



**NEW AMERICAN
DIMENSIONS**

Made in America: Communicating with Young Latinos

**Culturally Speaking:
Marketing to Latinos in English**

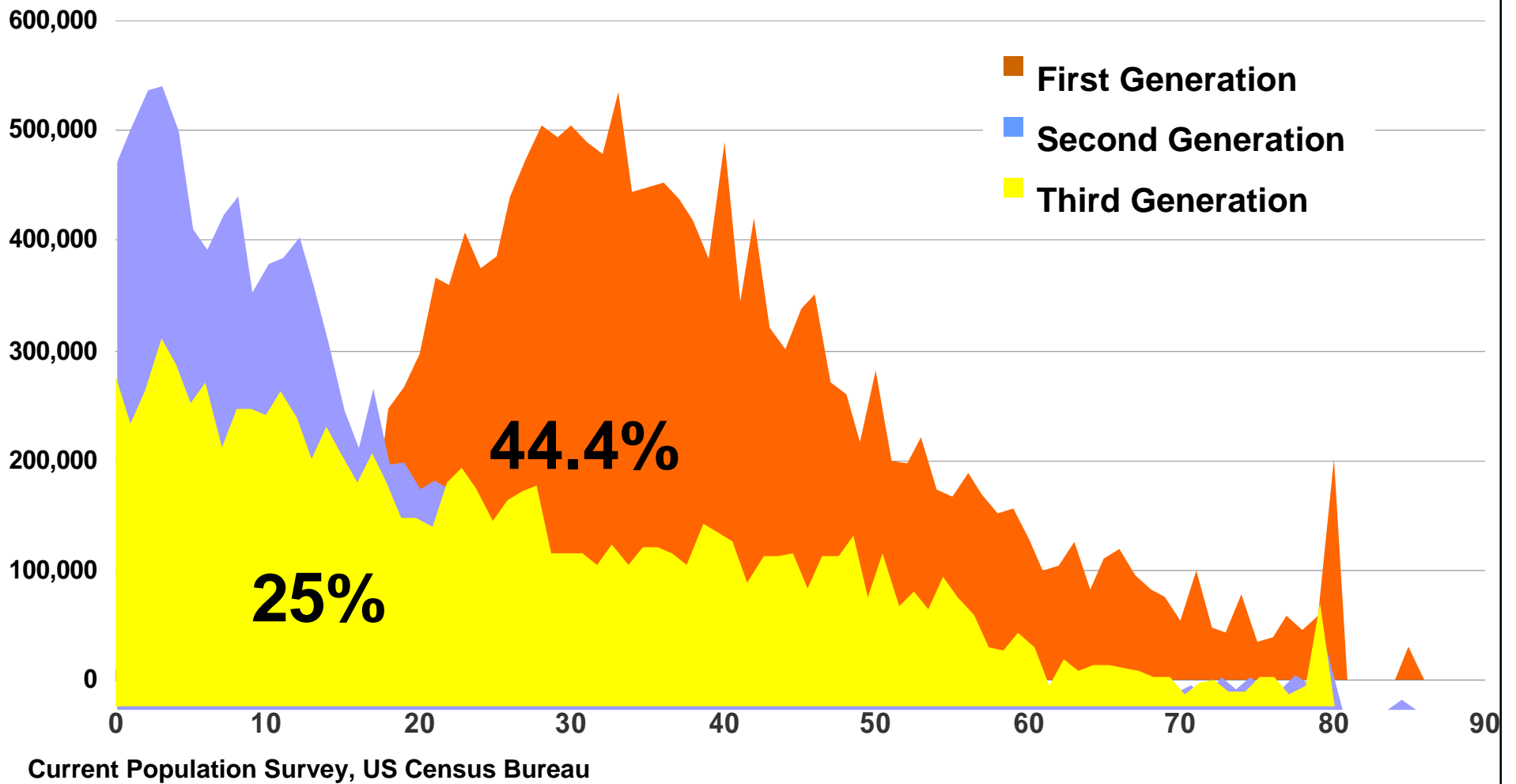
The Maritime Hotel

October 27, 2005

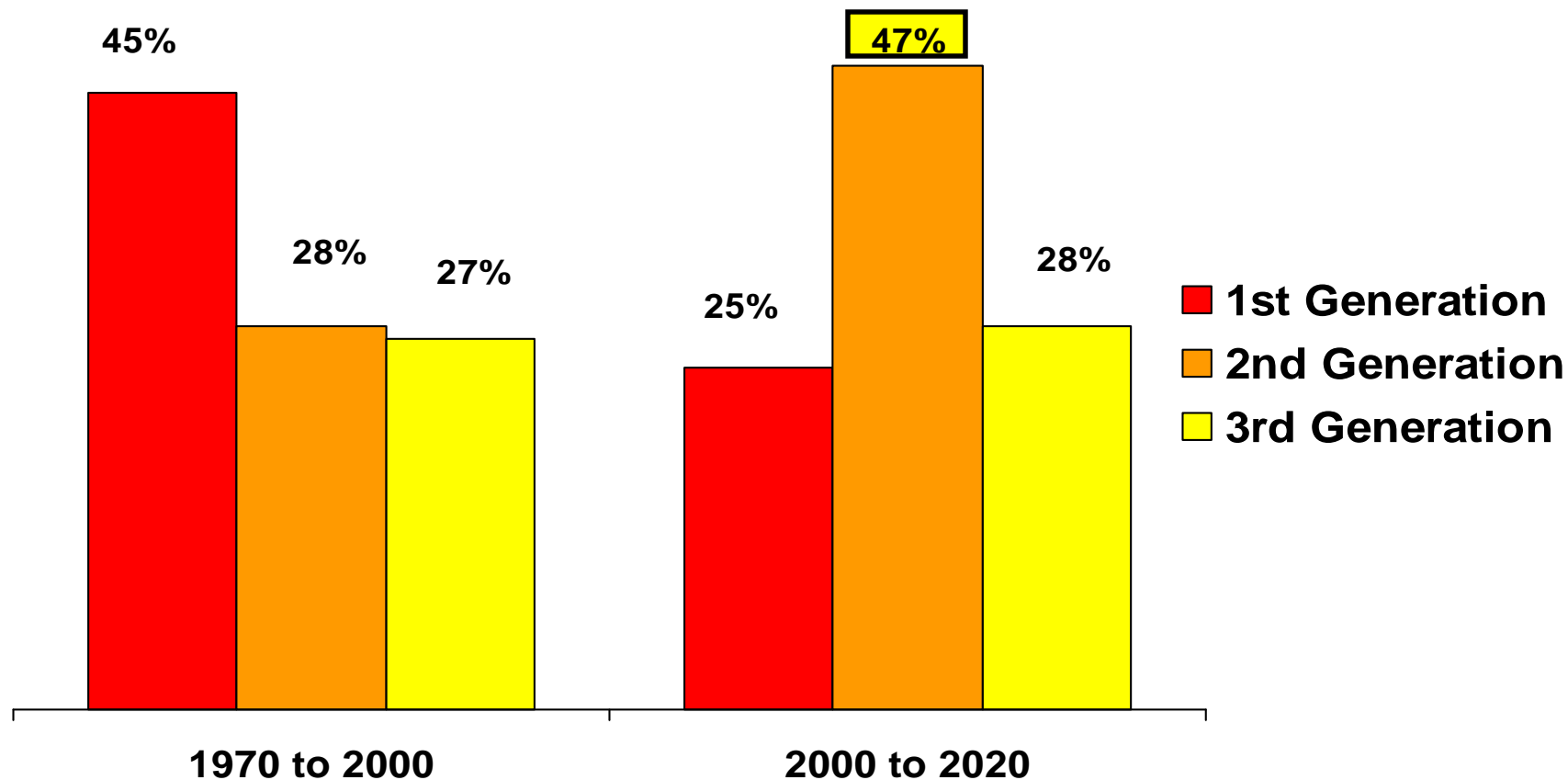


Introduction

The Hispanic Market Is Two Tiered

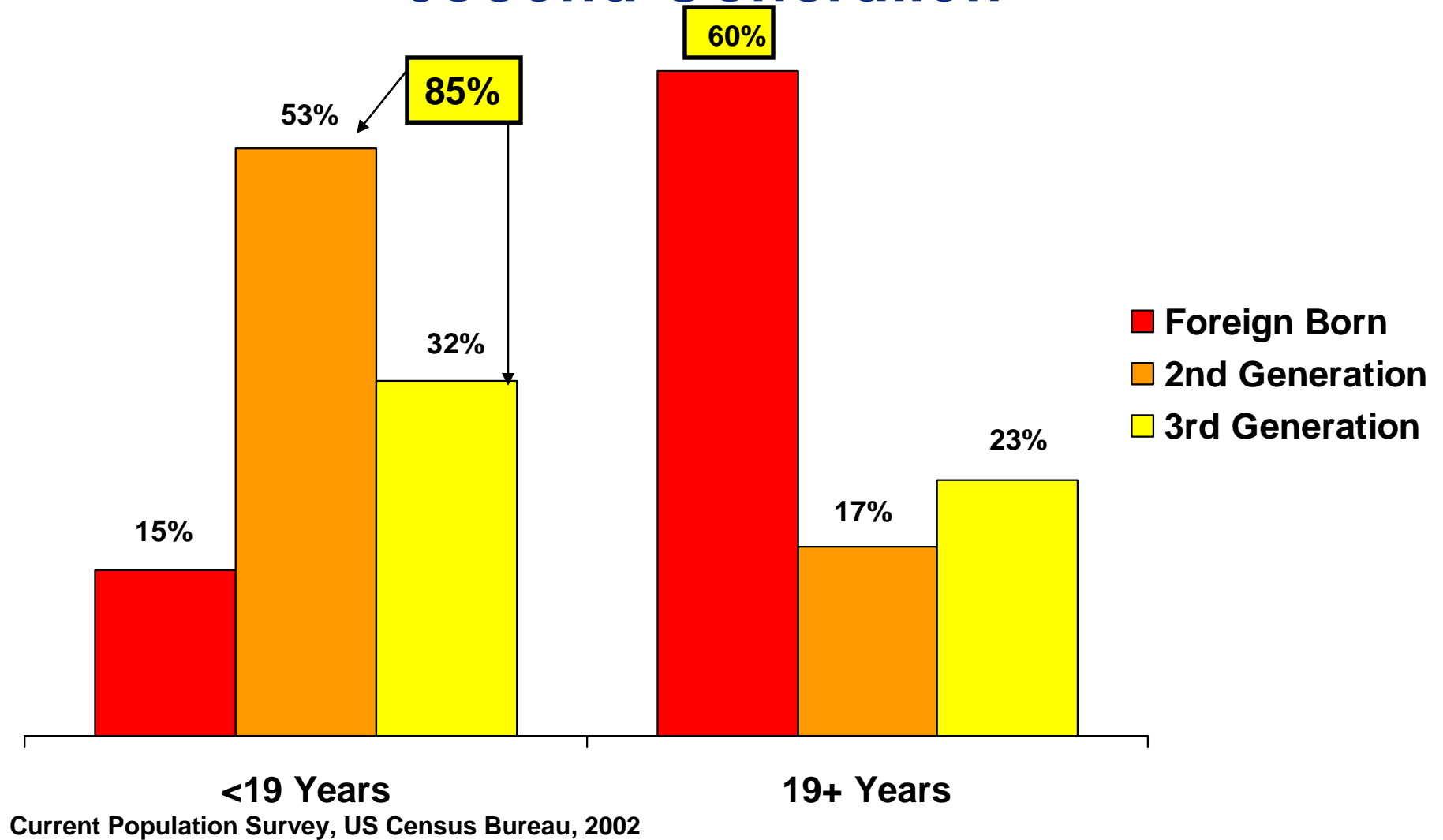


In the Next Fifteen Years, 2nd Generation Will Dominate Growth



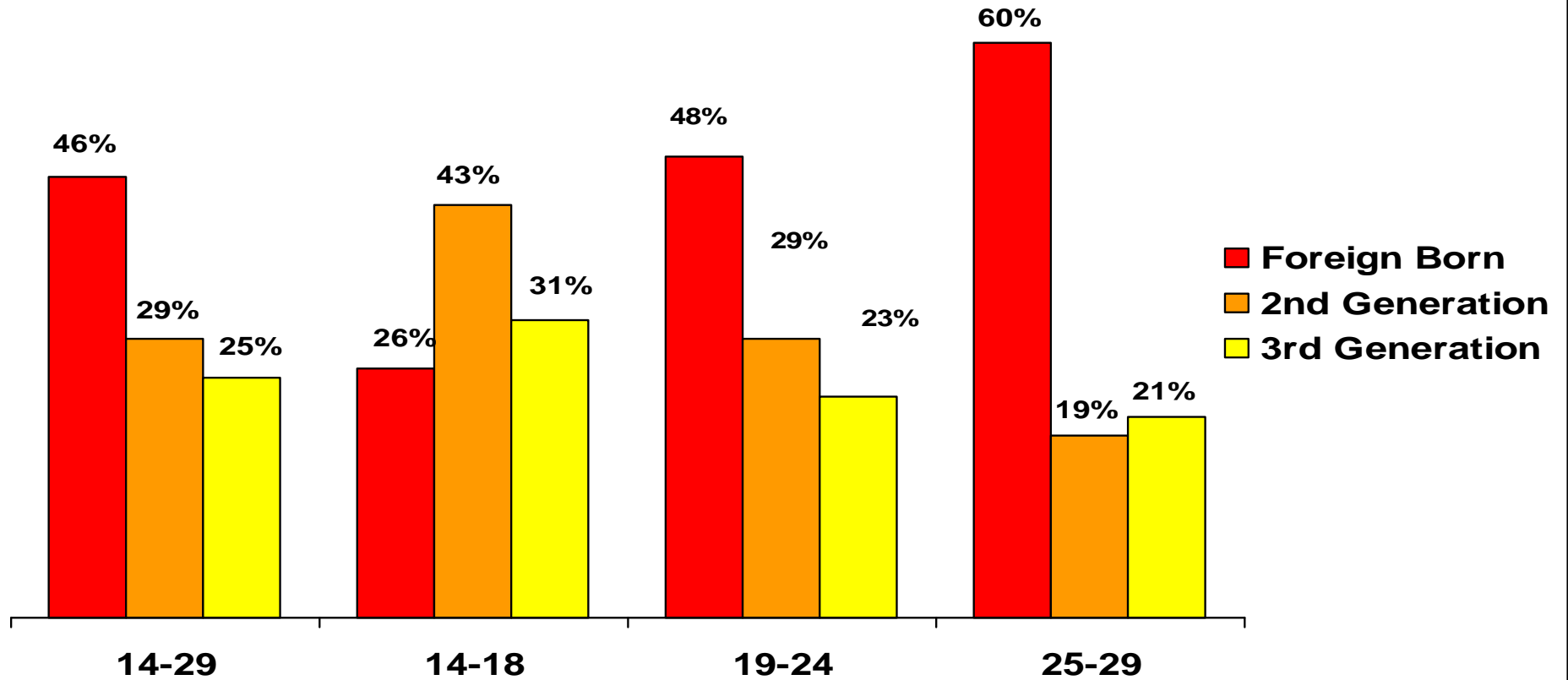
Pew Hispanic Center, 2002

A Majority of Younger Hispanics are Already Second Generation



Our Study Focused on Hispanics 14 to 29

Only US Born and Foreign Born Who Immigrated by Age 5



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
○ <i>Los Angeles</i>	121	56	177
○ <i>New York City</i>	121	22	143
○ <i>Miami</i>	102	22	124
○ <i>Chicago</i>	61	35	96
○ <i>Houston</i>	64	28	92
○ <i>Online</i>			503
○ <i>TOTAL</i>	444	163	1,135

Background

- Results were weighted by gender
- Sample Disposition by Methodology:

	Non-Online	Online
Unweighted	56%	44%
Weighted	61%	39%

- Sample Disposition by Generation

	1.5 Gen.	2 nd Gen.	3 rd Gen.
○ <i>Unweighted</i>	25%	59%	17%
○ <i>Weighted</i>	26%	58%	16%

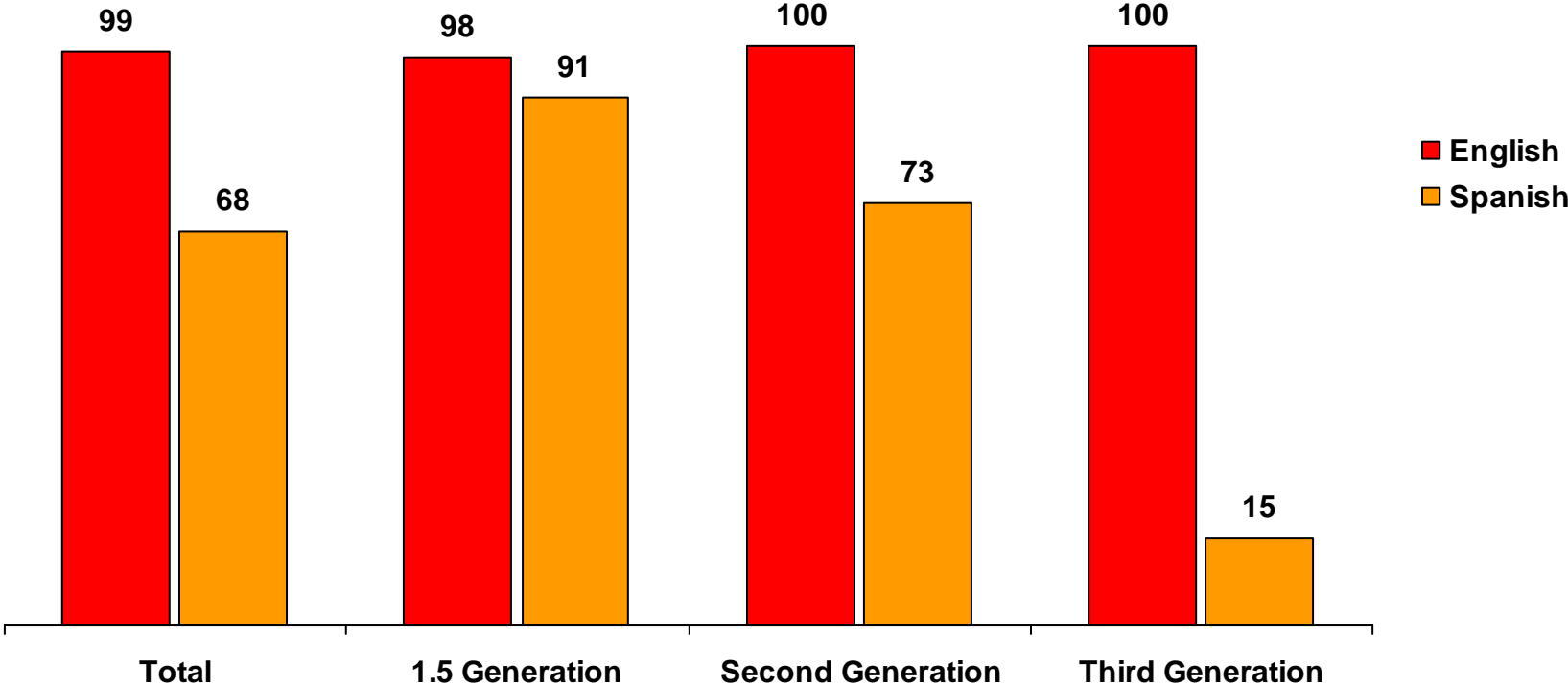


Language

Spanish language fluency is lost by the third generation.

% Speaking English / Spanish Well or Very Well

Base: Total

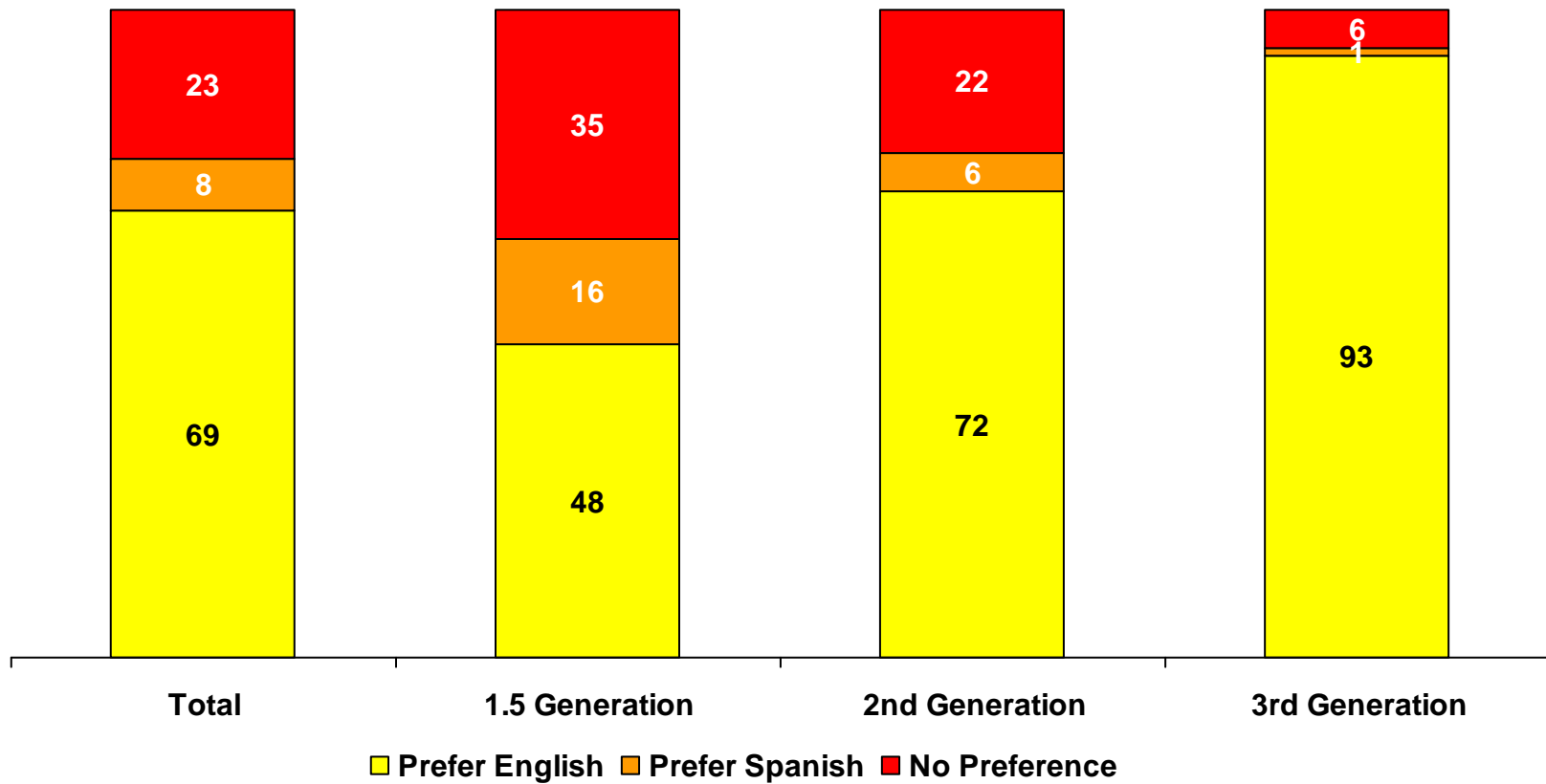


Q11/12: Would you say you speak English/Spanish...?

Preference for Speaking English is Clear and Increases with Generations

Base: Total

% Preferring English or Spanish

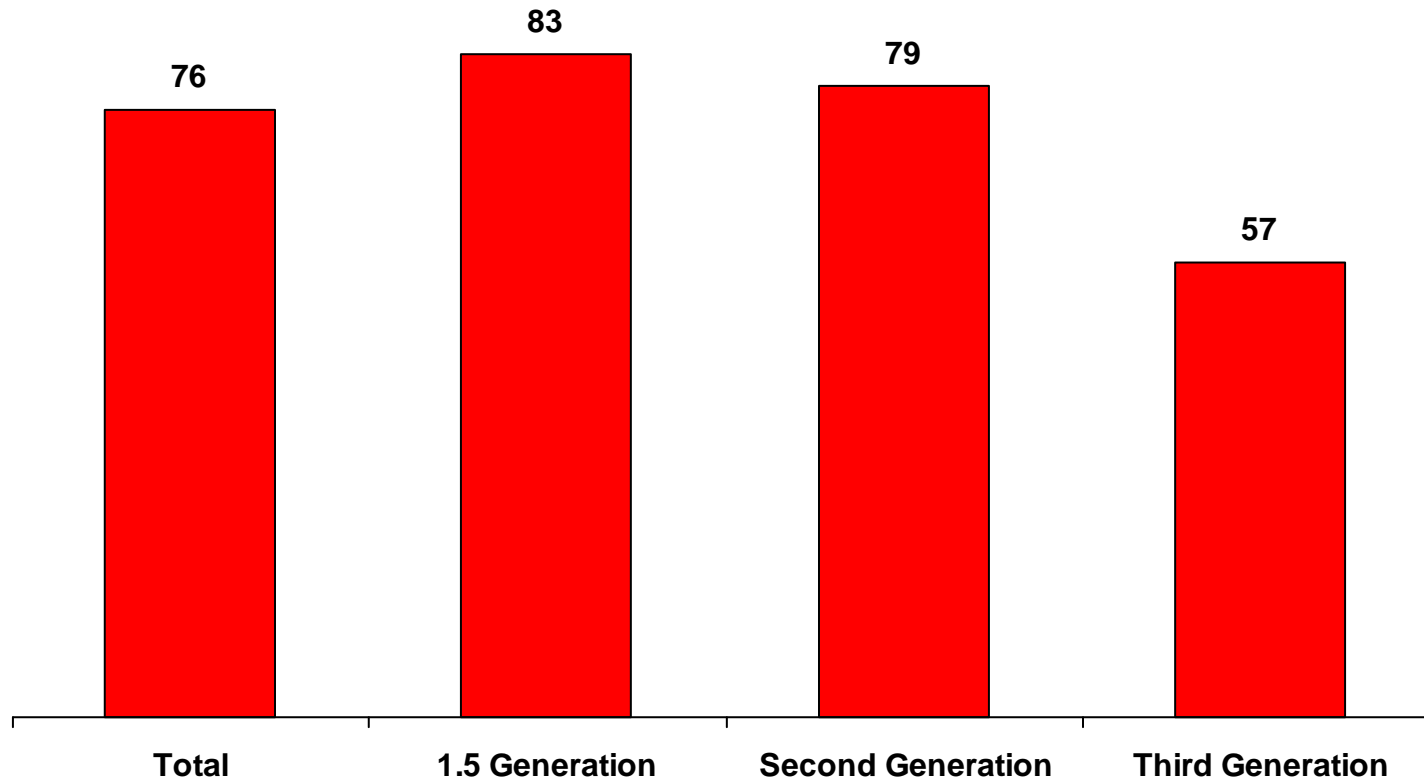


Q13: When given a choice, which language do you prefer to speak, Spanish or English?

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

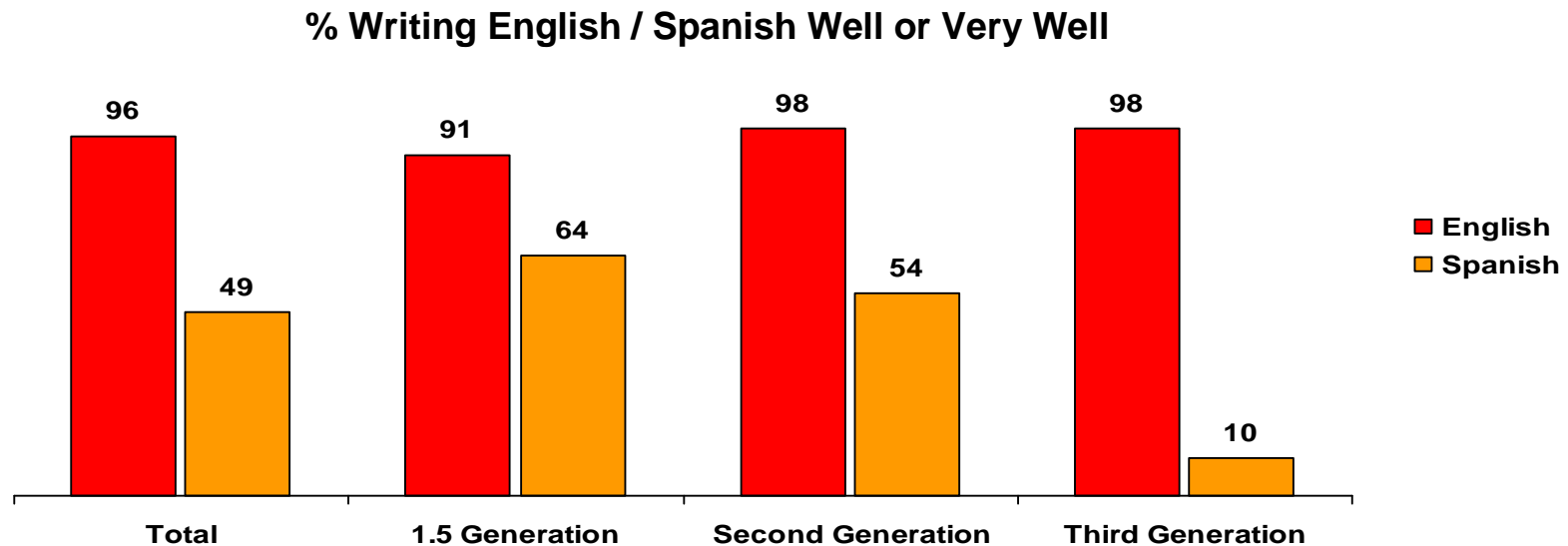
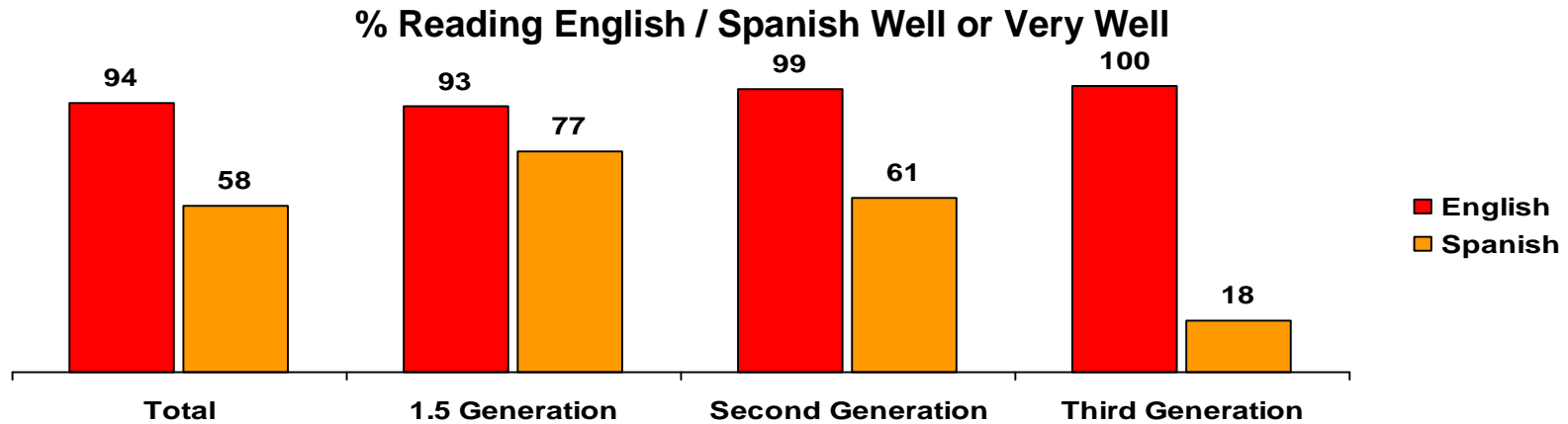
Base: Total

% Agreement Top 2 Box



Except for Third Generation, Spanish numbers drop for reading and especially writing.

Base: Total

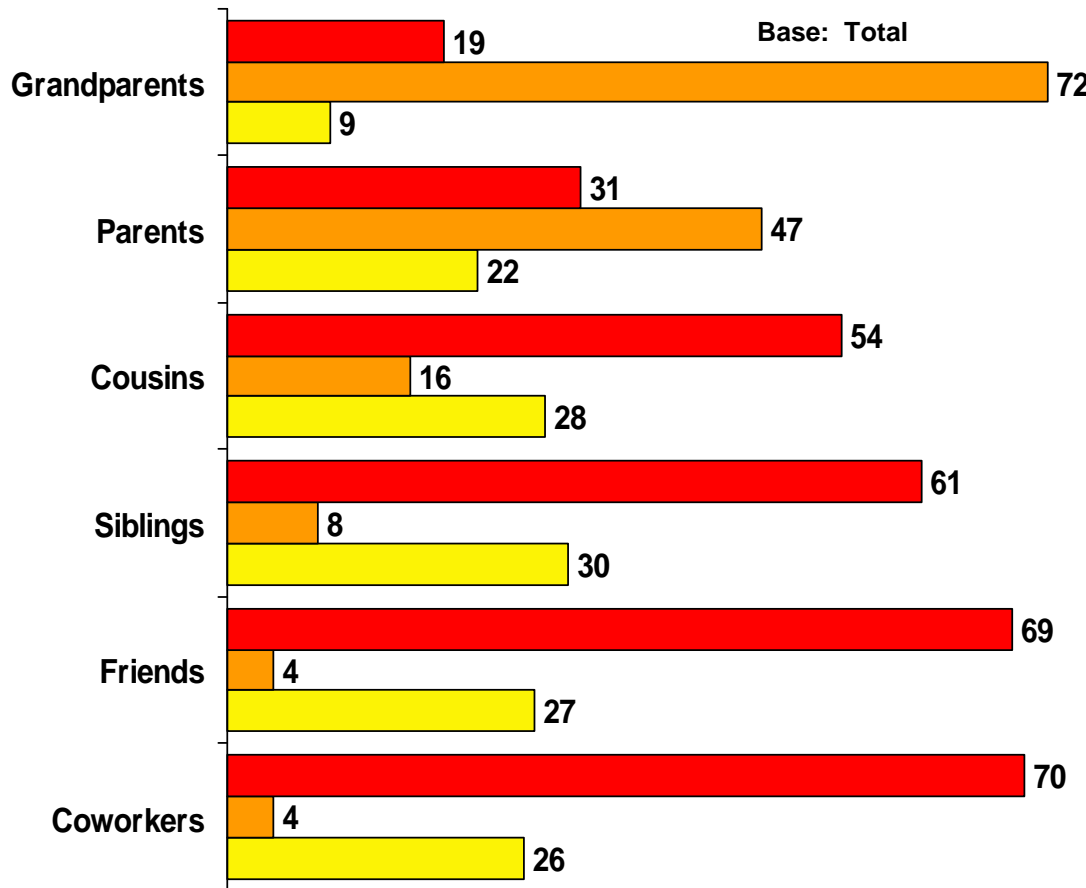


Q15/16/18/19: Would you say you read/write English/Spanish...?

Language Usage Depends on Who You're With

% Speaking Language with _____

% Speaking English with _____

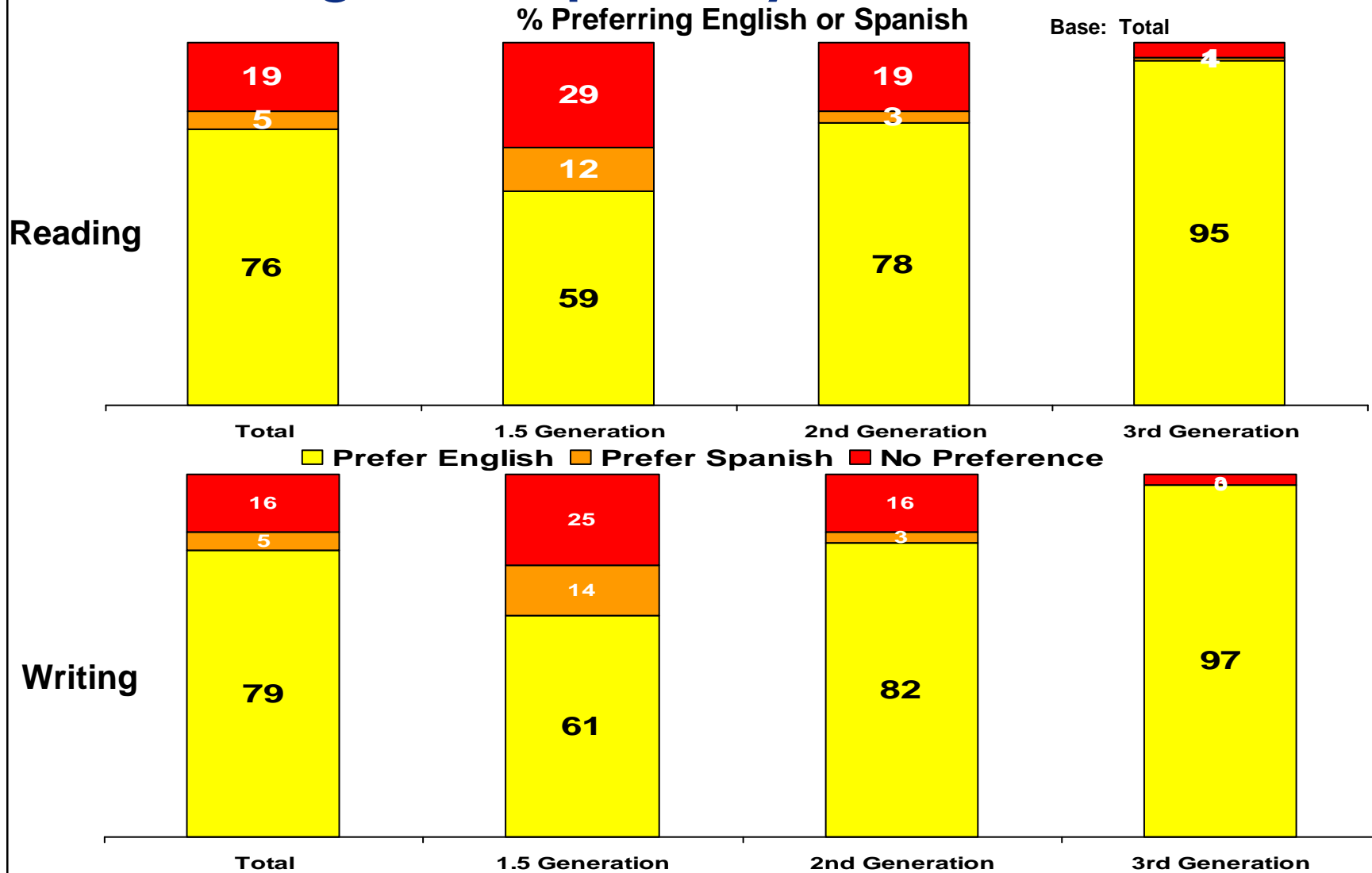


1.5	2 nd	3 rd
4%	11%	62%
7%	27%	84%
33%	54%	88%
36%	59%	91%
49%	72%	90%
57%	71%	88%

■ Both Equally
 ■ Spanish
 ■ English

Q14a/b/c/d/e/f: What language do you speak mostly with....?

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



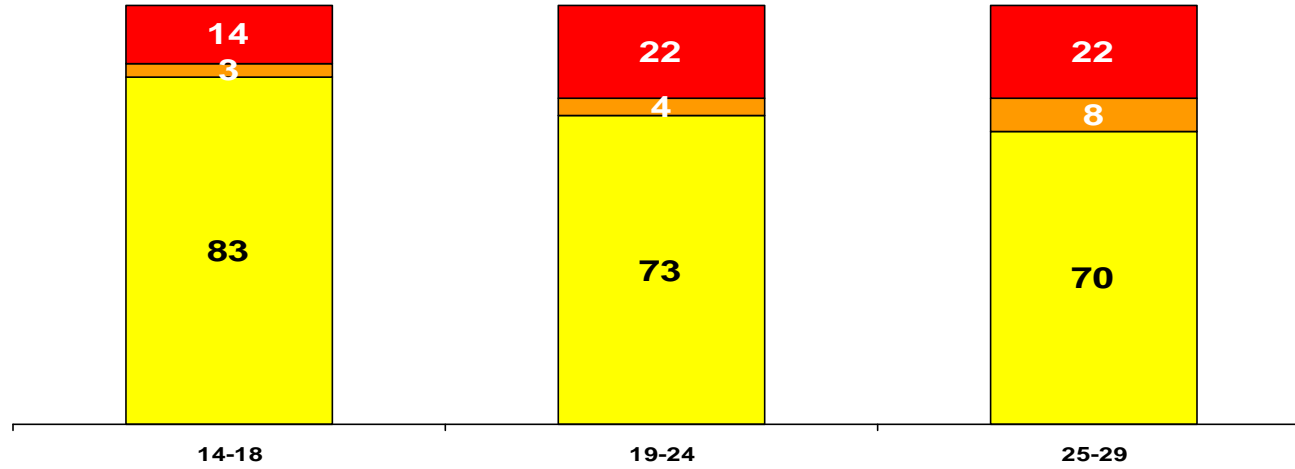
Q17/20: Given a choice, would you prefer to read/write in Spanish or in English?

...And Teens

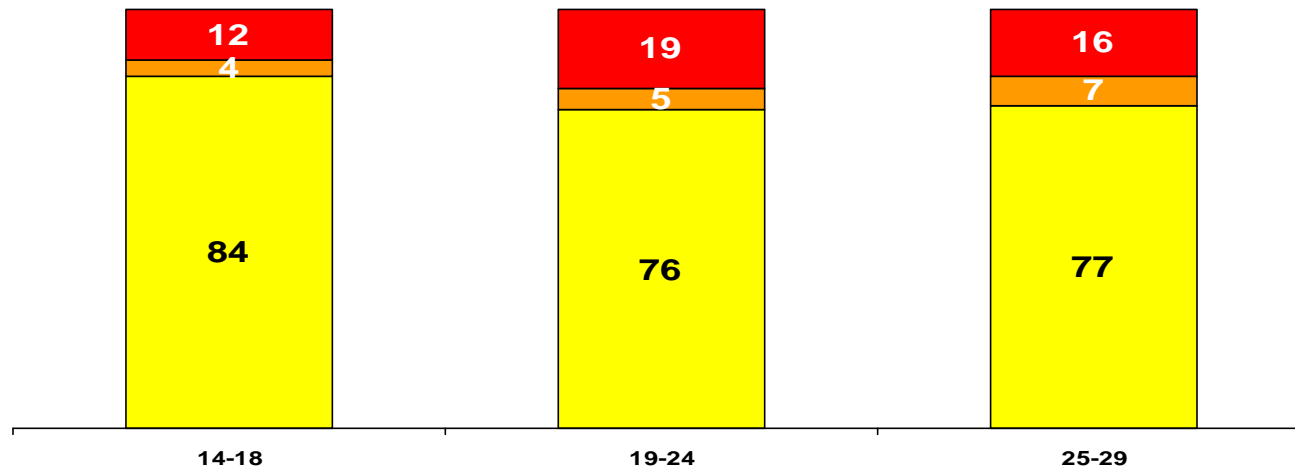
% Preferring English or Spanish

Base: Total

Reading



Writing



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

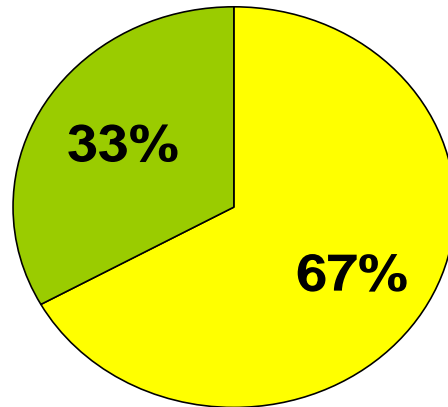


Television

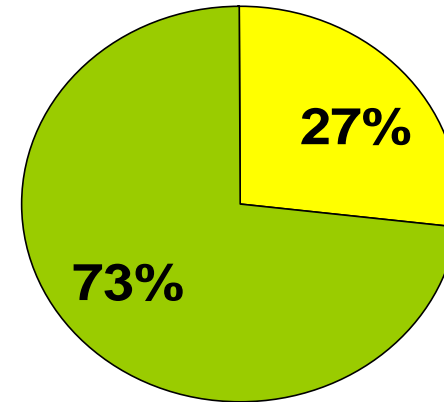
Two-Thirds have Cable; A Quarter have Satellite TV

Base: Watch TV (96%)

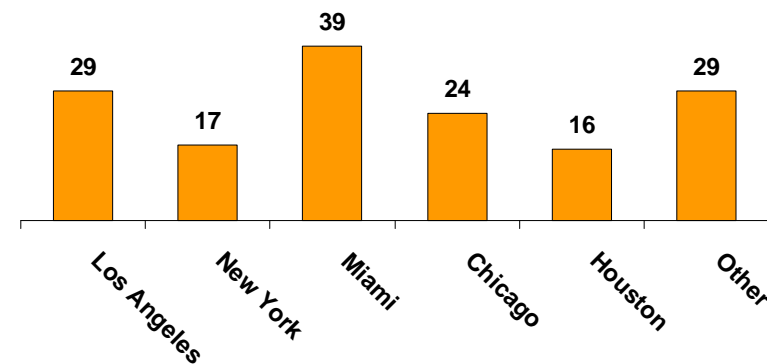
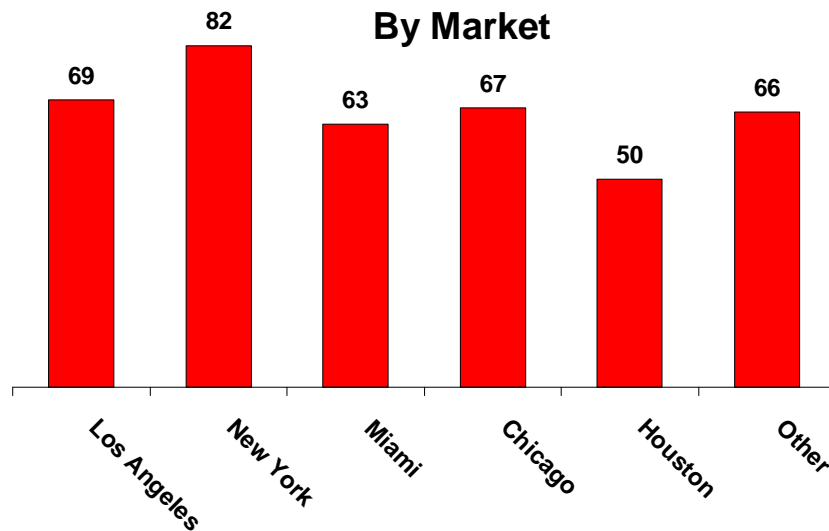
% With Cable TV



% With Satellite TV



By Market

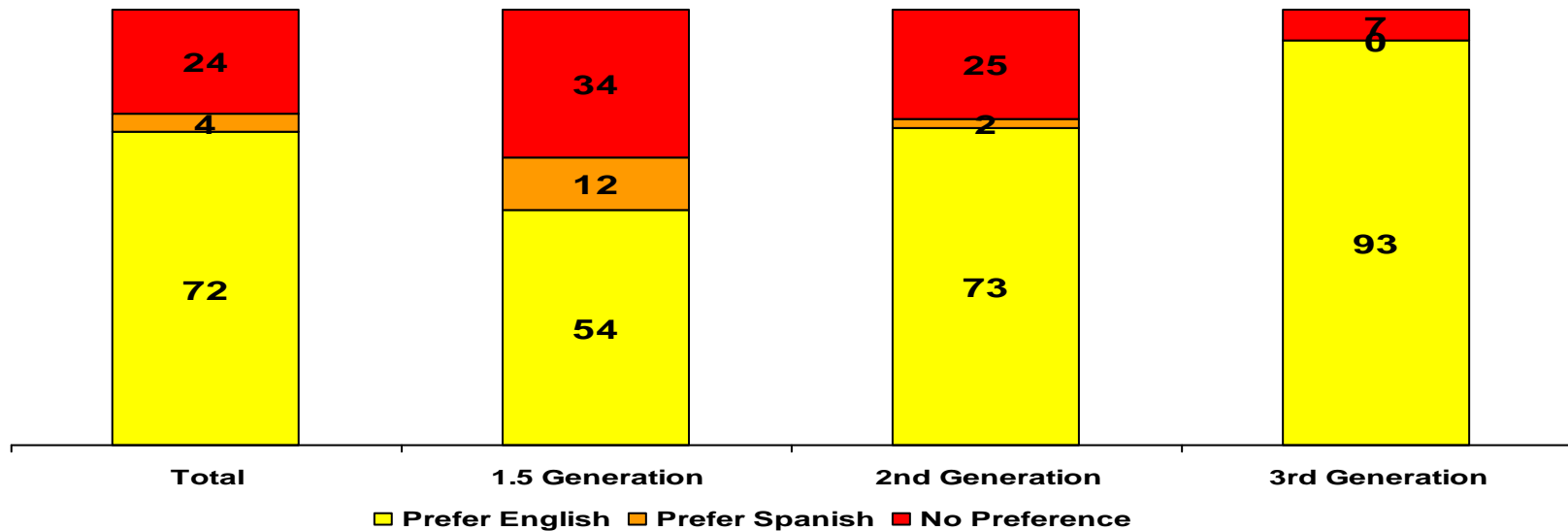


Q23a/b: Do you have Cable TV/Satellite TV in your household?

All Groups Demonstrate a Clear Preference for English Language Television

Base: Watch TV

% Preferring English or Spanish Television



Television Hours per Week

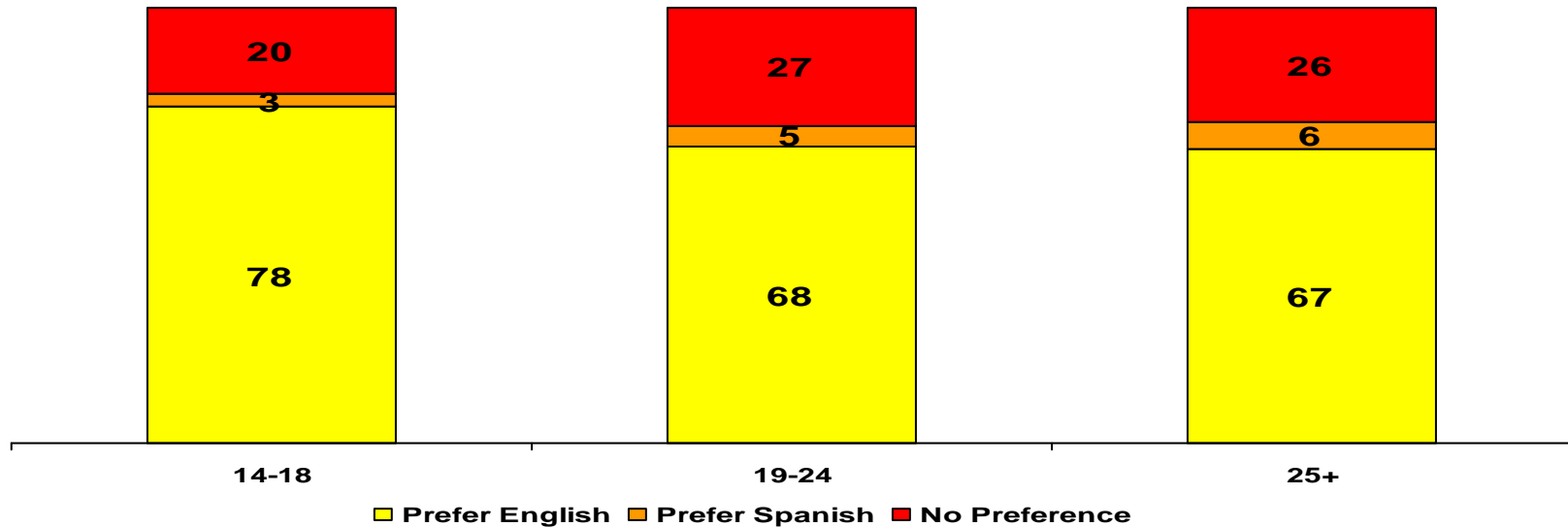
English	15.8	15.2	15.5	18.2
Spanish	5.7	7.6	5.2	2.8
Total	21.5	22.8	20.7	21.0

Q24: Overall, do you prefer to watch TV in English or Spanish? Q25/30: On average, how many hours per week do you watch English / Spanish TV?

Teens Preferred English More than Older Respondents

Base: Watch TV

% Preferring English or Spanish Television



Television Hours per Week

English	15.9		15.9		15.6
Spanish	5.0		6.2		6.1
Total	20.9		22.1		21.7

Q24: Overall, do you prefer to watch TV in English or Spanish? Q25/30: On average, how many hours per week do you watch English / Spanish TV?

Fox is the Most Watched Network Across Generations...

% Have Watched in Last Month – Top Ten (Aided)

Base: Watch TV

1.5 Gen.

Fox	81%
Univision	71%
MTV	67%
Telemundo	66%
WB	59%
ABC	59%
NBC	55%
UPN	53%
CBS	51%
Telefutura	49%

2nd Gen.

Fox	89%
MTV	73%
WB	69%
ABC	67%
NBC	64%
UPN	64%
Univision	59%
Telemundo	53%
CBS	52%
BET	43%

3rd Gen.

Fox	95%
ABC	87%
MTV	78%
NBC	78%
WB	70%
CBS	69%
UPN	63%
BET	40%
Bravo/Telemundo	24%
Univision	22%

... and Ages. At Least Half Watch Spanish-Language Television across Ages

% Have Watched in Last Month – Top Ten (Aided)

Base: Watch TV

14 to 18

Fox	89%
MTV	82%
WB	68%
ABC	66%
UPN	66%
NBC	56%
Univision	56%
BET	51%
Telemundo	50%
CBS	48%

19 to 24

Fox	89%
ABC	69%
MTV	66%
NBC	66%
WB	66%
Univision	57%
CBS	56%
UPN	56%
Telemundo	53%
BET	40%

25 to 29

Fox	84%
NBC	75%
ABC	69%
CBS	64%
MTV	64%
WB	64%
UPN	60%
Univision	55%
Telemundo	52%
BET	33%

Six Favorite 5 Shows Made the "Top Ten" for all 3 Generations. 4 were in English, 2 in Spanish

Favorite Five TV Shows – Top Ten Listing (listed by % order)

Base: Watch TV

1.5 Gen.

- The Simpson's
- El Gordo y La Flaca
- Friends
- Fear Factor
- George Lopez Show
- Republica Deportiva
- Control
- Guerra de Sexos
- The Apprentice
- Survivor / CSI

2nd Gen.

- The Simpson's
- Smallville
- Fear Factor
- George Lopez Show
- Desperate Housewives
- Friends
- Guerra de Sexos
- El Gordo y La Flaca
- Sex and the City
- America's Top Model

3rd Gen.

- Smallville
- Fear Factor
- Desperate Housewives
- The Simpson's
- George Lopez Show
- El Gordo y la Flaca
- Guerra de Sexos
- Friends
- La Oreja
- Survivor / Top Model

Six Favorite 5 Shows Made the “Top Ten” for all 3 Age Groups. 5 were in English, 1 in Spanish

Favorite Five TV Shows – Top Ten Listing (listed by % order)

Base: Watch TV

14 to 18

- The Simpson's
- Fear Factor
- Smallville
- Friend's
- Family Guy
- America's Top Model
- George Lopez Show
- Guerra de Sexos
- Desperate Housewives
- Republica Deportiva

19 to 24

- Smallville
- The Simpson's
- George Lopez Show
- Desperate Housewives
- Fear Factor
- Sex and the City
- Guerra de Sexos
- El Gordo y La Flaca
- Friend's
- Amor Real

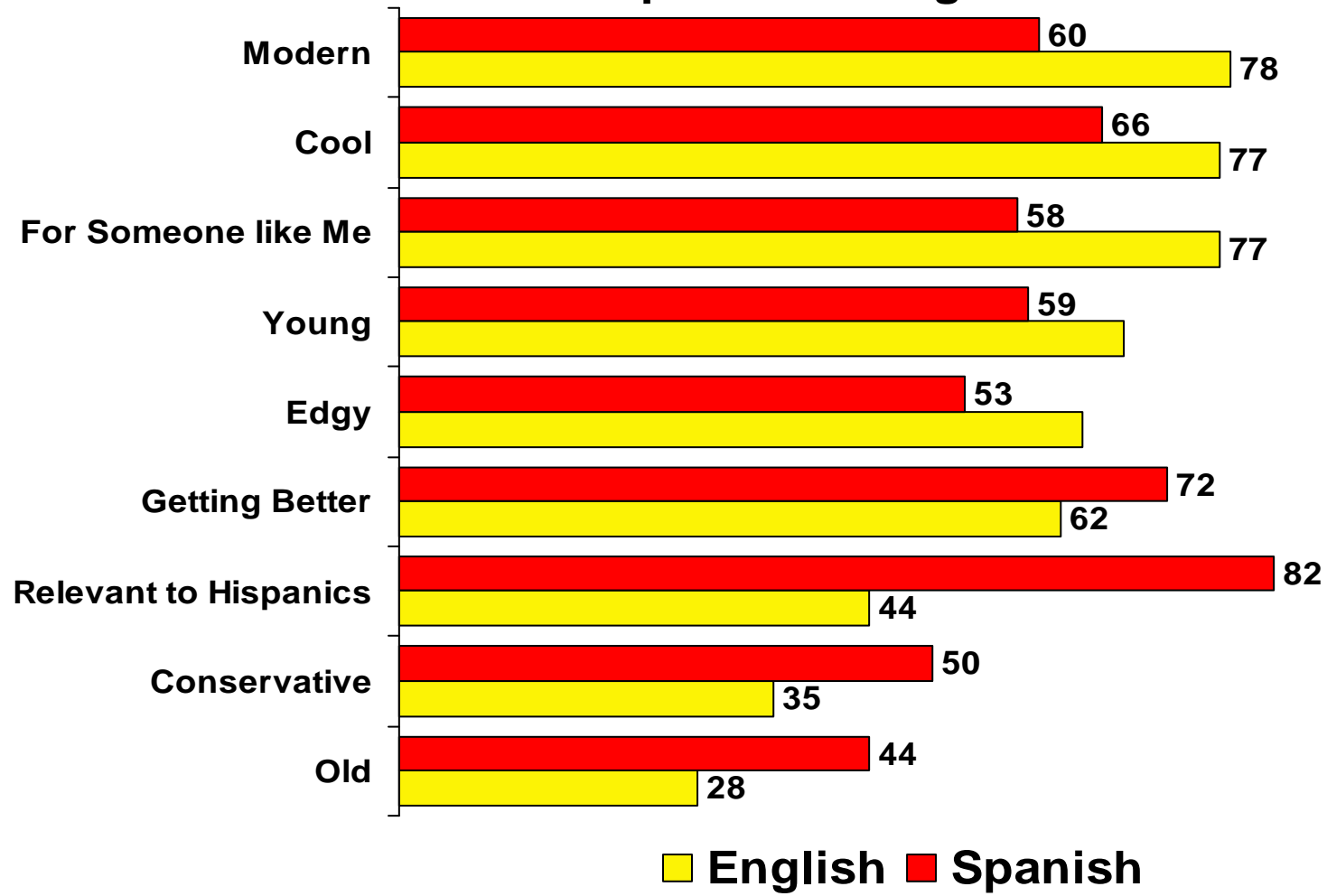
25 to 29

- El Gordo y la Flaca
- The Simpson's
- Desperate Housewives
- George Lopez Show
- Smallville
- Fear Factor
- Guerra de Sexos
- Control
- Amor Real
- Sex and the City

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

Base: Watch English/Spanish language TV

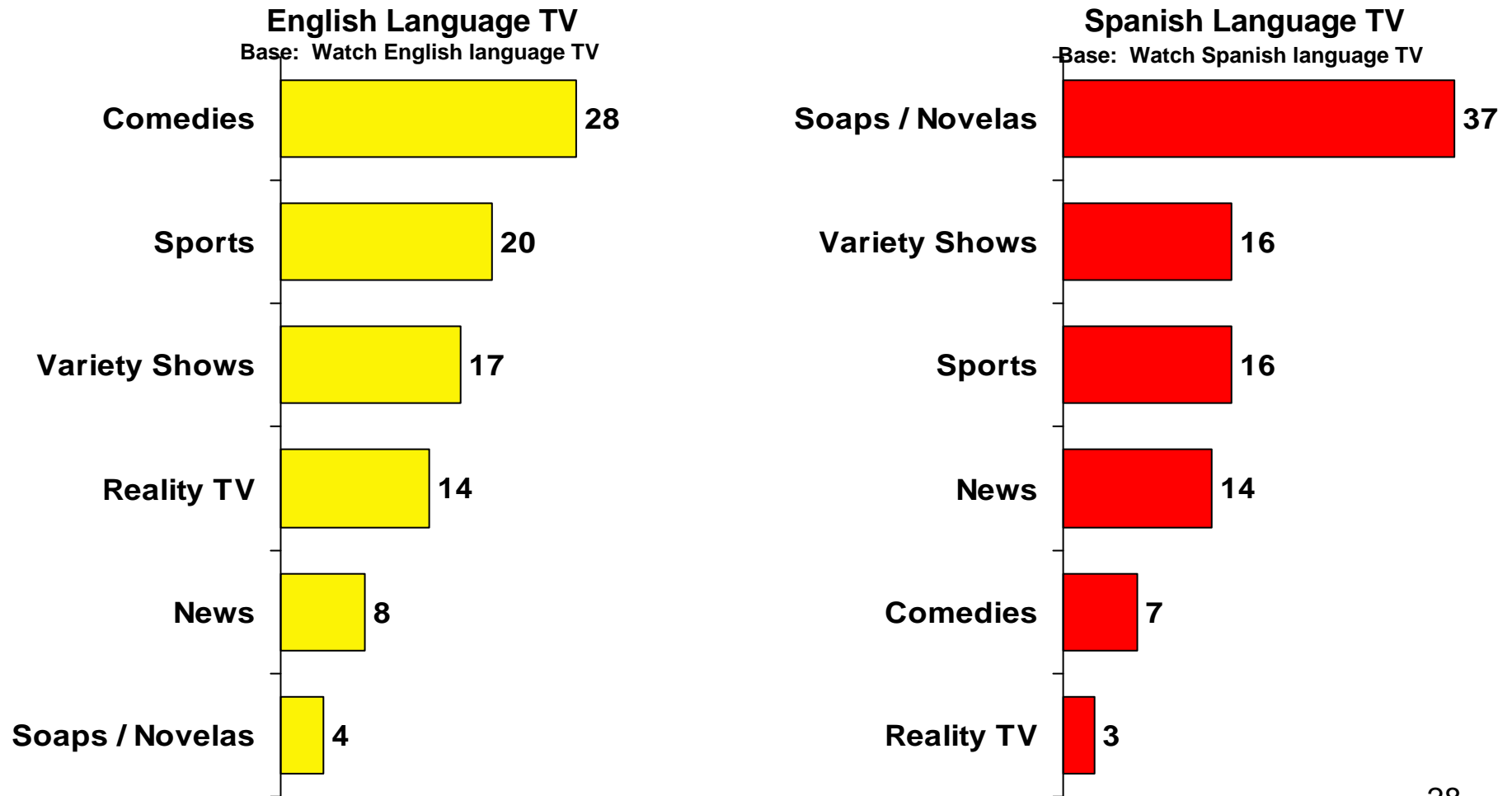
Top Two Box Agreement



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

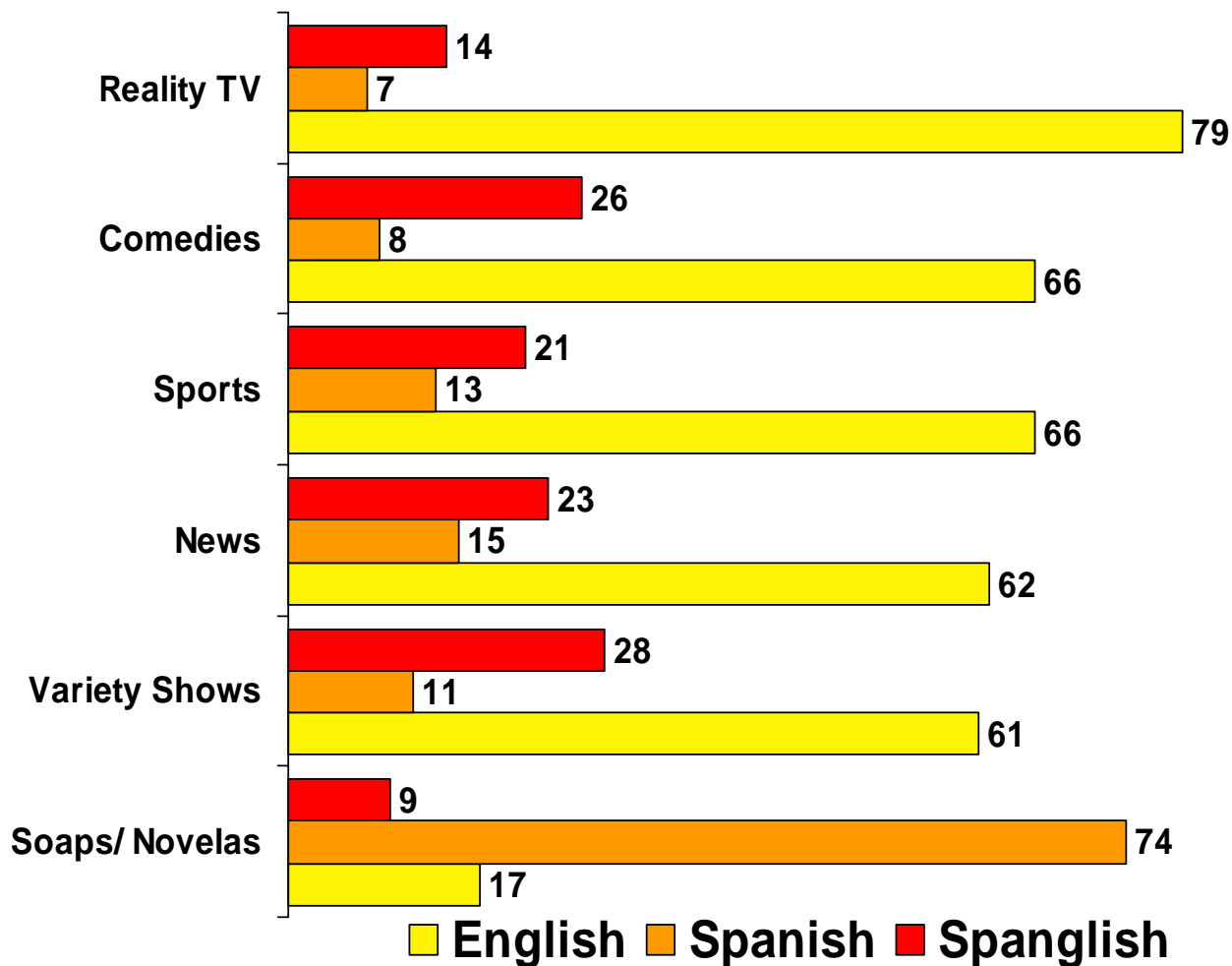


Q29/34: What is the main programming type you watch on English/Spanish language TV?

Language Preference Depends on the Content

Base: Watch TV in both English and Spanish

% Preference by Language



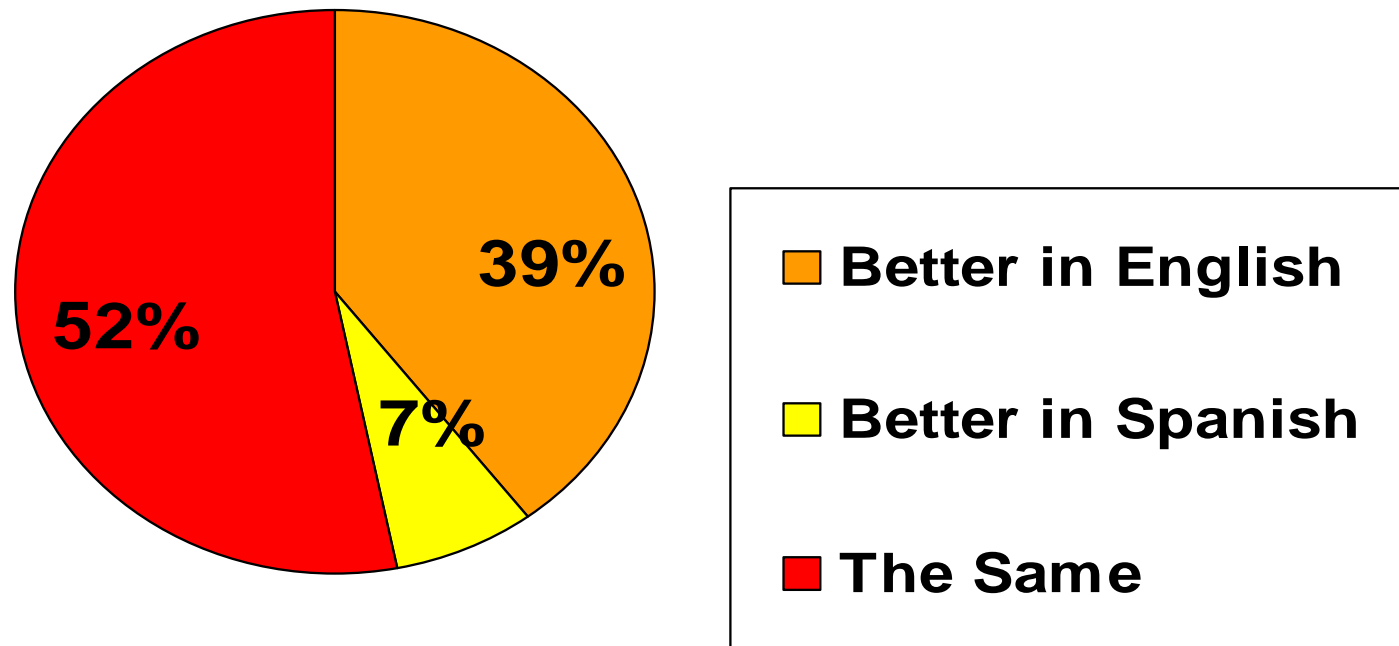
% Preferring English

1 st	2 nd	3 rd
73%	79%	95%
67%	65%	77%
53%	68%	95%
45%	68%	82%
56%	63%	65%
11%	18%	38%

A Majority Feel the Level and Quality of Commercials is Equal on Spanish and English TV

% Saying Level of Content Is...

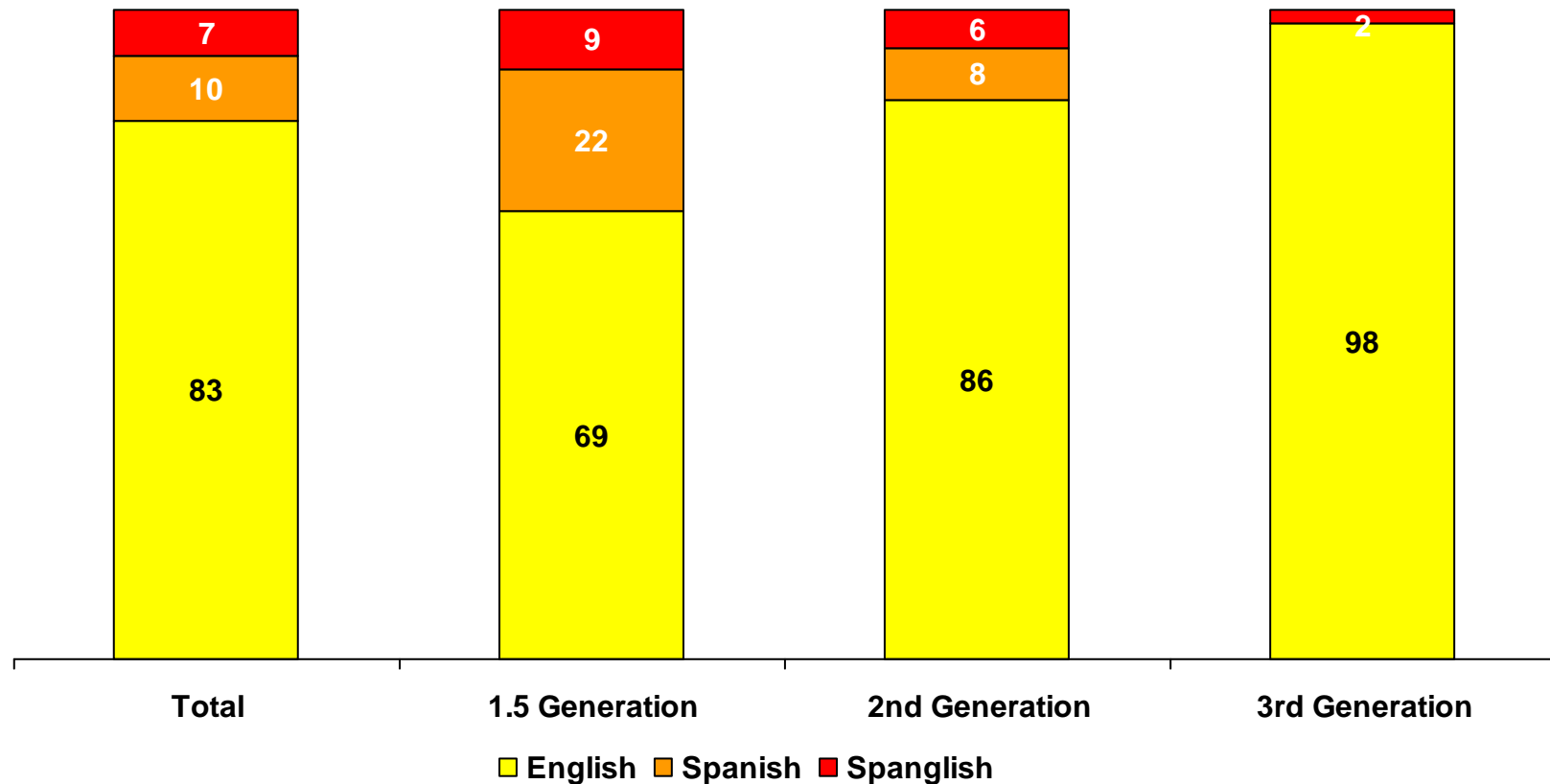
Base: Watch TV in both English and Spanish



Favorite Commercials are Usually in English

Base: Watch TV

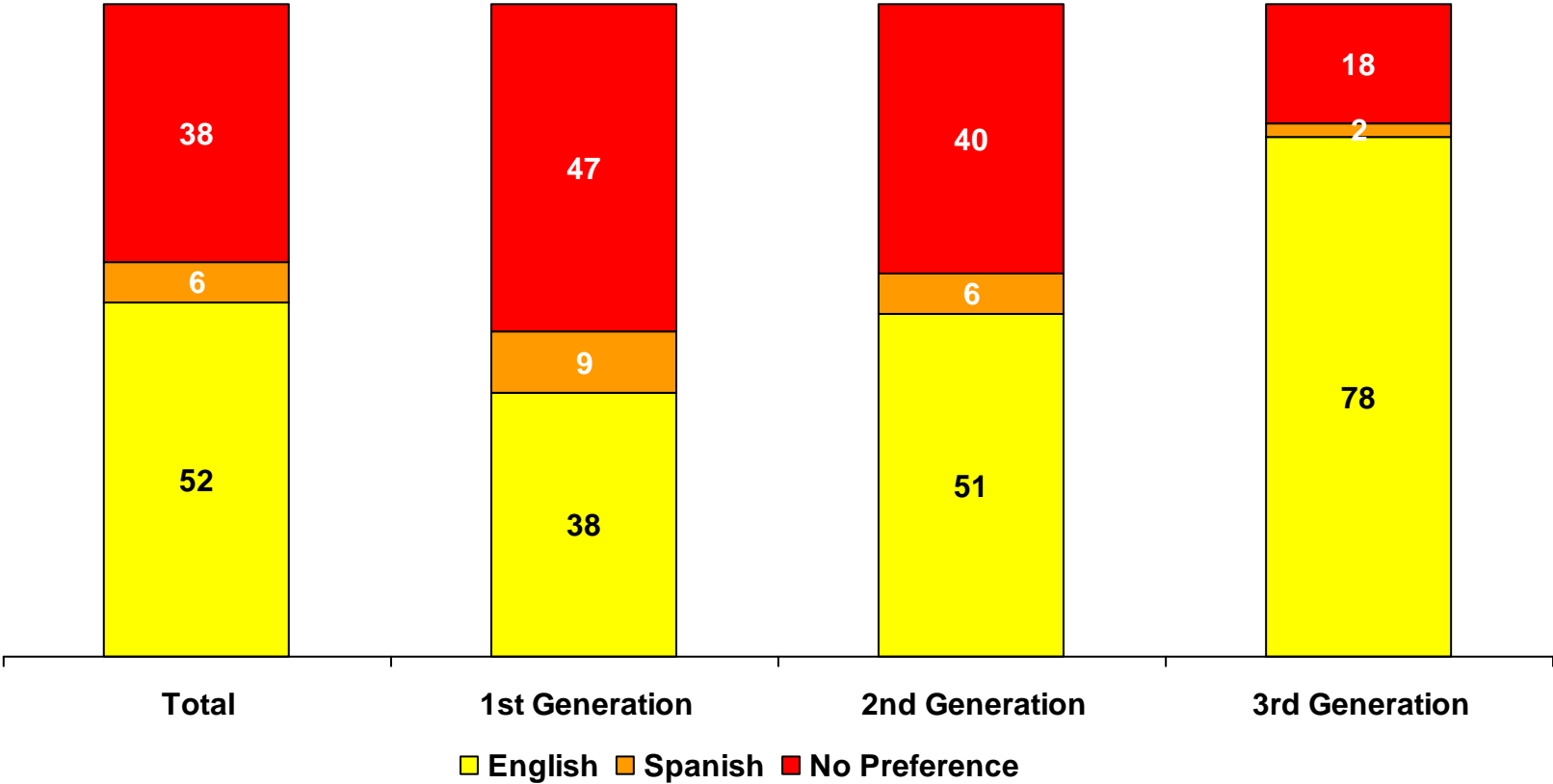
% Saying Favorite Commercial is in English / Spanish



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

Base: Watch TV

% Preferring English or Spanish

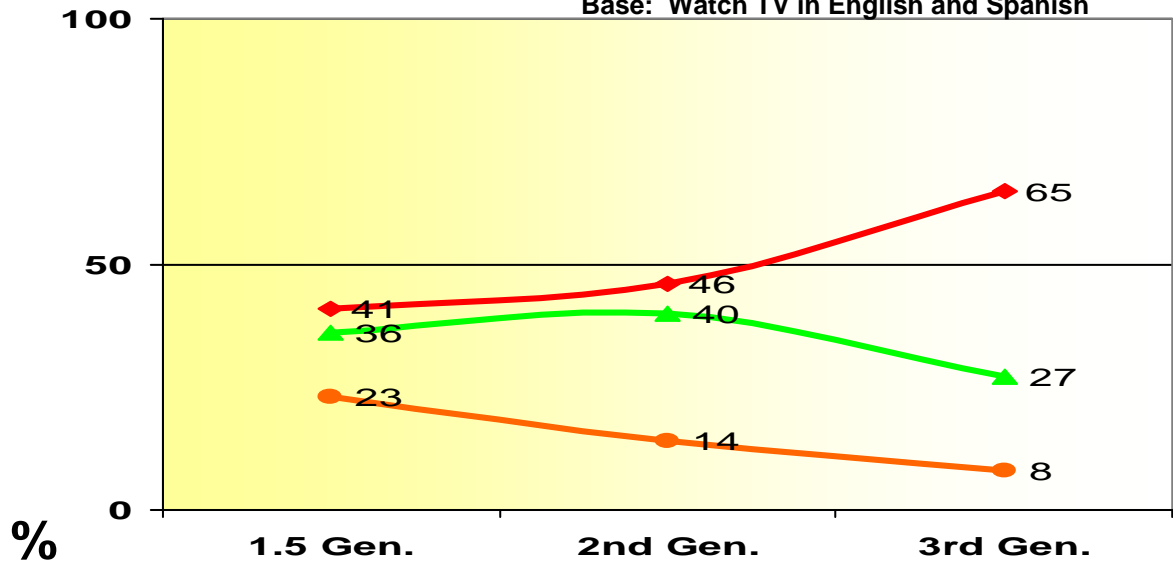


Q52: If a commercial were really good, would you prefer to see it in Spanish or in English?

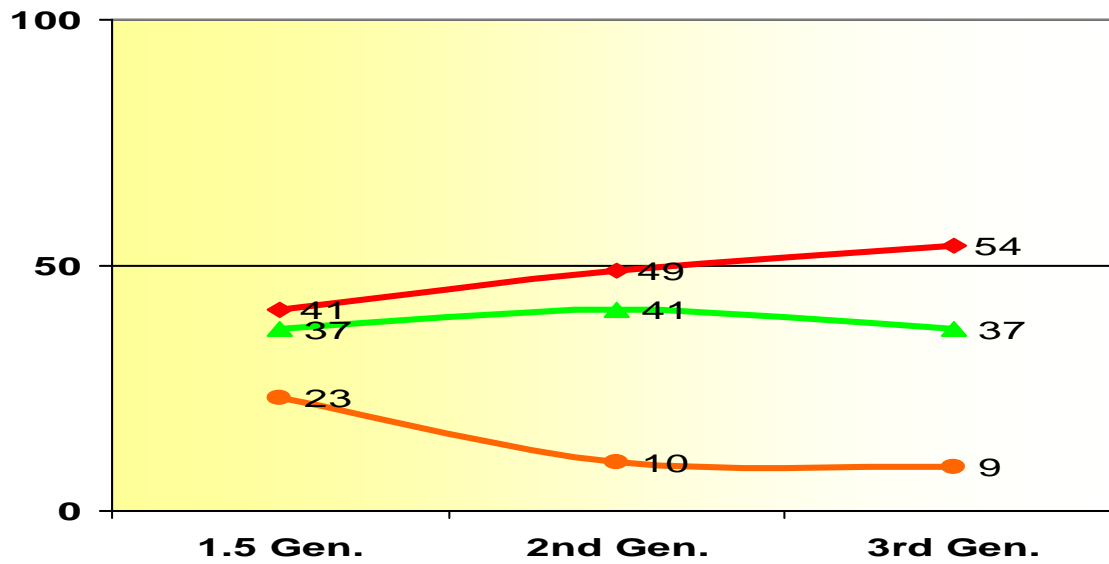
Those Watching Commercials In Both Languages either Prefer English or Have no Preference

Base: Watch TV in English and Spanish

% Agreement, Top 2 Box



- ◆ I relate more to commercials in English
- I relate more to commercials in Spanish
- ▲ No Preference



- ◆ I would rather see a commercial in English
- I would rather see a commercial in Spanish
- ▲ No Preference

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

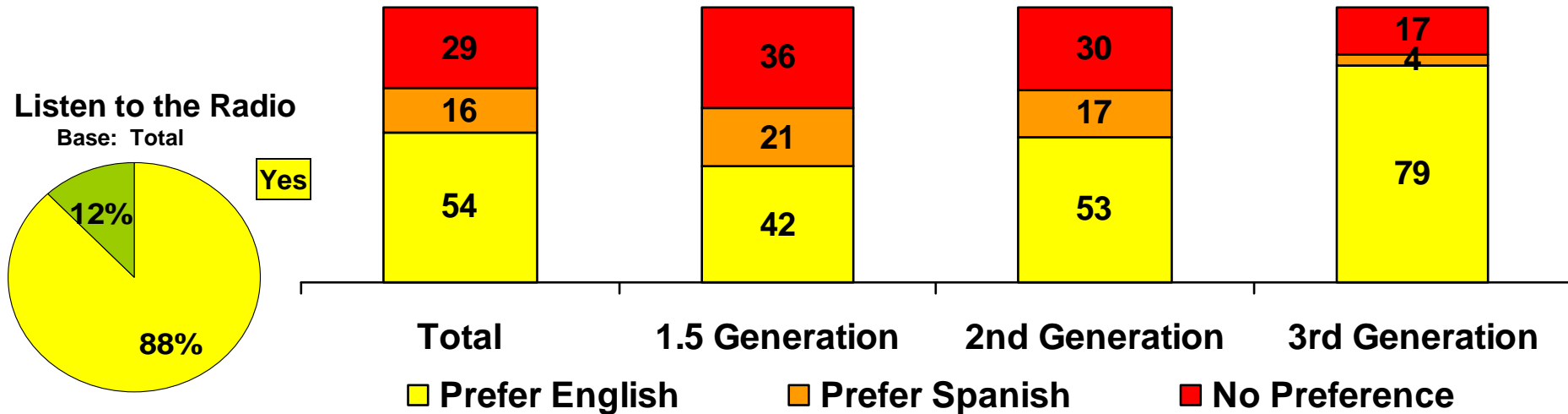


Other Media

Radio Listening is Higher in Spanish than Television, But Still Lower than English

Base: Listen to the Radio

% Preferring English or Spanish Radio



Q64: Do you listen to the radio?

Radio Hours per Week

English	11.8	12.0	11.9	11.5
Spanish	7.5	8.2	7.6	4.2
Total	19.3	20.2	19.5	15.7

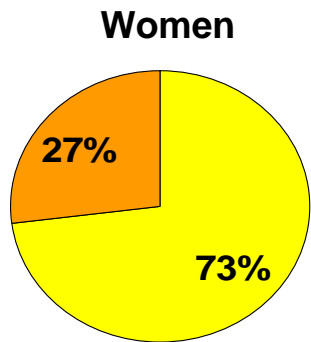
Q67: Overall, do you prefer to listen to radio in Spanish or English?

Q65/66: How many hours per week do you listen to English/Spanish language radio?

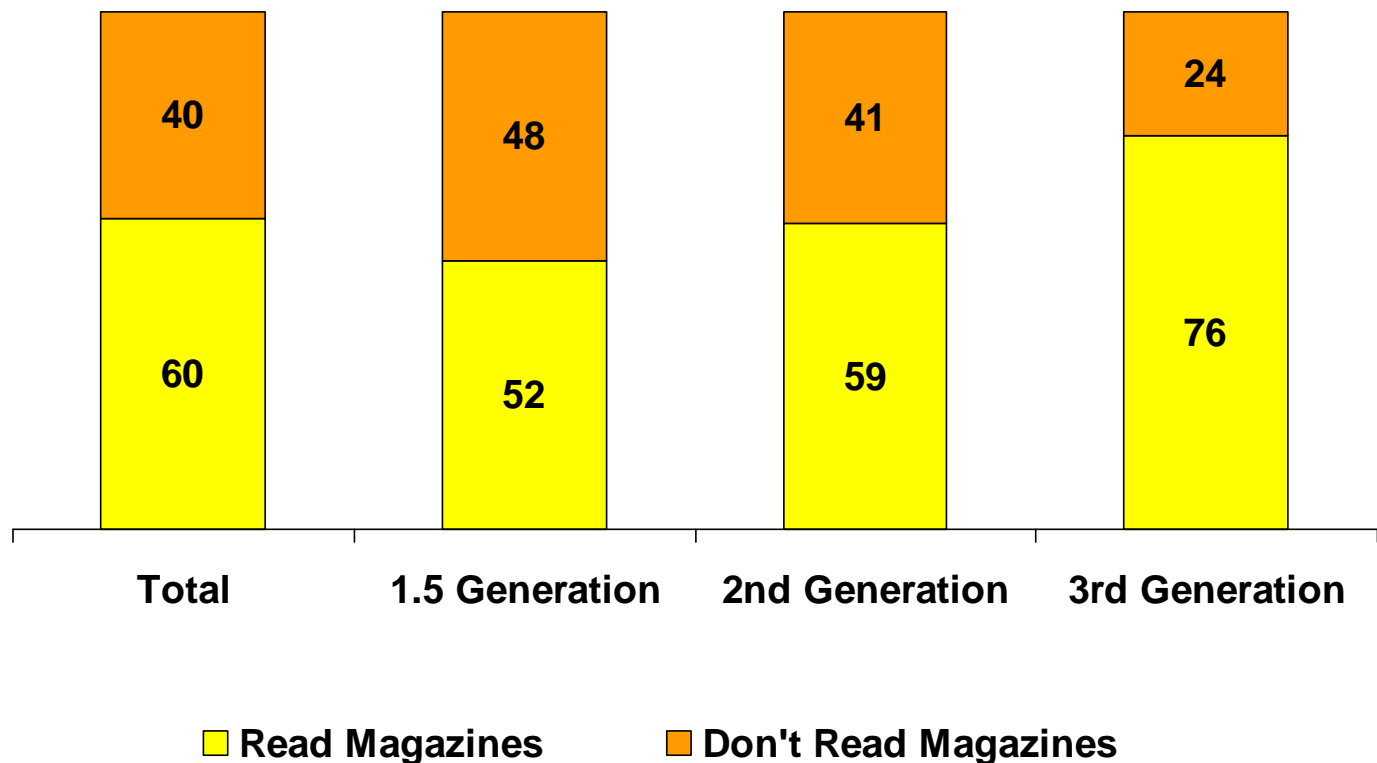
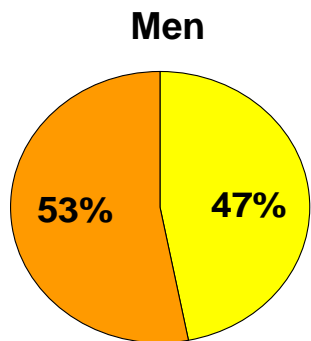
Magazine Readership Increases with Acculturation; Women Read More of Them

% Reading Magazines

Base: Total



Yes

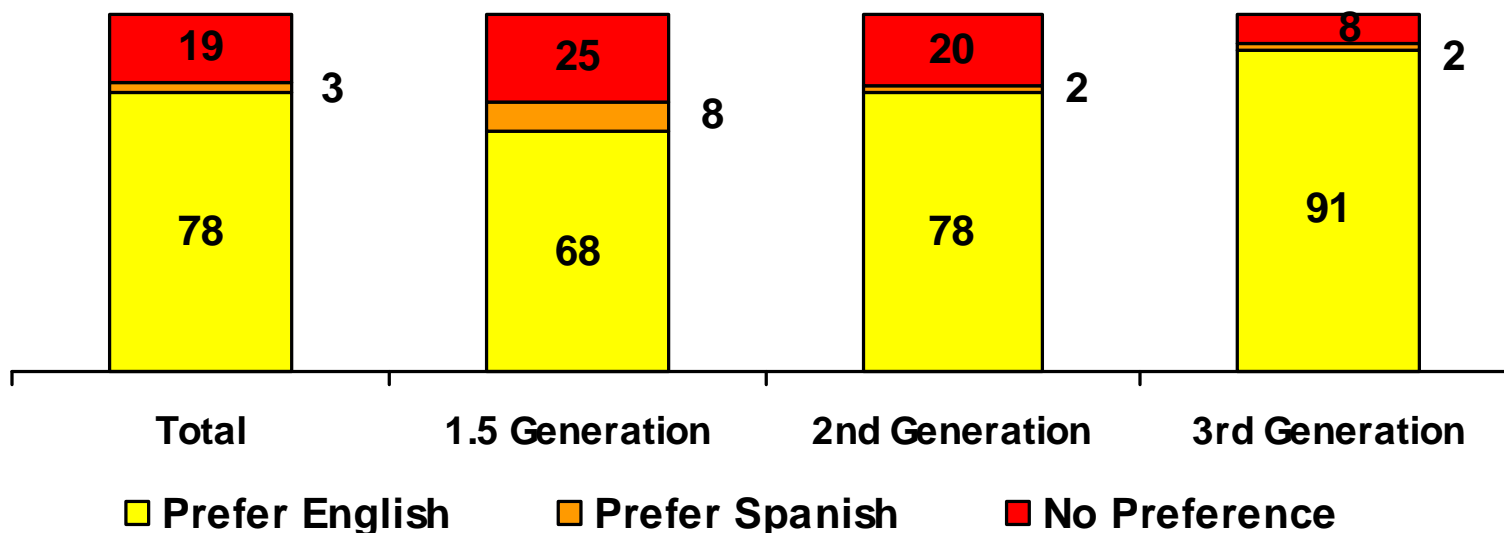


Q68: Do you read magazines?

Preference is for English Magazines; 1st Generation Magazine Readers Read More

Base: Read Magazines

% Preferring English or Spanish Magazines



Magazine Reading Hours per Week

English	3.8	4.8	3.5	3.4
Spanish	1.7	2.8	1.4	0.8
Total	5.5	7.6	4.9	4.2

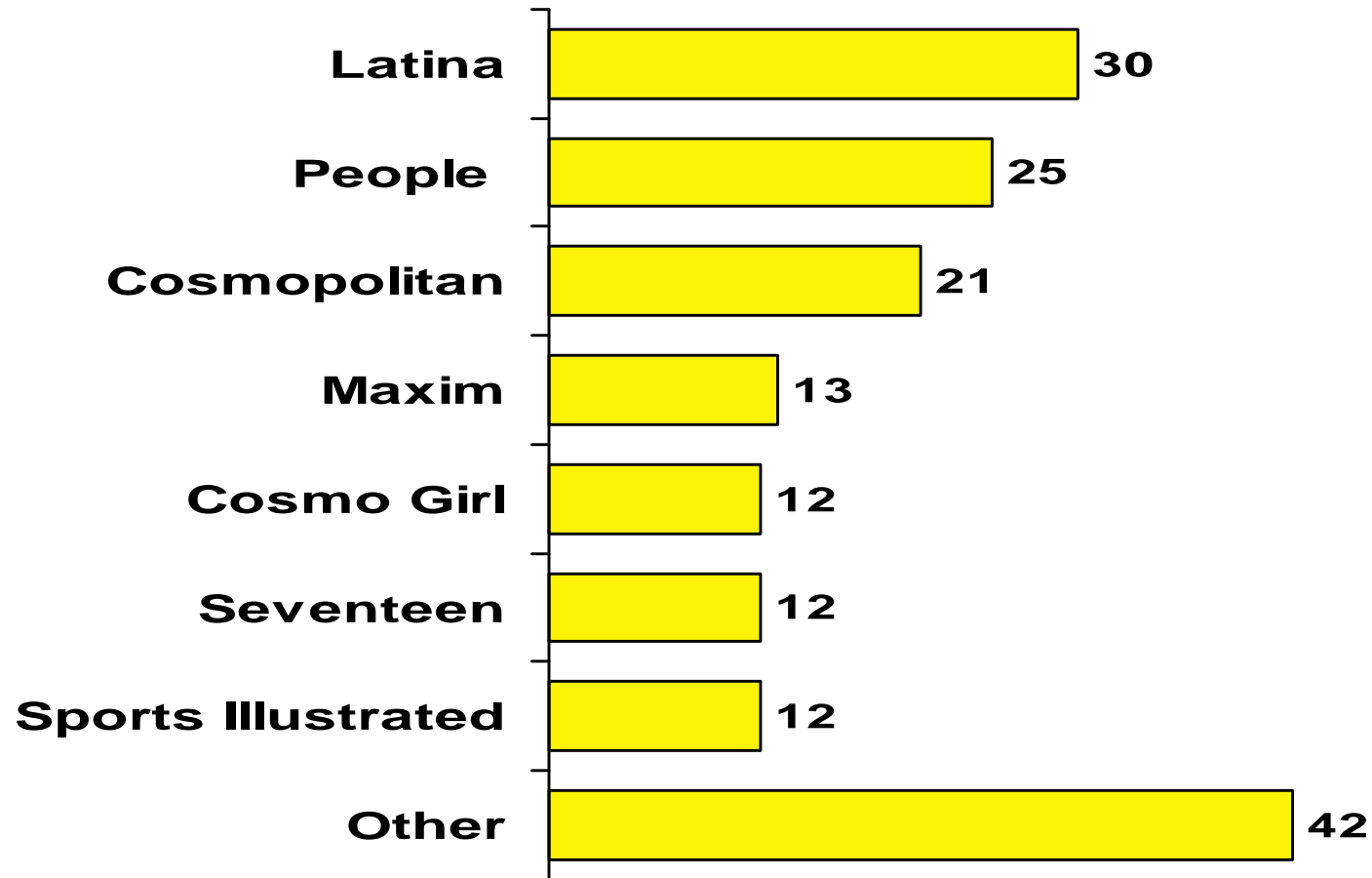
Q71: Overall, do you prefer to listen to radio in Spanish or English?

Q69/70: How many hours per week do you listen to English/Spanish language radio?

Top Magazines are all in English; Latina Tops the List

Base: Read Magazines

Unaided Mention %

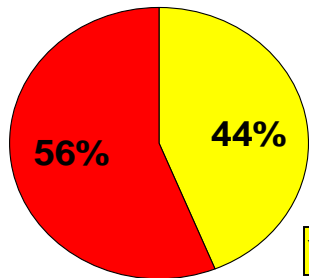


Q72: What magazines do you read on a regular basis?

Newspaper Reading and Internet Surfing are in English; 8 in 10 have Home Internet Access

Read Newspapers

Base: Total



Yes

English
Spanish
Total

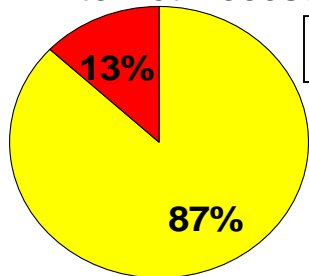
Newspapers Hours per Week

Base: Read Newspapers

	Total	1.5	2nd	3rd
English	3.6	3.5	3.6	3.9
Spanish	1.0	1.2	0.9	0.7
Total	4.6	4.7	4.5	4.6

Internet Access

Non-Online Sample = 80%



Base: Total

English
Spanish
Total

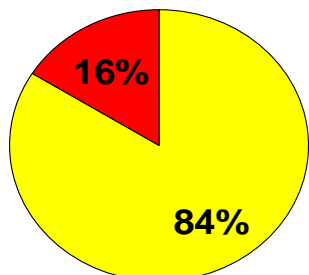
Internet Hours per Week

Base: Use Internet

	Total	1.5	2nd	3rd
English	13.1	11.5	13.8	13.3
Spanish	2.1	2.4	2.1	1.2
Total	15.2	13.9	15.9	14.5

Home Access

Base: Use Internet



Non-Online Sample = 79%

% with Home Internet Access

Base: Use Internet

79%		84%		93%
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Q74/77/78: Do you read newspapers/Use Internet/Have home access?

Q75/76/79/80: How many hours per week do you spend reading English/Spanish newspapers / on English/Spanish websites

Four in Ten Play Video Games at Home, Averaging 7.5 Hrs/Week and \$30 / Month

Play Video Games at Home Base: Total



Yes

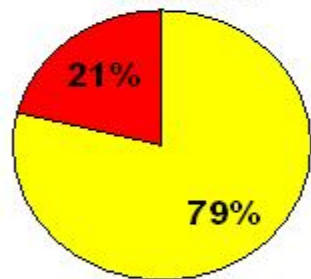
Play Games @ Home

Own PC

By Generation

	1.5	2nd	3rd
Play Games @ Home	39%	40%	52%
Own PC	70%	81%	88%

Own PC Base: Play games at home



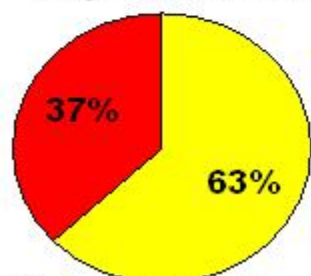
Play Games @ Home

Own PC

By Age

	14-18	19-24	25+
Play Games @ Home	57%	39%	28%
Own PC	71%	87%	87%
Average Hours / Week	8.5	7.5	4.9

Play Games on PC Base: Play games/own PC



Play Games @ Home

Average Hours / Week

Average \$ / Month

Male

Female

	Male	Female
Play Games @ Home	57%	28%
Average Hours / Week	8.2	5.8
Average \$ / Month	\$31	\$26

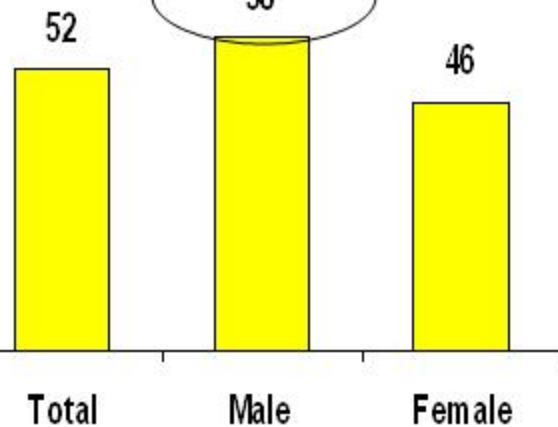
Q81: Do you play video games at home?

Q82: Do you own a PC?

Q83: Do you play video games on your computer?

Q84/85: How many hours per week/How much money per month do you spend?

Males and Teens are More Likely to Notice Video Game Ads and Buy as a Result.



Notice Products / Ads In Video Games

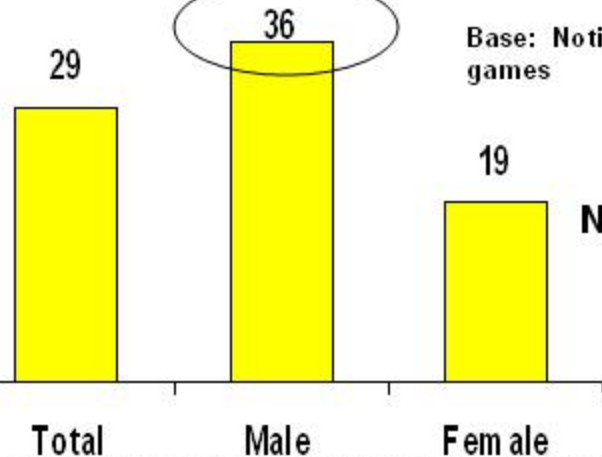
Base: Total

Notice Products / Ads
In Video Games
(Top 2 Box)

More Likely to Buy
(Top 2 Box)

	By Generation		
	1.5	2nd	3rd
Notice Products / Ads In Video Games (Top 2 Box)	44%	54%	60%
More Likely to Buy (Top 2 Box)	40%	26%	23%

More Likely to Buy



Q86: Would you say you agree/disagree that you notice products/ads in video games?

Base: Notice products/ads in video games

Notice Products / Ads
In Video Games
(Top 2 Box)

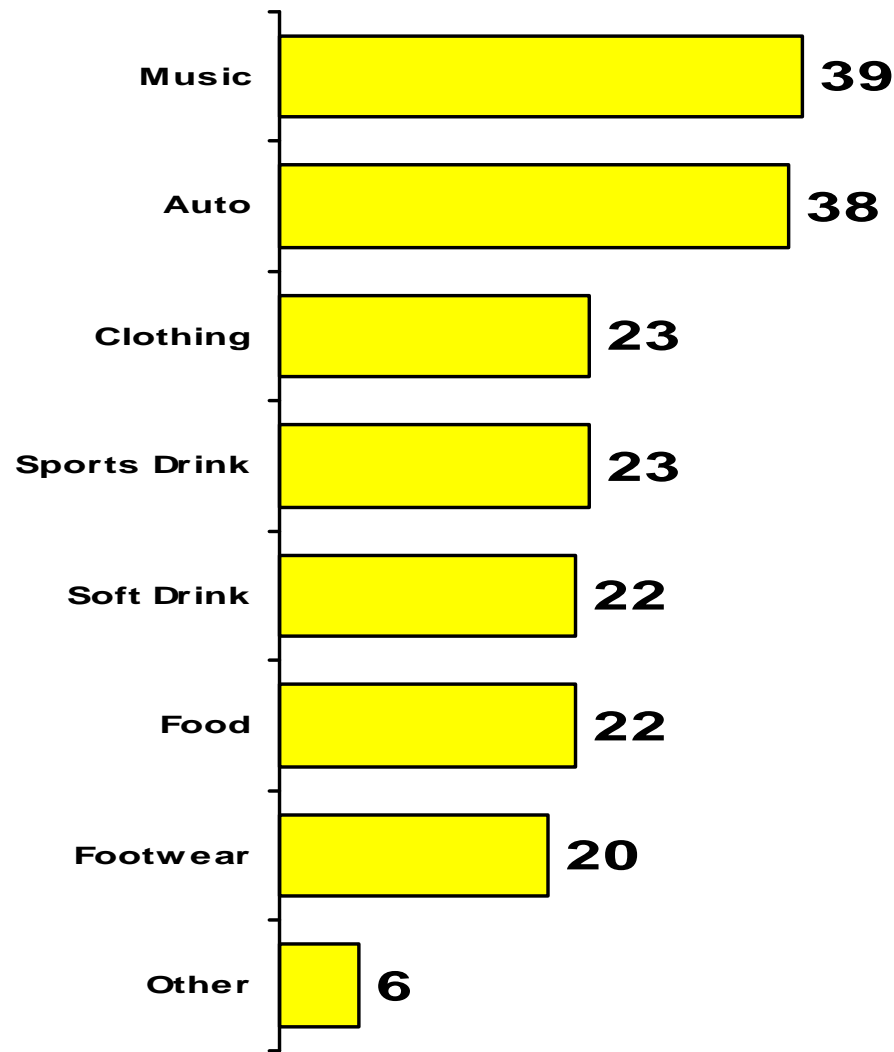
More Likely to Buy
(Top 2 Box)

	By Age		
	14-18	19-24	25+
Notice Products / Ads In Video Games (Top 2 Box)	57%	53%	46%
More Likely to Buy (Top 2 Box)	37%	30%	16%

Q88: How does your likelihood of purchasing these products change when you see products/ads in video games?

Music and Auto Ads Top the List of Video Game Ads

Base: Notice products/ads in video games

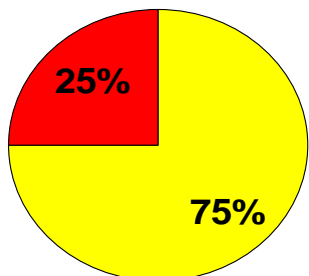


Q87: What types of products were being advertised?

Three-Quarters Own Cell Phones; Of Those, Three-Quarters Send Text Messages

Own Cell Phone

Base: Total



Own Cell Phone

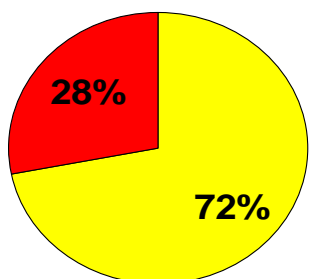
Send Text Messages

By Generation

	1.5	2nd	3rd
Own Cell Phone	73%	75%	78%
Send Text Messages	65%	74%	74%

Send Text Messages

Base: Own cell phone



Own Cell Phone

Send Text Messages

By Age

	14-18	19-24	25+
Own Cell Phone	61%	80%	86%
Send Text Messages	39%	20%	14%

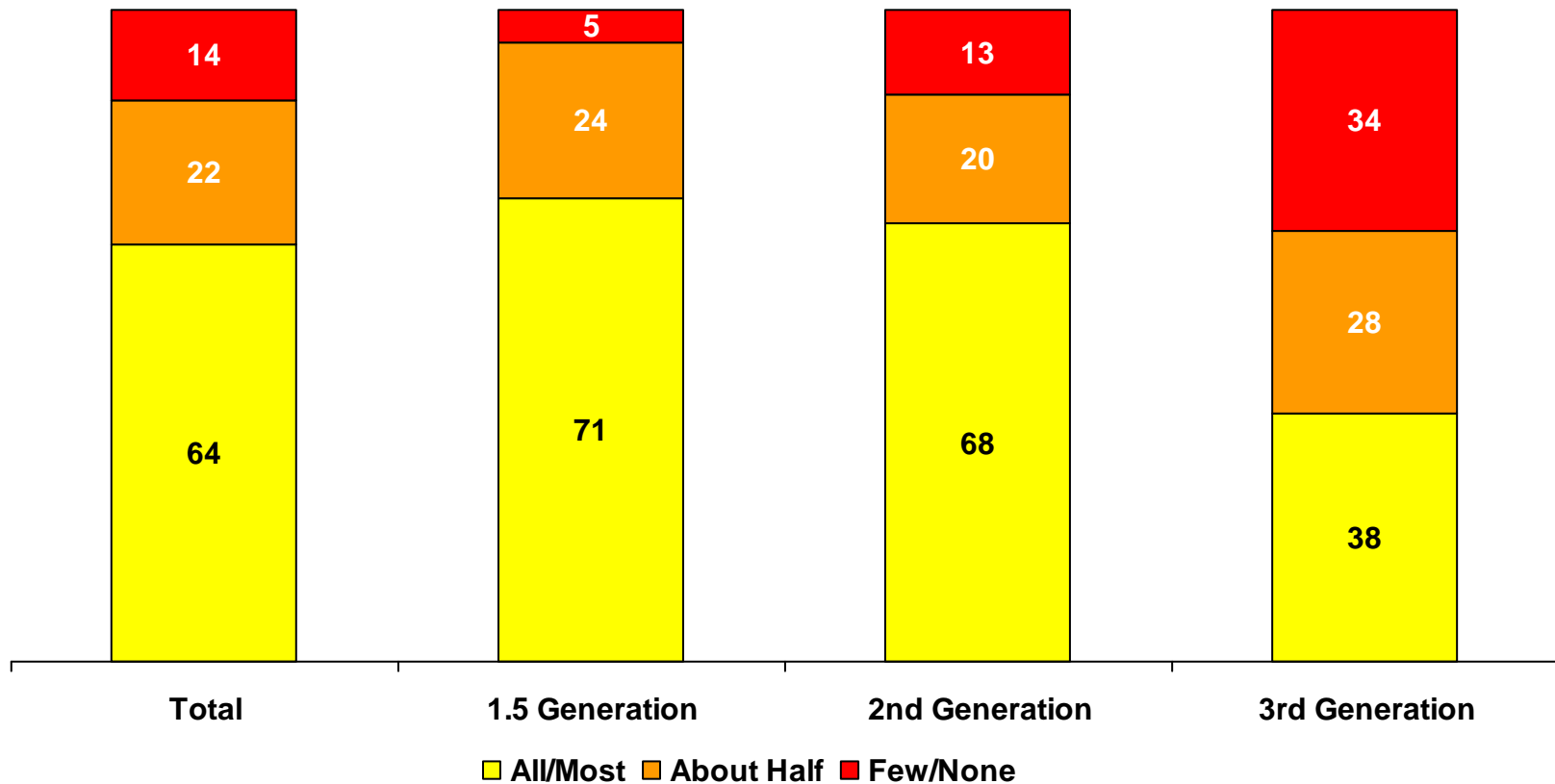


Their World

1st and 2nd Generation Respondents Have Mostly Hispanic Friends

% Agreeing

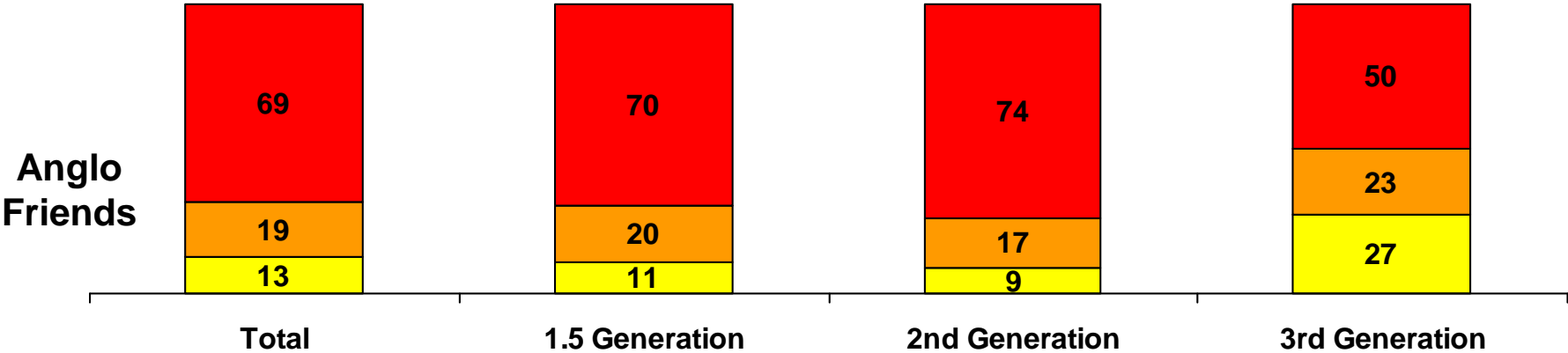
Base: Total



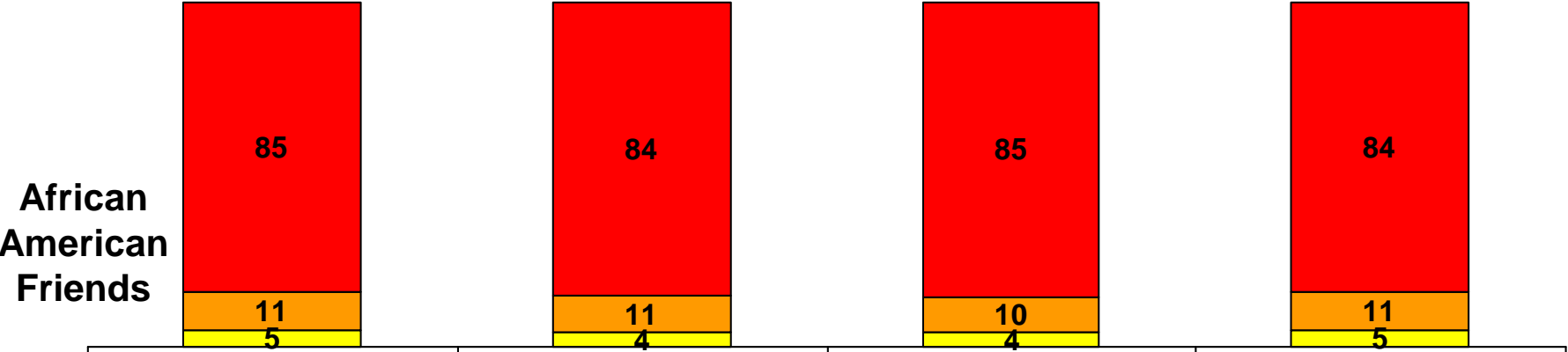
When Friends are non-Hispanic, they tend to be Anglo

Makeup of Friends

Base: Total



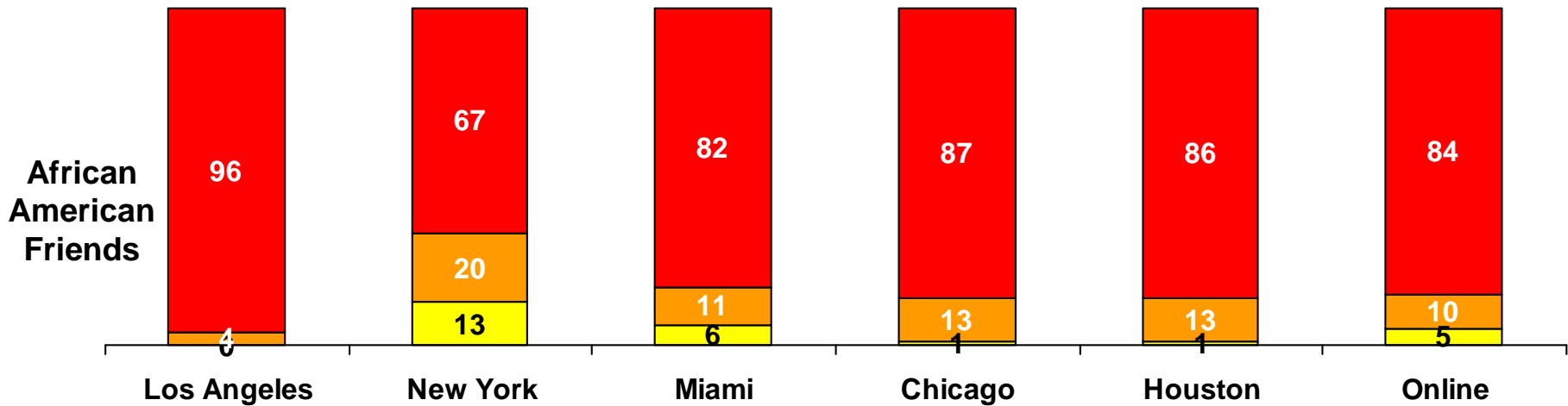
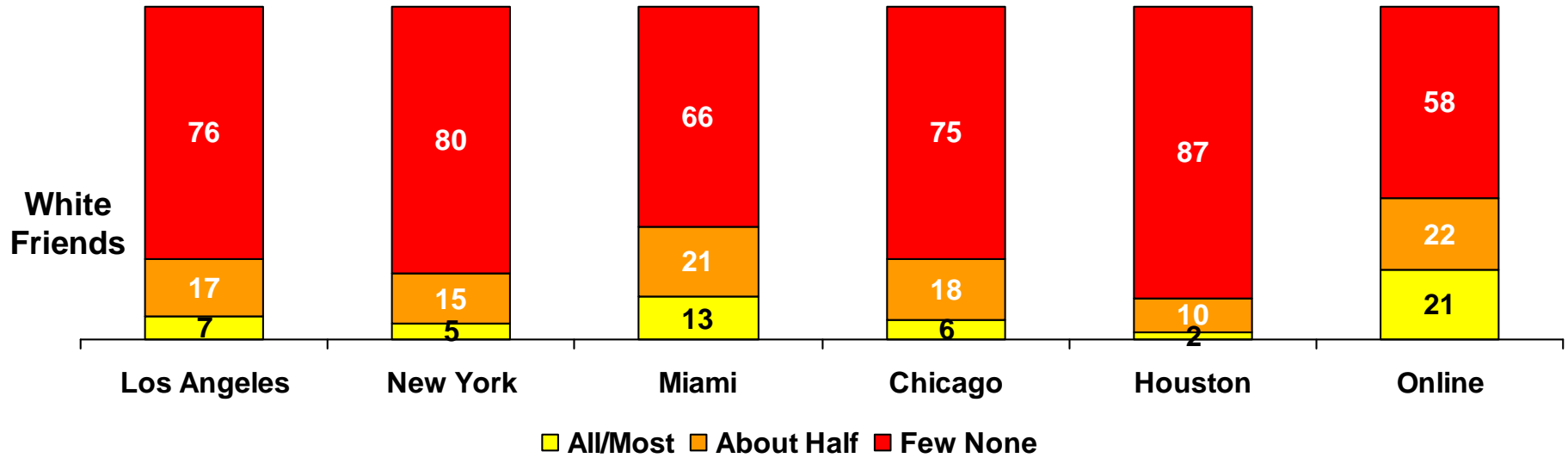
■ All/Most
 ■ About Half
 ■ Few None



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

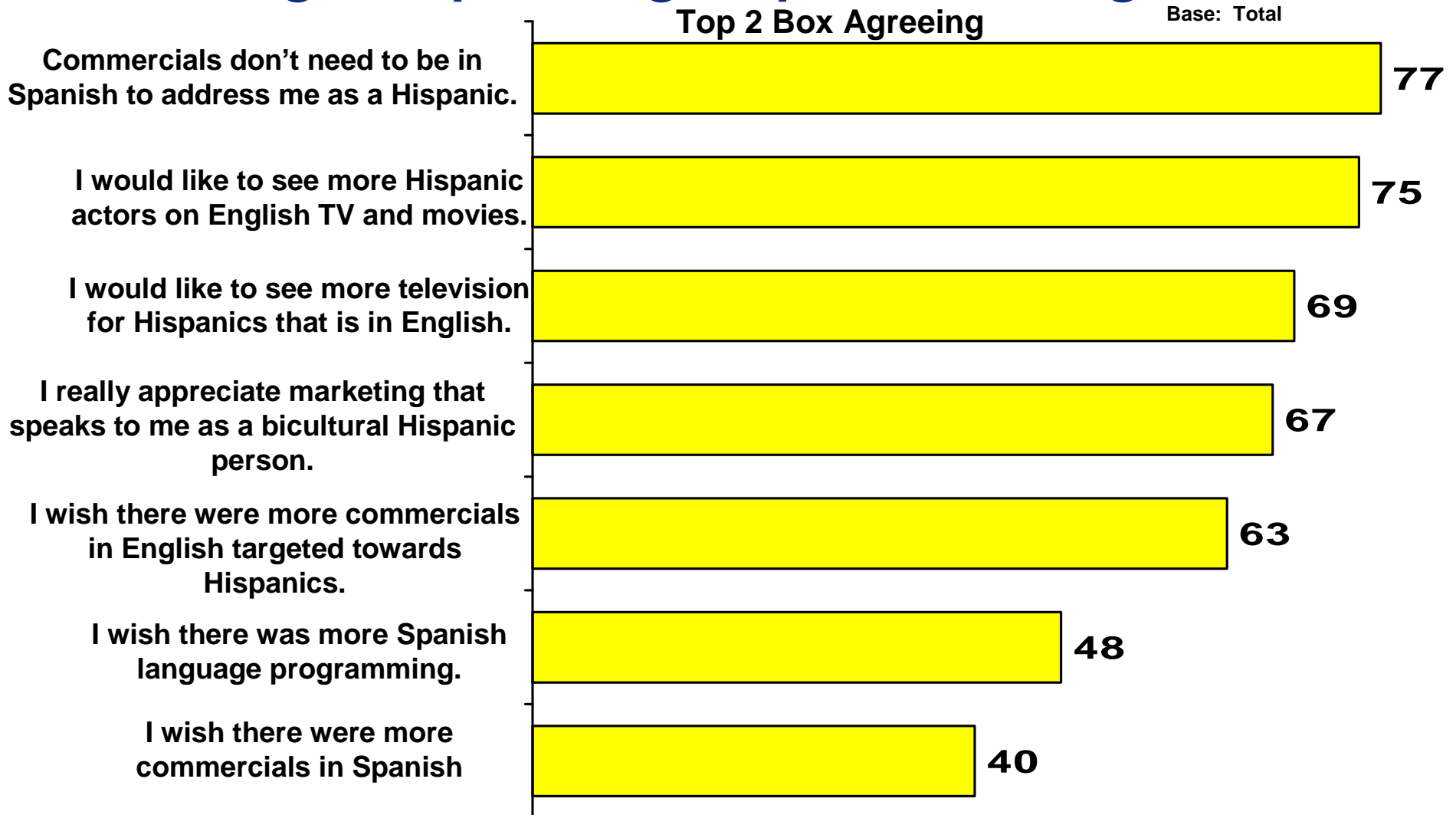
There Were Difference by Market

Makeup of Friends Base: Total



Q21a: Among your friends, how many are Hispanic?

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



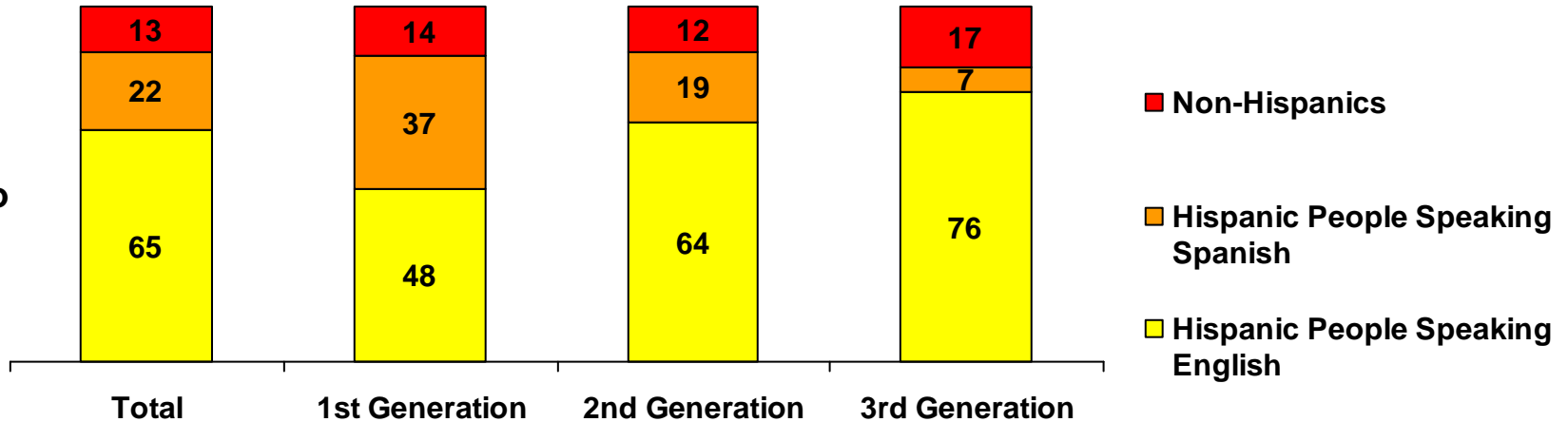
Q91: I'm going to read you some statements. Would you say you agree or disagree with this statement?

Most Identify More with English Speaking Hispanic Actors

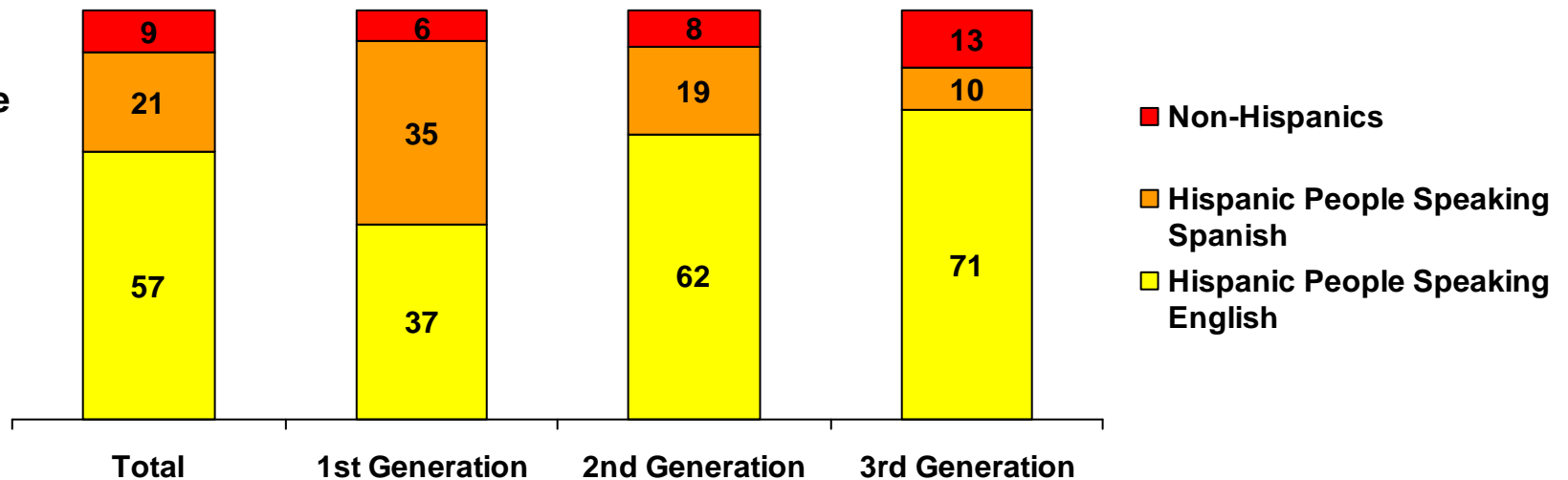
% Agreeing

Base: Total

I identify more with actors who are...



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

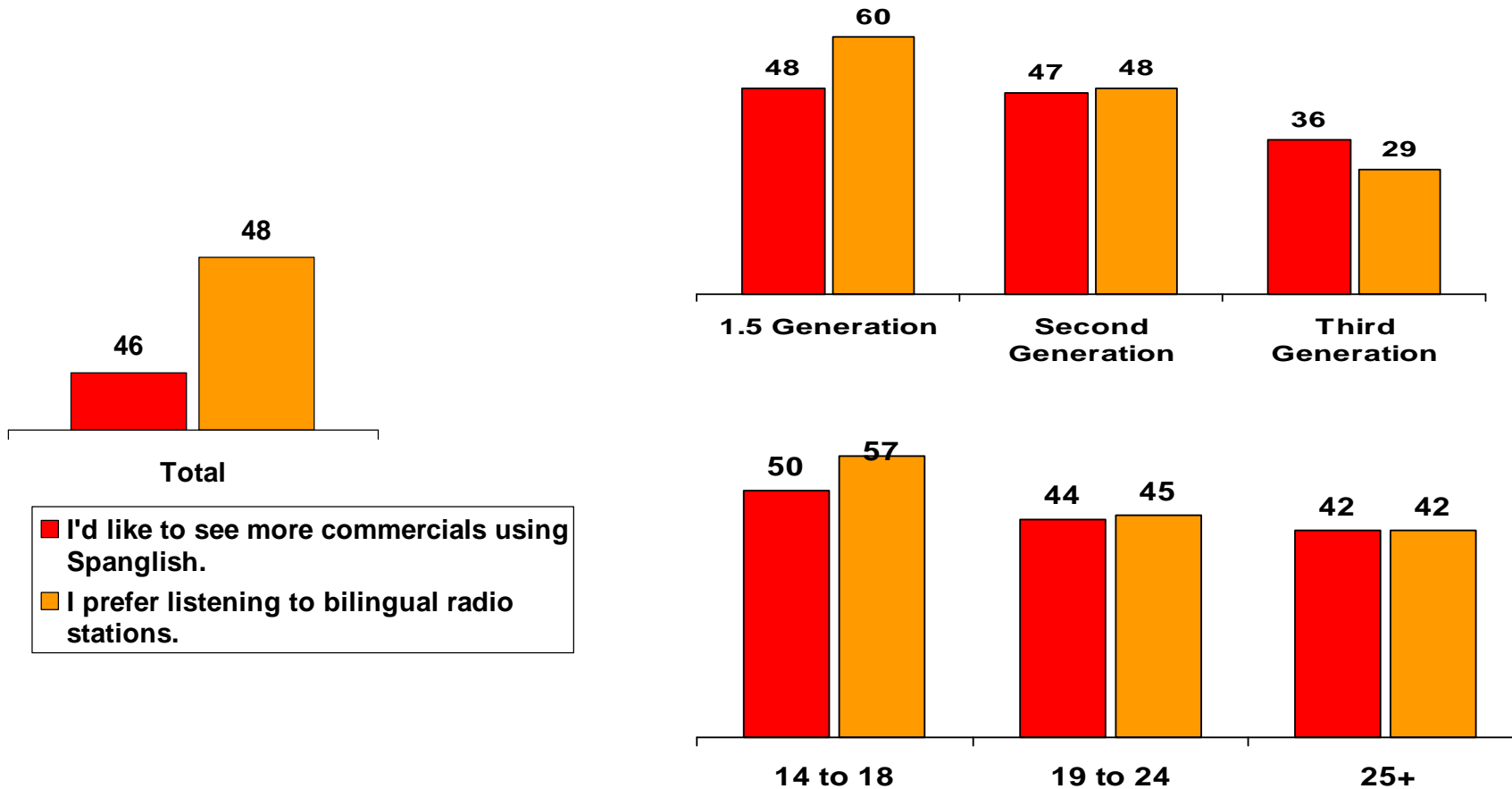


Q92: Who do you identify more with?

About Half Want Spanglish, More 1.5 Generation and Younger Respondents

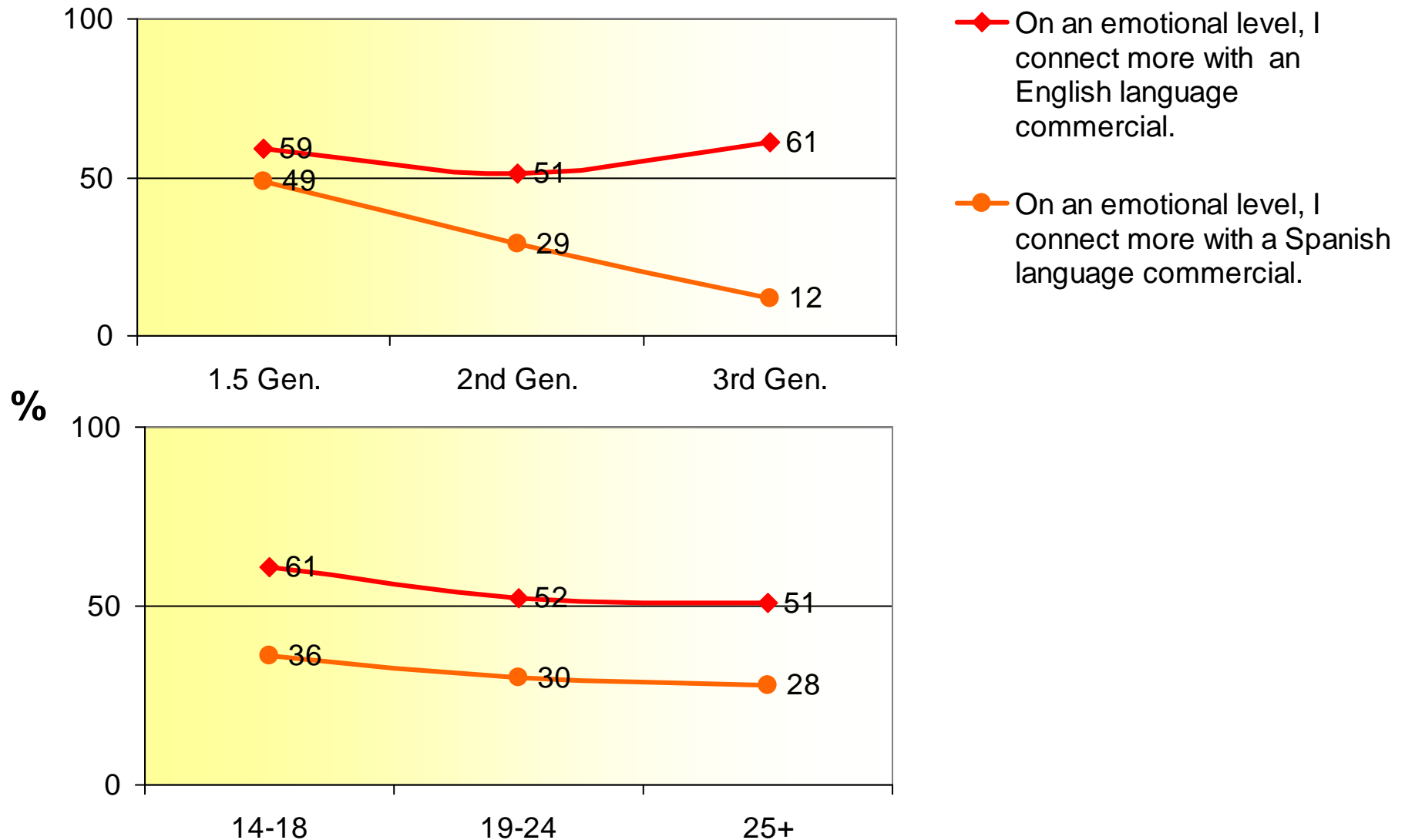
Base: Total

% Agreement, Top Two Box



English May Be the New “Language of the Heart”

Base: Total



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

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.