

Phoenix.



**Marketing
International**

Accelerated Performance through Research

A Profile of the Hispanic Population in the U.S.

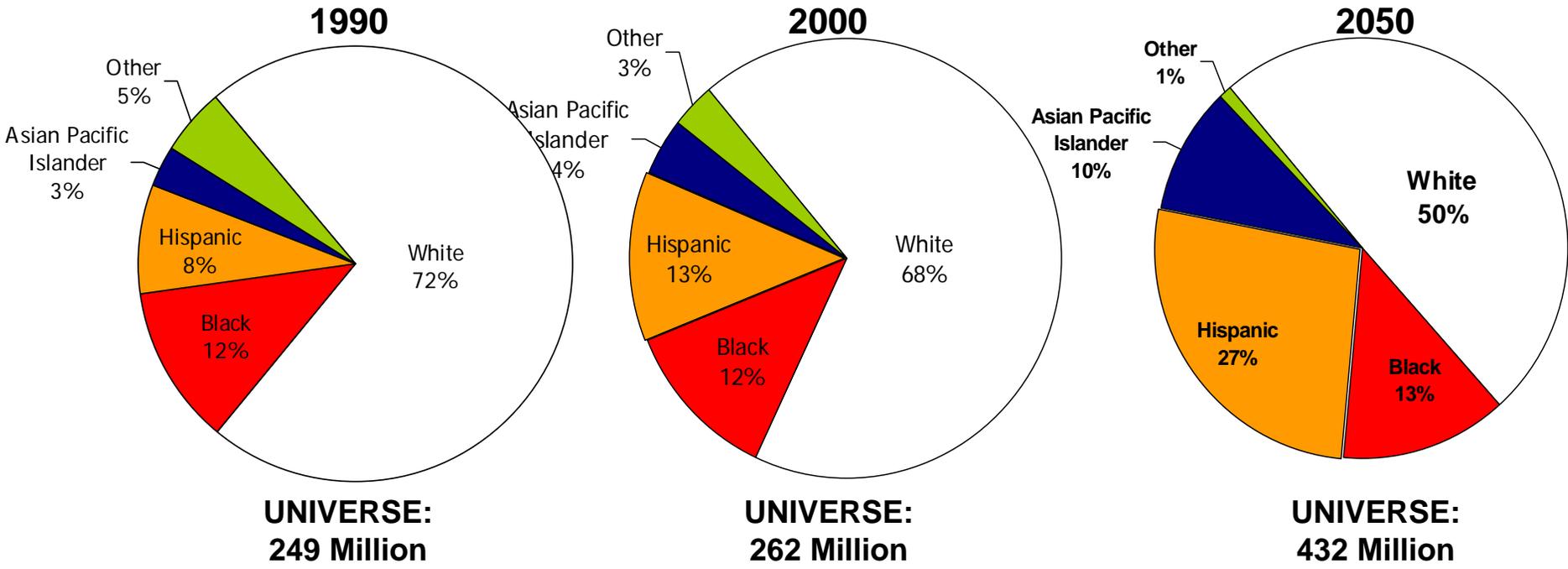
May 2007

Phoenix Multicultural
Los Angeles, CA



Tomorrow's Mainstream Markets

U.S. ethnic populations are growing rapidly, representing tomorrow's mainstream markets.



The Hispanic Consumer

Profile

- The largest ethnic group
- As of 2006, more than 44 million
 - Represents 14.8% of the total U.S. population
- Population grew nearly 102% from 1990 to 2006
- Estimated to reach more than 51 million by 2011
- Median age of 27.2 compared to 40.4 for non-Hispanic Whites
- 2005 purchasing power more than \$735 billion
 - Expected to rise to over \$1 trillion in 2010

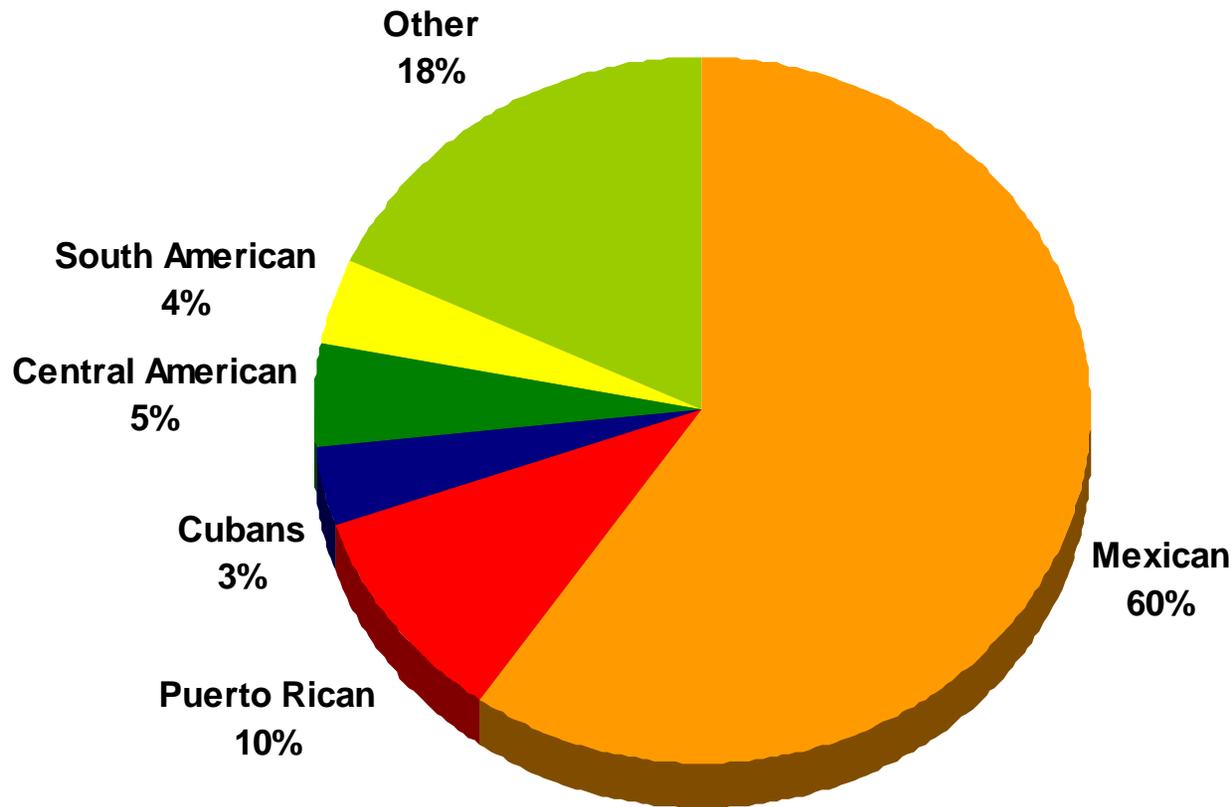


<i>Unacculturated</i>	44%
<i>Partially Unacculturated</i>	24%
<i>Bicultural</i>	14%
<i>Partially Acculturated</i>	12%
<i>Acculturated</i>	6%

Source: Geoscape 2006, Census 2005, Selig Center

Hispanics by Country of Origin

- Mexicans are the largest segment



Source: Geoscape 2006

Top States for Hispanics

Rank		% of State Pop*	% of Total U.S. Hispanic. Pop
1.	California	35.6%	31.1%
2.	Texas	35.8%	18.9%
3.	New York	16%	8.1%
4.	Florida	20%	7.6%
5.	Illinois	14.8%	4.3%
6.	Arizona	29%	3.7%
7.	New Jersey	15.6%	3.2%
8.	New Mexico	42%	2.2%
9.	Colorado	19.9%	2.1%

Source: Geoscape 2006

Top Emerging Markets

...For Hispanics

Market	State	2006 Hispanic Population	Hispanic Population Growth ('90-'11)
Charlotte	NC	251,060	1721%
Atlanta	GA	770,702	1097%
Nashville	TN	149,475	871%
Raleigh Durham	NC	273,089	855%
Indianapolis	IN	133,106	569%
Orlando	FL	753,890	464%

Source: Geoscape 2006 Out of top DMA's 1990-2011 growth

Hispanic Cultural Insights

Hispanic

- Part of Family
- Family, Friends, Community
- Differences, Respect
- Formality
- Cooperation
- Interdependence
- Obedience
- Defined Roles
- Hierarchy
- Respect for Age
- Male Dominance

Anglo/American

- Individuals
- Ourselves and Institutions
- Everyone the same
- Informality
- Competition
- Independence
- Egalitarian
- Role Diffusion
- Democracy
- Young Have Say
- Gender Equality

Source: Valdés, 1991. Copyright, Cultural Access Group, 1999

Reaching Hispanics

- Television and Word of mouth reign!
- Key factors to consider when developing a communications strategy for Hispanics
 - Group
 - Intimacy
 - Trust
 - Music
 - Humor
 - Tradition
 - Acceptance
 - Aspirational
 - Optimistic