U.S. Latinos Online: a driving force

IAB Hispanic Research Working Group
May 5th, 2010

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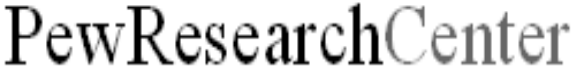
Many sources with varied methodologies, metrics and data…How to make sense of it all?



IAB Hispanic Research Working Group

Formed
- November 2009.

Goal
- Consolidate data from different resources and convey a clear message about the size, growth and dynamics of Hispanics online as well as how to most effectively talk to them in-language and in-culture.

Special focus
- The Hispanic dominant/Spanish preferred and Bicultural/Bilingual segments.

Members
- 12 media research individuals from ImpreMedia to Terra Networks, Telemundo, Univision, StarMedia, AOL Latino, Batanga and Scarborough.

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2010, a very important Census year

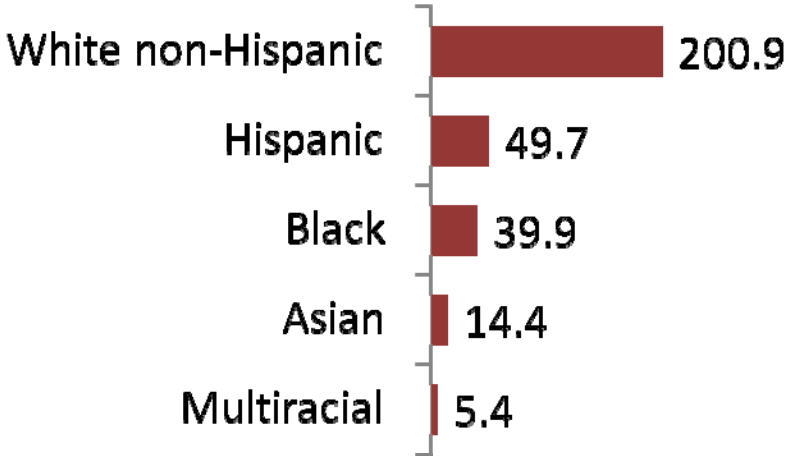
- Emphasis on COMPLETE and ACCURATE count of Hispanics, citizens and non-citizens alike.
- First time short form 10Q's in 10 minutes → more participation expected!

2010 Census will inform us:

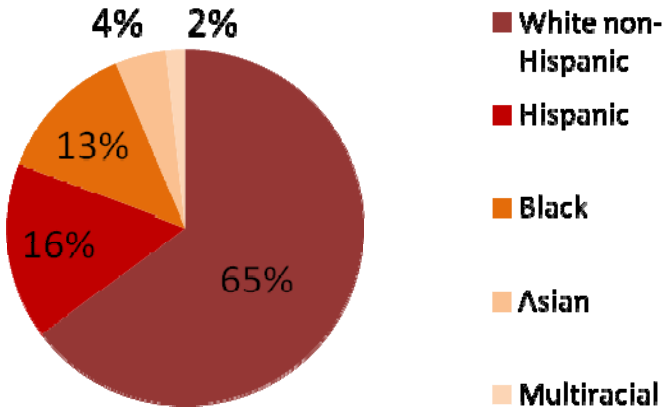
- **We are an increasingly multi-cultural nation**,
- A multi-generational society, and
- A multi-segmented household economy – traditional married couple with kids is the minority

- CA, TX, NM & HI are already "majority-minority" states; so will the nation by 2042.
- Hispanics are the largest minority and the fastest growing.
- White non-Hispanics will account for fewer than half of births by 2015.

2010 Population in Millions



2010 % of Total Population



Source: Text (New U.S. Census to Reveal Major Shift: No More Joe Consumer, AdAge article, Oct 2009.). Charts (US Census Bureau 2008 National Projections).
Note on terminology: terms "Latino" and "Hispanic" are used interchangeably as are terms "foreign born" and "immigrant". Language/acculturation descriptors vary by source: comScore (Spanish primary, bilingual and English primary); Simmons and Scarborough (Spanish preferred, bilingual and English preferred); ImpreMedia Engagement study (Spanish dominant, bilingual and English dominant) and AOL Cyberstudy (Hispanic dominant, bicultural and U.S. dominant)

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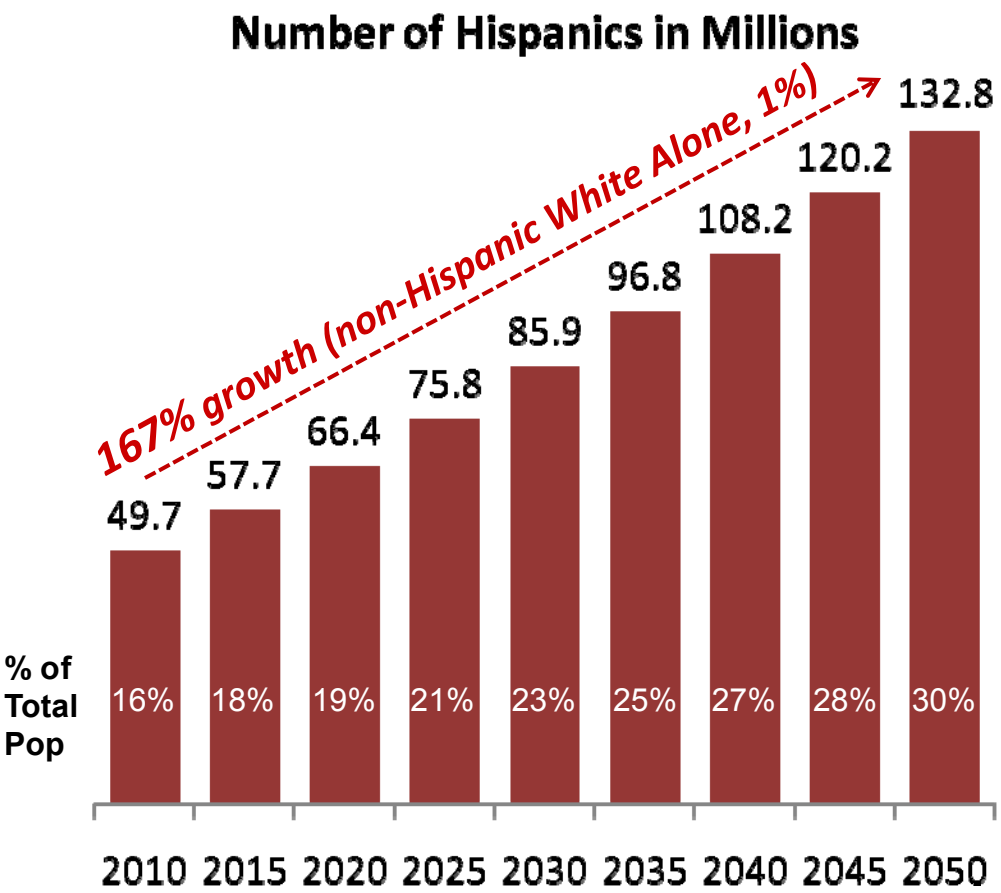
Hispanics, up 167% 2010-2050 across all ages. Non-Hispanic White Alone, up 1% (young & middle age groups, down)



AGE	HISPANIC % CHANGE 2010-2050	NON-HISPANIC WHITE ALONE % CHANGE 2010-2050
TOTAL	**167%**	**1%**
Under 5	119%	**-8%**
5 to 9	123%	**-7%**
10 to 14	142%	**-5%**
15 to 19	144%	**-12%**
20 to 24	161%	**-14%**
25 to 29	153%	**-10%**
30 to 34	129%	2%
35 to 39	125%	2%
40 to 44	136%	**-9%**
45 to 49	148%	**-22%**
50 to 54	170%	**-25%**
55 to 59	221%	**-13%**
60 to 64	262%	**-1%**
65 to 69	368%	24%
70 to 74	483%	40%
75 to 79	567%	53%
80 to 84	612%	72%
85 and over	841%	162%

Source: Projections of the Hispanic Population (Any Race) by Age and Sex for the United States: 2010 to 2050, Population Division, U.S. Census Bureau, Aug 08.

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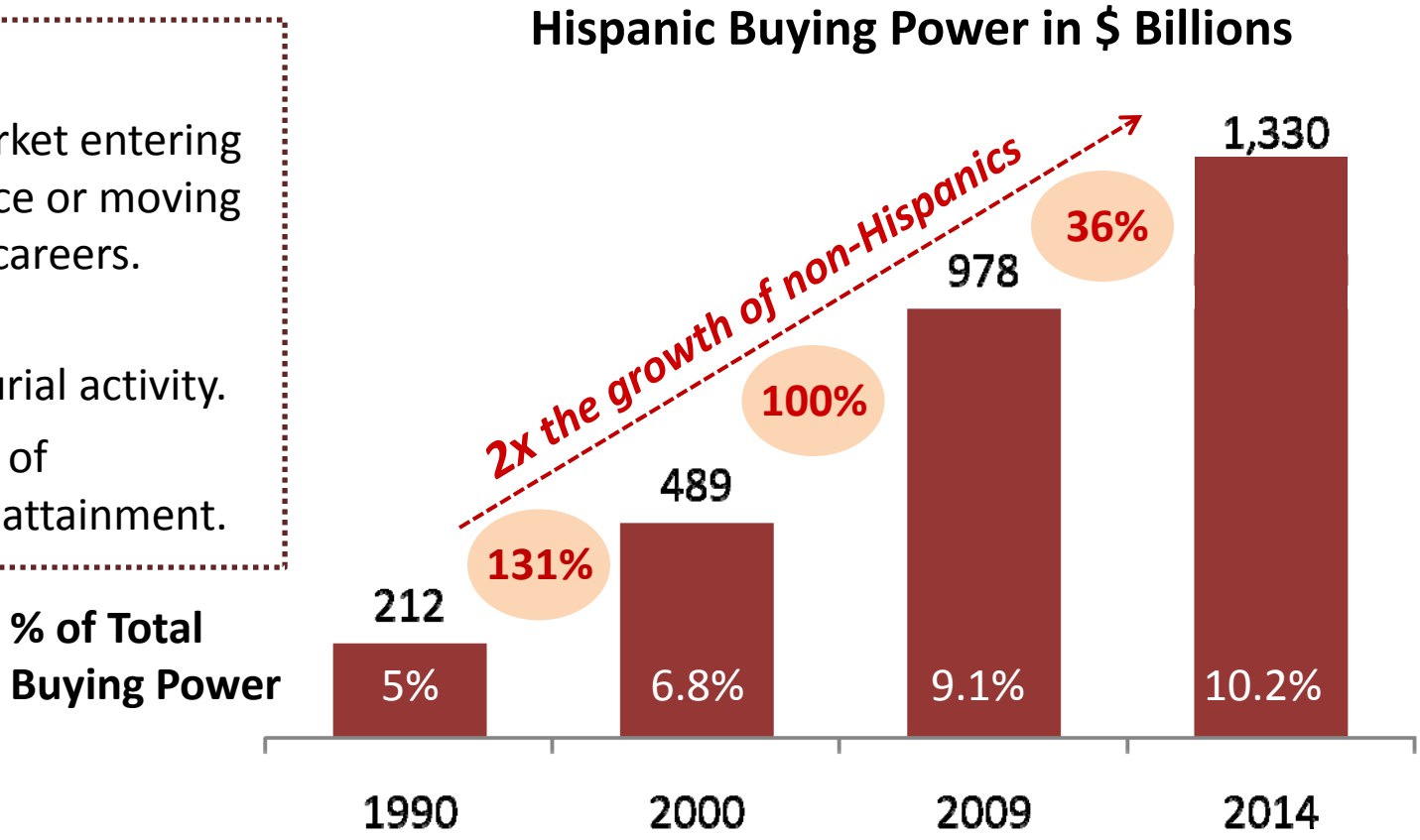
U.S. Hispanic buying power is growing dynamically

Drivers:

- A young market entering the workforce or moving up on their careers.
- A jump in entrepreneurial activity.
- Rising levels of educational attainment.



Source: The Multicultural Economy 2009, Selig Center for Economic Growth, Terry College of Business, The University of Georgia, Third Quarter 2009.

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U.S. Latinos online: yesterday, today and tomorrow

Yesterday

- 9% growth 2009-2010, 3x that of non-Hispanic White Alone

Today

- 30M Hispanics are online (2010)
  - 59.5% of Hispanic population
  - 13% of total online users

Tomorrow

- 39M Hispanics will be online in 2014
- 70% of Hispanic population
- 16% of total online users
- 32% growth, 4x that of non-Hispanic White Alone

Source: eMarketer, March 2010. Leading sources used: comScore, Nielsen, Pew Research Center, NTIA and Census.

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Meet the Hispanic adult Internet user

50% Male/50% Female

Hhld size of 4 (36% 5+ persons)

Household income of $77K

51% married

36 years old

59% Mexican

64% have children and 20% 3 or more

48% were born outside the U.S.

58% own a home

33% U.S. residents for 10+ years

69% are employed (23% live in hhlds with 3+ employed adults)

41% have at least 1 year of college (19% graduated College+)

80% speak Spanish at home

Source: Simmons NCS/NHCS Fall 2009 Full Year, Population A18+ (Nov08-Dec09); "Online" defined as websites/search engines visited past 30 days.

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Compared to non-Hispanics, Hispanic adult Internet users…

…are younger:

- On average, 8 years younger
- Twice as likely to be 18-24
- 50% more likely to be 25-35.

…live in larger hhlds:

- On average, 1 person more per hhld (4 vs. 2.9)
- 3x as likely to live in 5+ hhlds.

…are twice as likely to live in hhlds with 3 or more children, and

…are 77% more likely to live in hhlds with 3 or more employed adults.

Larger hhlds with more kids and employed adults

Source: Simmons NCS/NHCS Fall 2009 Full Year, Population A18+ (Nov08-Dec09); "Online" defined as websites/search engines visited past 30 days.

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Hispanics outpace the average Internet user in BPI (buying power index) across a variety of online activities

Top 10 online categories among Hispanics ranked by BPI, Jan '10

CATEGORY	% REACH	BUYING POWER INDEX (BPI)
Shipping	15%	317
Airlines	14%	292
Consumer goods	13%	256
Online travel agents	21%	249
Hotels/Resorts	17%	248
Mall	8.5%	246
Online trading	6%	242
Personal finance	29%	217
Sports/Outdoor	16%	215
Fragrances/Cosmetics	7%	213

15% of Hispanics online visit shipping sites and spend 217% more in e-commerce than the average Internet user

- Almost two-thirds (61%) of Hispanic Internet users made a purchase online last year and spent on avg. $746.
- This is not far behind the total Internet population at 72% and annual avg. spending of $851.

Source: Table (Top 10 BPI Categories with % Reach >=5%, comScore Jan '10); BPI is a measure of a site's visitors' online buying power, indexed to the Total Internet population. A BPI value >=100 means that a site's visitors purchase, on avg. ,is larger (in $ terms) than the avg. Internet user during the reported time period. Text box source: Scarborough Research, Scarborough Hispanic Multi-Market Plus Study, Release 2 2009. Data collection: Aug 08-Sept 09 gathered from over 36,000 Hispanic adults, age 18+, in Scarborough's 81 Top-Tier Local Markets. The Hispanic Multi-Market Plus Study represents 91% of the U.S. Hispanic adult population.

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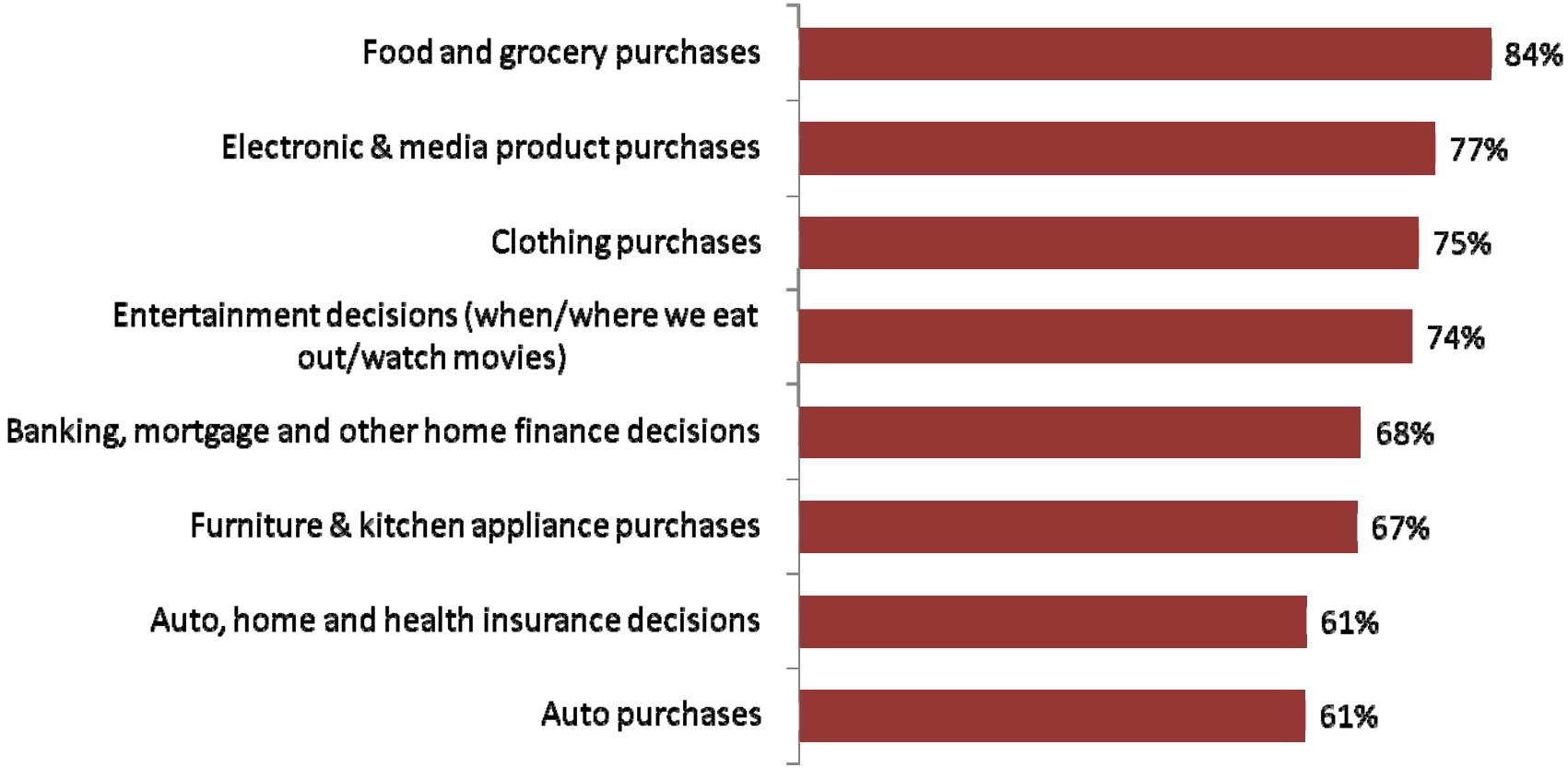
And Online Hispanics wield strong influence over many of their households' purchases

Decisions within your hhld you have a strong influence, % of Hispanics online



Source: ImpreMedia Print and Online Consumer Engagement Study, Nov 08.

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Hispanics also outpace non-Hispanics in the use and adoption of the Internet for news, Entertainment and socializing

Online activities where Hispanics over-indexed 110+

ONLINE ACTIVITY	HISP %	INDEX VS. NON-HISP
Download Music Files	**32%**	**145**
Employment Search	27%	142
Movie Information/ Reviews/ Showtimes	27%	123
Instant Messaging (IM)	25%	139
Watch Videos, TV Programs/Movies Online	**25%**	**139**
Bulletin/Message Boards	**23%**	**177**
Sports	23%	128
Digital Imaging/Photo Albums Online	**22%**	**122**
Auto Shopping Or Comparing	16%	114
Download Or Listen To Podcasts	**14%**	**140**
Video Game News/ Reviews/ Cheat Codes	12%	165
Chat Forums	**12%**	**127**
Listen/Traditional Radio Stations Online	**11%**	**157**
Send Electronic Greeting Cards	**9%**	**112**
Online Gambling	7%	290
Listen To Satellite Radio Online	**7%**	**198**
Personal Ads/Dating Services	5%	140

Entertainment
Socializing
Other

Top 5 Hispanic online activities

Activities	Hispanic %
1. Emails	**72%**
2. News/weather	**50%**
3. Banking	46%
4. Music downloads	**32%**
5. Travel info	29%

Source: Simmons NCS/NHCS Fall 2009 Full Year, Population A18+ (Nov08-Dec09); Base: Online past 30 days defined as websites/search engines visited past 30 days. Activities bolded are those that show interactivity with the sites and therefore require broadband.

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And the Internet has become part of their daily lives

-61% of Hispanics said *"When I need information the first place I look is the Internet"*

-60% said *"I get more and more news from the Internet ".* They indexed 109 vs. non-Hispanics.

-29% said *"The Internet has become a primary source of Entertainment for me personally"*, a 121 index vs. non-Hispanics.

-25% said the same about *"their family"* and indexed 139 vs. non-Hispanics.

-29% said *"The Internet has become a new way for me to socialize or meet people".* They indexed 132 index vs. non-Hispanics.

-48% have a social network profile, 55% more likely than White and 12% more than African Americans.*

Source: Simmons NCS/NHCS Fall 2009 Full Year, Population A18+ (Nov08-Dec09); Base: Online past 30 days defined as websites/search engines visited past 30 days. *Mintel, "Hispanics Online" as cited in press release, March 25th, 2009.

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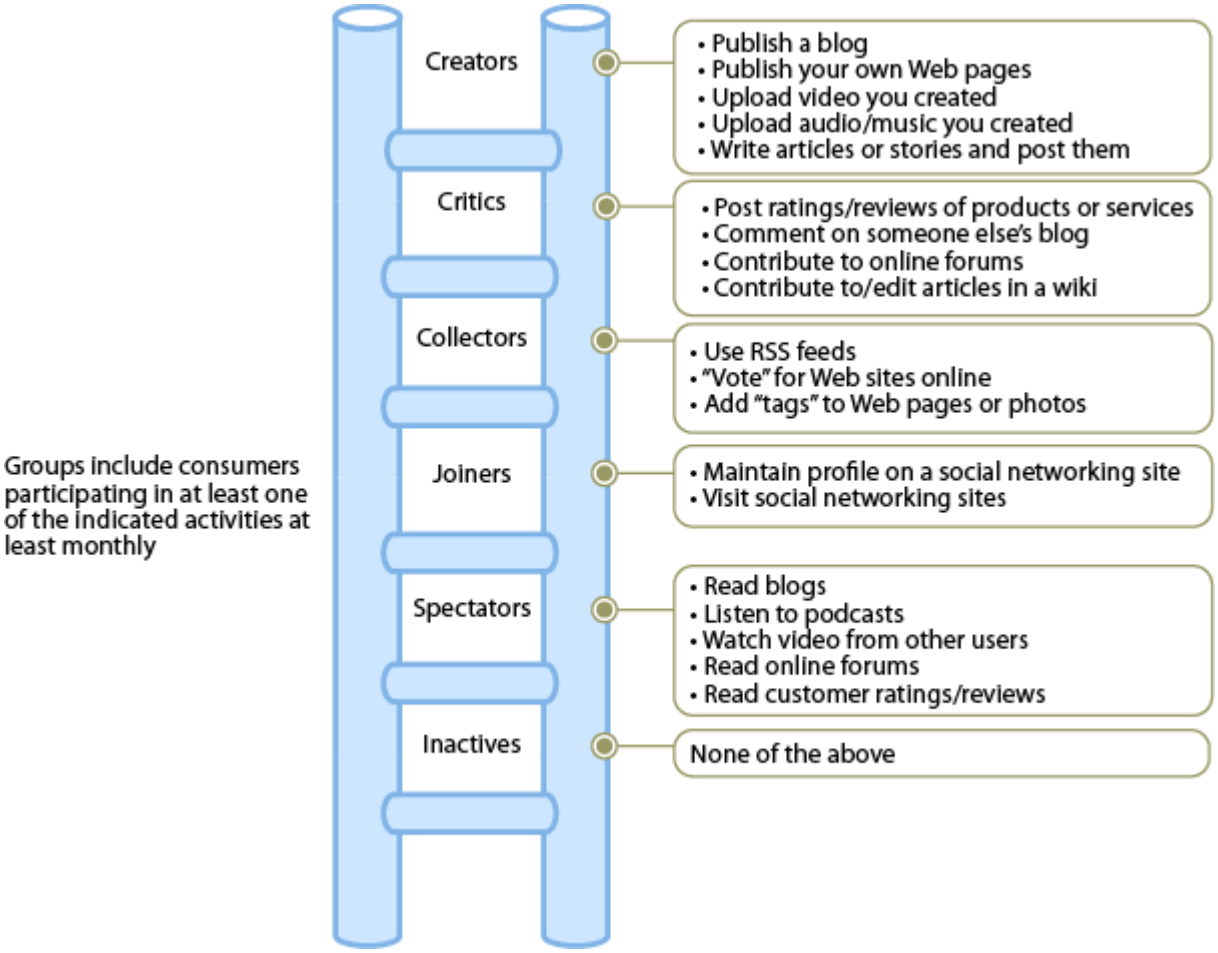
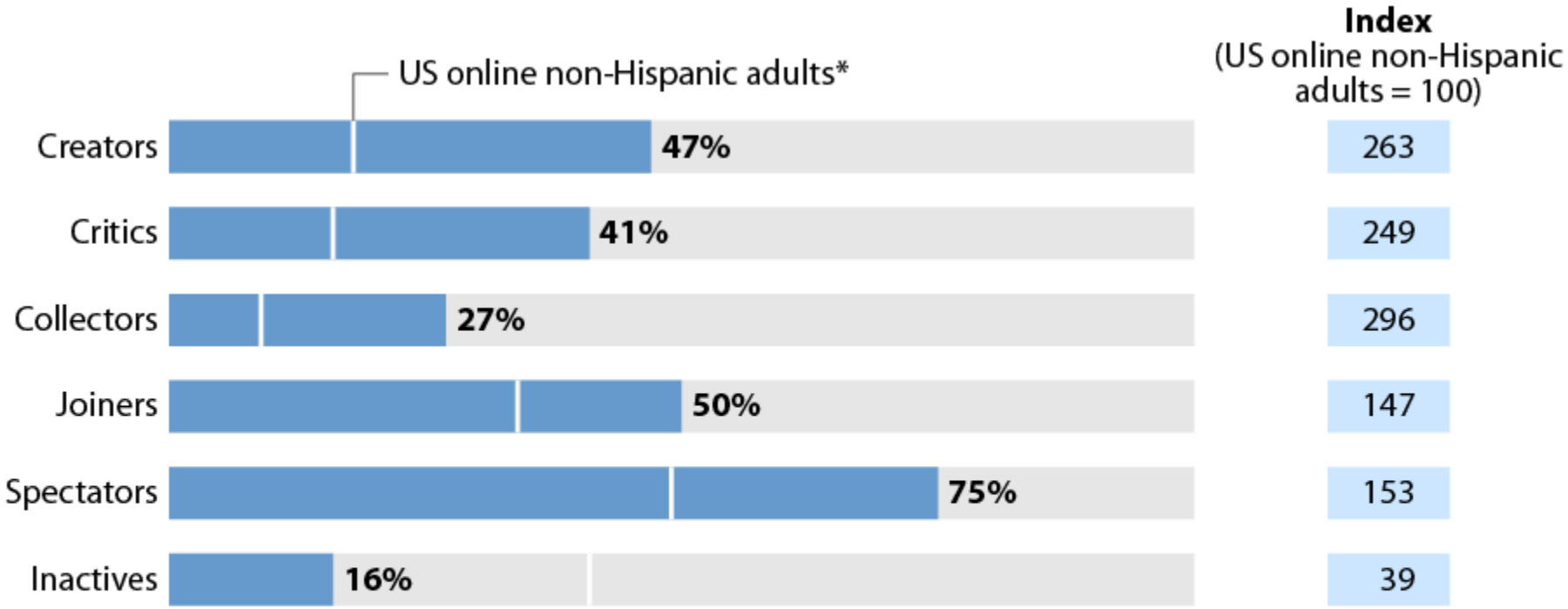
March 2010 **"Social Media Is Mainstream For Online Hispanics"**

The Social Technographics® Ladder



March 2010 **"Social Media Is Mainstream For Online Hispanics"**

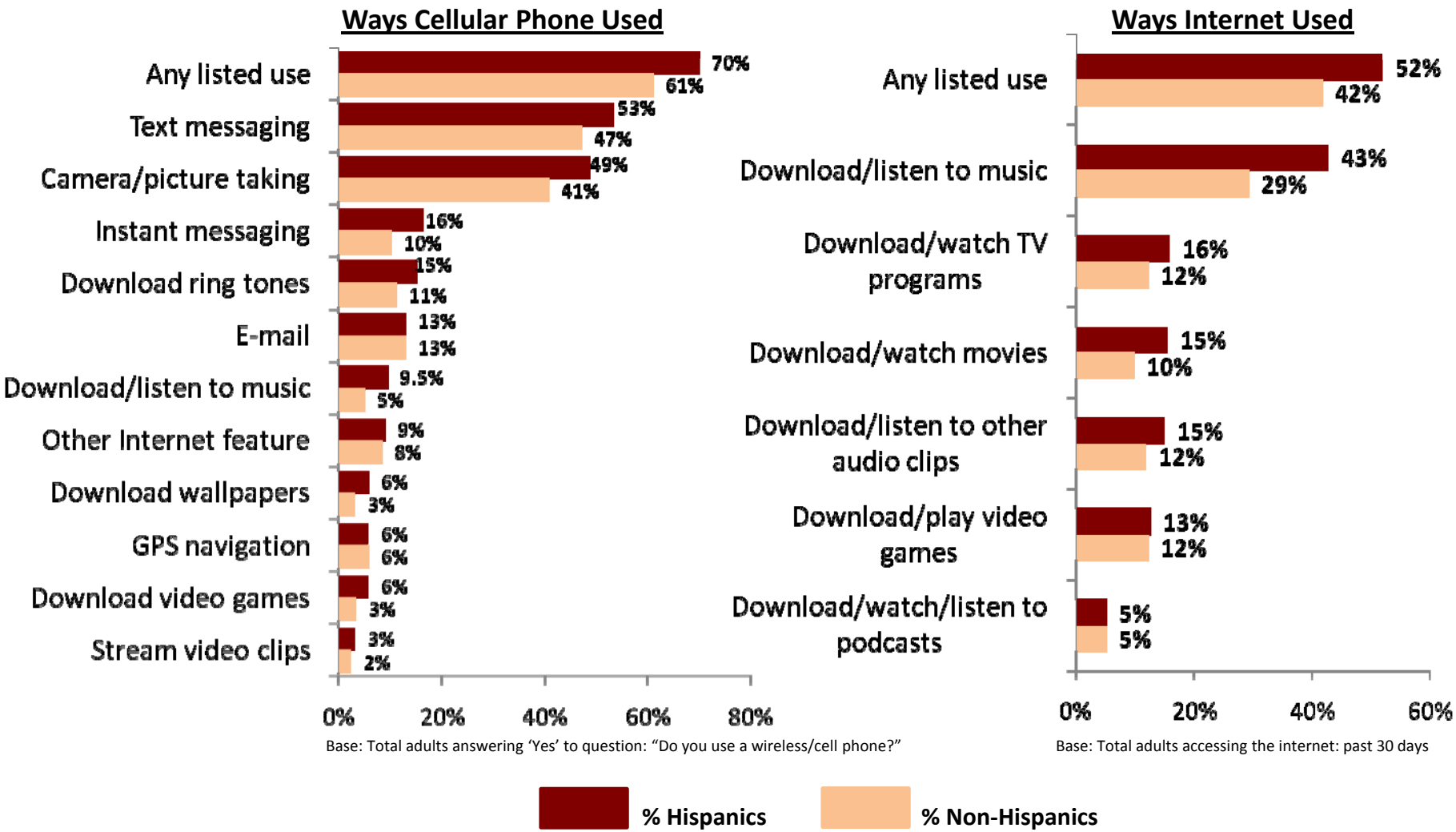
Hispanics Are More Engaged Across All Parts Of The Social Technographics® Ladder



Base: 1,553 US online Hispanic adults
*Base: 35,285 US online non-Hispanic adults

Source: Hispanic Technographics® Media And Marketing Phone Survey, Q1 2009 (US)
*Source: North American Technographics Benchmark Survey, 2009 (US, Canada)

Hispanics are more avid users of wireless services and broadband, both mobile and at home



Source: Scarborough Research, Multi Market Study, R2 2009.

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And more receptive to online ads than non-Hispanics

Offline advertising consumption trends migrate to the online world. It has been well documented that Hispanics enjoy advertising and are more curious about the product or services promoted through ads.

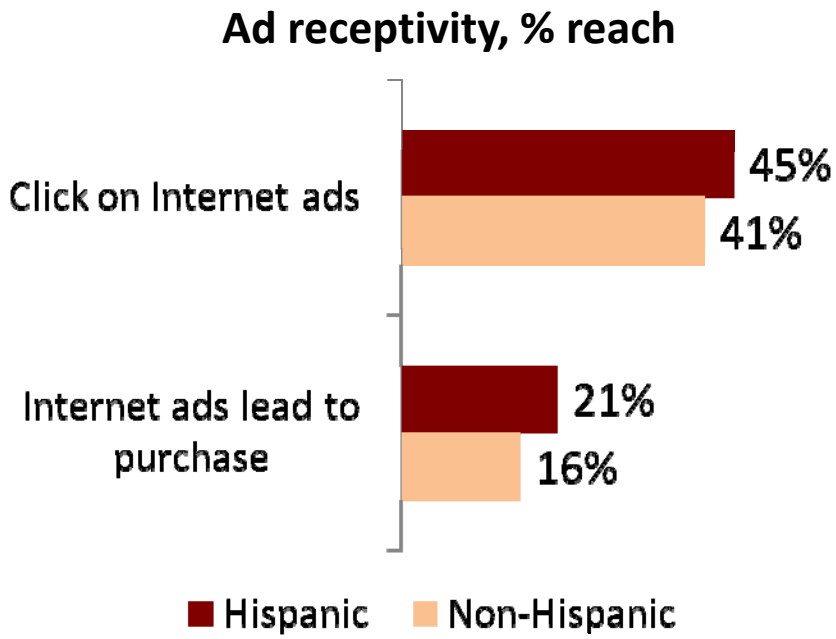
Hispanics that access the Internet at least once a week…

…are twice as likely as non-Hispanics to ***respond*** to an email advertisement:

4.6 mean times per week vs. 2.3.

…***click*** on Internet ads one more time per week than non-Hispanics:

4.4 mean times per week vs. 3.3.



Source: Chart (Simmons NCS/NHCS Fall 2009 Full Year, Population A18+ (Nov08-Dec09); "Online" defined as websites/search engines visited past 30 days; "Click on" and "Purchase based" defined with banner ads, e-mail ads, floating ads, full-motion video, pop-up/under, sponsored websites and webpage links. Text (Mintel. Hispanics Online, 2009)

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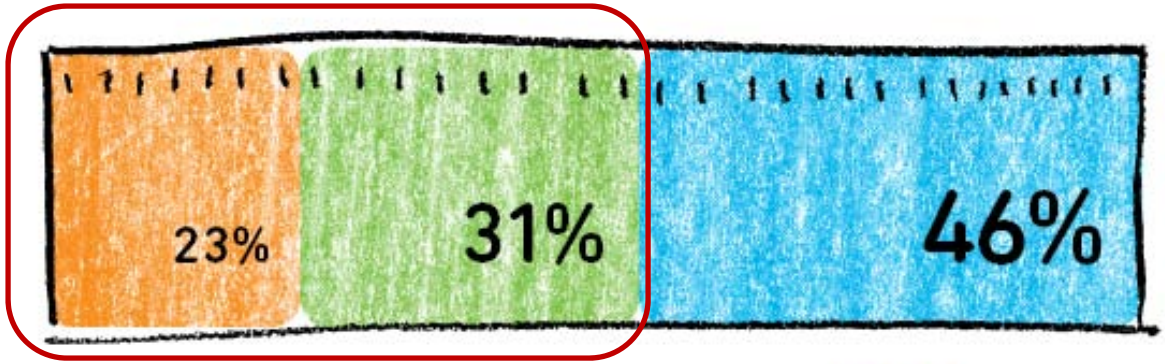
TODAY: Hispanic dominant & Biculturals are the majority representing 54% of Online Hispanics & 71% of Offline Hispanics

The American Yardstick

Market segmentation of Online Hispanics based on acculturation



Hispanic Dominant

- Predominantly speak Spanish at home
- Most media consumption in Spanish
- Foreign-born
- Mean age 40
- Lived in the US seven years average

Biculturals

- Speak both languages at home
- Most media consumption in English
- Foreign and US-born
- Mean age 34
- Lived in the US 22 years average

US Dominant

- Speak English at home
- Most media consumption in English
- US-born
- Mean age 37
- Lived in the US 36 years average

Currently, marketers tend to divide Hispanics into three different categories: Hispanic Dominant, Bicultural and US Dominant. Offline, the sizing of these groups is reversed, with Hispanic Dominants representing 52% of the segment, Biculturals 19% and US Dominants 28%.

Source: AOL Hispanic CyberStudy ’10 Conducted By Cheskin Research.

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U.S. Spanish preferred & Bilingual adults online: yesterday and today

- 19M Spanish preferred & Bilingual adults are online (2009)
  - 47% of total Hispanics
  - 82% of total Hispanics online

Yesterday

Today

- 10% growth 2008-2009 (English preferred: 8%)

Source: Simmons NCS/NHCS Fall 2009 Full Year, Population A18+ (Nov08-Dec09); Base: “Online” defined as online computer services used. "Spanish preferred defined as language spoken at home - Spanish only or mostly Spanish but some English; "Bilingual" defined as language spoken at home - mostly Spanish but some English, mostly English but some Spanish or Spanish/English equal; "English preferred” defined as language spoken at home - English only or mostly English but some Spanish.

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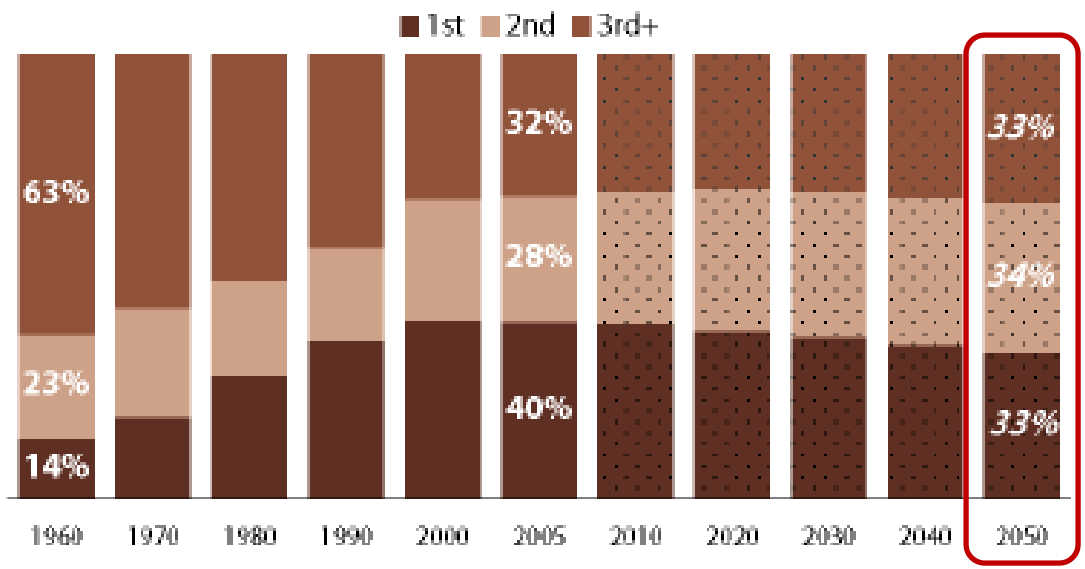
TOMORROW: Biculturals/2nd Generation U.S. born Hispanics growing most with near equal generational distribution by 2050

Figure 13

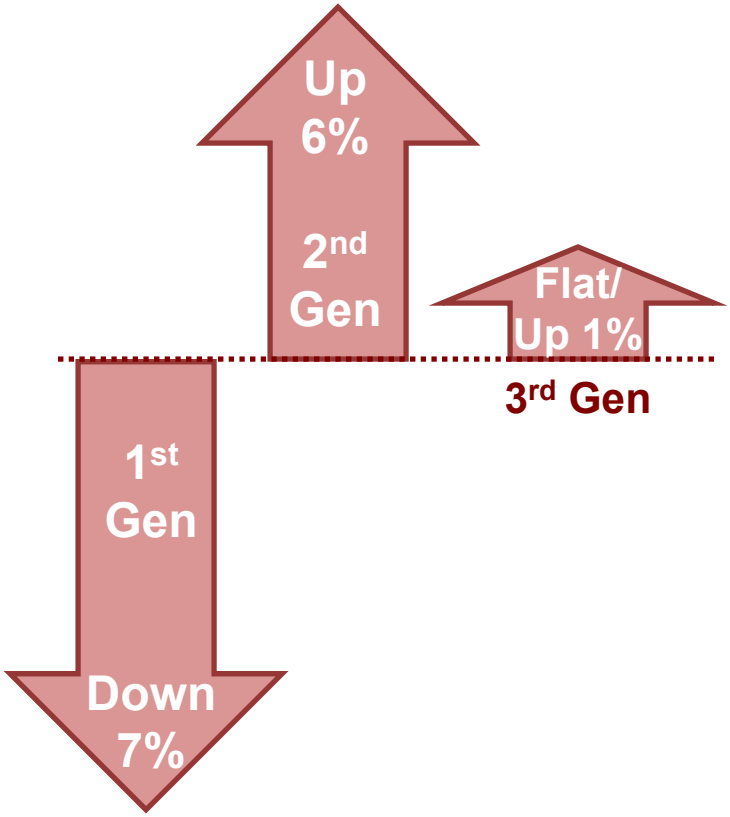
Hispanic Population by Generation, Actual and Projected: 1960–2050

(% in each generation)



Note: First generation is foreign-born; second generation is U.S.-born children with at least one immigrant parent; third generation is U.S.-born of U.S.-born parents. Projections for 2005–2050 indicated by dotted bars.

Source: Pew Research Center, 2008



Source: Pew Research Center, 2008. Growth % are 2005-2050.

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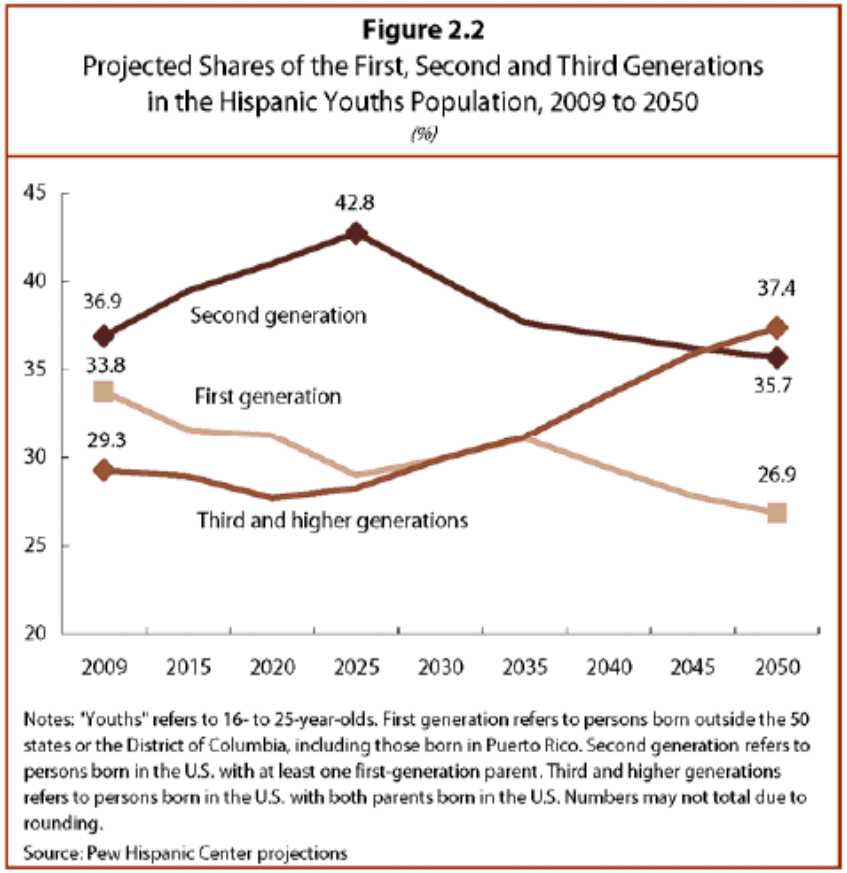
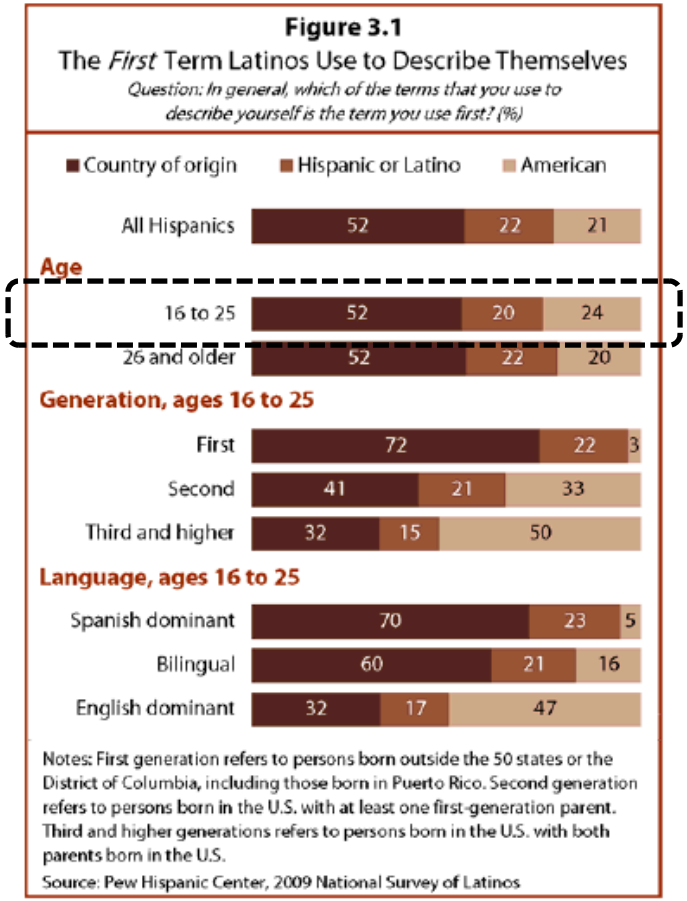
Native born are driving Hispanic growth vs. immigration, yet not abandoning their Latino origin

The 2nd generation IS growing in population…



…yet the majority (72%) of Latino youth use "Country of origin/Hispanic/Latino" as the first term to describe themselves



Source: Pew Research Center, Between Two Worlds: How Young Latinos Come of Age in America, Dec 09

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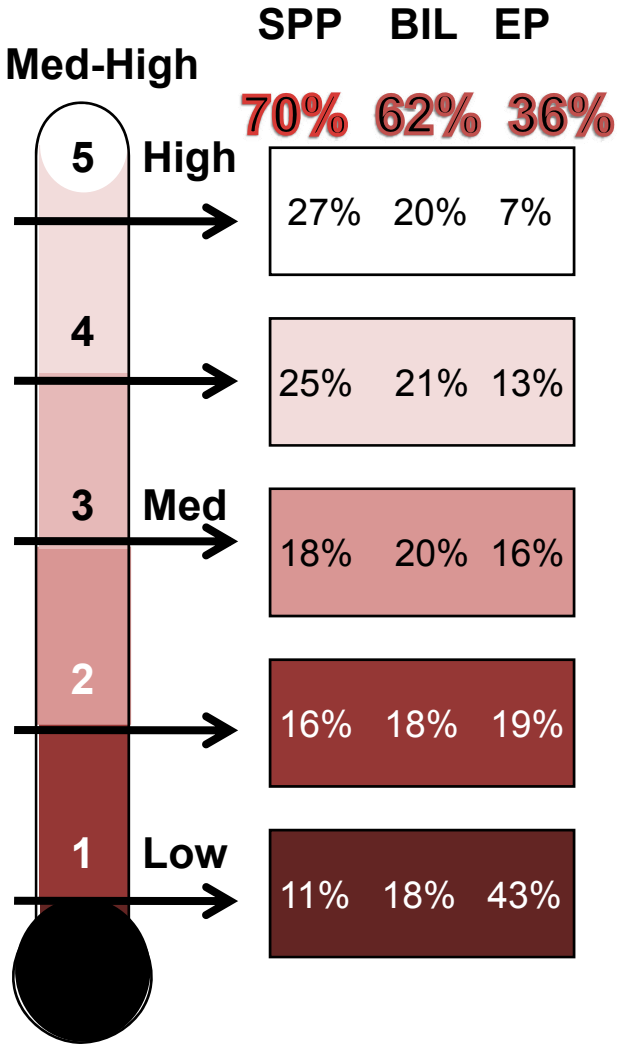
And that carries to the online world. Even English preferred show strong ties to their original culture

% identifies with original culture



STATEMENT – CULTURE & LIFESTYLE	% SPAN PREF	% BILING	% ENG PREF
"I often celebrate holidays from Hispanic countries"	60%	58%	45%
"I try to keep up with Latin music, news or sports from Hispanic countries"	73%	65%	37%
"When I'm with other Hispanics/Latinos, I like to share more about my Hispanic/Latino roots"	72%	65%	43%
"When I am with non-Hispanics, I like to share more about my Hispanic heritage"	63%	56%	38%
"I make an effort to have my personal appearance reflect that I am Hispanic/Latino"	47%	42%	25%
"I think that government and businesses should make more of an effort to communicate with Hispanic people in Spanish"	65%	56%	35%
"My home has many things in it that remind me of my Hispanic heritage"	61%	56%	39%
"I often encourage Hispanic children to participate in traditional Hispanic games and activities"	57%	49%	29%
"I enjoy eating traditional Hispanic/Spanish food"	90%	92%	90%
"I have more Hispanic friends than non-Hispanic friends"	72%	61%	39%
"I buy more Hispanic/Spanish foods and products than American foods and products"	67%	53%	30%
AVERAGE	**66%**	**59%**	**41%**

Source: Simmons NCS/NHCS Fall 2009 Full Year, Population A18+ (Nov08-Dec09); Base: Hispanic "Online" defined as websites/search engines visited past 30 days; "Spanish preferred defined as language spoken at home - Spanish only or mostly Spanish but some English; "Bilingual" defined as language spoken at home - mostly Spanish but some English, mostly English but some Spanish or Spanish/English equal; "English preferred" defined as language spoken at home - English only or mostly English but some Spanish. Statements based on any agree.

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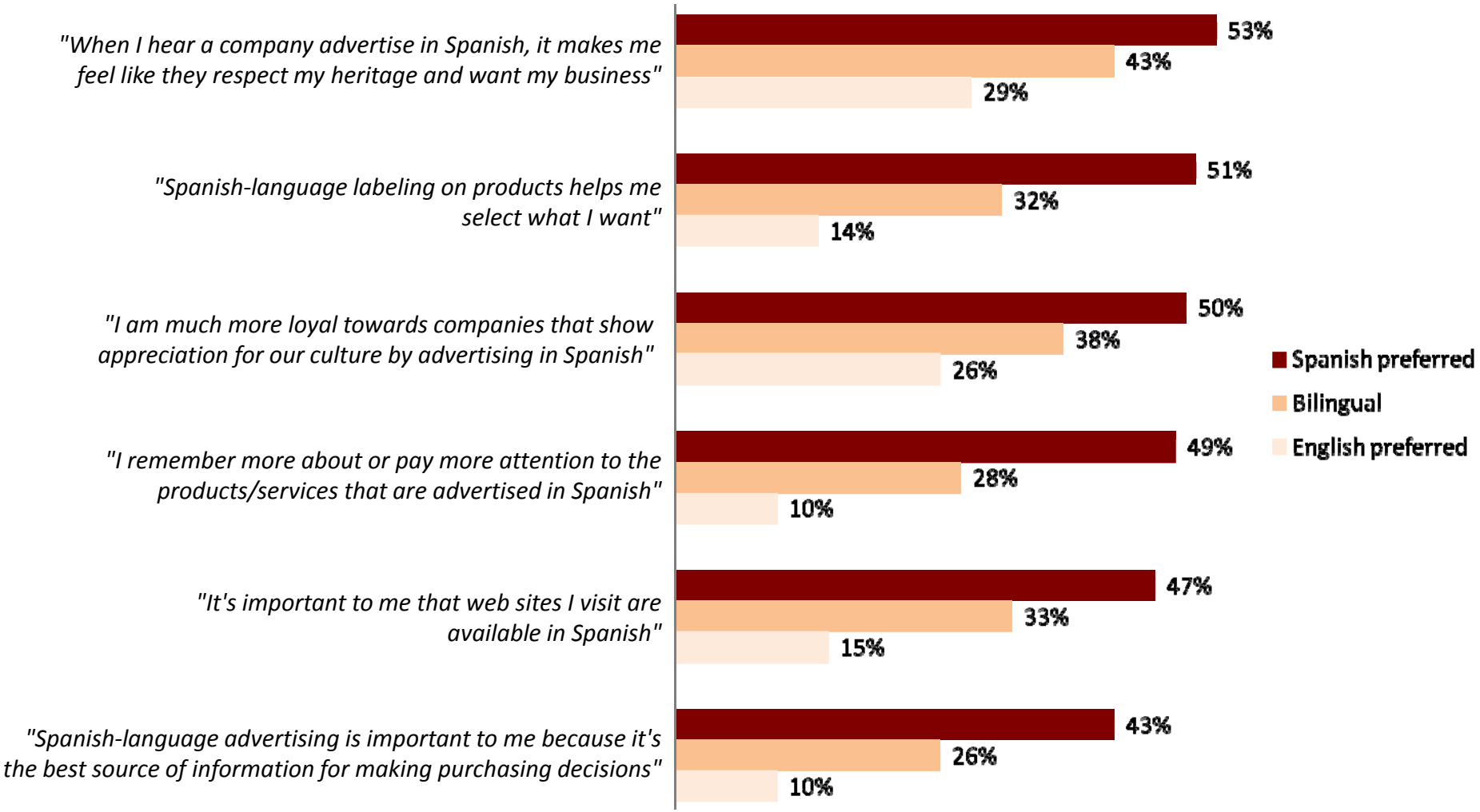
Language represents that strong connection to culture and it is important in marketers' advertising messages

% agreed with statements about language in online advertising



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Meet the Spanish preferred & Bilingual adult Internet user

51% Male/49% Female

Hhld size of 4.1 (38% 5+ persons)

35.6 years old

52% married

Household income of $71K

60% Mexican

66% have children and 20% 3 or more

57% were born outside the U.S.

56% own a home

40% U.S. residents for 10+ years

68% are employed (23% live in hhlds with 3+ employed adults)

38% have at least 1 year of college (17% graduated College+)

Compared to English preferred, Spanish preferred and Bilinguals are 38% as likely to live in 5+ hhlds and 17% more likely to live in hhlds with 3+ children.

Source: Simmons NCS/NHCS Fall 2009 Full Year, Population A18+ (Nov08-Dec09); Base: Language spoken at home – Spanish only, mostly Spanish but some English, mostly English but some Spanish or Spanish/English equally; "Online" defined as websites/search engines visited past 30 days.

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Spanish prim. & Biling. outpace English prim. Internet users in BPI (buying power index) across a variety of online activities

Top 10 online categories among Spanish primary & Bilinguals ranked by BPI, Jan '10

CATEGORY	% SPANISH PRIMARY & BILINGUALS	BUYING POWER INDEX(BPI)
Shipping	9%	465
Retail - Music	6%	463
Fragrances/Cosmetics	6%	421
Jewelry/Luxury Goods/Accessories	8%	408
Health Care	9%	367
Airlines	16%	350
Financial Information/Advice	16%	302
Flowers/Gifts/Greetings	14%	282
Ground/Cruise	5%	277
Consumer Electronics	21%	277

9% of Spanish primary & Bilinguals online visit shipping sites and spend 365% more in e-commerce than the average Internet user

- 54% of Spanish preferred & Bilingual Internet users made a purchase online last year and spent on avg. $707.

Source: Table (Top 10 BPI Categories with % Reach >=5%, comScore Jan '10); BPI is a measure of a site's visitors' online buying power, indexed to the Total Internet population. A BPI value >=100 means that a site's visitors purchase, on avg. ,is larger (in $ terms) than the avg. Internet user during the reported time period. Text box source: Scarborough Research, Scarborough Hispanic Multi-Market Plus Study, Release 2 2009. Data collection: Aug 08-Sept 09 gathered from over 36,000 Hispanic adults, age 18+, in Scarborough's 81 Top-Tier Local Markets. The Hispanic Multi-Market Plus Study represents 91% of the U.S. Hispanic adult population.

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They do visit mass reach destinations, yet more likely to be found and more engaged within Spanish language sites

Top sites among Spanish primary & Bilinguals, Jan '10

MEDIA	% SPAN PRIMARY & BILINGUALS	% COMP UNIQUE VISITORS	COMP INDEX UNIQUE VISITORS	COMP INDEX PAGE VIEWS
TOTAL INTERNET	100%	5%	100	100
Google sites	88%	5%	105	144
Microsoft sites	81%	6%	119	218
Yahoo! sites	78%	5%	99	90
Ask Network	51%	6%	112	110
Facebook.com	48%	5%	89	74
Fox Interactive Media	48%	6%	115	150
Hispanic focus sites	**47%**	**53%**	**1046 10x!**	**1813 18x!**
AOL LLC	43%	4%	81	44
Apple Inc.	36%	6%	113	118
Warner Music	36%	8%	156	175
Wikimedia Foundation sites	35%	5%	94	89

Source: comScore Jan 10. Hispanic focus sites for purposes of this project comprise [M] AOL Latino, [P] Batanga, [M] Starmedia, [M] Telemundo, [P] Terra – Telefonica, [P] Univision Communications Inc, [P] Impremedia Network.

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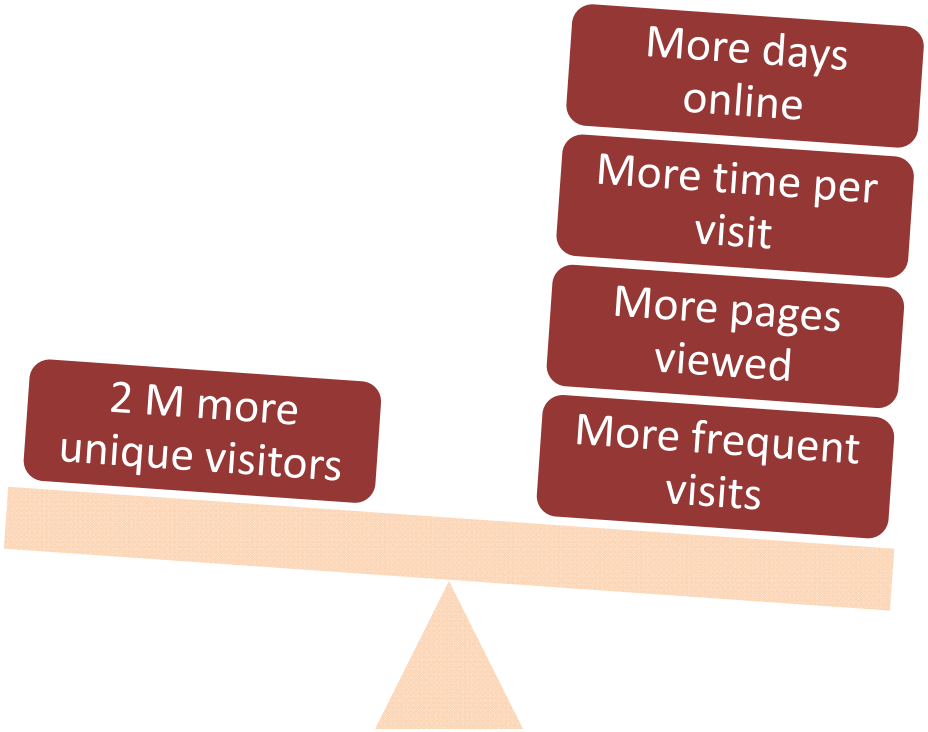
Spanish primary and Bilinguals outperform English primary across key engagement measures

More English primary uniques

More engaged!
Spanish primary & Bilinguals



More days online per month
+6% avg. daily visitors
+20% avg. usage days per visitor

More time per visit
+24% total minutes
+19% avg. minutes per usage day
+35% avg. minutes per visitor
+7% avg. minutes per visit

More pages viewed
+20% total pages viewed
+15% avg. pages per usage day
+32% avg. pages per visitor

More frequent visits
+18% total visits
+30% avg. visits per visitor

Source: comScore Jan 10 3MA.

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And they show high engagement by verticals and emerging media

News & Entertainment
Emerging Marketing tactics
Communication

SPANISH PRIMARY & BILINGUAL CATEGORIES VISITED	% REACH	COMP INDEX UNIQUE VISITORS	COMP INDEX PAGE VIEWS	AVG. MINUTES PER VISITOR	AVG. VISITS PER VISITOR
Portals	97%	104	120	526	40
Entertainment	97%	106	144	325	21
Search/Navigation	92%	103	112	50	26
Extended Web (Widgets)	90%	102	112	0	n/a
Social Networking	86%	105	106	198	19
e-mail	86%	109	109	245	24
Multimedia	85%	121	203	267	15
News/Information	82%	100	101	71	12
Retail	79%	100	79	77	11
Technology	68%	104	87	12	5
Business/Finance	63%	95	89	50	9
TV	61%	122	262	42	6
Entertainment - Music	56%	109	99	23	6
Games	55%	98	77	101	9

Source: comScore Jan '10 3MA. Notes: Portals exhibit very high reach (97%); SP/Bil are 44% more likely to consume Entertainment and 162% more TV page views than the avg. Internet user; email exhibits high time spent & visitation; widgets, social networking and multimedia (video and audio) show high reach and are popular emerging vehicles for advertisers; key industry verticals such as news, retail, technology, music & finance exhibit high reach among SP/Bil.

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Hispanic dominants are the early adopters

Everything you know is wrong

Acculturation doesn't equate with technological sophistication

	Hispanic Dominant	Bicultural	US Dominant
PC access	100%	100%	100%
Keep up with the latest technology	29%	35%	34%
Considered tech expert by friends and family	41%	40%	31%
Early adopter	41%	25%	22%

Hispanics are universally embracing new technologies regardless of their acculturation level. Furthermore, contrary to common stereotypes, the most acculturated Hispanics are not necessarily the most technologically savvy. In fact, less acculturated Hispanics tend to be early adopters, evaluating new formats and spreading the word in their communities.

Source: AOL Hispanic CyberStudy '10 Conducted By Cheskin Research. "Early adopters" defined as respondents who were in the top 3 box agreement based on a scale of 0-10 (10 being "strongly agree" and 0 "do not agree at all") from question "How much do you agree or disagree that you are usually among the first people to try new media and communications technologies"

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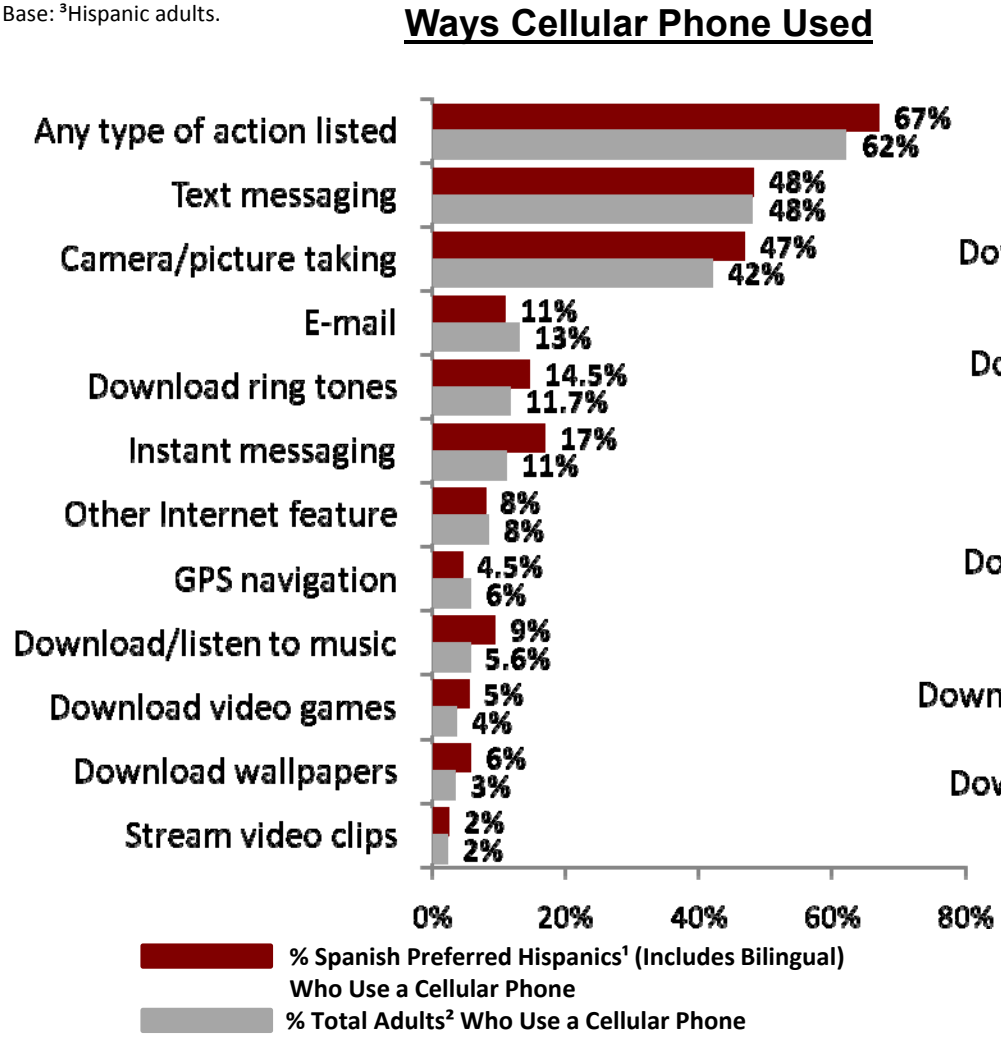
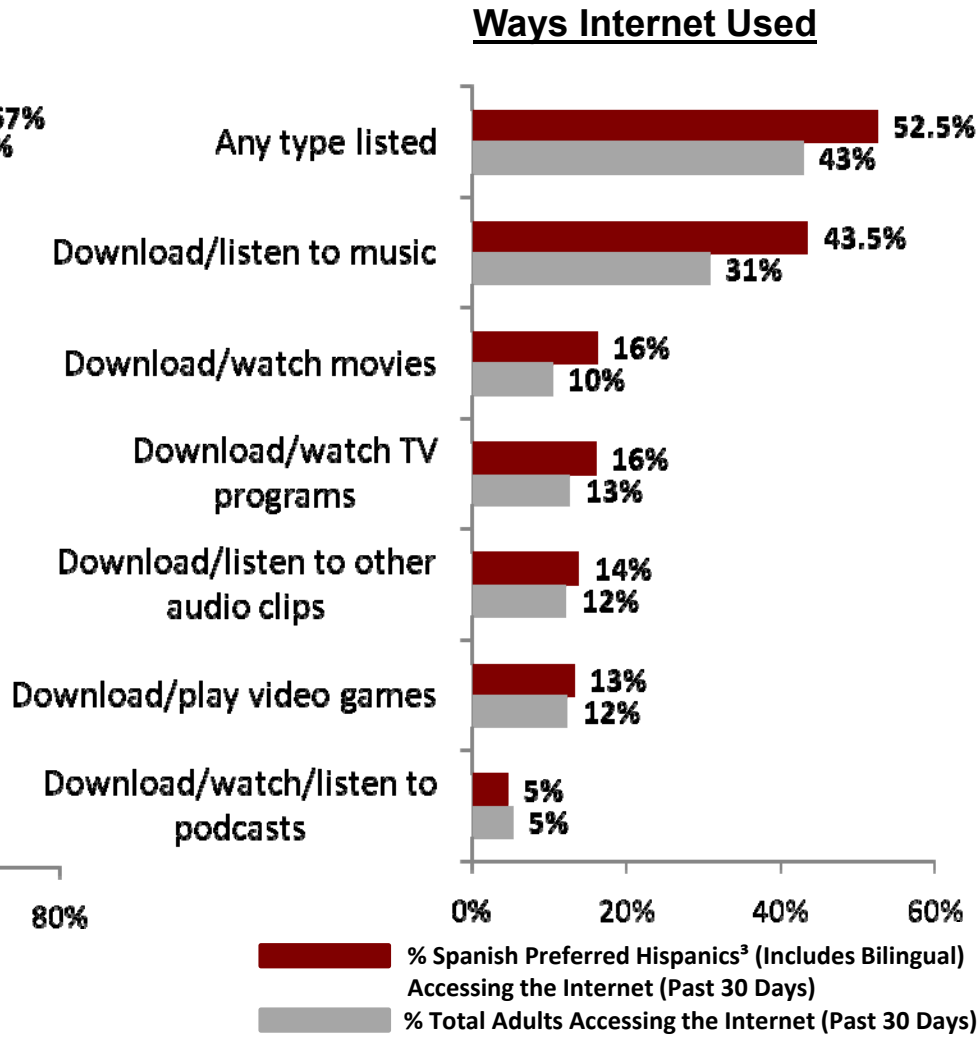
They are also avid cell users and Internet downloaders, more so than the total population

Base: [1]Hispanic adults or [2]Total adults answering 'Yes' to question: "Do you use a wireless/cell phone?".
Base: [3]Hispanic adults.





Source: Scarborough Research, Multi Market Study, R2 2009.

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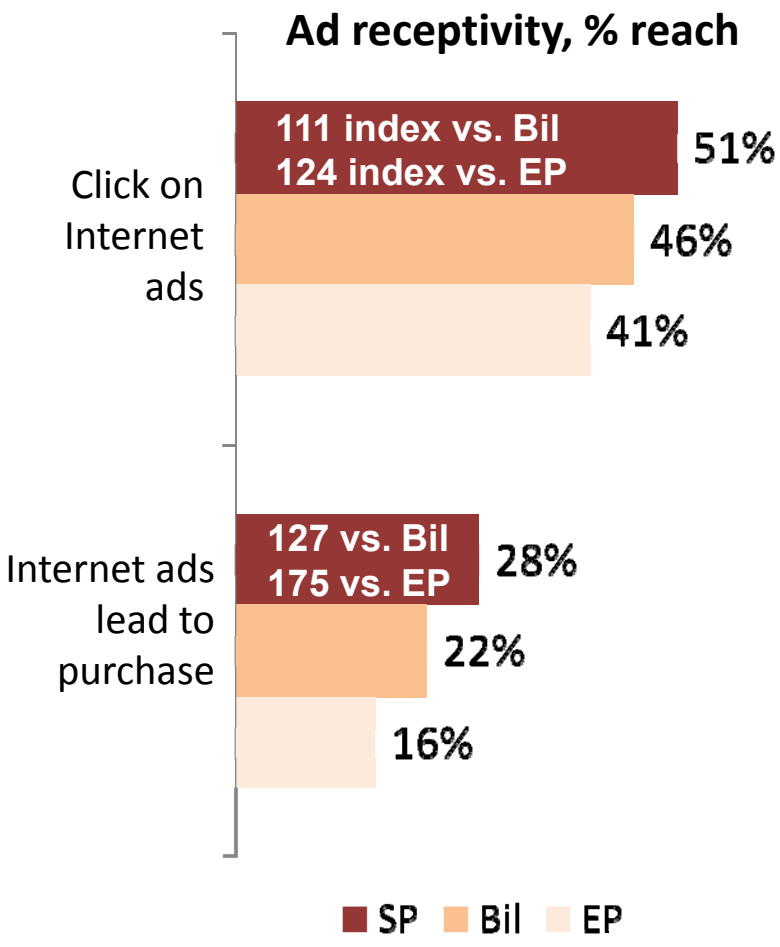
Spanish preferred and Bilinguals are more receptive to online ads and they take more action than English preferred



ACTIVITIES PAST 3 MONTHS AS DIRECT RESPONSE TO SEEING ONLINE ADS	% OF SP & BIL	INDEX VS. EP
Visited a store	48%	121
Went to a movie	36%	101
Went to a local restaurant	32%	107
Went grocery shopping	31%	93
Visited a bank and made an inquiry	23%	162
Went to an entertainment show	19%	153
Visited an automotive website	18%	141
Visited a car dealer	17%	166
Went to a theme park	16%	148
Visited a travel agency	15%	221
Visited a health clinic or doctor	15%	140
Attended a job interview	15%	153
Went to a zoo, museum, etc.	14%	118
Went to sports events	14%	112
Visited a property for sale or rent	11%	103
Visited a professional	7%	181

Source: Chart (Simmons NCS/NHCS Fall 2009 Full Year, Population A18+ (Nov08-Dec09); "Online" defined as websites/search engines visited past 30 days; "Click on" and "Purchase based" defined with banner ads, e-mail ads, floating ads, full-motion video, pop-up/under, sponsored websites and webpage links - very often, often or somewhat often. Table (ImpreMedia Print and Online Consumer Engagement Study, Nov 08.)

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Talk to the Latino "influentials", the ones who tell their community what to buy, where to shop and how to vote

Span pref & Bil are more active than English pref. online…	*Index*
• Emailed online newspaper/expressed views online	165
• Blogged/participated in online chat group	147
• Pledged money online for public radio/TV	136
• Posted photos/video to public sites	120

…offline	*Index*
• Wrote/called newspaper to express opinion	248
• Hosted community event	237
• Helped raise money for community group/child's school	141
• Spoke up/voted at community group/child's school	140
• Pledged money for public radio/TV	111
• Volunteered time for community group/child's school	109

…and influence more people more frequently	*Index*
• 50.5% ay they are a strong influence when their hhld members are researching a product or service to purchase	110
• 27% say people agree with and follow most of their advice when they recommend or criticize products, brands or services	106
• 44% talks to more than 11 people daily*	105

Source: ImpreMedia Print and Online Consumer Engagement Study, Nov 08. *Face-to-face, online or on the telephone. Index is vs. English preferred.

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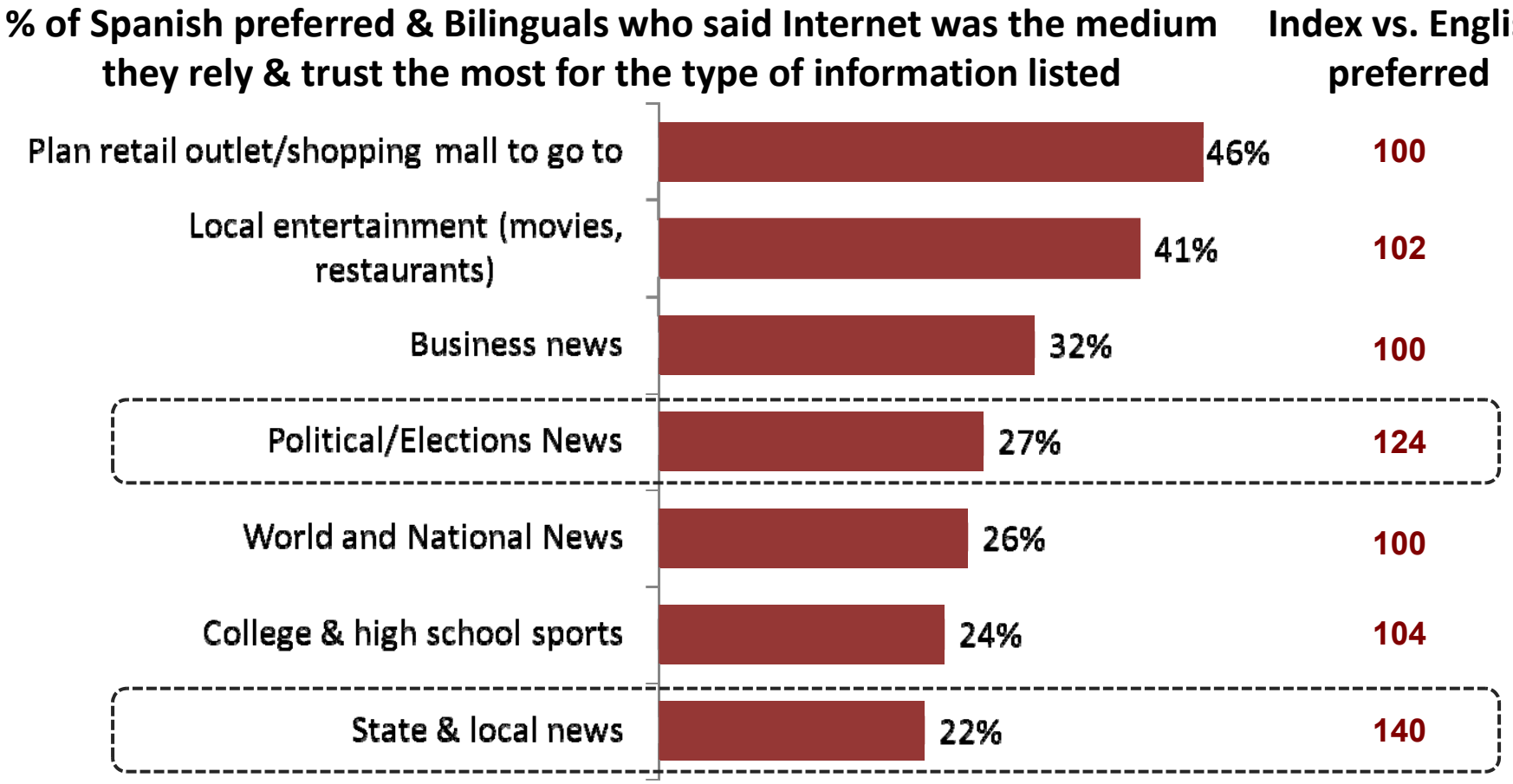
Spanish preferred and Bilinguals are more likely to rely and trust the Internet more than any other medium for Political, State and Local news



Source: ImpreMedia Print and Online Consumer Engagement Study, Nov 08.

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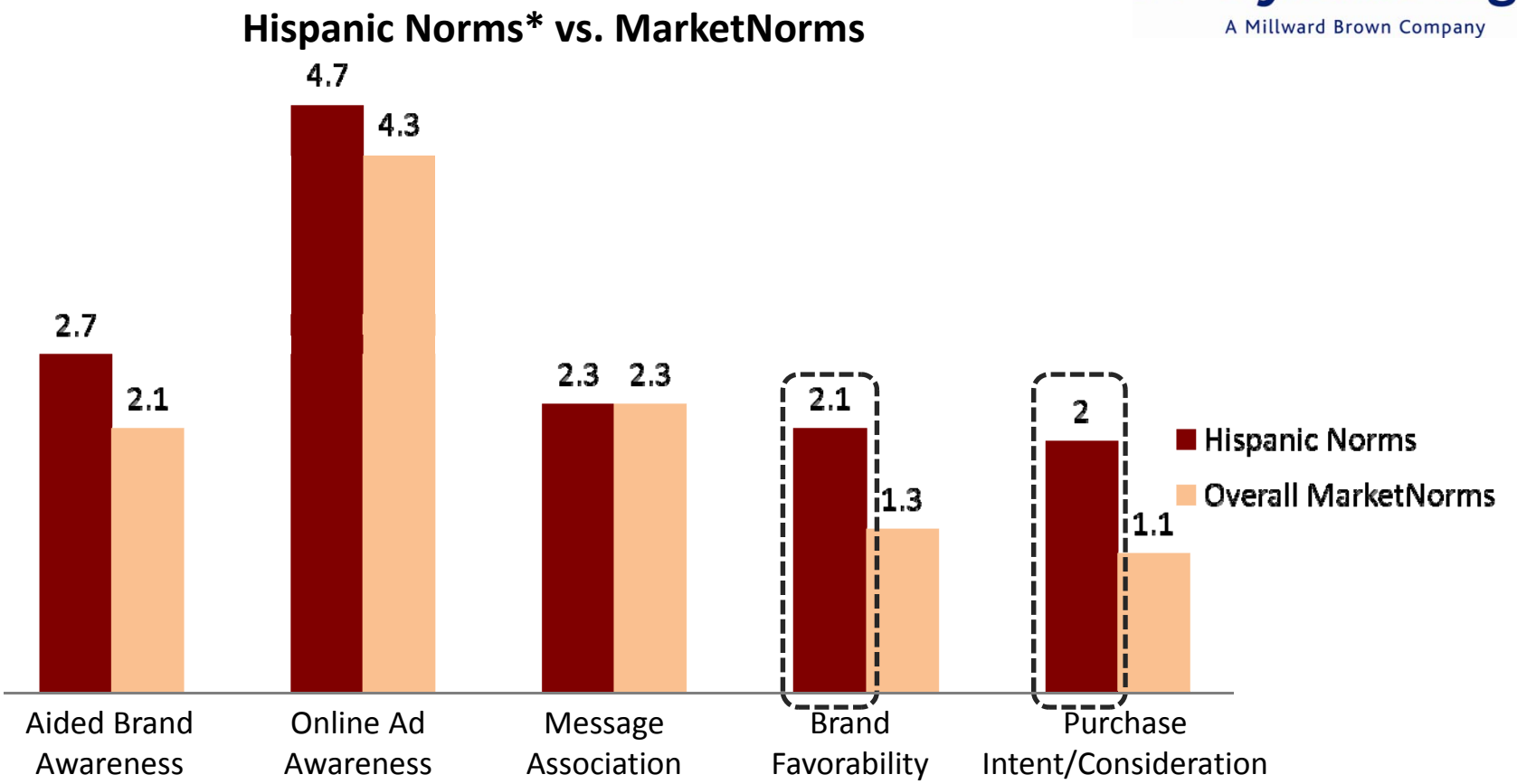
Hispanic sites are top performers, particularly on harder to move persuasion metrics



Source: Dynamic Logic's MarketNorms®: Last 3 Years, Q4/2009, N=2,461 n=3,713,053; Hispanic Site Norms: Last 3 Years, Q4/2009, N=37 n=30,375

**Note: Hispanic Norms is based on site category (Hispanic/Latino sites) and primary target is Hispanic/Latinos*

Gracias