LATINA POWER SHIFT
EXECUTIVE SUMMARY

U.S. Hispanic women, also known as Latinas, have recently and rapidly surfaced as prominent contributors to the educational, economic, and cultural wellbeing of not only their own ethnicity, but of American society and the consumer marketplace. This rise of Latinas is driven both by strong demographics and a healthy inclination to embrace and retain their Hispanic culture even as they make significant strides toward success in mainstream America.

• The rise of Latinas. Latinas are outpacing Latino males in their educational pursuits and career development, are overwhelmingly the decision-makers in household spending, have surpassed the proportion of non-Hispanic white families with children, and through their youth and increased incomes have become an attractive consumer segment who is being actively courted by marketers.

• Latinas are leading the shift to the ambicultural® middle.1 Latinas’ embrace of culture and language is salient, in that over the past decade, bilingual language proficiency has significantly increased while the proportion of Spanish dominance has held steady.

• Latinas are expanding their purchasing power. Latinas are rapidly catching up with or exceeding Hispanic males and non-Hispanic females in big ticket purchasing (homes and autos) and in the use of financial services. Eighty-six percent of Latinas say they are the primary decision makers in their households making them pivotal to the Hispanic market’s $1.2 trillion in annual buying power.2,3

• Family needs are reflected in the Latina shopping basket. In many categories, the consumer behavior of Latinas distinctively varies from that of other American females. Some of the high levels of purchasing by Latinas are associated with the needs of their larger families or cultural nuances—many food categories, oral hygiene products, bottled water, detergent, and paper products, for example.

• Latinas cultivate connectivity. Focused on strong shifts toward an increasingly balanced bicultural milieu, Latinas are adopting and adapting all types of technology at a higher pace than U.S. females. In significant areas, Latinas are outpacing society in using technology for culturally-centered social networking. Personal technology has found an ideal fit with Latinas’ propensity to be connected, to communicate, and to investigate ways for improving their and their families’ wellbeing. For many Latinas, personal technology and social networking are enabling the maintenance and recovery of ethnic culture, language and traditions. This takes place domestically as Latinas build affinity groups around their ethnicity and their common trajectories within American society, as well as internationally as they create robust connections with relatives and friends in their countries of origin.

1Ambicultural is a registered service mark of EthniFacts, LLC and is used with their permission.
2Nielsen, April 2013.
3UGA Selig Center Multicultural Economy Study 2012.
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SECTION ONE:
LATINAS ARE KEY DRIVERS OF HISPANIC ECONOMIC POWER IN THE U.S.

The Hispanic Market Imperative (Nielsen Q2 2012) and other recent reports have documented the prominent role of Latinos in all aspects of American life and as the primary driver of U.S. growth essential to future business success. As companies unlock the potential value of Latino consumers, it is becoming evident that the key to reaching their hearts, minds, and pocketbooks is increasingly through Latinas.

Hispanic women are a key growth engine of the U.S. female population and are expected to become 30 percent of the total female population by 2060, while the non-Hispanic white female population is expected to drop to 43 percent. By 2060, there will be no single dominant ethnic group, instead the female (and total) population will be comprised of a diverse ethnic plurality where Latinas play a sizeable role.

AMERICA’S MOMS ARE MORE LATINA

Almost a quarter (23 percent) of all U.S. births in 2011 were to a Latina mom, greater than the Latina’s share (17 percent) of all women of childbearing age. Latinas in nearly two thirds (63 percent) of Hispanic families have children under age 18 compared to 40 percent for non-Hispanic white females. This high incidence of Latina motherhood is in part due to the fact that the under 45 Latina population is 16 percentage points higher than that of total females, as shown in the graph below. Young Latina moms are in acquisition mode for an array of household and family products as they establish families and make decisions for their new households. Latinas bring with them their cultural tastes, experiences and expectations, at times different from their older Latina moms and non-Latina peers. This unique cultural background and series of “firsts” in terms of education, income and confidence have them crossing into new territory for marketers.

TODAY, HISPANICS REPRESENT A MAJORITY OF CHILDREN UNDER AGE 18 IN CALIFORNIA AT 52% AND NEW MEXICO AT 59%, AND ARE NEARING A MAJORITY IN TEXAS AT 49%. IN THESE AND MANY MORE MARKETS, LATINAS ARE BECOMING CENTRAL PLAYERS IN THE MODERN AMERICAN FAMILY.

2013 U.S. FEMALE POPULATION DISTRIBUTION BY AGE

Source: Nielsen Pop-Facts Demographics, 2013 Update
12011 American Community Survey, 2011, US Census Bureau
PREDOMINANT DECISION MAKERS

In the last decade, Latinas have moved ahead of their male counterparts as the main engine of Hispanic social and economic advancement and are at the fulcrum of Latino empowerment across all economic sectors. Based on a recent Nielsen study in the U.S., Latinas say they are the primary or joint decision maker in every category from purchasing groceries, insurance, financial services, electronics, to family care. The traditional view of the Hispanic family has often centered on Latino males, but in today’s America, Latinas are not just increasingly the primary wage earner and influencer in the modern Hispanic household, they are also making their interests and concerns felt in the workplace, politics, healthcare and education. They are a growing force at school, the office, the supermarket, the shopping mall and the Internet. Their desire to succeed is second only to their passion to connect with friends, family and others in their community.

With Hispanics outpacing non-Hispanic whites in the proportion of families with children under 18, Latinas will become a more dominant driver in the consumption of everything from media, banking, and real estate to family care, household products and cosmetics. Latinas’ increasing level of education, income, and social connectivity demands that companies understand and appeal to their primary drivers of engagement and consumption behavior.

LATINA PERCEIVED DECISION-MAKING BY GENDER

<table>
<thead>
<tr>
<th>Category</th>
<th>Primarily Latinas</th>
<th>Both Latino Genders</th>
<th>Primarily Latino Males</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food</td>
<td>67%</td>
<td>33%</td>
<td>1%</td>
</tr>
<tr>
<td>Beverages</td>
<td>55%</td>
<td>41%</td>
<td>4%</td>
</tr>
<tr>
<td>Clothes</td>
<td>66%</td>
<td>34%</td>
<td>0%</td>
</tr>
<tr>
<td>Home Electronics</td>
<td>33%</td>
<td>50%</td>
<td>17%</td>
</tr>
<tr>
<td>Personal Electronics</td>
<td>38%</td>
<td>50%</td>
<td>12%</td>
</tr>
<tr>
<td>Auto/Transport</td>
<td>30%</td>
<td>48%</td>
<td>22%</td>
</tr>
<tr>
<td>Pharmaceuticals</td>
<td>59%</td>
<td>38%</td>
<td>2%</td>
</tr>
<tr>
<td>Family Finances</td>
<td>41%</td>
<td>50%</td>
<td>9%</td>
</tr>
<tr>
<td>Insurance</td>
<td>38%</td>
<td>50%</td>
<td>11%</td>
</tr>
<tr>
<td>Social Activities</td>
<td>45%</td>
<td>52%</td>
<td>3%</td>
</tr>
</tbody>
</table>


6 Nielsen, April 2013.
7 UGA Selig Center Multicultural Economy Study 2012.
ACHIEVING A HIGHER STANDARD OF LIVING

Many Latinas are embracing opportunities to advance, demonstrated by positive gains in higher education and higher earnings, which are shifting Latinas towards the middle class and beyond. For the first time, Latinas have exceeded non-Hispanic females in college enrollment. A record seven in ten (73 percent) Hispanic high school female graduates are enrolling in college, 11 percentage points ahead of Hispanic males (61 percent) and one percentage point higher than non-Hispanic females (72 percent). While four-year college graduation rates fall well below the total population, Latinas are also demonstrating forward momentum through increases in “some college” experience (up 4 percentage points to 45 percent from 2008 to 2013) and up three percentage points in four-year college graduation rates (reaching 16 percent in 2013).

Latinas in households making $75,000 or more increased by 5 percentage points over the past ten years showing notable gains, despite the recession and slow recovery. At the same time, Latina households are rising out of the lowest income category and holding their position in other income groups indicating strong resilience among blue and pink collar segments.

U.S. LATINAS ARE EMBRACING ENTREPRENEURSHIP WITH THE NUMBER OF LATINA FIRMS RISING 46% FROM 2002 TO 2007, FASTER THAN LATINO (33%) AND FASTER THAN TOTAL FEMALE (20%) BUSINESSES.

U.S. LATINAS ARE TAKING CENTER STAGE IN NATIONAL AND LOCAL POLITICS COMPRISING 34% OF ALL LATINO ELECTED OFFICIALS IN 2013, A RISE OF 126% SINCE 1996.

HOUSEHOLD INCOME OVER PAST TEN YEARS FOR LATINAS 18+

<table>
<thead>
<tr>
<th>Income Range</th>
<th>2003</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;$25K</td>
<td>33%</td>
<td>27%</td>
</tr>
<tr>
<td>$25K-$50K</td>
<td>32%</td>
<td>32%</td>
</tr>
<tr>
<td>$50K-$75K</td>
<td>19%</td>
<td>20%</td>
</tr>
<tr>
<td>$75K+</td>
<td>16%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Source: Nielsen, Feb 2013.

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1Pew Hispanic Research Center and female enrollment estimates based on ages 16 to 24 years of age. CPS U.S. Census Bureau Oct 2011, school enrollment supplement by Bureau of Labor Statistics.
2Nielsen, Feb 2013.
Because of her unique place in the multigenerational Hispanic family, and her willingness to seek relationships outside of it, the modern Latina is innately ambicultural — able to pivot from English to Spanish, Latina to American, and back again without thinking about it. Ambicultural connotes a willingness and ability to function competently in two cultures which is a very attractive cultural destination for Latinas. Hispanic women who feel equally Latina and American overwhelmingly want to stay that way (87 percent). Fifty percent of those who culturally feel more Latino than American and 71 percent of those who culturally feel more American than Latino, want to shift to the ambicultural middle. The gravitational pull is to be culturally both American and Latino, without denying either end, and to fully embrace their duality.

**Source:** EthniFacts Latino+ Identity Project, 2013.

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Language is a fundamental cultural maintenance behavior and Latinas are making the conscious choice to hold onto Spanish in combination with English, thus enhancing their ability to integrate into different social and professional scenarios, heightening their marketability in the workforce.

Some marketers assume that Millennial Latinas (ages 18-34) will be vastly different from their older counterparts and shift to English dominance, but that is not supported in the data. Millennial Latinas, significantly more likely to be U.S. born, have similar levels of Spanish and English use compared to older Latinas.

**Language Used at Home 2013**

<table>
<thead>
<tr>
<th>Language Used at Home</th>
<th>Millennial Latinas</th>
<th>Total Adult Latinas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spanish Dominant</td>
<td>33%</td>
<td>34%</td>
</tr>
<tr>
<td>Spanish/Eng Equal</td>
<td>36%</td>
<td>34%</td>
</tr>
<tr>
<td>English Dominant</td>
<td>32%</td>
<td>32%</td>
</tr>
</tbody>
</table>

Source: Nielsen, Feb 2013.

**Important Steps to Marketing to the Latina**

- Recognize the Latinas’ purchasing power. They represent a significant and growing spending power for the modern American family.
- Embrace cross-cultural and linguistic dexterity. Do not assume Latinas will assimilate – ambicultural® is the new battleground where two languages and two cultures are better than one.
- Utilize cross channels for messaging. Latinas’ are powerful connected networks. Your campaign should employ the full range of mass and social media channels.
Latinas’ consumer behavior differs from that of other ethnicities and from the overall U.S. female population. It is reflective of both their family-centered value system and their “do it all” mindset. Not only are Latinas increasingly their family’s breadwinner and decision-maker, but they still embrace their traditional role as nurturer and family caretaker, and often espouse products that make themselves and their families look and feel their best.

SHifting TIDE IN FINANCIAL PRODUCT USE

Nearly a quarter of Latinas (24 percent) have increased their personal contribution to the household over the past year. Latinas intend to spend the extra money they earn over the next five years on building the financial security of their family, primarily by paying off debt and increasing their savings.

### WHERE LATINAS WILL SPEND EXTRA MONEY OVER NEXT FIVE YEARS

(Top Indices to non-Hispanic white females)

<table>
<thead>
<tr>
<th>Category</th>
<th>Index</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay off debt</td>
<td>73%</td>
<td>(135)</td>
</tr>
<tr>
<td>General savings</td>
<td>63%</td>
<td>(121)</td>
</tr>
<tr>
<td>Retirement savings</td>
<td>38%</td>
<td>(112)</td>
</tr>
<tr>
<td>Education for self</td>
<td>21%</td>
<td>(263)</td>
</tr>
<tr>
<td>New home</td>
<td>21%</td>
<td>(350)</td>
</tr>
<tr>
<td>Home electronics</td>
<td>20%</td>
<td>(143)</td>
</tr>
<tr>
<td>Personal electronics</td>
<td>19%</td>
<td>(119)</td>
</tr>
<tr>
<td>Investments</td>
<td>19%</td>
<td>(190)</td>
</tr>
<tr>
<td>Having another child</td>
<td>16%</td>
<td>(145)</td>
</tr>
<tr>
<td>Educating children</td>
<td>15%</td>
<td>(136)</td>
</tr>
</tbody>
</table>

As Latinas’ income and education level have advanced, so has their ability and willingness to invest in long-term and fixed assets. Even though Hispanics suffered the greatest losses in the foreclosure crisis, three in four Hispanics agree that buying a home is the best long-term investment possible and 56 percent consider it a symbol of success (compared to only 32 percent of all Americans).

Latinas are more likely than other females to have bought a first home or made a first time financial investment in the past year, and they are just as likely to have bought a new car, made a major home improvement or refinanced a home.

<table>
<thead>
<tr>
<th>LIFE EVENTS EXPERIENCED IN LAST 12 MONTHS</th>
<th>LATINAS 18+</th>
<th>LATINAS TO TOTAL U.S. FEMALES 18+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bought A Used Car Or Light Truck</td>
<td>8.4%</td>
<td>102</td>
</tr>
<tr>
<td>Made Major Home Improvement</td>
<td>7.4%</td>
<td>100</td>
</tr>
<tr>
<td>Refinanced Your Home</td>
<td>4.1%</td>
<td>100</td>
</tr>
<tr>
<td>Bought First Home</td>
<td>2.1%</td>
<td>121</td>
</tr>
<tr>
<td>Bought New Home (Not First Home)</td>
<td>1.4%</td>
<td>91</td>
</tr>
<tr>
<td>First Time Financial Investment</td>
<td>1.3%</td>
<td>121</td>
</tr>
</tbody>
</table>

Source: Nielsen, April 2013, HH 18+.

While twenty-first century Latinas are advancing their consumption of major assets, we cannot fail to note the Latina segment who resists banked financial products and lives in a primary cash market. These Latinas represent high growth potential if marketers can help them understand the enormous benefits of building a financial history for themselves and their families.

INSIDE THE SHOPPING CART

The caretaking and nurturing nature of Latinas seems evidenced in their shopping carts. Latinas tend to buy either prepared perishable foods or foods that require cooking, over-indexing in categories such as dry grains and beans, eggs, oils, flour, dry mixes, spices, prepared and unprepared meat and seafood, cereals, and yogurt.

Other areas where Latinas buy more than non-Hispanic white females – almost all beverage categories and baby and household products are likely indicative of their larger household size and their younger families with more children. The beverage categories of note where Latina’s over-index compared to non-Hispanic white females include juices (both refrigerated and shelf stable), bottled water and non-carbonated soft drinks. Latinas over-index in several food and household products in addition to health and personal care.

Latinas’ are increasing health awareness for both themselves and their families making them more conscientious about weight, preventative health measures, and personal care.

Latinas’ pride in their appearance results in a higher share of beauty, skin and hair products compared to non-Hispanics. Latinas greatly over-index with Women’s fragrance products than their non-Hispanic counterparts. They are more likely than the overall U.S. female population to use personal care and beauty products, not only for themselves but also for men and children.

HISPANIC TO NON-HISPANIC WHITE FEMALE HEAD OF HOUSEHOLD DOLLAR MARKET SHARE INDEX (INDICES OF 100 OR GREATER)

<table>
<thead>
<tr>
<th>NON-PERISHABLES</th>
<th>PERISHABLES</th>
<th>BEVERAGES</th>
<th>HOUSEHOLD</th>
<th>PERSONAL CARE- BEAUTY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dry veg./beans/grains 316</td>
<td>Baby food 208</td>
<td>Juice/drinks-refrig. 150</td>
<td>Total baby needs 156</td>
<td>Women’s fragrance 208</td>
</tr>
<tr>
<td>Shortenings/oils 164</td>
<td>Egg 138</td>
<td>Juices –shelf 148</td>
<td>Disp. diapers 155</td>
<td>Men’s toiletries 207</td>
</tr>
<tr>
<td>Spices/extracts 133</td>
<td>Prep. food 130</td>
<td>Btd. water 139</td>
<td>Laundry supplies 130</td>
<td>Cologne 170</td>
</tr>
<tr>
<td>Pkg. milks 131</td>
<td>Unprep. froz. meat/seafood 117</td>
<td>Soft drinks non-carb 129</td>
<td>HH cleaners 118</td>
<td>Hair care 159</td>
</tr>
<tr>
<td>Dry mixes 130</td>
<td>Yogurt 110</td>
<td>Wine 116</td>
<td>Paper products 111</td>
<td>Personal soaps 147</td>
</tr>
<tr>
<td>Can seafood 123</td>
<td>Fresh meat 104</td>
<td>Beer 115</td>
<td></td>
<td>Sanitary protect 144</td>
</tr>
<tr>
<td>Cereal 116</td>
<td>Pkg meat 103</td>
<td>Milk 108</td>
<td></td>
<td>Grooming 141</td>
</tr>
<tr>
<td>Flour 115</td>
<td>Dairy desserts 103</td>
<td>Coffee 104</td>
<td></td>
<td>Family plan 137</td>
</tr>
<tr>
<td>Pasta 108</td>
<td>Dressings/salads/prep. food - deli 101</td>
<td>Tea 103</td>
<td></td>
<td>Cosmetics 135</td>
</tr>
<tr>
<td>Sugar &amp; substitute 108</td>
<td>Produce 100</td>
<td>Carb. beverages 102</td>
<td></td>
<td>Deodorant 131</td>
</tr>
<tr>
<td>Table syrups 107</td>
<td></td>
<td>Liquor 100</td>
<td></td>
<td>Skin care 130</td>
</tr>
<tr>
<td>Can vegetables 103</td>
<td></td>
<td></td>
<td></td>
<td>Oral hygiene 125</td>
</tr>
<tr>
<td>Cookies 102</td>
<td></td>
<td></td>
<td></td>
<td>Shaving 118</td>
</tr>
<tr>
<td>Table bfast- shelf stable 101</td>
<td></td>
<td></td>
<td></td>
<td>Fem hygiene 115</td>
</tr>
<tr>
<td>Condiments/sauces 101</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sources: Nielsen Homescan, 01/01/12 - 12/29/12.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Many Latinas today rank health and nutrition as a primary concern. One-third of Latinas are trying to lose weight by dieting, one-third look for organic or natural products and a quarter are counting calories. These levels are equal to or higher than the total U.S. female population and it is important to understand the changing needs of today’s progressive Latina.

<table>
<thead>
<tr>
<th>TOTAL AGREE</th>
<th>LATINAS 18+</th>
<th>LATINAS TO TOTAL U.S. FEMALES 18+</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% Penetration</td>
<td>INDEX</td>
</tr>
<tr>
<td>I’ll Try Any New Diet</td>
<td>18%</td>
<td>132</td>
</tr>
<tr>
<td>I Look For Organic/Natural When Food Shopping</td>
<td>34%</td>
<td>116</td>
</tr>
<tr>
<td>Normally Count Calories In The Foods I Eat</td>
<td>25%</td>
<td>102</td>
</tr>
<tr>
<td>Most Time Trying to Lose Weight</td>
<td>35%</td>
<td>100</td>
</tr>
<tr>
<td>I Do Some Sport/Exercise Once A Week</td>
<td>52%</td>
<td>99</td>
</tr>
</tbody>
</table>

Sources: Nielsen, April 2013, Households with females 18+.

**WHAT LATINA CONSUMPTION IMPACTS**

- Family consumption behaviors. Latinas are the key to future growth across a wide array of product categories, especially when it comes to family consumption.
- Family and financial health. As household wealth increases, Latinas’ will invest and spend in many categories to build financial stability for their families.
- Product experimentation. Products or categories that are new to many Latinas will require education to spur interest, whether for financial products or new food categories.
U.S. Hispanic women are both the guardians of Latino culture and advocates of change. There is a perception that men have the proclivity towards gadgets, but it is really the Latina who inspires technology adoption, driven by her rising education, income and role as super mom. She is creating her own digital persona. Today’s Latinas are using their mobile devices to connect media, entertainment, brands and family. She has taken multi-tasking to a new level by increasing her connectivity with television and digital communications, often simultaneously and on multiple screens. She might be searching for new Latino recipes on Pinterest, filling-in details from her favorite novela on Twitter, posting and exchanging with comadres (good friends) on Facebook, or sharing her kids’ latest tales on Flickr.

HOW SHE CONSUMES MEDIA

The U.S. Latinas’ ambicultural® identity plays a vital role in her persona. Latinas do not come home and say they are going to watch a Spanish or English program, instead they use technology to help find entertainment that supports their cross-cultural disposition. They are choosing programs that resonate, which come in both languages and are pertinent to both Latino and American culture. Latinas draw equally from culture and innovation to formulate a vibrant ecosystem that begins with personal and family interests, and then radiates outward to embrace community, media, and a global network of Latinas and moms who share interests, passions and priorities.
Latinas are consuming more television and digital media than ever before, extending the hours in their day to consume everything on demand, in the language they prefer. Access to robust content options allows for a more enriched media experience that more closely aligns with how they identify themselves. As Latinas are increasingly enabled to fully express their cultural duality in the digital space, brands can leverage their cultural values to create meaningful connections.

**P&G EMPOWERING LATINAS IN THE AMBICULTURAL® DIGITAL SPACE**

**ORGULLOSA.COM IS A P&G MULTI-BRAND ONLINE INITIATIVE THAT BLENDS LATINA LIFESTYLE STORIES WITH PRODUCT INFORMATION, SCHOLARSHIPS, BEAUTY TIPS, RECIPES, AND CONTINUAL MESSAGES OF EMPOWERMENT AND SUPPORT. ORGULLOSA IS AN EXCELLENT EXAMPLE OF INTEGRATING MASS MEDIA BRAND INITIATIVES WITH AN OVERARCHING SOCIAL MEDIA STRATEGY TAILORED TO AMBICULTURAL® LATINAS.**

**TV MINUTES GROW IN BOTH LANGUAGES**

Latina television viewing has increased with the rising use of Spanish broadcast and cable in both Spanish and English. Cable and Spanish broadcast have increased their content options for Latinas and made strong gains in overall viewing time.

<table>
<thead>
<tr>
<th>LATINA TELEVISION VIEWING MINUTES</th>
<th>LATINAS 18+</th>
<th>2003</th>
<th>2013</th>
<th>'03 TO '13</th>
</tr>
</thead>
<tbody>
<tr>
<td>PUTS (PERSONS USING TELEVISION)</td>
<td></td>
<td>4:42:58</td>
<td>4:58:26</td>
<td>+15:33</td>
</tr>
<tr>
<td>ENGLISH CABLE</td>
<td></td>
<td>1:15:36</td>
<td>1:29:26</td>
<td>+13:49</td>
</tr>
<tr>
<td>ENGLISH BROADCAST</td>
<td></td>
<td>1:22:56</td>
<td>0:43:54</td>
<td>_39:02</td>
</tr>
<tr>
<td>SPANISH CABLE</td>
<td></td>
<td>0:04:13</td>
<td>0:14:54</td>
<td>+10:41</td>
</tr>
<tr>
<td>SPANISH BROADCAST</td>
<td></td>
<td>1:19:21</td>
<td>1:34:54</td>
<td>+15:33</td>
</tr>
</tbody>
</table>

Source: Nielsen, Feb 2013.

2003 PUTS based on LIVE data, while 2013 includes DVR playback.

**RELEVANCE OF SPANISH TV**

A NIELSEN BRAND EFFECT STUDY CONDUCTED ACROSS CATEGORIES FOUND THAT AVERAGE BRAND RECALL AMONG HISPANIC WOMEN IS TWICE AS HIGH IN SPANISH TV COMPARED TO ENGLISH TV. THIS IS NOT NECESSARILY A REFLECTION OF LANGUAGE ALONE, BUT THE AMOUNT OF RELEVANT CONTENT AND ADVERTISING MESSAGES DESIGNED TO APPEAL TO LATINAS IS GREATER ON SPANISH TV THAN ON ENGLISH TV.

Source: Nielsen TV Brand Effect, January 2012 to April 2013, Women 18+. 
Leaders in Mobile and Internet Technology

Latinas are discovering the benefits of untethered entertainment and savoring a multitude of mobile activities at rates consistently and sizably ahead of non-Hispanic white females. Online Latinas are more likely than their non-Hispanic white counterparts to own smartphones at 77 percent (vs 55 percent). Latinas seem to be bypassing laptops and desktops in favor of mobile technology.\(^4\)

Mobile devices allow greater personalization and give Latinas the integrated systems they need to connect with family, their personal networks and information and entertainment options. Latinas are quick to adopt new capabilities like mobile banking, shopping and price comparisons. Moreover, social networking is used by 56 percent of Latinas who share information among their connected communities in the U.S. and Latin America. Forty-four percent of Latinas use apps on their mobile devices, 40 percent GPS and 37 percent streaming audio.

\(^4\)Nielsen Mobile Insight Study, Q4 2012, monthly trends. Study based on females who are online.
U.S. LATINAS’ ONLINE MOBILE ACTIVITIES OVER THE PAST 30 DAYS
INDEX TO NON-HISPANIC WHITE FEMALES

64% INTERNET
INDEX 136

57% EMAIL
INDEX 136

44% APPS
INDEX 133

38% BANKING
INDEX 176

26% MOBILE SHOPPING
INDEX 156

81% TEXT MESSAGE
INDEX 108

62% PICTURE MESSAGE
INDEX 137

56% SOCIAL NETWORK
INDEX 142

40% GPS
INDEX 163

37% STREAM AUDIO
INDEX 216

24% VIDEO
INDEX 218

20% TWITTER
INDEX 199

17% BAR SCAN
INDEX 135

Source: Nielsen Mobile Insight Study, Q4 2012, monthly trends. Study based on females who are online.
DIGITAL INFORMATION STEERS DECISION-MAKING

Technology is a key companion to today’s consumer and the Latina is no exception. Eight-out-of-ten Latinas are using online information to make decisions about purchasing products online, three quarters are using it to make day-to-day decisions or as a lifestyle guide through big events, and two thirds to help inform in-store retail purchases. The importance of online information is crucial to buying decisions both online and off.

<table>
<thead>
<tr>
<th>STRONGLY OR SOMEWHAT AGREE</th>
<th>TOTAL ADULT LATINAS</th>
<th>LATINA MILLENNIALS TO TOTAL LATINA ADULTS INDEX</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have purchased a product online based on online info</td>
<td>81%</td>
<td>102</td>
</tr>
<tr>
<td>I rely on online lifestyle info to help me make day to day decisions</td>
<td>77%</td>
<td>108</td>
</tr>
<tr>
<td>I rely on online lifestyle info to help me navigate big life events</td>
<td>75%</td>
<td>105</td>
</tr>
<tr>
<td>I have purchased a product in store based on what online info</td>
<td>69%</td>
<td>107</td>
</tr>
<tr>
<td>I follow brands online</td>
<td>62%</td>
<td>106</td>
</tr>
</tbody>
</table>

How much do you agree or disagree with each of the following statements? [Strongly agree, somewhat agree, somewhat disagree, strongly disagree]


INFORMATION LATINAS WANT AND NEED

Latinas have a voracious appetite for information with the majority searching several times per month for an array of topics from health to education, dating and more. Their extensive interest in using the Internet to learn makes it a fertile environment for marketers of all types. The most important search topics are family, personal health, and well-being.
U.S. LATINAS’ ONLINE SEARCH IN KEY CATEGORIES (% RATE TOPIC AS VERY IMPORTANT)

- **RECIPES & COOKING**: 44% searched several times per month, 77% rate as very important.
- **BEAUTY TIPS**: 30% searched several times per month, 75% rate as very important.
- **PERSONAL HEALTH & WELLNESS**: 54% rate as very important.
- **FASHION ADVICE**: 27% searched several times per month, 69% rate as very important.
- **FAMILY HEALTH**: 66% rate as very important.
- **WEIGHT/FITNESS**: 41% rate as very important.
- **EDUCATION**: 45% rate as very important.
- **PARENTING/FAMILY ADVICE**: 48% rate as very important.
- **FINANCES/INVESTMENTS**: 42% rate as very important.
- **ROMANCE/DATING**: 24% rate as very important.
- **HOSTING PARTIES/CELEBRATIONS**: 15% rate as very important.

LATINA SOCIAL & CULTURAL ECOLOGY

Social media is increasingly seeding eco-niches of Latinas, that is, aggregating people around common cultural interests and behaviors. Principal eco-niches include Latino friends and family social networks, ambicultural® special interest communities, Latino media and Spanish language sites.

These Latino online experiences often materialize on popular sites where cultural interests are in full expression and are attracting like-minds to create the Latino online ecosystem. These are in Spanish and English, in the U.S. and Latin America, and range from all imaginable topics and areas of interest. On social networks like Facebook for example, 77 percent of Latinas say over half their friends are Hispanic.

About a fifth of Latinas predominantly use Spanish to surf the web and almost a third use Spanish and English equally. Beyond language, a majority (62 percent) of Latinas wish for more lifestyle information about Latinas online, and over sixty percent want more lifestyle information written in Spanish. When Latinas search for Latino subject matter online, recipes top the list, followed by news, music, family health, beauty and celebrations.

77%
ON AVERAGE, 77 PERCENT OF LATINAS’ SOCIAL NETWORK FRIENDS ARE HISPANIC.¹⁶

62% WISH FOR MORE LIFESTYLE INFORMATION WRITTEN “FOR LATINAS LIKE ME”

56% WISH THERE WAS MORE ONLINE LIFESTYLE INFORMATION WRITTEN IN SPANISH

59% SAY LATINA CELEBRITIES INFLUENCE HOW I WANT TO LOOK AND BEHAVE

Language used by Latinas to surf the web

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>9%</td>
<td>Only Spanish</td>
</tr>
<tr>
<td>15%</td>
<td>Mostly Spanish</td>
</tr>
<tr>
<td>31%</td>
<td>Both Spanish and English equally</td>
</tr>
<tr>
<td>21%</td>
<td>Mostly English</td>
</tr>
<tr>
<td>24%</td>
<td>Only English</td>
</tr>
</tbody>
</table>


HOW TO ATTRACT LATINAS ON MEDIA

- Integrated marketing initiatives. Reach Latinas where they learn and network in digital space and via devices that they over-index on (mobile).
- Bi-Lingual programming. Increasing broadcast media choices in both Spanish and English offer marketers multiple venues to attract Latinas in culture.
- Identify cultural interests and behaviors. Understanding and activating Latinas’ rich eco-niches will pay dividends to savvy marketers.

¹⁵Ethnifacts Latino + Identity Project 2013.
¹⁶The term, Latino eco-niches is attributed to Ethnifacts, LLC 013.
CONCLUSION

U.S. Latinas are in the driver’s seat with better education, better income, and better jobs. Latinas are the guardians of culture and the leading proponents of ambiculturalism.® Rather than choosing between Latino or American culture, they are assertively becoming both, which then influences all of their consumption, media, and digital behaviors. Latinas leverage all the resources available to them, unlike previous generations who did not have access to advancements in modern technology. English TV viewership keeps pace as Latinas increase their overall television consumption in both languages. Spanish TV and the Internet are readily available as opposed to prior generations who did not have the opportunity to fully sustain Latino culture. Mobile and global connectivity are providing a means of navigating both American and Latino cultures and creating a greater sense of community, thus enabling Latinas to continually fit in and feel like they belong. Ultimately, technology helps hold family together and allows them to keep up the connections so important and inherent to Latino culture.

It is inevitable that Latinas will strongly influence the U.S. new mainstream with their upward trajectory and growing impact on the future of families, media, technology and commerce. The same female-led traditions and matriarchal roles that are revered and prioritized as central to Hispanic culture and values—hard work, familism, femininity, determination, resilience, and optimism—are being used by Latinas to leave their imprint on American society. Latina’s thriving social networks, facility with technology, and hunger for information will bolster their innate abilities to navigate the complexities of living between two cultures, even as they build new bridges to others around them. Marketers who properly grasp the significance of this market will be the first to gain Latinas’ trust and benefit from all that they have to offer, now and long into the future.
THE LATINA POWER SHIFT REPORT IS A U.S. INITIATIVE DRIVEN BY NIELSEN AND THE HISPANIC/LATINO ADVISORY COUNCIL.

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ABOUT THE HISPANIC/LATINO ADVISORY COUNCIL

The Hispanic/Latino Advisory Council was assembled in order to assist our efforts to recruit, measure, and accurately report on U.S. Latino households. The Council consists of industry, community and business leaders from around the country. They advise us as we train our bilingual sample recruiters and translate materials for Latino TV households.

ABOUT THIS REPORT

Nielsen is an industry leader in multicultural research and is the publisher of the 2012 State of the Hispanic Consumer: The Hispanic Market Imperative. Since then, Nielsen has received countless requests for added perspective on this important market, particularly regarding Latina women who make the majority of household spending decisions for the $1.2 trillion dollar Hispanic market. This report offers illuminating perspective about important changes among Latinas and their increasingly central role in the changing marketplace.

ABOUT NIELSEN

Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence and mobile measurement. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands.

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