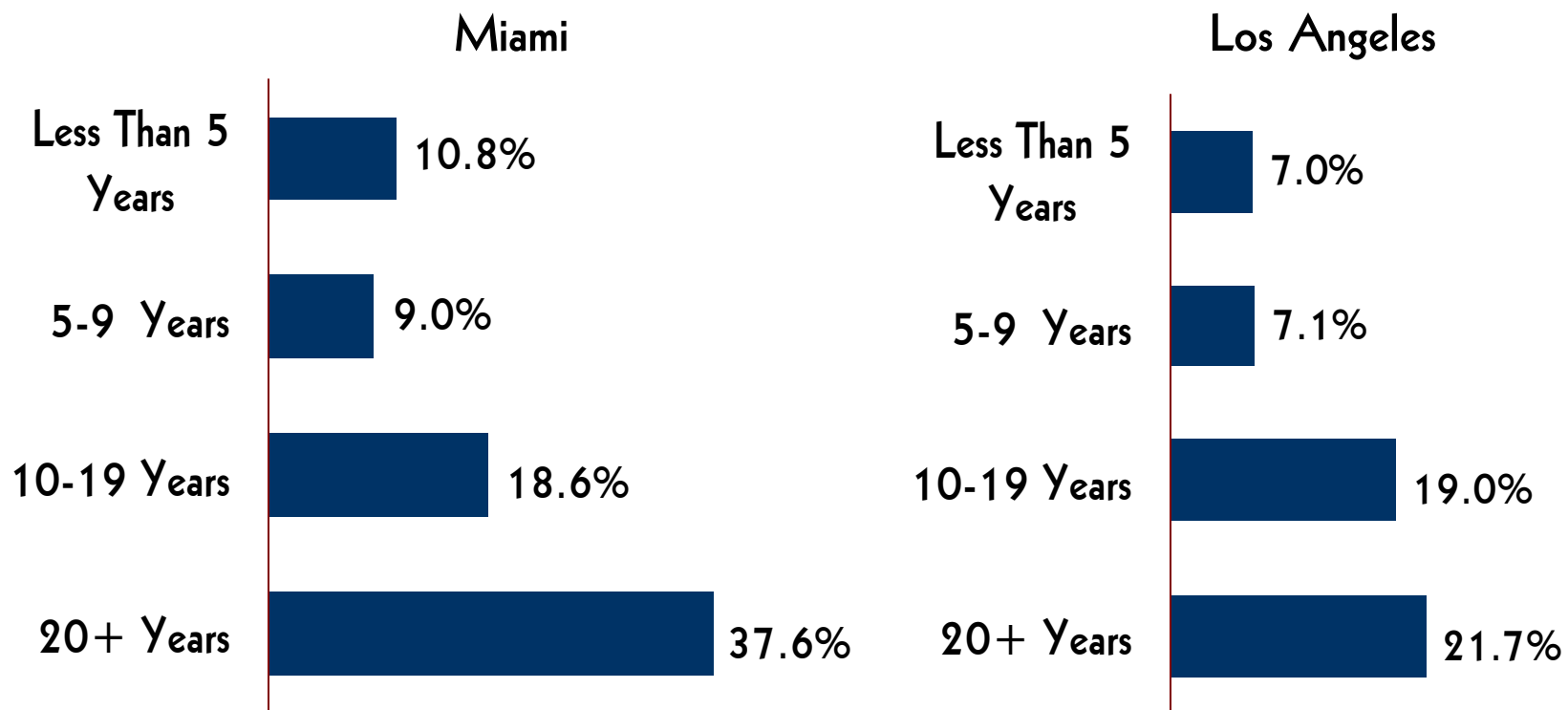
Source: Scarborough Research Miami and Los Angeles Release 1 2005

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## Length of Residence in U.S. Among Hispanics

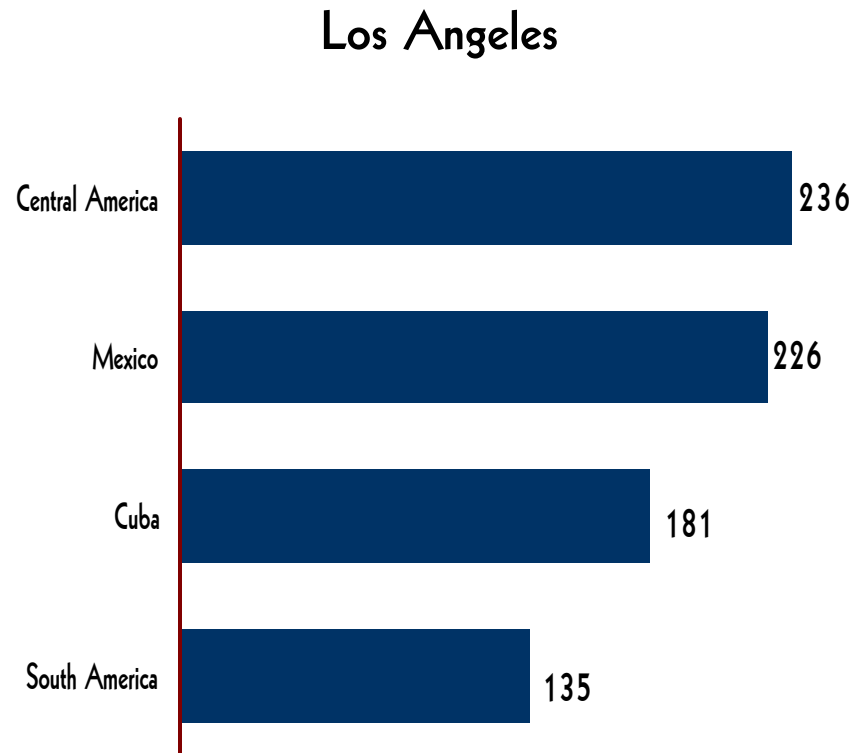
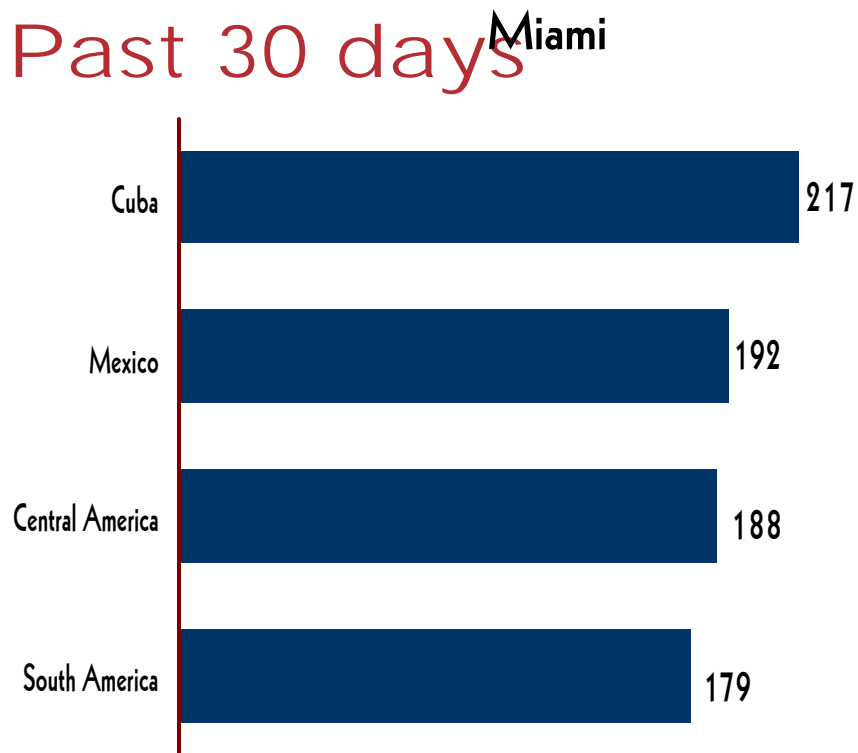


Source: Scarborough Research Miami and Los Angeles Release 1 2005

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# International Calls Made for Personal Reasons Past 30 days



Source: Scarborough Research Miami and Los Angeles Release 1 2005

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