

# Reaching Hispanic Consumers in San Francisco

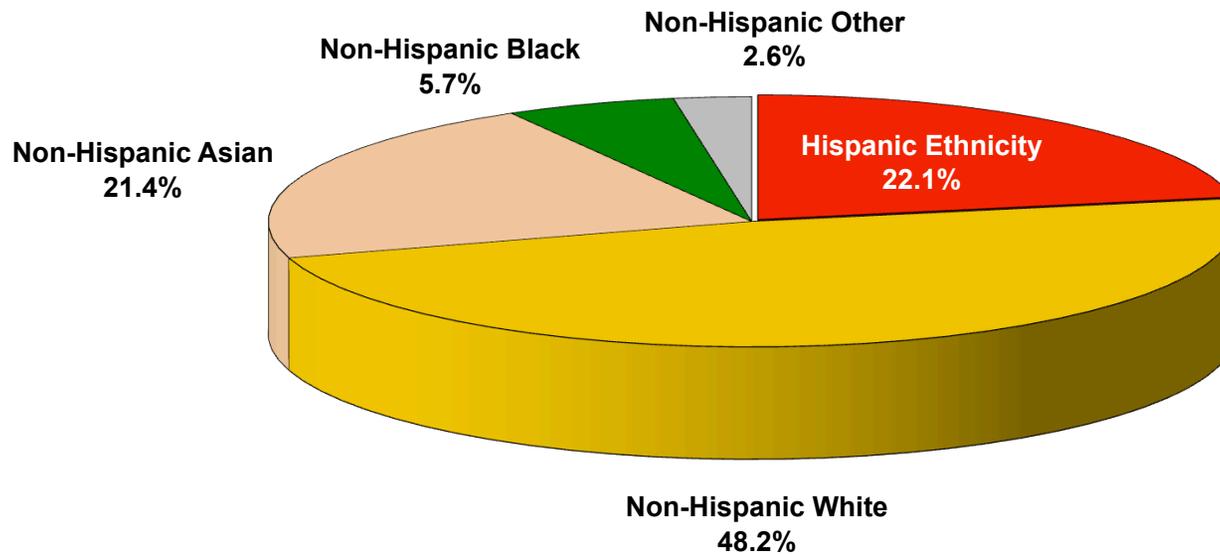
San Francisco  
Bay Area

comcast  
SPOTLIGHT.

# Hispanics Represent 22.1% of the Total San Francisco DMA Population



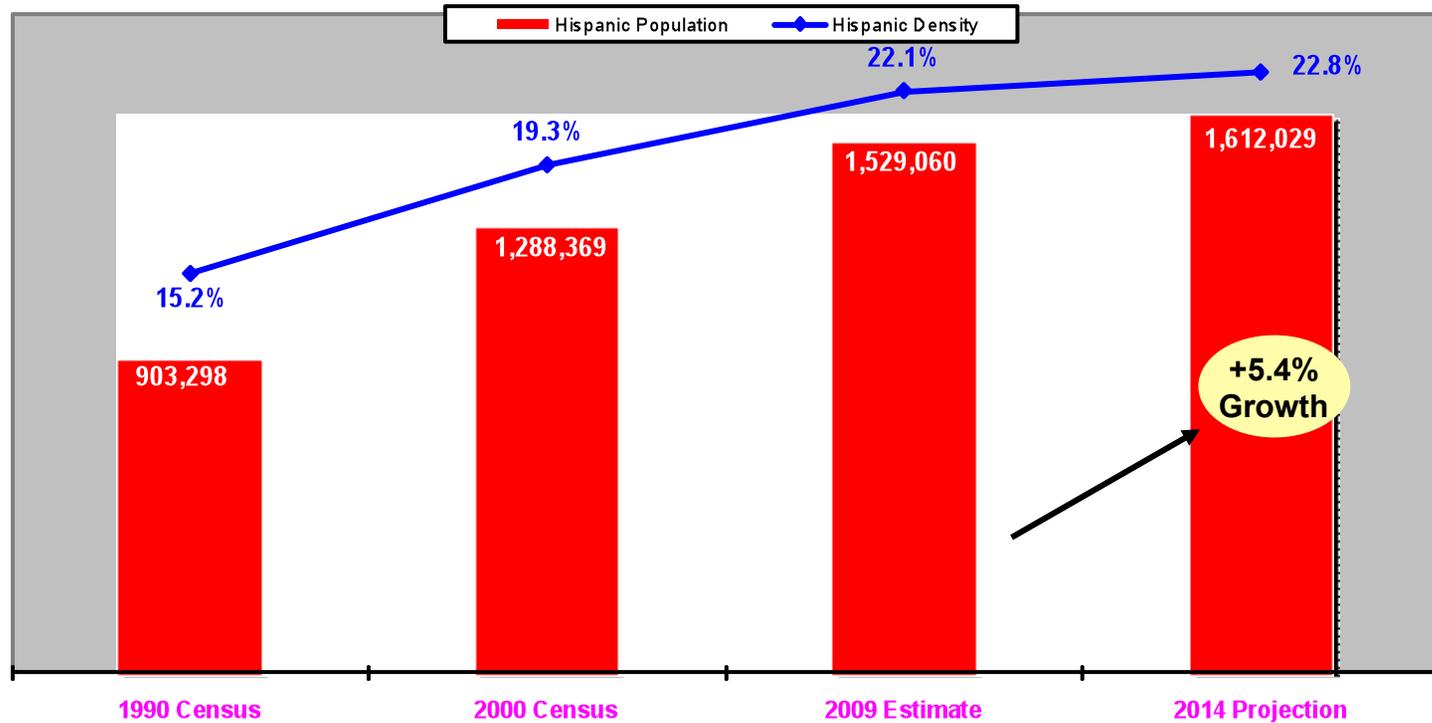
## SF DMA Race/Ethnic Composition



**San Francisco  
Bay Area**

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# Since 1990, the SF DMA Hispanic Population has Grown Tremendously



**By 2014, Hispanics are projected to represent nearly 1 out of every 4 persons in the Bay Area**

**San Francisco Bay Area**

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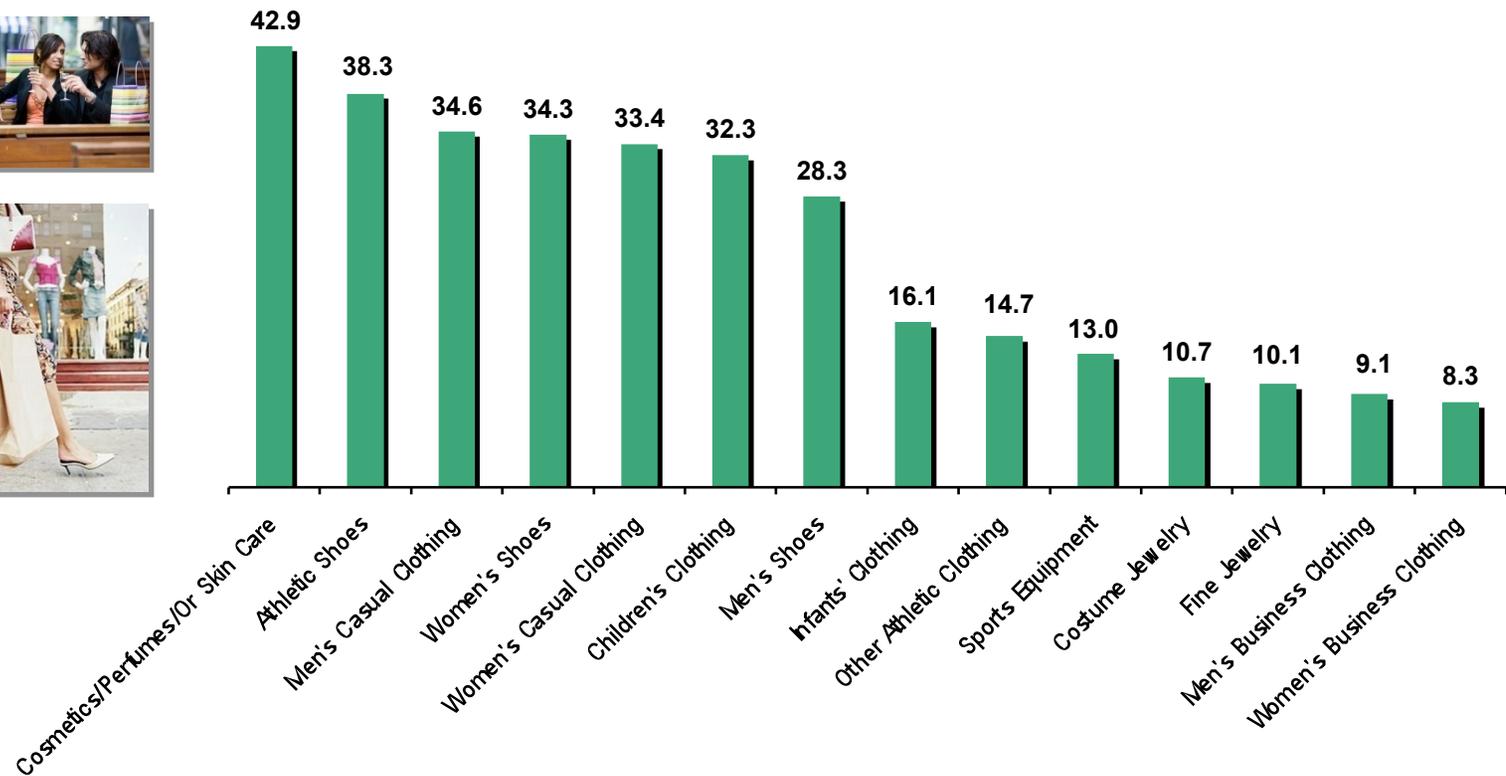


***Bay Area Hispanics Represent a Significant  
Buying Power in Today's Economy***

San Francisco  
Bay Area

# Bay Area Hispanics Make Purchases on a Wide Variety of Apparel/Retail Items

% of SF DMA Hispanics who Purchased Apparel Items in the Past Year



# Bay Area Hispanics Represent a Powerful Buying Block for Home Items and Home Improvements

## Target: SF DMA Hispanic Households

<b>Item in the Home bought in the past year</b>	<b>Target Persons</b>	<b>Target %</b>
Hardware, building, paint, lawn, garden items	590,268	53.4
Television	357,009	32.3
Camera Or Accessories	296,425	26.8
Mattress	185,648	16.8
Draperies, blinds, other window treatments	209,188	18.9
Furniture	196,550	17.8
Carpeting/Floor Covering	140,303	12.7
Stereo Equipment/Home Music System	109,923	10.0
<b>Home Improvement done in the past year</b>	<b>Target Persons</b>	<b>Target %</b>
Total Home Improvement	379,903	34.4
Remodeling	211,822	19.2
Landscaping	157,827	14.3



# Bay Area Hispanics are More Likely to Plan to Buy a New or Used Vehicle in the Next Year

## New Vehicles

	<u>Hispanic Target Index*</u>
HH Plans to Buy a <b>New</b> Vehicle in the next 12 months	113
HH Plans to Pay Under \$25,000 for a <b>New</b> Vehicle in the next 12 months	150

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## Used Vehicles

	<u>Hispanic Target Index</u>
HH Plans to Buy a <b>Used</b> Vehicle in the next 12 months	110
HH Plans to Pay Under \$25,000 for a <b>Used</b> Vehicle in the next 12 months	134

\* How to read Target Index: Hispanics are 13% more likely to plan to buy a New Vehicle in the next 12 months than the average Bay Area household.

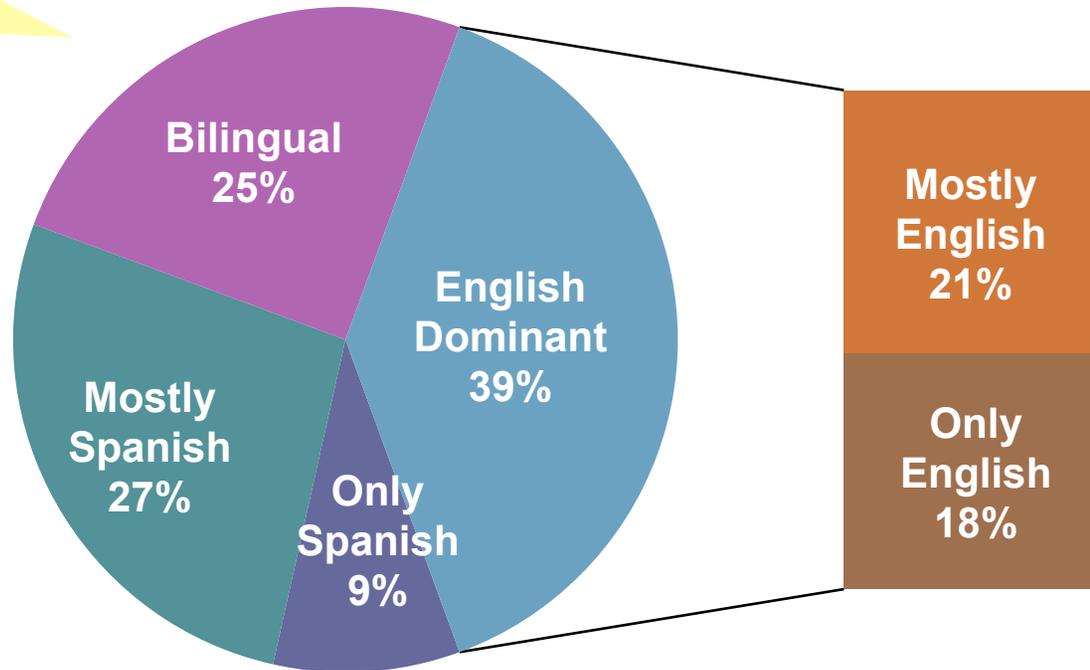
# The Majority of Bay Area Hispanics are English Dominant or Bilingual

*Reach Your Hispanic Consumer in the language they speak at home*

**Only Comcast  
Has Networks  
That Attract All  
Hispanics!**

- Use Comcast Spotlight's Spanish-language networks to reach Spanish-Only Hispanic consumers.
- Use Comcast Spotlight's English-language networks to reach English speaking Hispanic consumers.

### SF DMA Hispanic Households By Language Use



San Francisco  
Bay Area

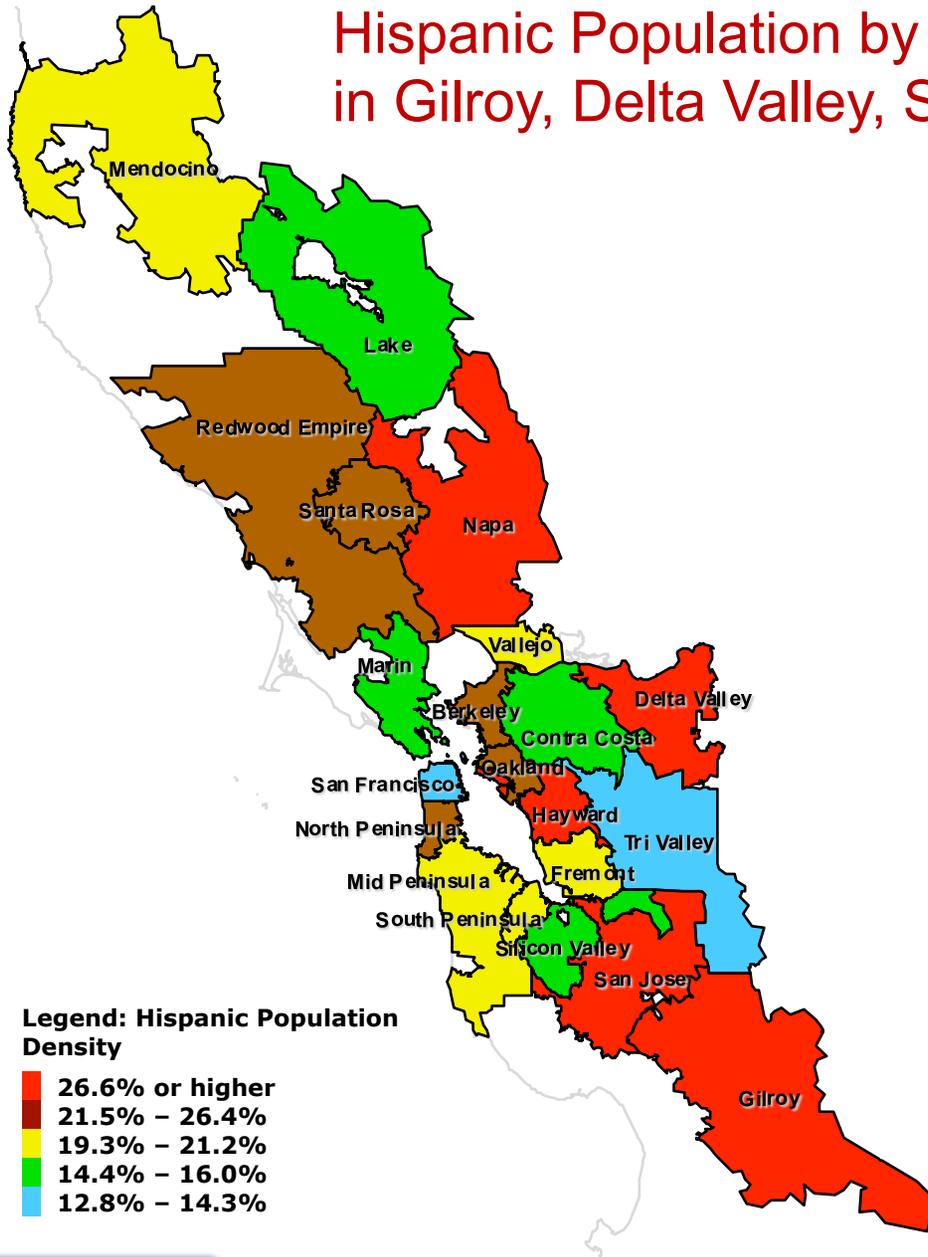
Source: Nielsen Media Research Universe Estimates, 2009-2010 Season.



# *Why Comcast Spotlight?*

San Francisco  
Bay Area

# Hispanic Population by Zone Shows the Highest Density in Gilroy, Delta Valley, San Jose, Napa and Hayward



**Legend: Hispanic Population Density**

- 26.6% or higher
- 21.5% – 26.4%
- 19.3% – 21.2%
- 14.4% – 16.0%
- 12.8% – 14.3%

Zone	%	Population	
		Hispanic	Total
<b>Gilroy Zone</b>	<b>46.5%</b>	<b>74,859</b>	<b>160,996</b>
<b>Delta Valley Zone</b>	<b>34.8%</b>	<b>95,252</b>	<b>274,048</b>
<b>San Jose Zone</b>	<b>30.9%</b>	<b>336,567</b>	<b>1,089,406</b>
<b>Napa Zone</b>	<b>30.5%</b>	<b>50,231</b>	<b>164,455</b>
<b>Hayward Zone</b>	<b>26.6%</b>	<b>112,396</b>	<b>422,714</b>
<hr/>			
Santa Rosa Zone	26.4%	51,782	196,318
North Peninsula Zone	25.0%	63,263	252,785
Oakland Zone	24.2%	102,295	421,905
Berkeley Zone	23.7%	86,532	365,247
Redwood Empire Zone	21.5%	48,019	223,755
Mendocino Zone	21.2%	13,979	65,959
Fremont Zone	20.2%	63,994	317,585
Mid-Peninsula Zone	20.1%	74,769	372,253
South Peninsula Zone	19.5%	31,345	160,970
Vallejo Zone	19.3%	27,557	143,050
<hr/>			
Lake Zone	16.0%	9,872	61,683
Contra Costa Valley Zone*	14.6%	61,527	420,429
Silicon Valley Zone	14.4%	73,658	511,949
Marin Zone	14.4%	34,327	238,992
<hr/>			
San Francisco Zone	13.1%	105,978	806,696
Tri Valley Zone	12.8%	32,457	254,356
<b>Total</b>	<b>22.4%</b>	<b>1,550,659</b>	<b>6,925,551</b>

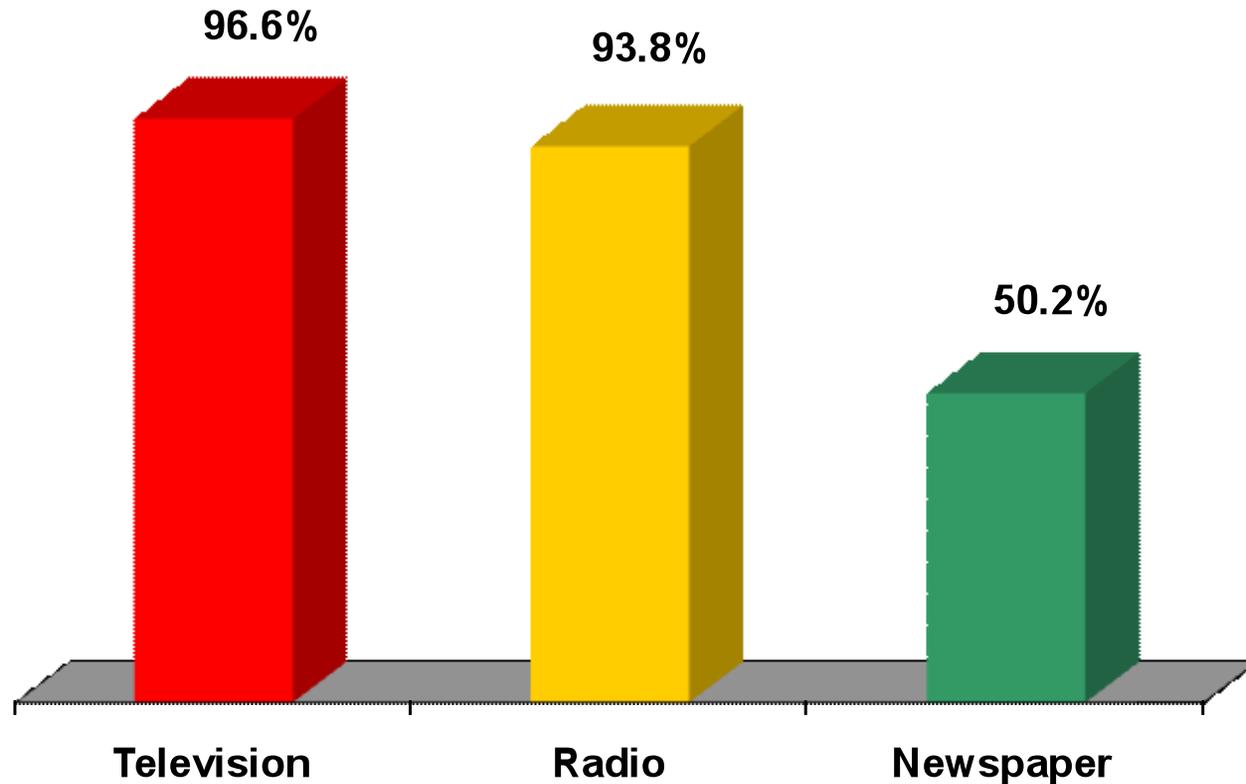
\* Note that the population for the Contra Costa Plus Zone is included in the Contra Costa Valley Zone population.

**San Francisco Bay Area**

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# Bay Area Hispanics Watch More Television than Listen to Radio or Read the Newspaper

% of Media Consumed Among Bay Area Hispanics



**San Francisco  
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Note: Television and Newspaper data is from questionnaires. For Radio, data is from diaries M-Su 6A-12M

Source: Scarborough Research Survey San Francisco DMA, Total Adults 18+ Aug 08 – July 09

# Bay Area Hispanics Watch Sports on Cable Television

Sports On Cable TV Past Year:	Hispanic	
	Target Pop.	Target %
Mexican Soccer National Team	176,063	15.9
San Francisco Giants	168,662	15.3
Olympics	163,385	14.8
Monday Night Football	120,907	10.9
Baseball Playoffs	119,709	10.8
Oakland A's	118,648	10.7
Reg. Season NFL	101,675	9.2
Reg. Season MLB	97,077	8.8
Pro Boxing	96,144	8.7
San Jose Sharks	95,376	8.6
Golden State Warriors	89,228	8.1
NBA Playoffs	87,792	7.9
Mixed Martial Arts (MMA)	70,800	6.4
Figure Skating	64,080	5.8

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Source: Scarborough Research Survey San Francisco DMA, Total HHLD Aug 2008-July 2009

## Comcast Spotlight ... One Stop Advertising!

### *Target All Hispanics on Comcast*

- Comcast is the only place to buy media that reaches the entire Hispanic market
- Some Hispanics are Spanish-only speakers
  - Comcast offers advertising on Galavisión in most areas, and Fox Sports en Español and Mun2 in areas with high Hispanic Densities. Target Spanish-only consumers with these networks
- Many Hispanics are bilingual as well as English-only speakers
  - English-speaking Hispanics have always been heavy users of cable television

# Attract Spanish-Only Hispanics On Comcast Spotlight Spanish-Language Nets

*Comcast Spotlight Spanish-Language Networks! Include these on any campaign to target Hispanics.*



**Galavisión** - is the leading Spanish-language cable network in the United States. Galavisión's new lineup will expand its lead as the number one general interest Spanish-language cable network among Hispanics of all ages. The new schedule includes innovative talk and variety shows, popular sporting events and much more.

Available everywhere except: Lake Zone.



**FOX Sports en Español** – is the only 24-hour Spanish-language sports network in the United States targeting the growing, diverse Hispanic community. FOX Sports en Español presents year-round, first-run telecasts of popular soccer leagues and competitions, international baseball - where many of our professional athletes play in the off season, professional boxing, original productions and in-depth sports reporting direct from Argentina and Mexico, everyday.

Available everywhere except: Contra Costa Plus, Mendocino and Lake Zones.

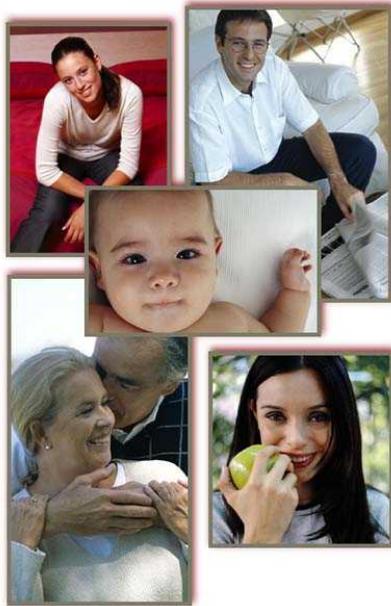


**Mun2** - a reference to the Spanish word "mundos," which means "worlds," is part of Telemundo Cable and targets the youthful Hispanic market with a fresh, new and authentic programming line-up that includes music video programs, entertainment shows, young dramatic series, an eclectic blend of movies, games and comedy shows.

Available only in San Jose and Mendocino Zones.

San Francisco Bay Area

# Target Hispanics on These Recommended Cable TV Networks



Hispanics and Targeted  
Cable Television...  
A Perfect Match!

Network	%	Index
Mun 2	2.5	510
Galavision	19.5	490
Fox Sports en Espanol	9.5	428
Discovery Health	7.3	165
Nickelodeon	14.9	152
Cartoon Network	15.3	143
Tru Tv	4.5	126
Animal Planet	20.3	122
MTV	9.7	110
E!	9.2	100
ABC Family	9.4	100

San Francisco  
Bay Area

\*NOTE: Unreliable – number of responses too small for reliability. Shown only for consistency purpose.

Source: Scarborough Research Survey San Francisco DMA, Total Adults 18+ Aug 08 – July 09

# Summary

- Hispanics represent **22.1%** of the total San Francisco DMA population
  - Since 1990, the SF DMA Hispanic population has grown tremendously
- Hispanics have a significant influence on our market's economy
  - Hispanics have **made many purchases** on a variety of retail items, items in the home and home improvement
  - Hispanics plan to buy a new or used vehicle in the next year
- Hispanics are English speakers
  - **Only Comcast Spotlight** has networks that **attract** Hispanics who are Spanish-only speakers and English speaking Hispanics
- Hispanics live across all Comcast Spotlight advertising zones, with higher concentrations in Gilroy, Delta Valley, San Jose, Napa and Hayward zones
- More Hispanics watch television than listen to radio or read the newspaper
- Comcast Spotlight offers one-stop advertising
  - **Comcast Spotlight is the only place** to buy media that **reaches the entire Hispanic market**
- Comcast Spotlight sports deliver Hispanic consumers
- Attract English-speaking Hispanics consumers on your own Hispanic Virtual Networks

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