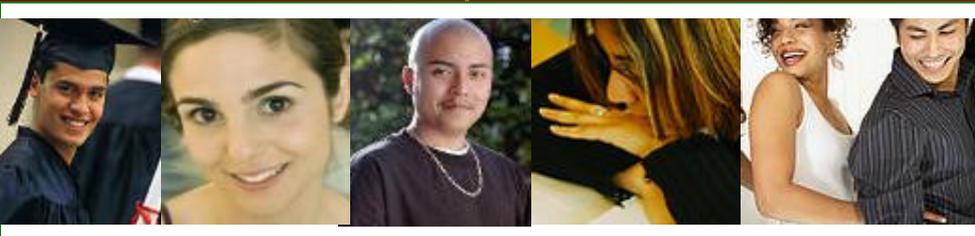


“Made in America”

Communicating to
U.S. Born Latinos



Introduction

This is America, Speak Spanish!



Paul Rodriguez

A NEW AMERICA?

The people we vote for want to kick all the illegal aliens out of the country. They want to build a super fence so that they can't get in. I have one question...

Who's gonna build the fence?



Carlos Mencia

A NEW AMERICA?



“Demography is destiny.”

— Auguste Comte

Historical Perspectives



- New immigrant waves have always unsettled cultural norms.
- Over time, a new synthesis emerged, with addition of newcomers.
- The newcomers assimilated, but they also changed the mainstream in profound ways.

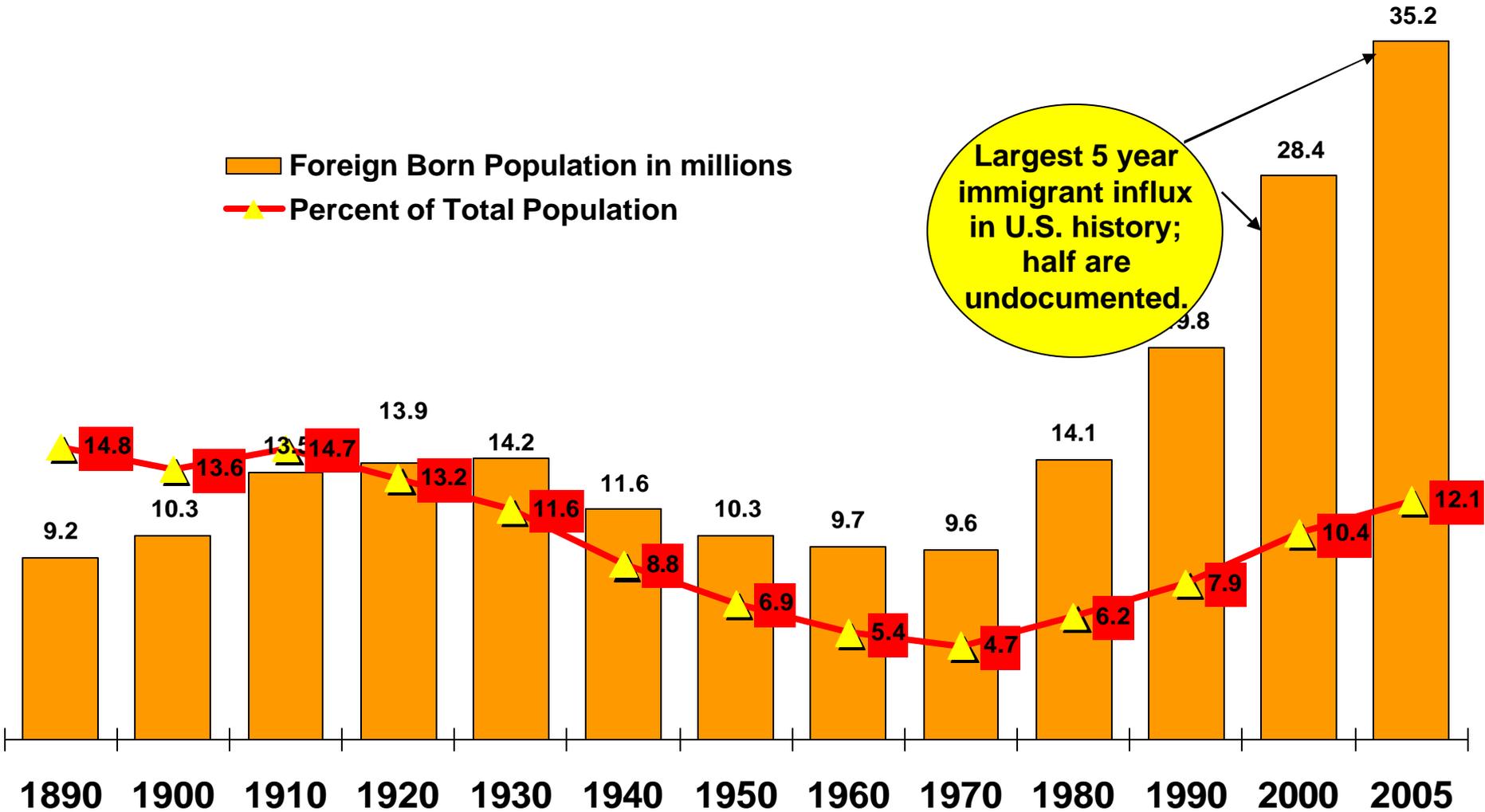
Recent Observations:



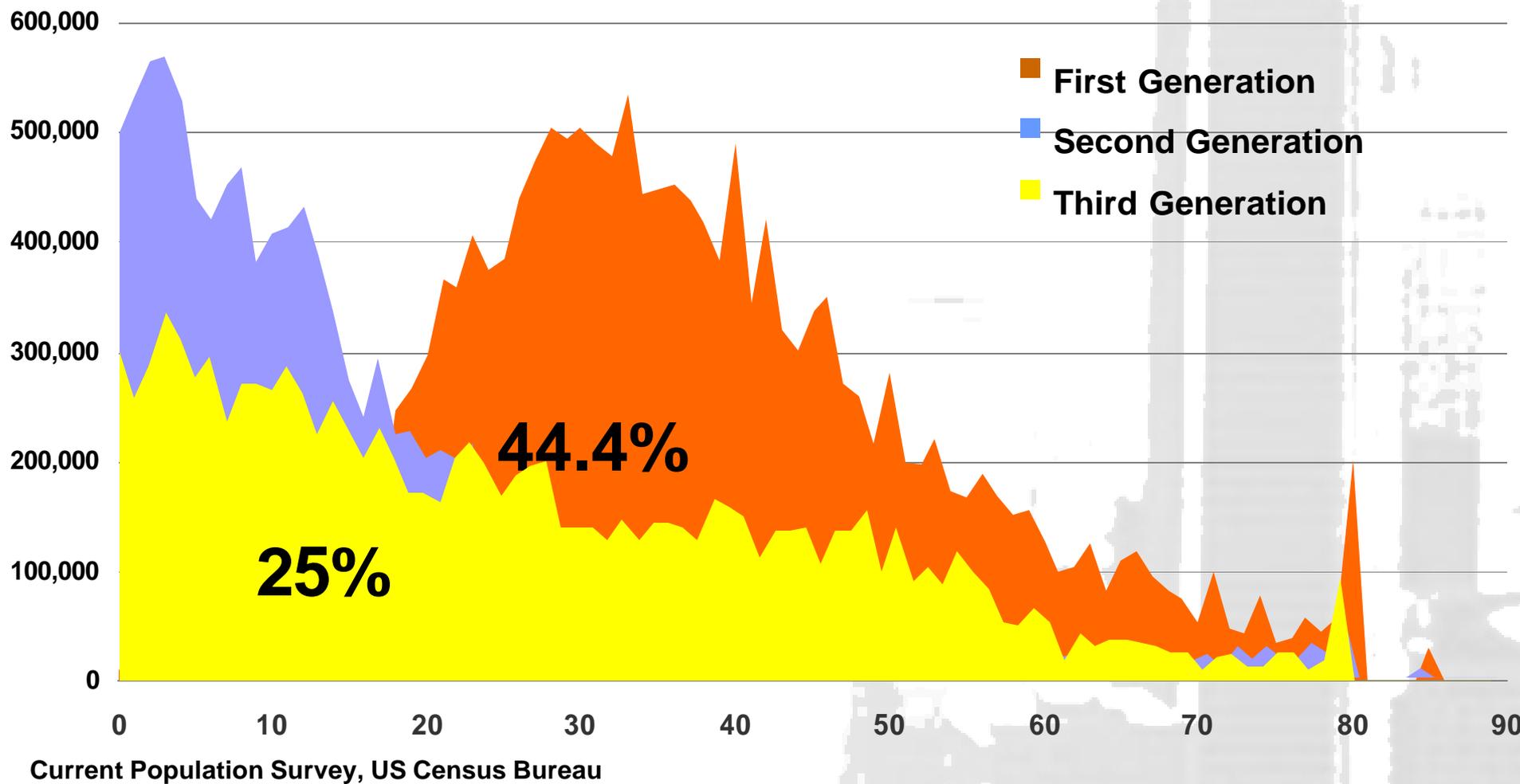
“The persistent in flow of Hispanic immigrants threatens to divide the United States into two peoples, two cultures, and two languages. Unlike past immigrant groups, Mexicans and other Latinos have not assimilated into mainstream U.S. culture... rejecting the Anglo-Protestant values that built the American dream. The United States ignores this challenge at its peril.”

- Samuel Huntington, “Who are We: The Challenges to America’s National Identity,” 2004

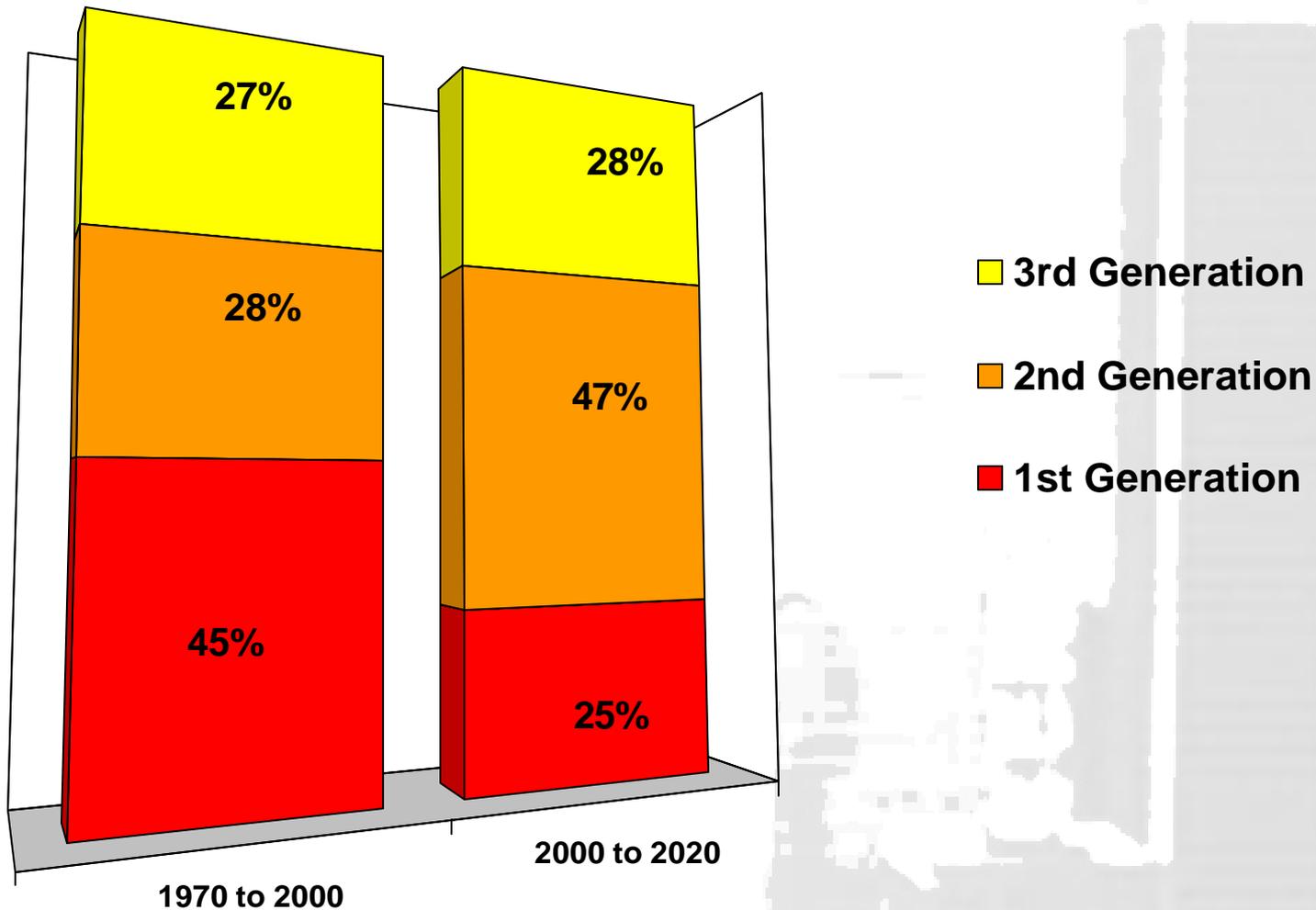
The Foreign Born population is at an all time high



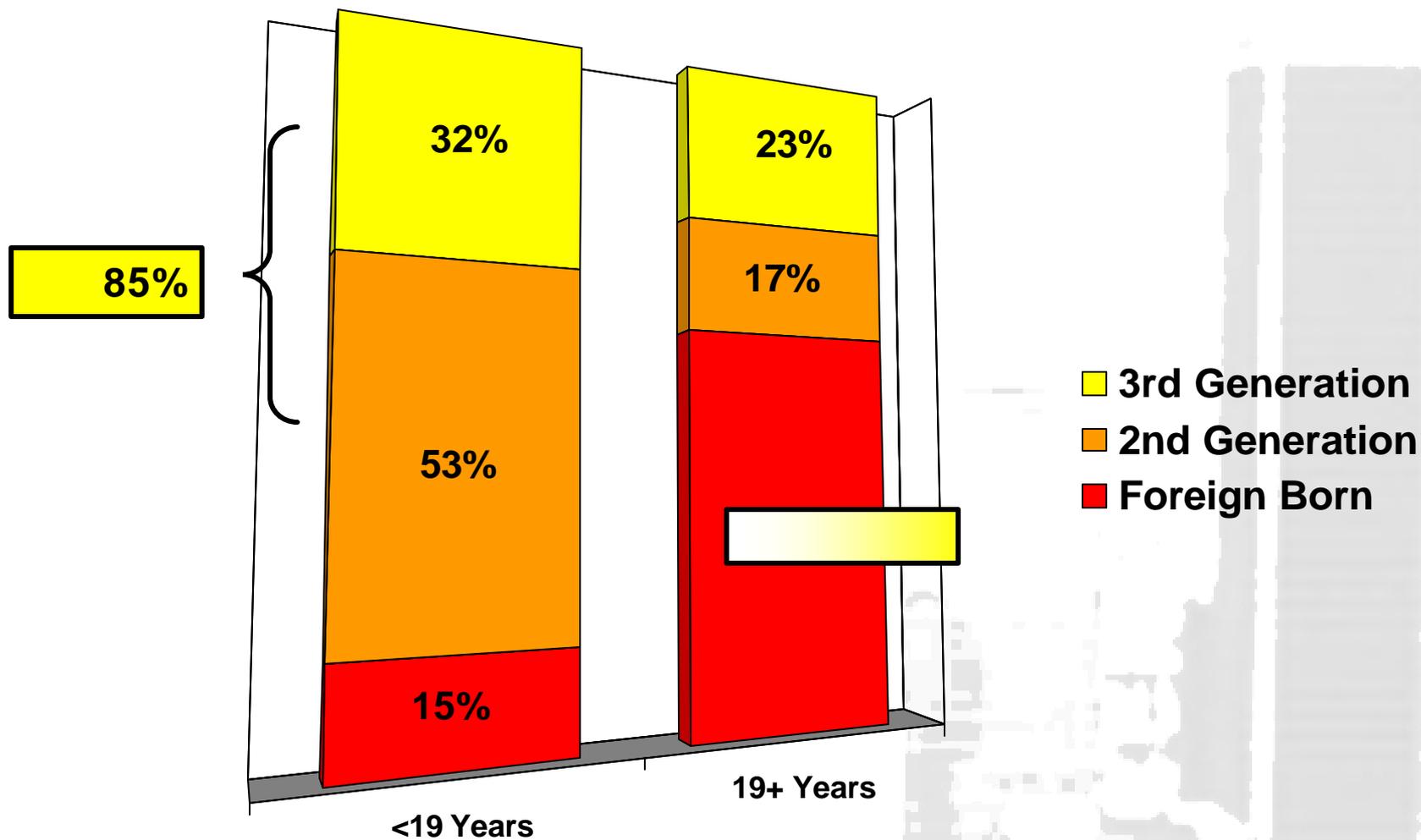
The Hispanic Market Is Two Tiered



In the Next Fifteen Years, 2nd Generation Will Dominate Growth



A Majority of Younger Hispanics are Already Second Generation



Current Population Survey, US Census Bureau, 2002

Methodology

Screening

- Self-Identified Hispanic
- Between the ages of 14 and 29 years old
- Must have been born in the United States or immigrated to the United States when five years old or younger



Background

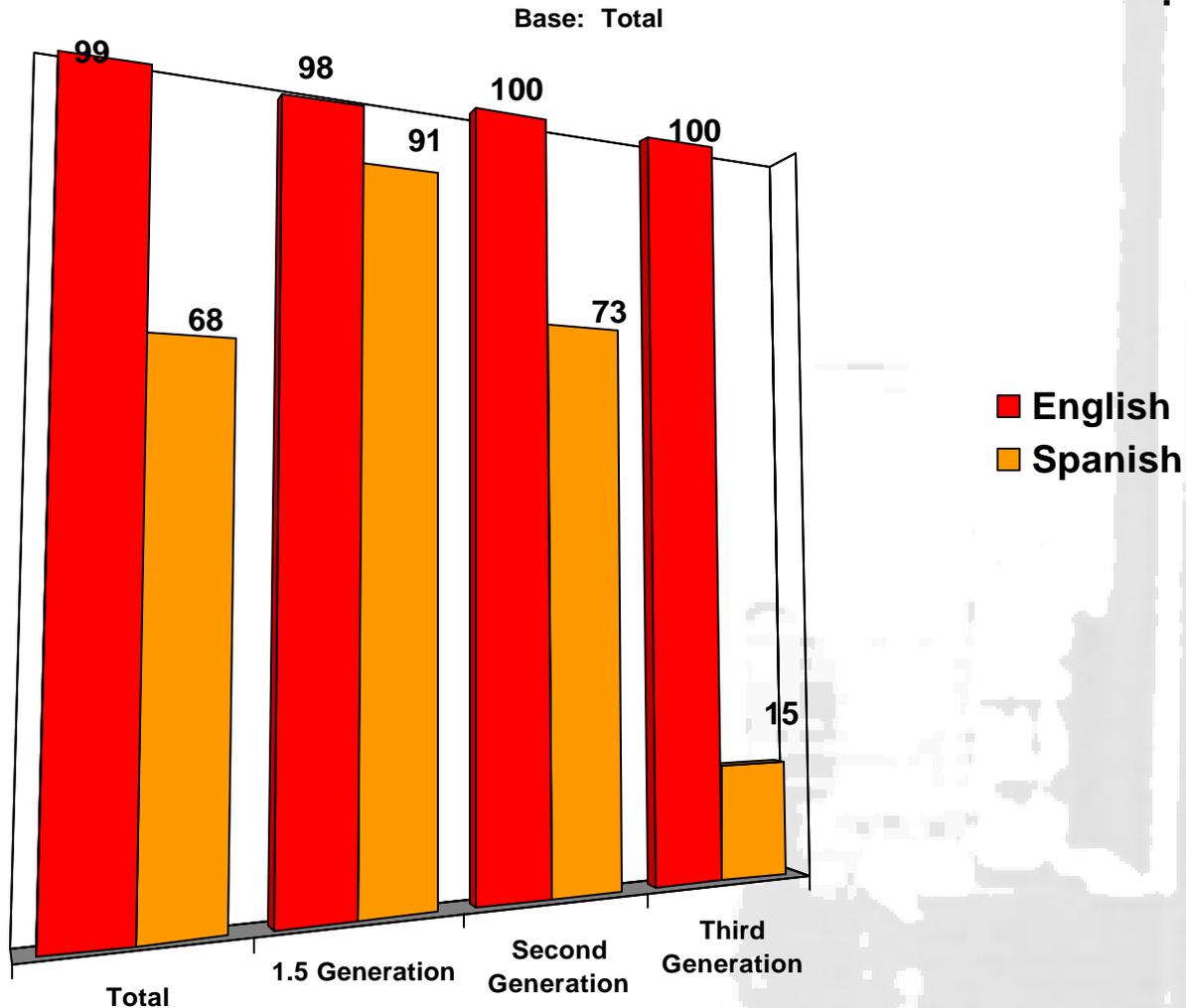
- 25 minute survey
- Online interviews were nationwide. Intercept and telephone interviews were conducted in the following markets:

	Intercepts	Phone	Total
Los Angeles	121	56	177
New York City	121	22	143
Miami	102	22	124
Chicago	61	35	96
Houston	64	28	92
Online	--	--	503
TOTAL	444	163	1,135

Language

Spanish Language Fluency is Lost by the Third Generation

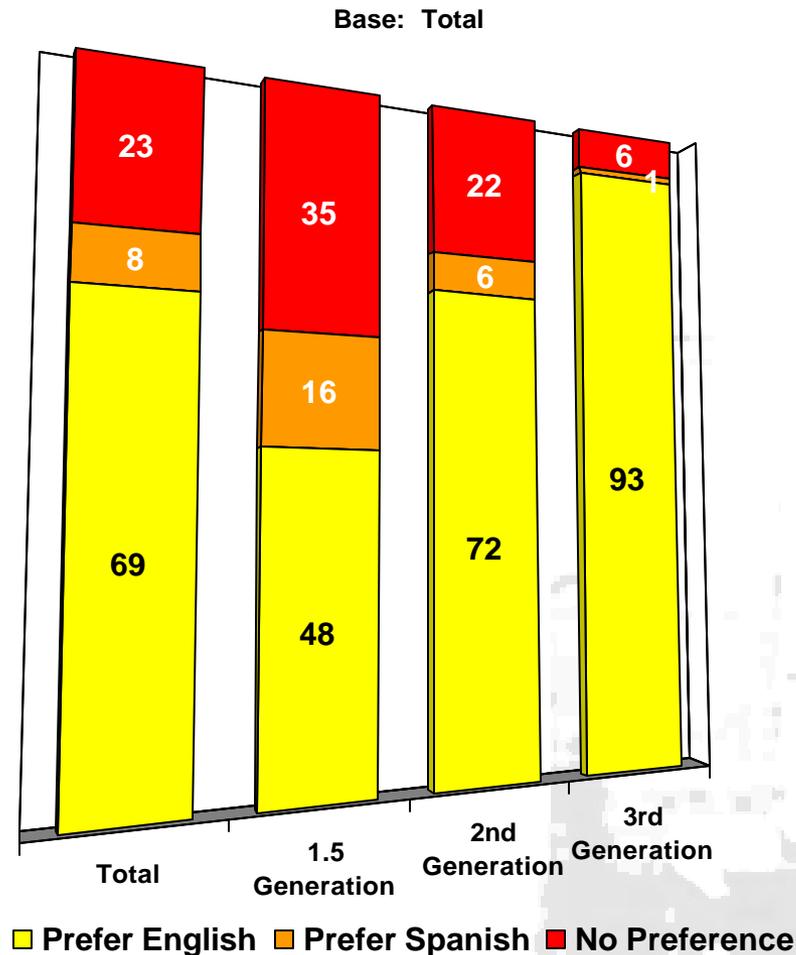
% Speaking English / Spanish Well or Very Well



Q11/12: Would you say you speak English/Spanish...?

Preference for Speaking English is Clear and Increases with Generations

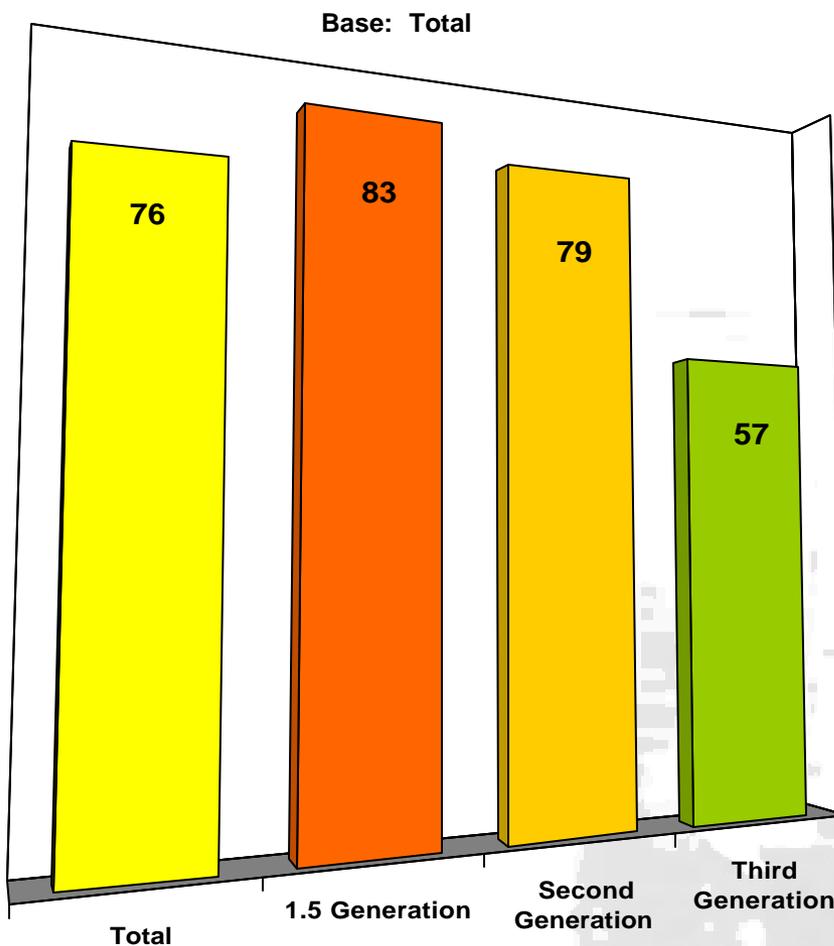
% Preferring English or Spanish



Q13: When given a choice, which language do you prefer to speak, Spanish or English?

Still, A Majority Intend to Pass Spanish on to Their Children

% Agreement Top 2 Box



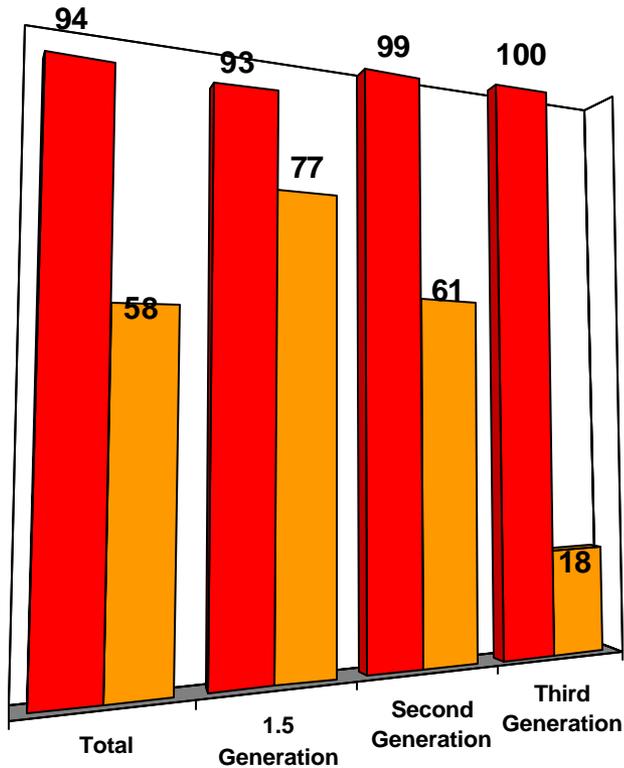
91k: I intend to make sure that my children speak Spanish. Agree/Disagree

Except for Third Generation, Spanish Numbers Drop for Reading and Especially Writing

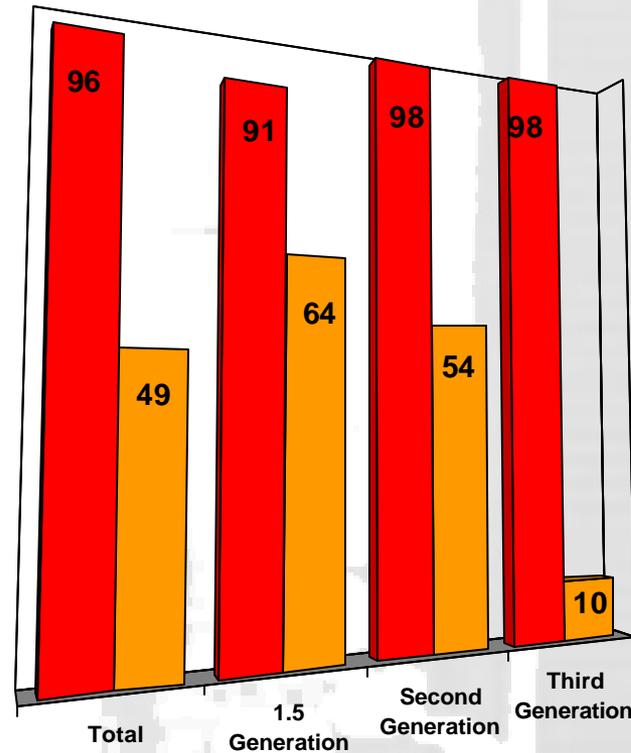
% Reading English / Spanish Well or Very Well

% Writing English / Spanish Well or Very Well

Base: Total



■ English
■ Spanish

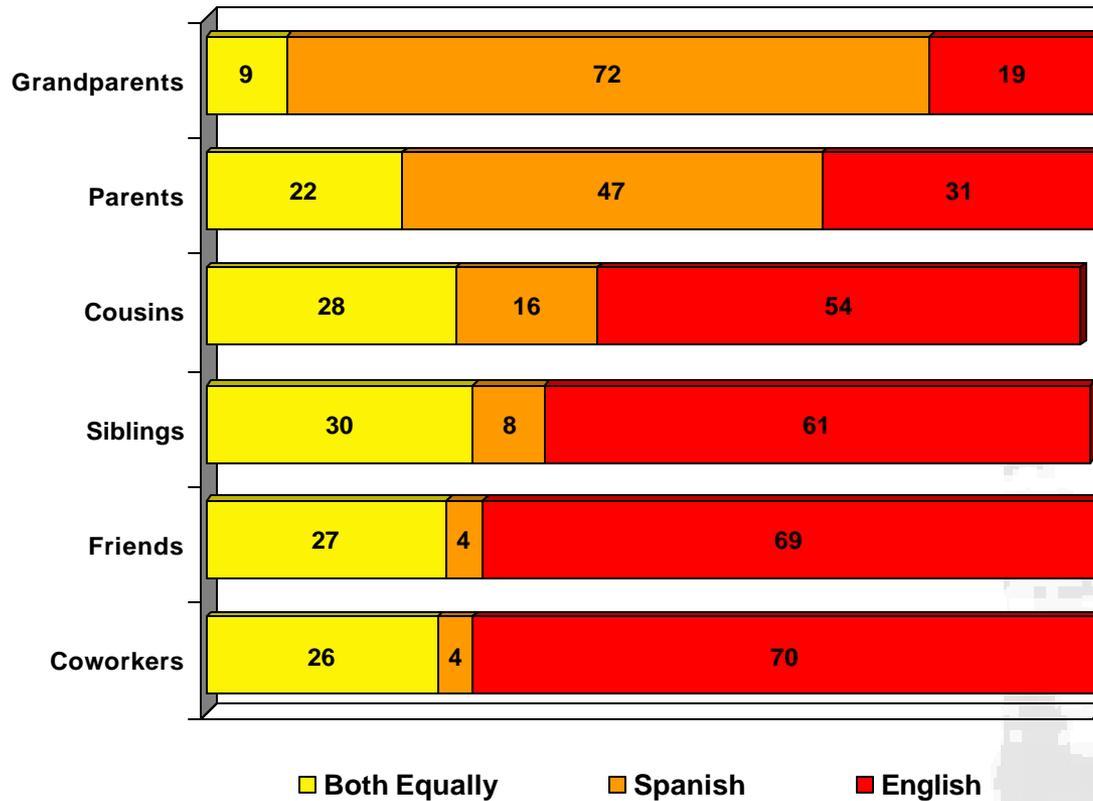


■ English
■ Spanish

Language Usage Depends on Who You're With

% Speaking Language with _____

Base: Total

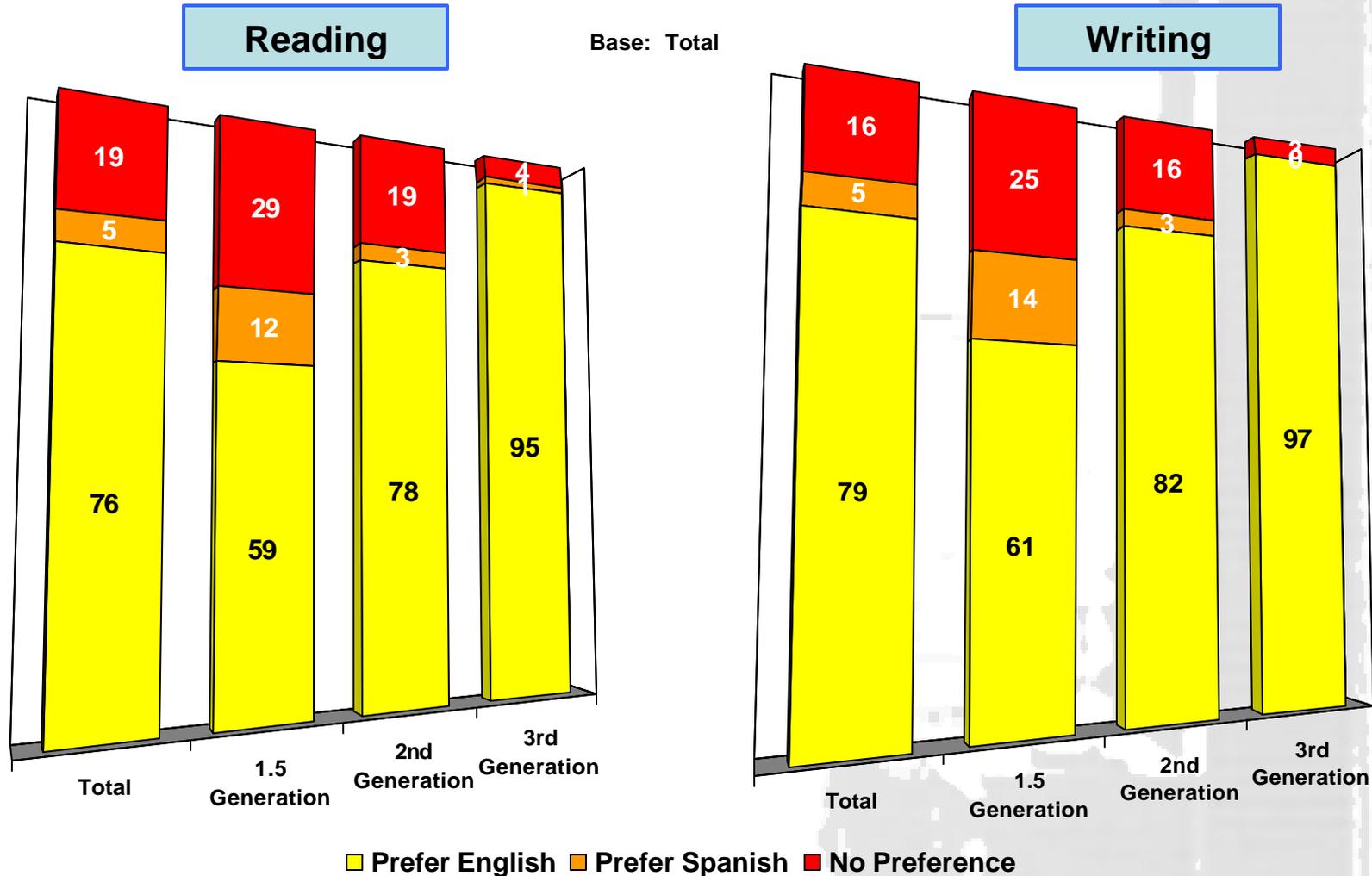


% Speaking English with _____

	1.5	2 nd	3 rd
	4%	11%	62%
	7%	27%	84%
	33%	54%	88%
	36%	59%	91%
	49%	72%	90%
	57%	71%	88%

A Clear Majority Prefer to Read and Write in English – Especially 3rd Generation...

% Preferring English or Spanish



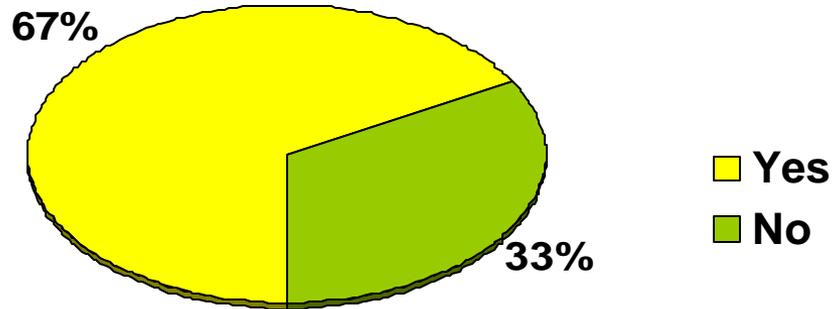
Q17/20: Given a choice, would you prefer to read/write in Spanish or in English?

Television

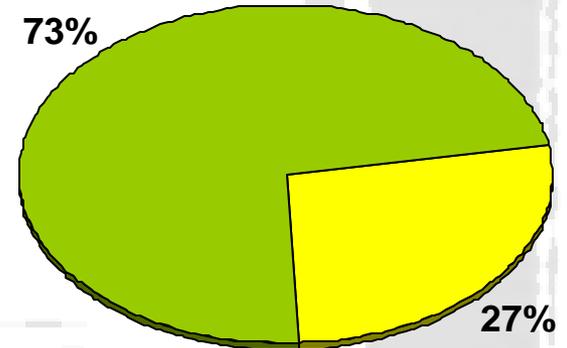
Two-Thirds have Cable; A Quarter have Satellite TV

% With Cable TV

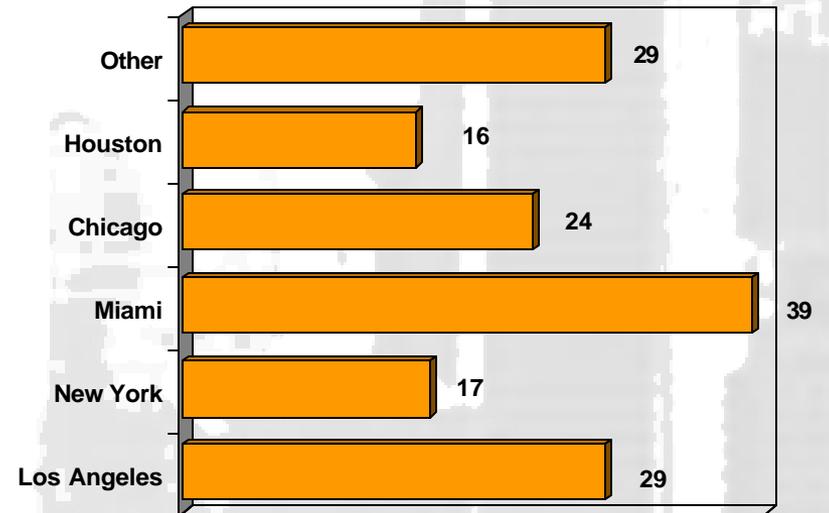
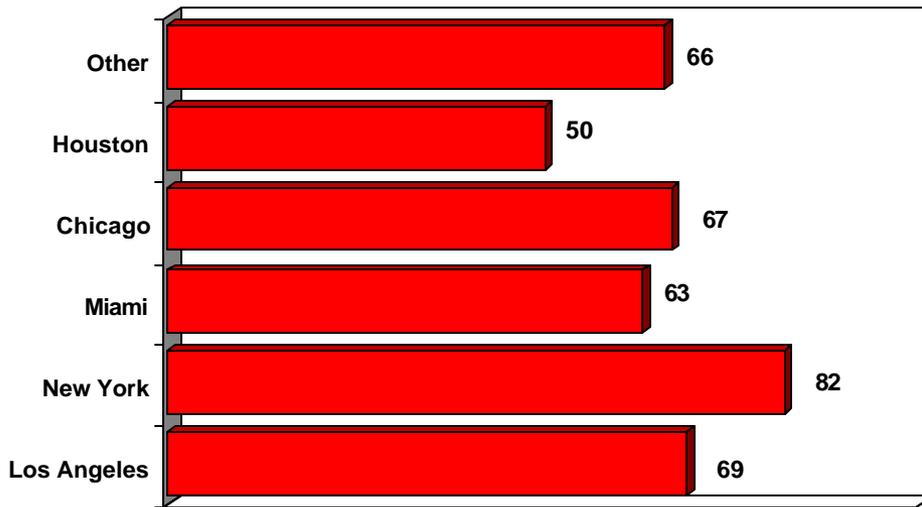
Base: Watch TV (96%)



% With Satellite TV



By Market

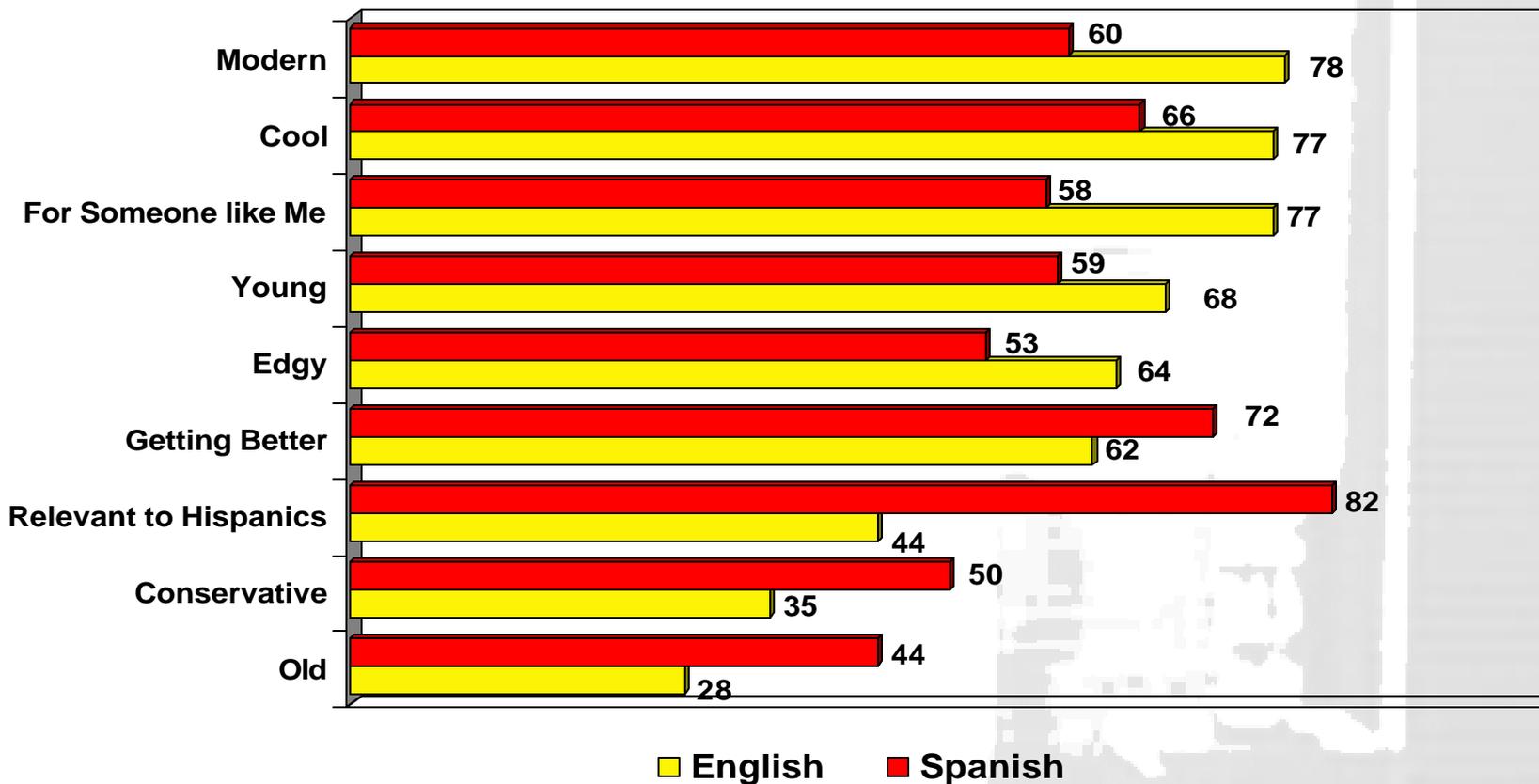


Q23a/b: Do you have Cable TV/Satellite TV in your household?

Top Attributes for English TV are “Modern,” “Cool,” and Importantly, “For Someone Like Me”

Top Two Box Agreement

Base: Watch English/Spanish language TV



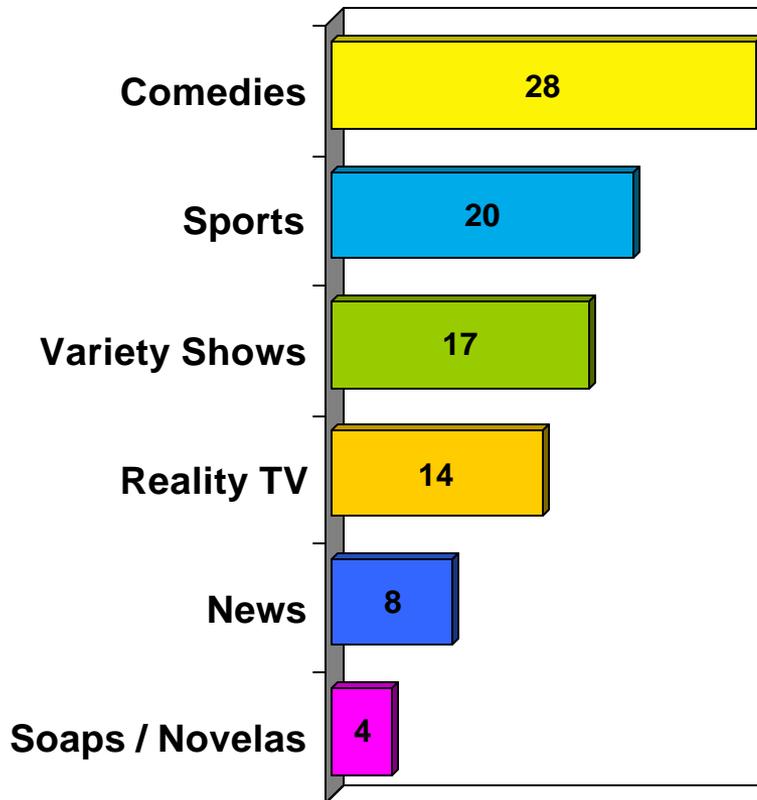
Q27/32: I'm going to read you words and would like to know how accurately each of them describes English/Spanish language TV.

Comedies are the Biggest Program Type for English; Soaps / Novelas for Spanish

% Choosing Main Program Type by Language

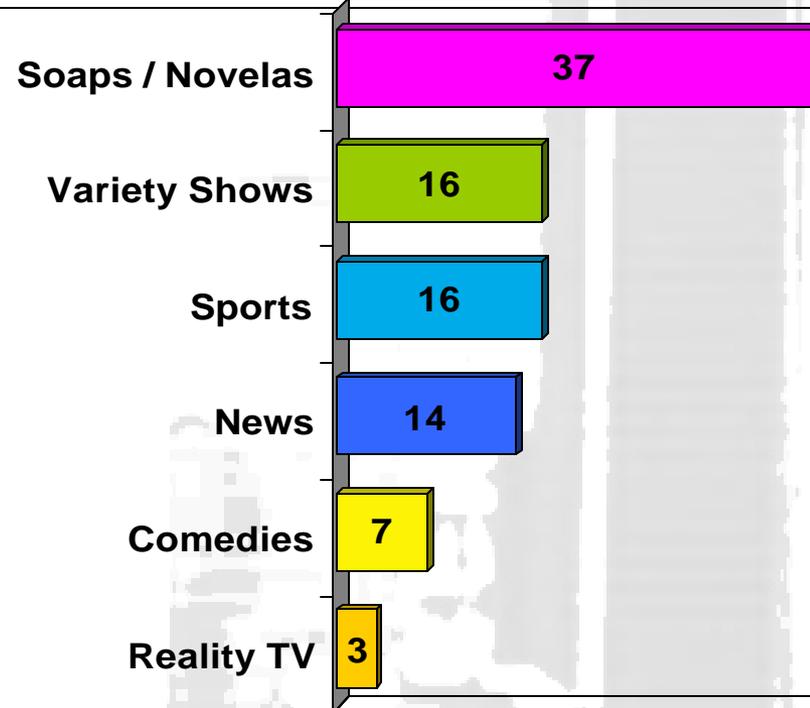
English Language TV

Base: Watch English language TV



Spanish Language TV

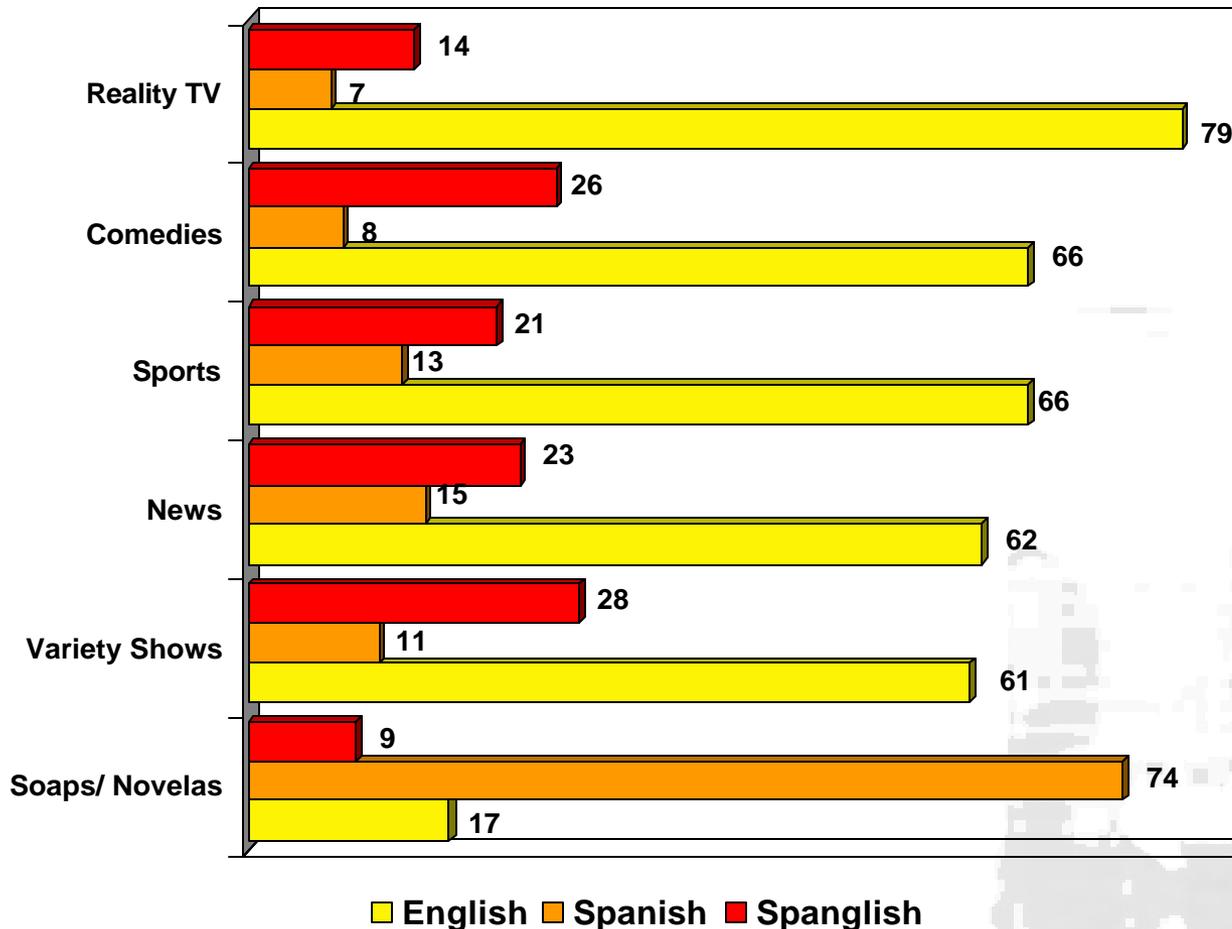
Base: Watch Spanish language TV



Language Preference Depends on the Content

% Preference by Language

Base: Watch TV in both English and Spanish



% Preferring English

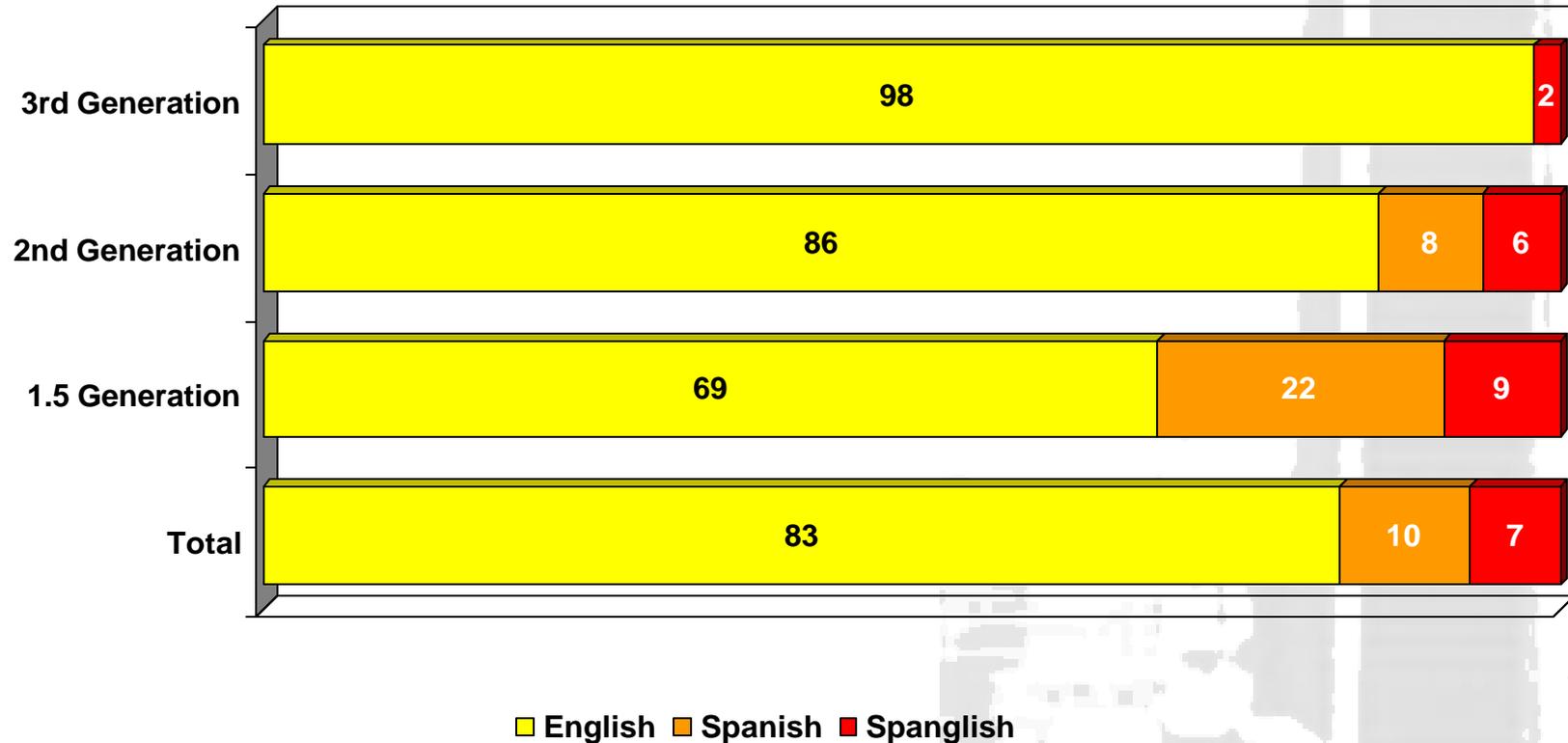
	1 st	2 nd	3 rd
Reality TV	73%	79%	95%
Comedies	67%	65%	77%
Sports	53%	68%	95%
News	45%	68%	82%
Variety Shows	56%	63%	65%
Soaps/ Novelas	11%	18%	38%

Q55a/b/c/d/e/f: For each of the following types of programming, do you prefer to watch in Spanish, English or Spanglish?

Favorite Commercials are Usually in English

% Saying Favorite Commercial is in English / Spanish

Base: Watch TV

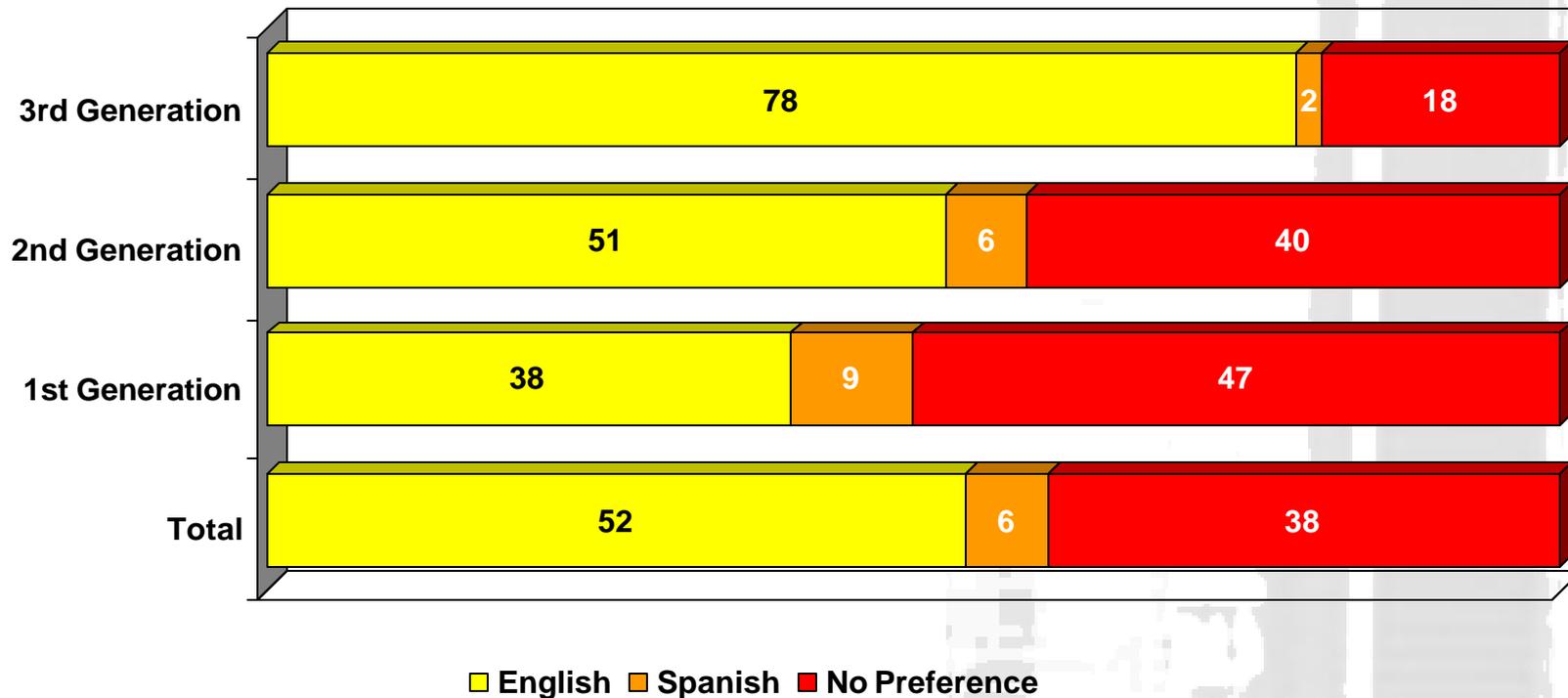


Q46: Is your favorite commercial in?

A Majority of Total Respondents Would Prefer to See Commercials in English...

% Preferring English or Spanish

Base: Watch TV

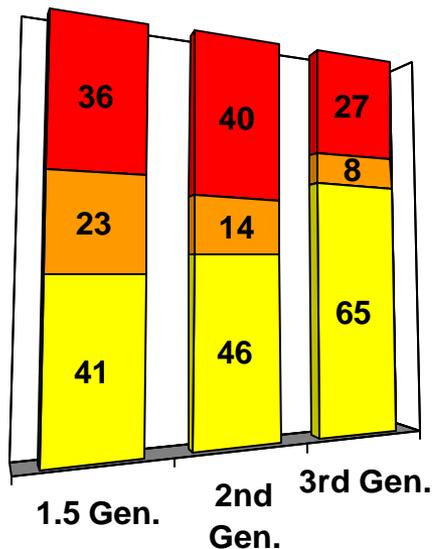


Q52: If a commercial were really good, would you prefer to see it in Spanish or in English?

Those Watching Commercials In Both Languages Either Prefer English or Have no Preference

% Agreement, Top 2 Box

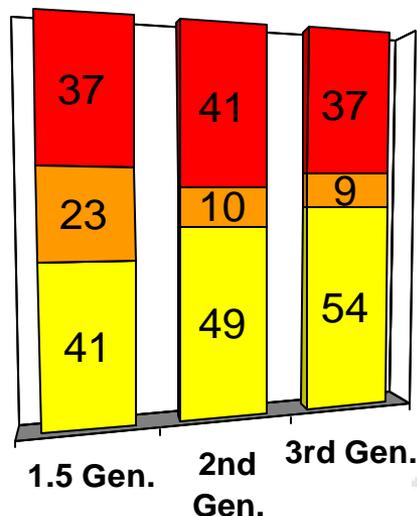
Base: Watch TV in English and Spanish



■ No Preference

■ I relate more to commercials in Spanish

■ I relate more to commercials in English



■ No Preference

■ I would rather see a commercial in Spanish

■ I would rather see a commercial in English

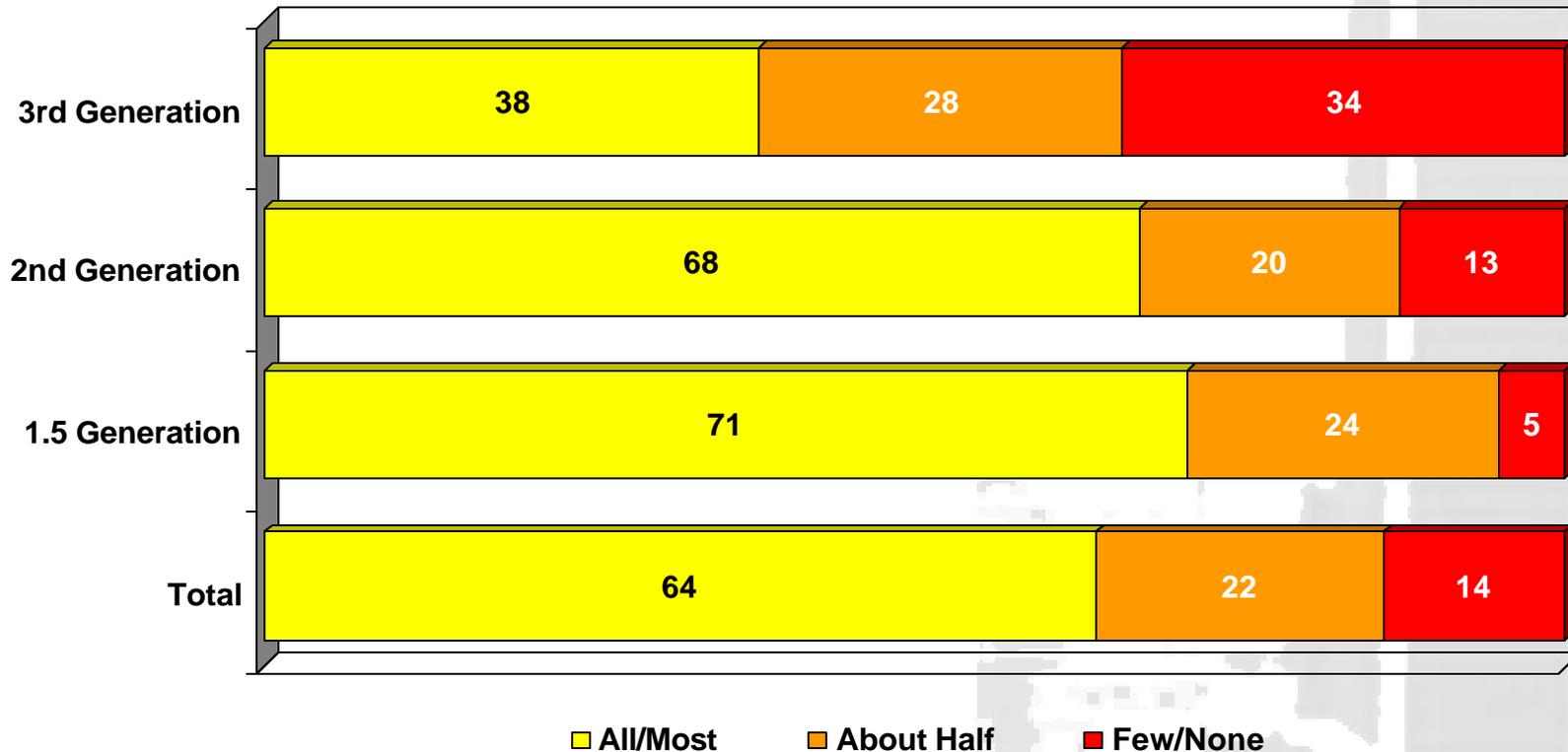
Q57/58: Which statement best describes how you feel?

Their World

1st and 2nd Generation Respondents Have Mostly Hispanic Friends

% Agreeing

Base: Total



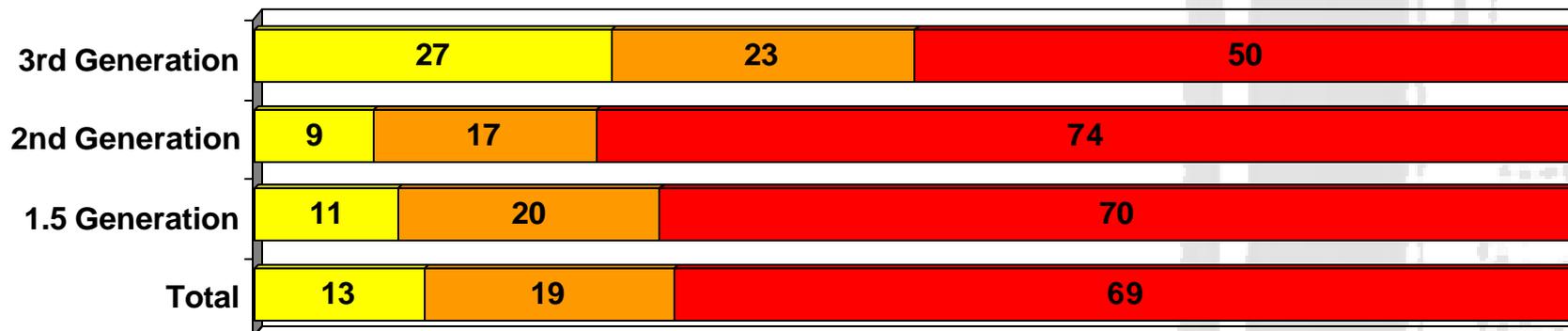
Q21a: Among your friends, how many are Hispanic?

When Friends are non-Hispanic, They Tend to be Anglo

Makeup of Friends

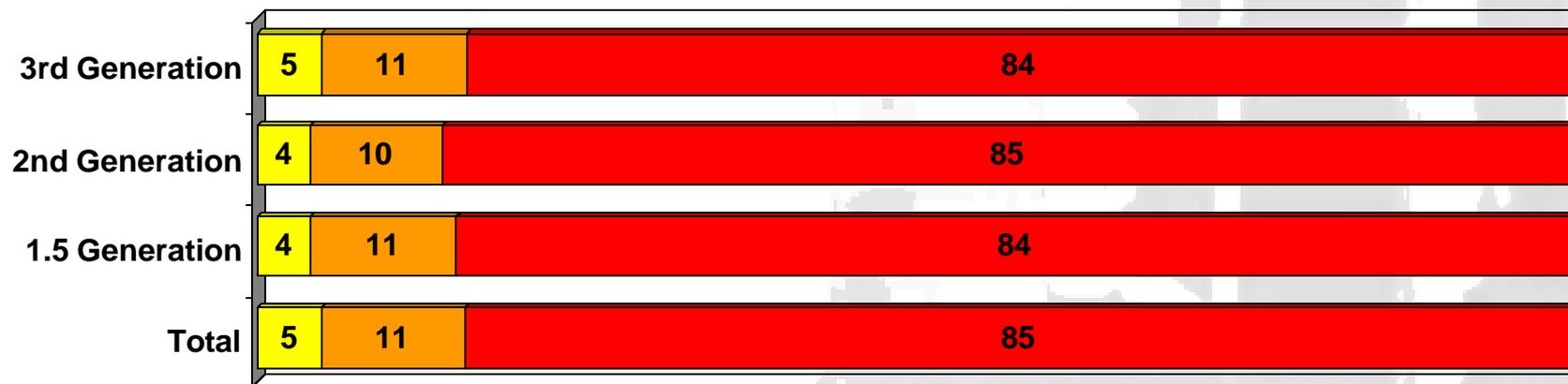
Base: Total

Anglo Friends



African American Friends

■ All/Most ■ About Half ■ Few None



Q21a: Among your friends, how many are White (Anglo) / African American?

There Were Difference by Market

White Friends

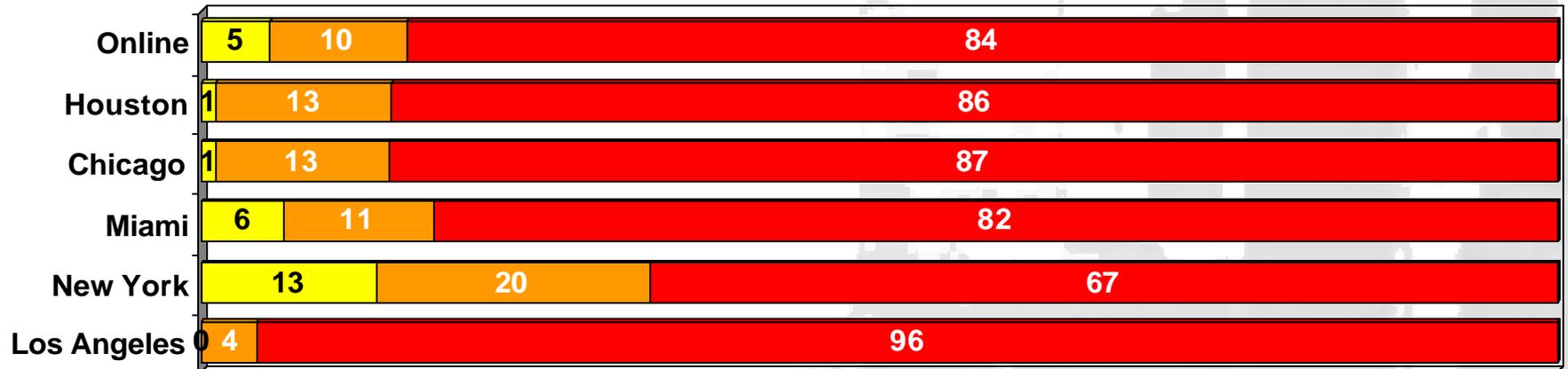
Makeup of Friends

Base: Total



African American Friends

■ All/Most ■ About Half ■ Few None

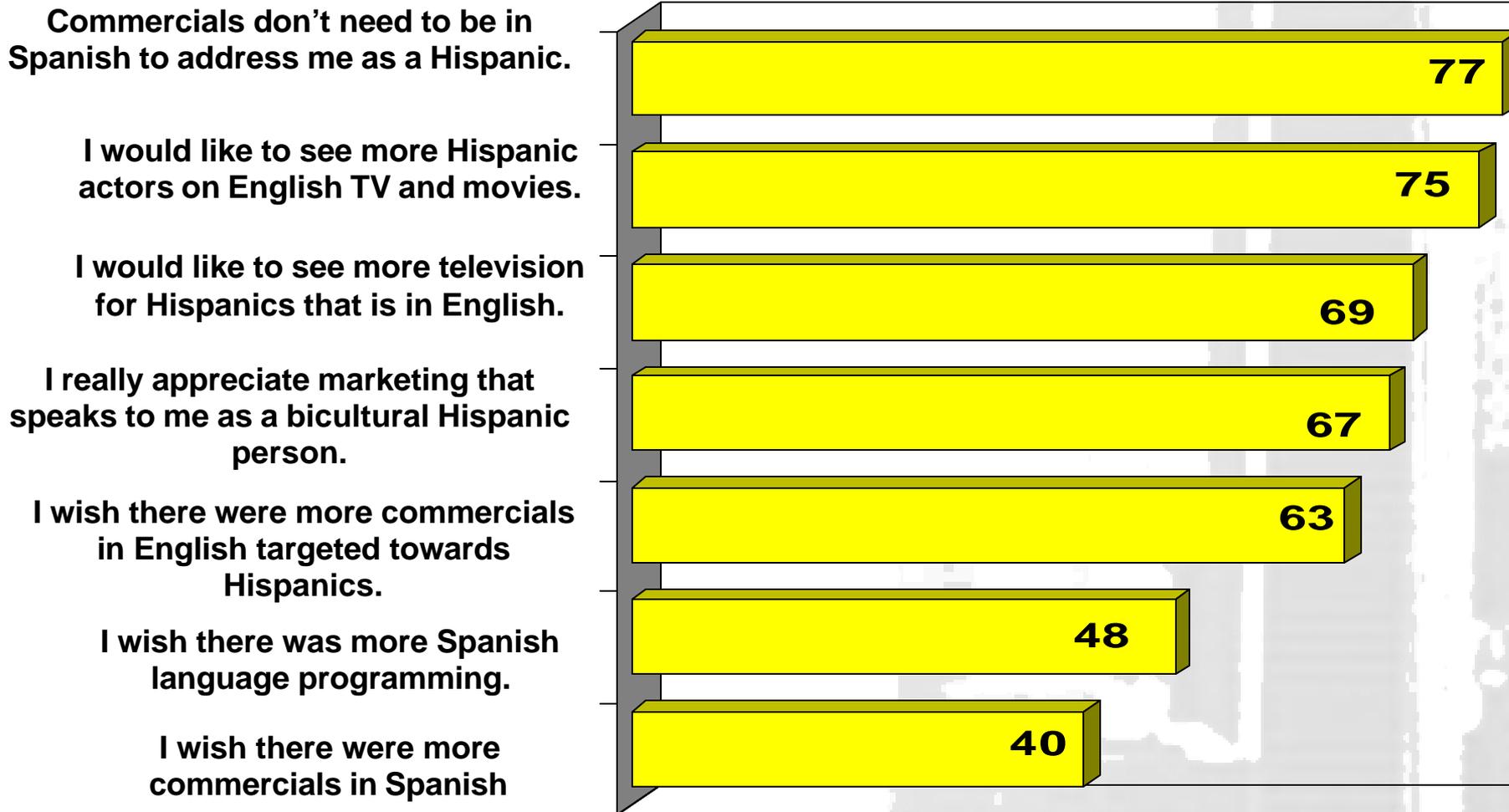


Q21a: Among your friends, how many are Hispanic?

There is Clearly an Opportunity to Address English Speaking Hispanics in English

Top 2 Box Agreeing

Base: Total



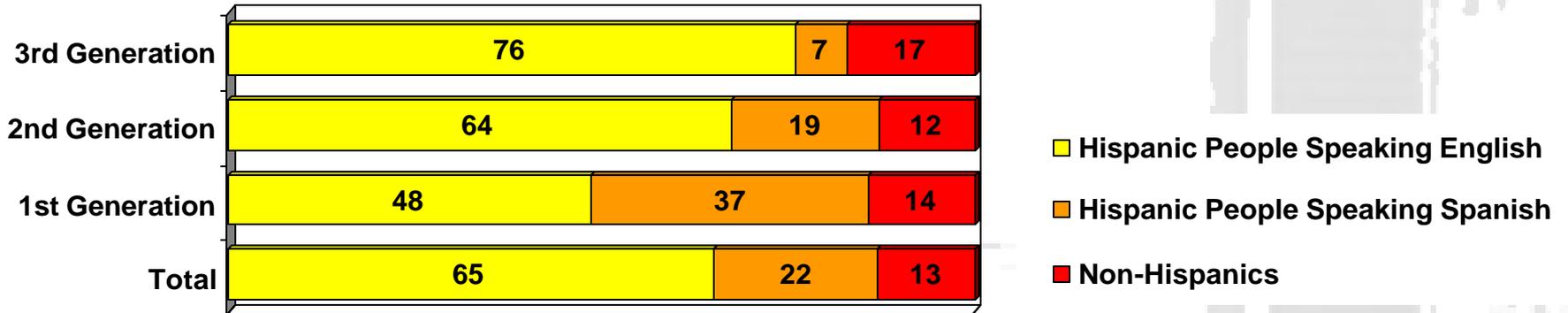
Q91: I'm going to read you some statements. Would you say you agree or disagree with this statement?

Most Identify More with English Speaking Hispanic Actors

% Agreeing

Base: Total

I identify more with actors who are...

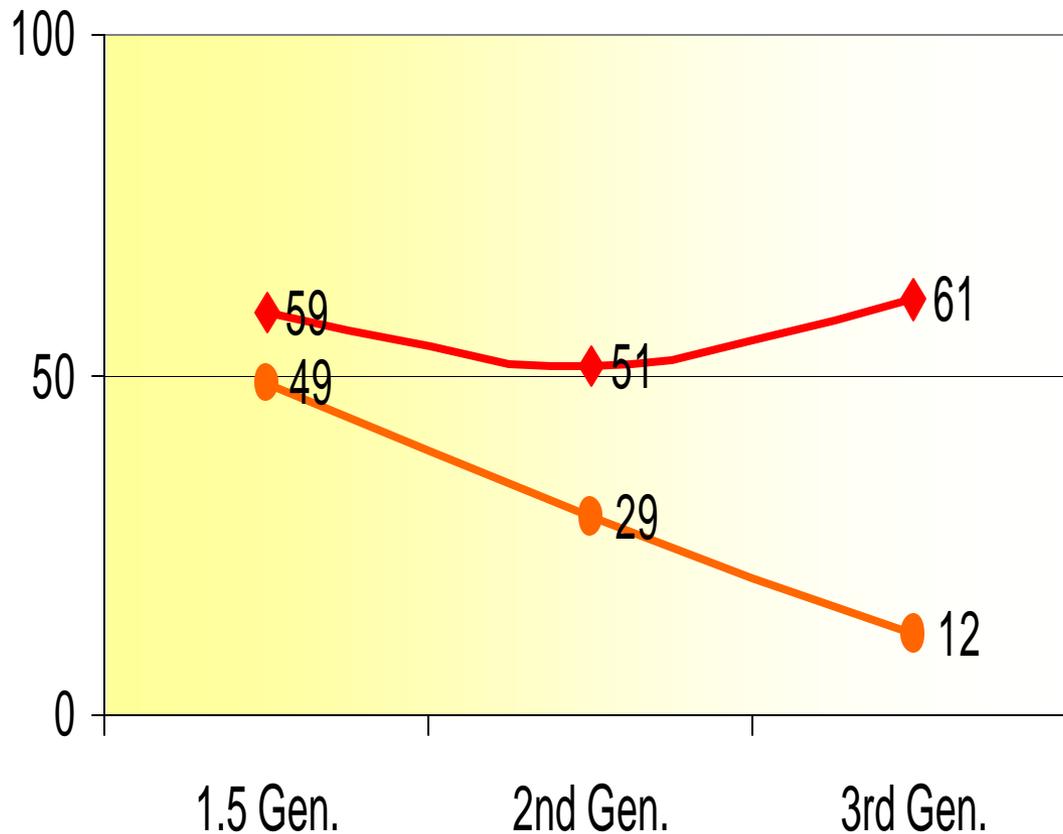


I'd be more likely to buy a product from an actor who was...



English May Be the New “Language of the Heart”

Base: Total



- ◆ On an emotional level, I connect more with an English language commercial.
- On an emotional level, I connect more with a Spanish language commercial.

Conclusions

Four Points

1. U.S. born Hispanics demonstrate a clear preference for English. This applies across all media. By the third generation, Spanish proficiency, for all intents and purposes, disappears.
2. Despite clear English dominance, U.S. born Hispanics are consuming Spanish language radio and television. This includes the Third Generation. Clearly Spanish language programming speaks to them in a culturally relevant manner.
3. Today's young Hispanics may be assimilating, but they certainly have not yet assimilated. Their ethnic identities are strong, and they are looking for ways to express their unique needs, both culturally and linguistically.
4. There is a clear opportunity for companies looking to make a connection with U.S. born Hispanics in their preferred language – English. Or Spanglish.