

# Trends of the National Hispanic Market

Mike O'Shea  
VP Business Development  
Telemundo Network



# Third Largest Hispanic Market In The World

Top 5 Hispanic Populations  
2007

Country	2007 Population
Mexico	108,700,891
Colombia	44,227,550
U.S. Hispanic Market	44,224,595
Spain	40,448,191
Argentina	40,301,927

Top 5 Hispanic Populations  
Purchasing Power 2007

Country	Purchasing Power (Billions)
Spain	\$1,276
Mexico	\$1,237
U.S. Hispanic Market	\$798*
Argentina	\$671
Colombia	\$401

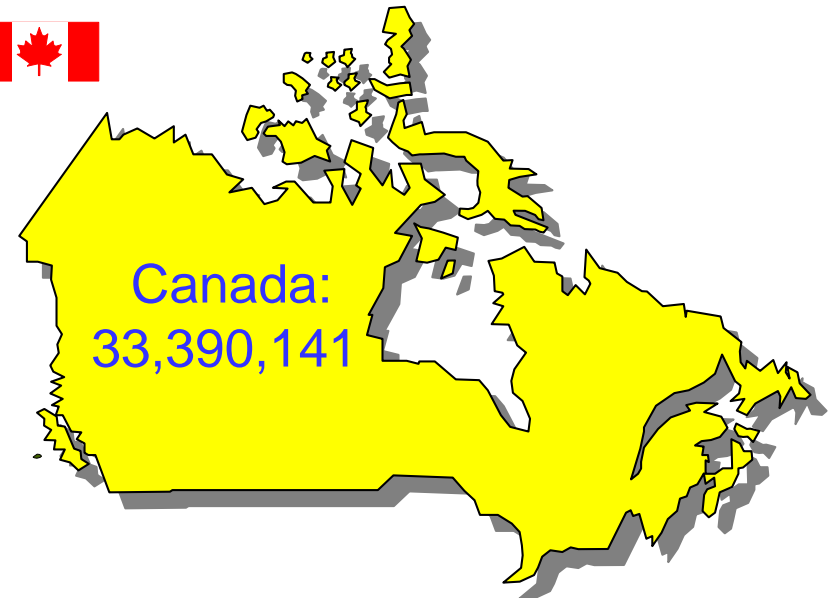
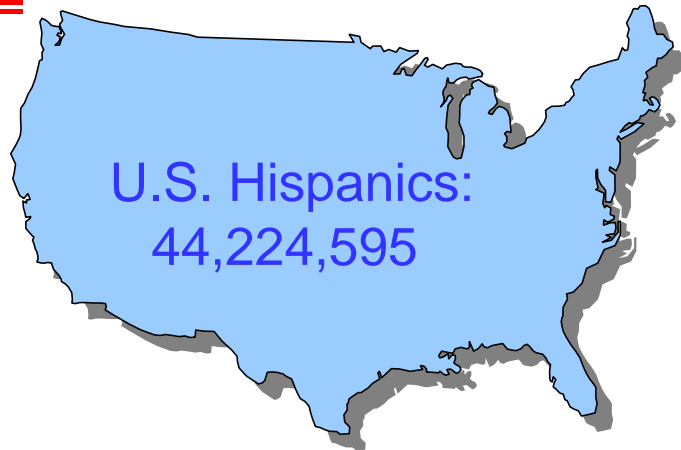
Source: U.S. Bureau of the Census, International Database, Countries Ranked by Population: 2007; U.S. Interim Projections by Sex, Race and Hispanic Origin 2007; Selig Center for Economic Growth, Terry College of Business, The University of Georgia, June 2006; International Monetary Fund, World Economic Outlook by Countries: 2007

\* 2006



# U.S. Hispanic Market Is Larger Than Canadian Population

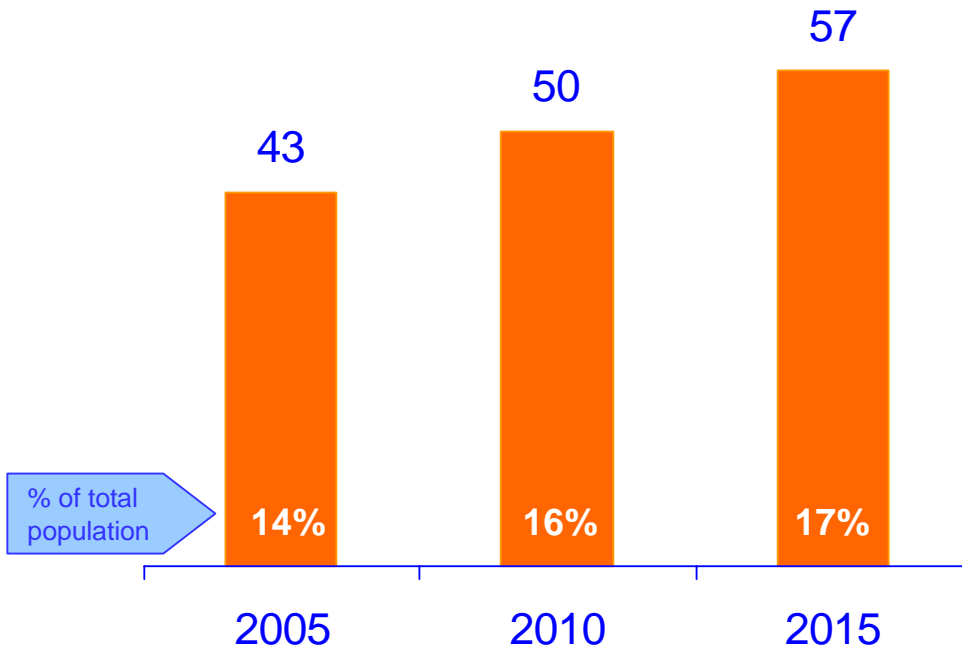
2007 Population



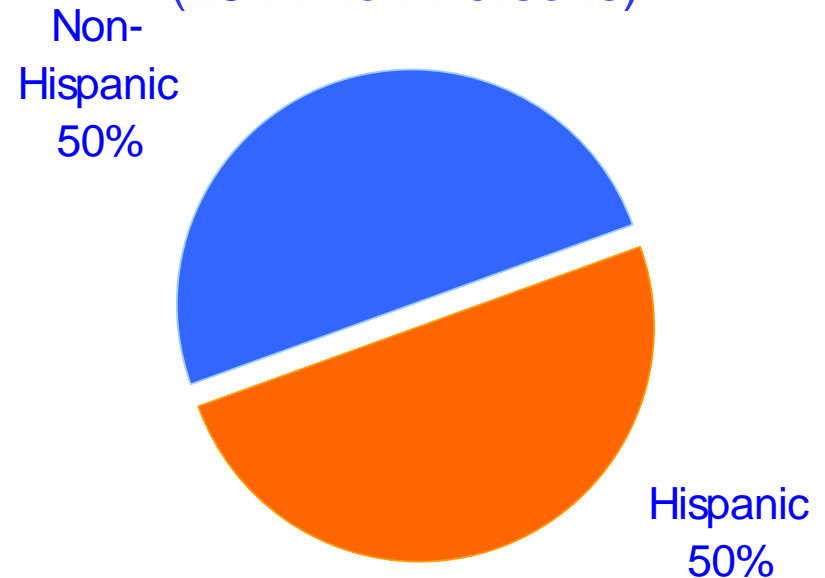
Source: U.S. Bureau of the Census, International Database, Countries Ranked by Population: 2007; U.S. Interim Projections by Sex, Race and Hispanic Origin 2007

# Hispanics Are The Population Growth

Hispanic Population  
(Millions)



Share Of New Growth 2005-  
2015  
(28 Million Persons)



Source: Global Insight

# Hispanics Represent A Large Consumer Segment In Major U.S. Markets

## Top 10 Hispanic DMAs

DMA	2006 Population	% Hispanic
1. Los Angeles, CA	7,538,736	43%
2. New York, NY	4,196,338	20%
3. Miami, FL	1,870,888	44%
4. Chicago, IL	1,799,243	19%
5. Houston, TX	1,798,360	32%
6. Dallas, TX	1,597,459	24%
7. San Francisco, CA	1,429,295	21%
8. Phoenix, AZ	1,235,970	27%
9. San Antonio, TX	1,180,577	53%
10. Harlingen, TX	1,025,632	89%

Source: Claritas iMark

# Hispanics Represent A Large Consumer Growth Segment In Major U.S. States

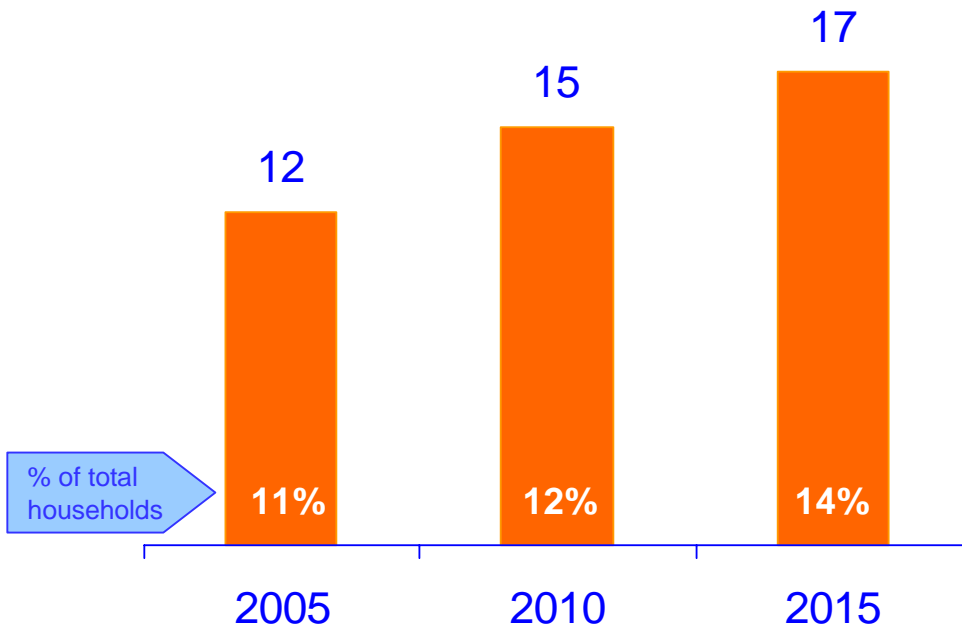
## Top 10 States With Highest % Hispanic Growth

States	Hispanic Population Growth (2006-2011)	% Hispanic Population Growth (2006-2011)
1. Georgia	+213,280	33%
2. Nevada	+189,977	33%
3. Arkansas	+42,382	32%
4. North Carolina	+174,850	31%
5. South Carolina	+43,274	31%
6. Virginia	+135,533	29%
7. Tennessee	+51,776	29%
8. Delaware	+13,353	26%
9. Maryland	+82,264	26%
10. Alabama	+26,117	25%

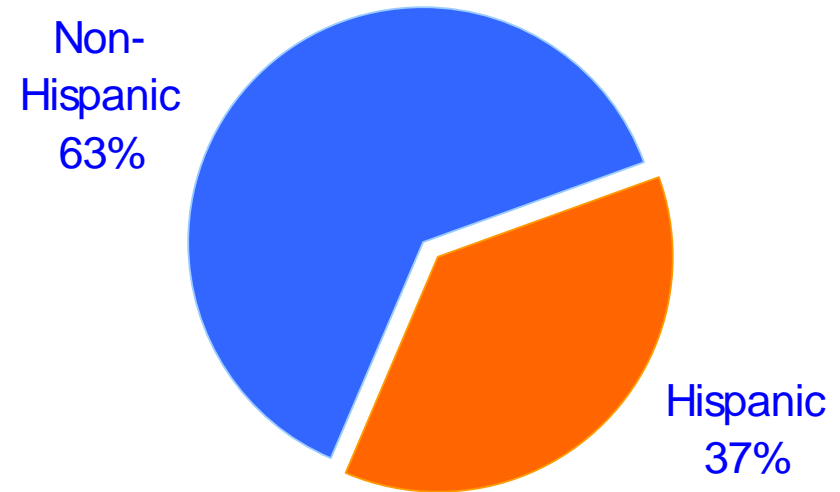
Source: Claritas iMark

# Hispanics Will Fuel Household Formation Rate

Hispanic Households  
(Millions)



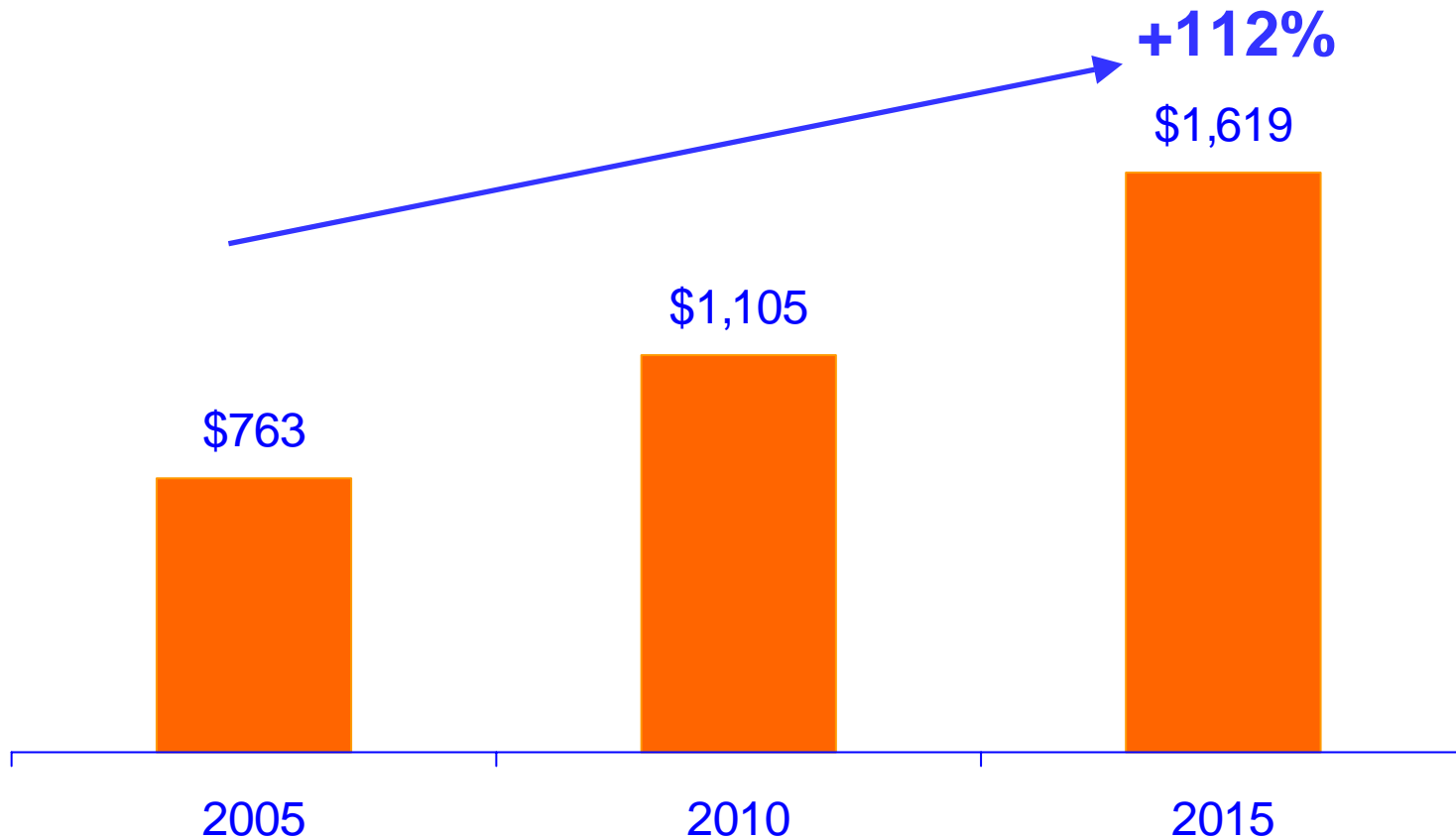
Share Of New Growth 2005-  
2015  
(13 Million Households)



Source: Global Insight

# Hispanics Will Contribute \$900B To The Economy Over The Next 10 Years...

Hispanic Population Disposable Income 2005-2015 (\$Billions)



Source: Global Insight



# ... And Are Becoming A Strong Consumer Of Appliances

## % Own Appliances

Appliance	Hispanic	Non-Hispanic	Index
Microwave Oven	81%	89%	91
Refrigerator	80%	88%	91
Automatic Washing Machine	47%	69%	68
Separate Clothes Dryer	42%	66%	64
Electric Stove or Range	40%	54%	74
Automatic Dishwasher	34%	57%	60
Garbage Disposal	29%	38%	76
Toaster Oven	23%	31%	74

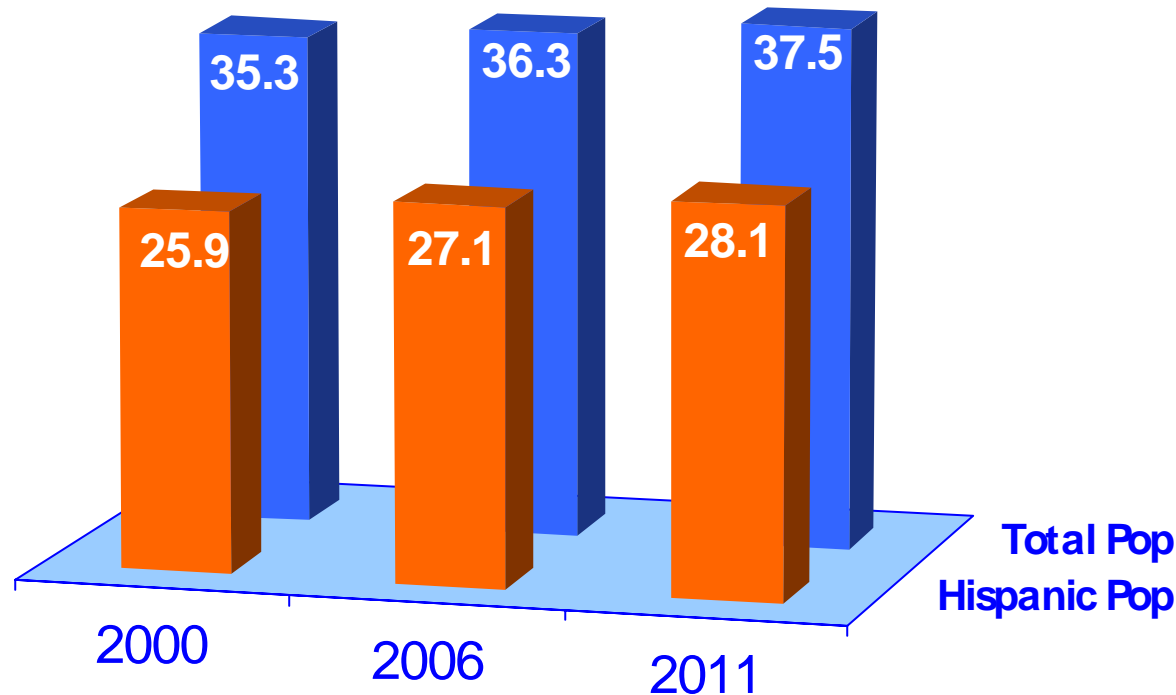
## % Bought Appliances Last 12 Months

Appliance	Hispanic	Non-Hispanic	Index
Microwave Oven	10%	7%	143
Refrigerator	6%	6%	100
Automatic Washing Machine	3%	6%	50
Separate Clothes Dryer	4%	5%	80
Electric Stove or Range	3%	3%	100
Automatic Dishwasher	4%	4%	100
Garbage Disposal	2%	2%	100
Toaster Oven	3%	2%	150

Source: Simmons NCS/NHCS Fall 2006 Adult Full Year (Jan 06-Oct 06) - HH

# The Younger Hispanic Market Represents An Extra Purchase Cycle For Appliance Manufacturers

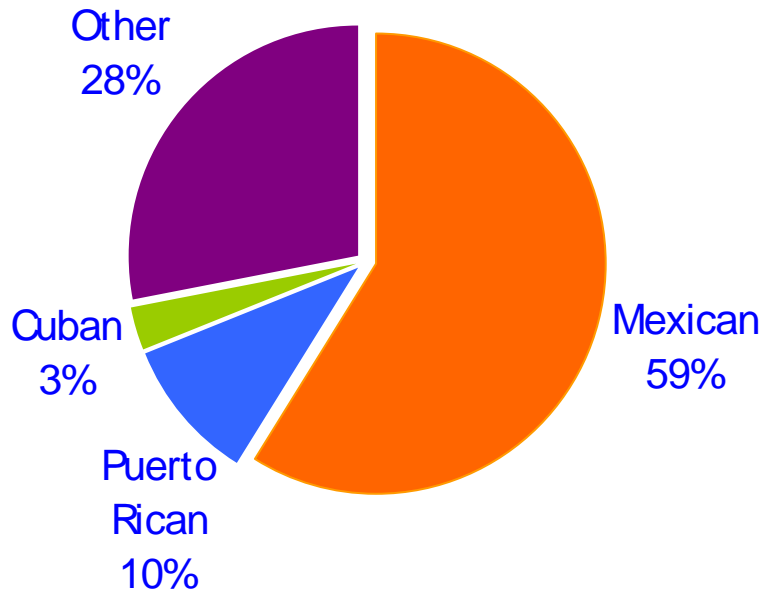
Median Age Of The U.S. Population



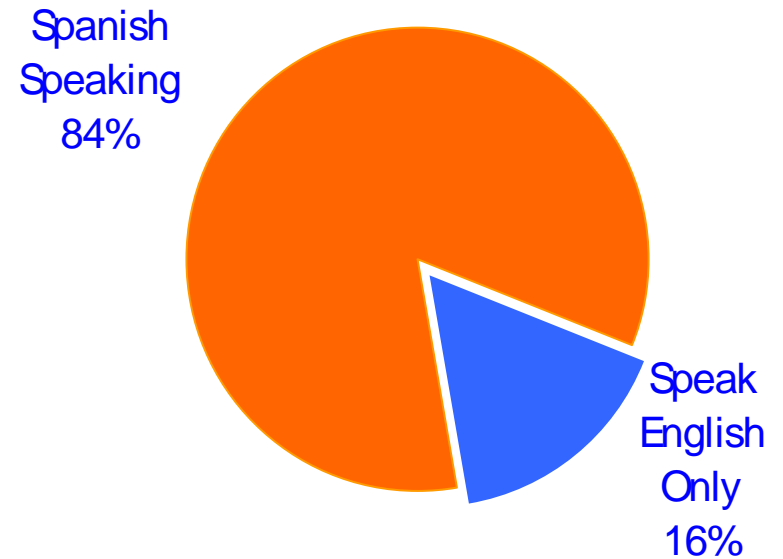
Source: Claritas iMark

# While Of Varied Ancestries, Most Hispanics Share A Common Trait....Spanish

U.S. Hispanic Population  
By Ancestry



% Hispanic P2+ Speak Any Spanish

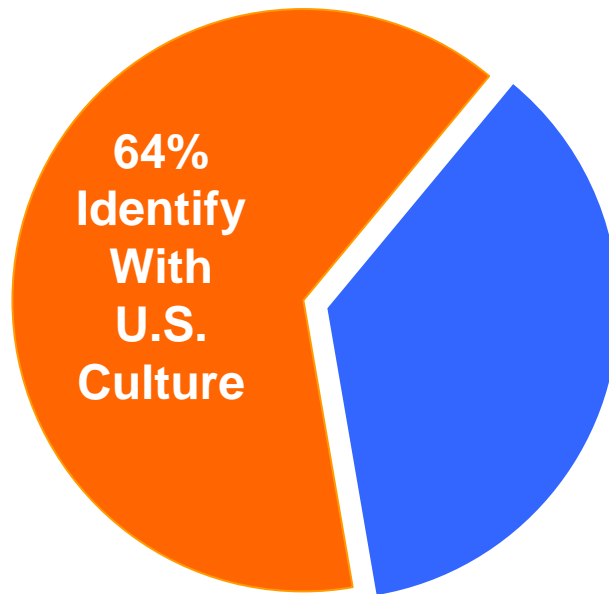


Source: Claritas iMark

Source: Nielsen Audience Watch – Audience Analytics – NTI HOH Hispanic

# Most Hispanics Are Acculturated...

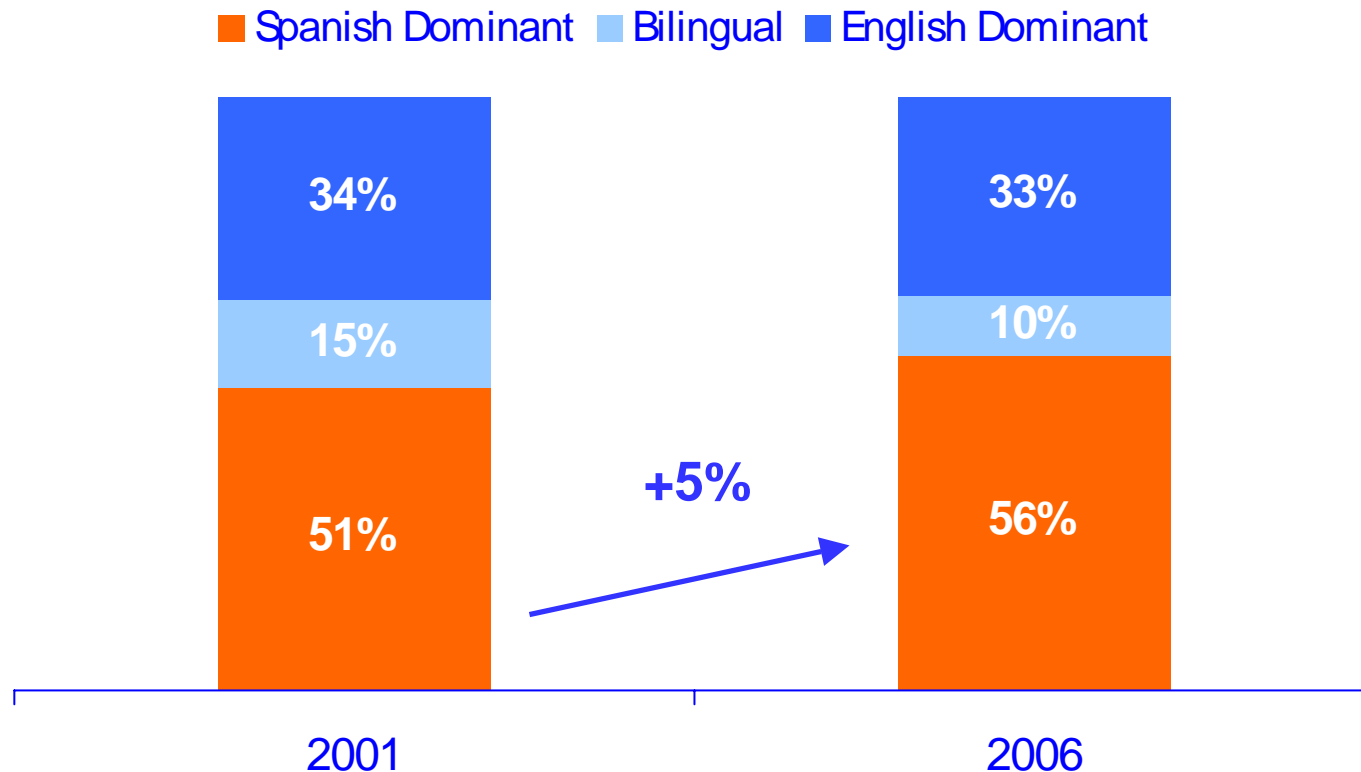
% Of Hispanic Population That Has A Medium To High Level  
Of Identification With U.S. Culture



Source: NCS/NHCS Fall 2006 Adult Full Year (Jan 06 – Oct 06) POP

# ...Yet Hispanics Speak Spanish At Home

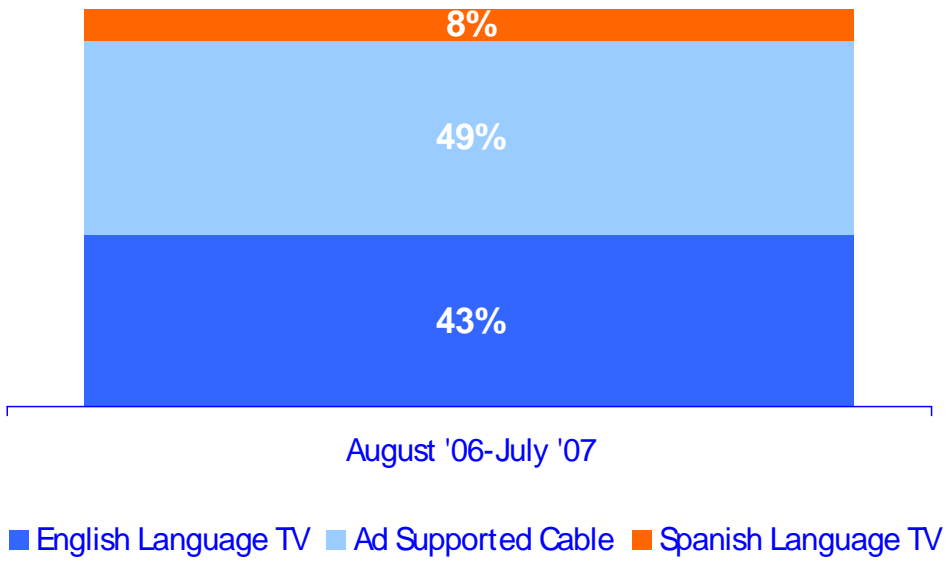
## Language Spoken At Home



Source: NCS/NHCS Fall 2006 Adult Full Year (Jan 06 – Oct 06) POP and Hispanic Study 2001 POP

# 8% Of A18-49 Captured On Spanish Language TV

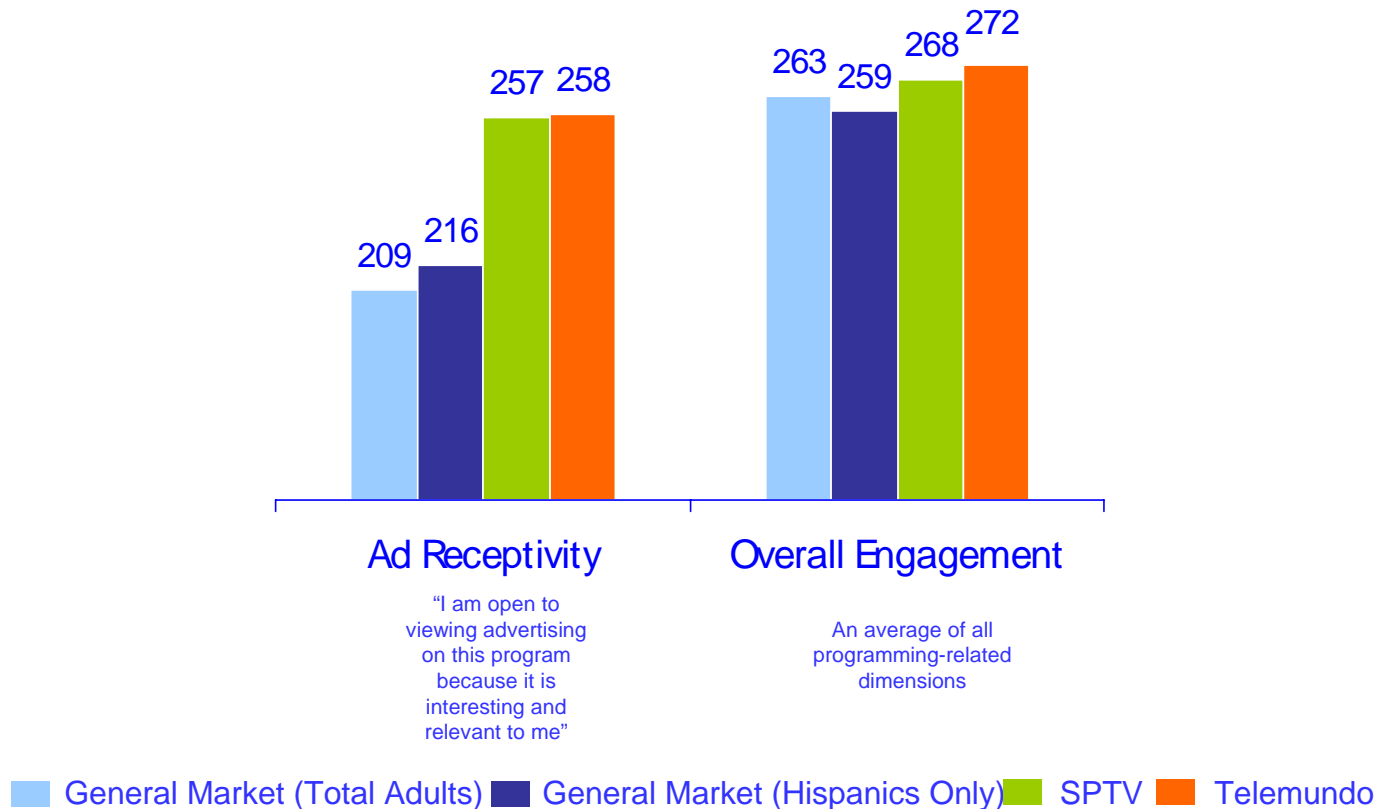
% Of Total TV Viewing To Spanish TV  
A18-49



Source: NTI August '06-July'07; Spanish Language TV=Telemundo, Univision, Telefutura, Azteca, + NHTI, Spanish Cable & Spanish Independents  
English Broadcast = ABC, NBC, CBS, FOX, CW, MNT, PAX  
Cable = English Ad Supported Cable

# Measuring Engagement

## Spanish TV Delivers The Most Engaging Programming

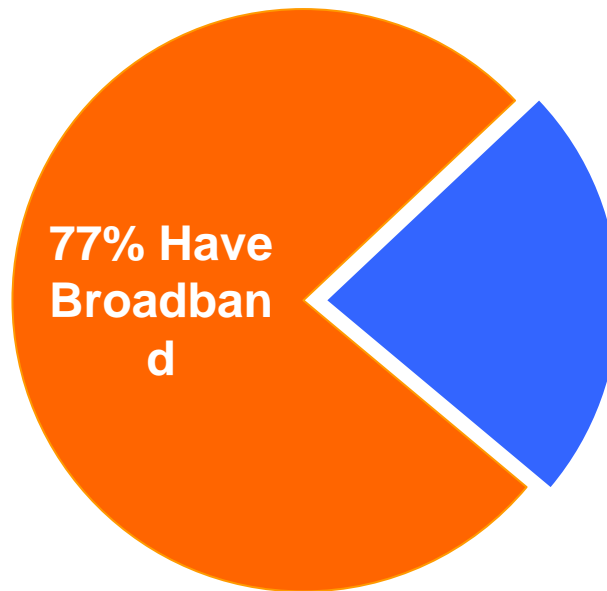


Base: Adults 18-49

Source: Simmons MME 2007 Tier 1, Average of all programs, SPTV=Univision, Telefutera, Azteca, Telemundo; GM=ABC, CBS, CW, FOX, I, MY NETWORK, NBC

# Hispanics Are Internet Savvy

16.5 Million Hispanics Have Internet Access....

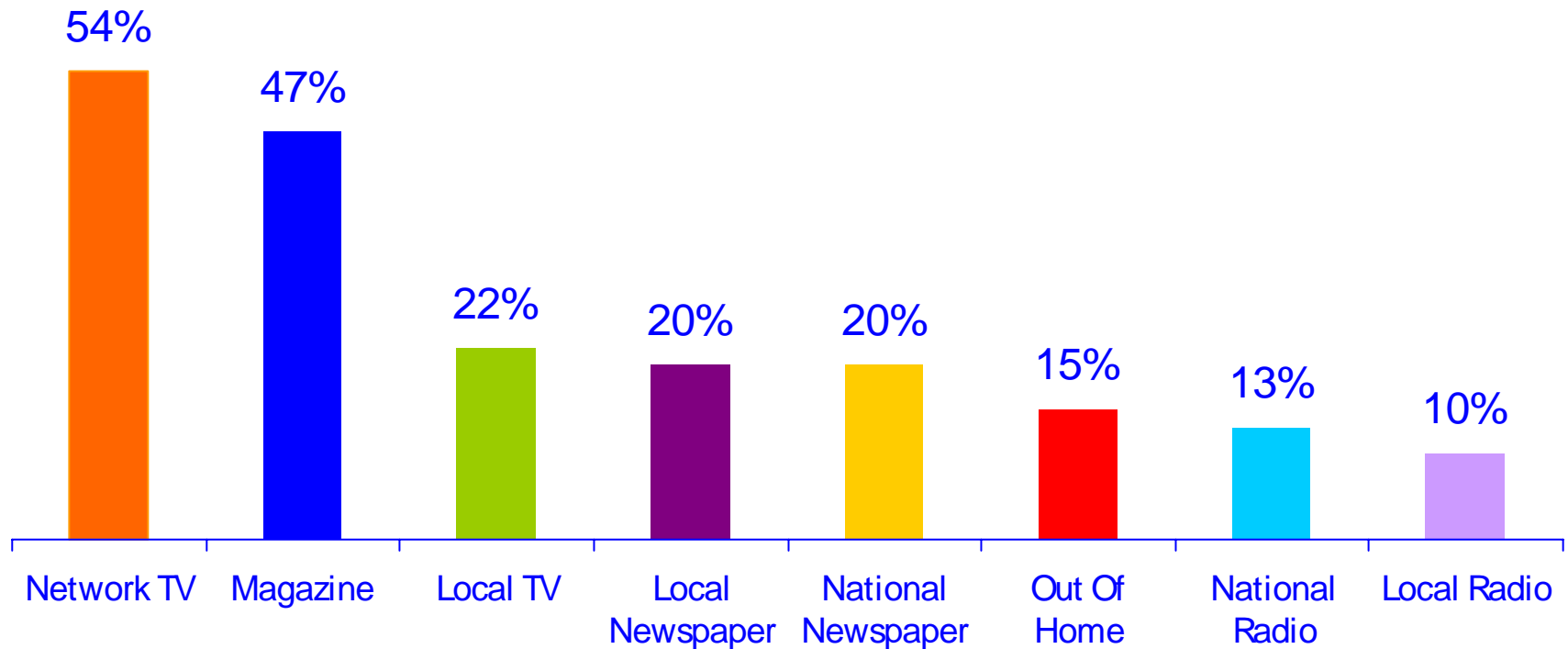


Source: Conexion Cultura: US Hispanics Use Of Media and Technology 2007



# Spanish Network TV Advertising Leads The Way In Growth

Growth In Spanish Ad Expenditures By Medium (2002-2006)



Source: Hispanic Business December Issue 2006

# Major Advertisers Seeing The Value Of Spanish Language Television

## Top 10 Corporate Advertisers Investment In Spanish Language TV

Advertiser	\$\$\$ Spent
Procter & Gamble Co.	\$143M
Sears Holdings Corp	\$77M
Johnson & Johnson	\$64M
McDonalds Corp	\$62M
at&t	\$61M
General Motors Corp	\$61M
Walt Disney Co	\$53M
Wal-Mart Stores Inc	\$52M
Toyota Motor Corp	\$48M
Verizon	\$48M

Source: TNS Media Intelligence July 2006-June 2007

