

U.S. Diversity 2010 Markets Report



Snapshot Report



Carat



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Chapter I – Introduction

2010 U.S. DIVERSITY MARKETS REPORT

The U.S. multicultural population continues to grow, which is changing the face of the American consumer. Synovate continues to recognize the importance of the U.S. multicultural markets, and is proud to present the fourteenth edition of the U.S. Diversity Markets Report.

The U.S. Diversity Markets Report is the most comprehensive guide on ethnic markets used today, trusted by clients since first published in 1980. In the 2010 edition, we continue to track the key measures that marketers are accustomed to seeing in the Report. In addition to accurate Hispanic demographics and consumer data, we continue to present these statistics for African-Americans and Asian-Americans as well.

This Report is divided into nine in-depth chapters covering demographics, Hispanic, African-American, and Asian-American market characteristics, acculturation, media and advertising, products and services use, among others. The chapters of this Report are as follows:

CHAPTER II: THE MULTI CULTURAL MARKET

The first section in the study presents an overview of the three Diversity segments explored, including population projections and growth rates.

CHAPTER III: HISPANIC MARKET DEMOGRAPHICS AND CHARACTERISTICS

This section provides an overview of population, households, buying power, and a variety of proprietary study data related to the work, home and consumer lives of Hispanics. We also describe our proprietary Acculturation Model as a recommended approach to sub-segmenting the Hispanic market, and how to use this model for marketing purposes. Data are presented separately by market and other variables, as well as snapshots of each of the ten top Hispanic markets are included.

CHAPTER IV: AFRICAN-AMERICAN MARKET DEMOGRAPHICS AND CHARACTERISTICS

In addition to population and household demographics, we explore country of birth, education, employment status, computer ownership and Internet access, dwelling type and home ownership. Data is presented on a national basis for African-Americans, as well as separately by the four census regions.

CHAPTER V: ASIAN-AMERICAN MARKET DEMOGRAPHICS

For Asian-Americans, we explore population and household demographics among this fast growing group, which now has an average annual growth rate at par with Hispanics.

CHAPTER VI: LANGUAGE PREFERENCE AND USAGE

This section reports language use among Hispanics. It covers topics such as the first language learned to speak, language most comfortable speaking and language used in various situations by different segments.

CHAPTER VII: MEDIA USAGE

This section explores media usage differences among Hispanics, African-Americans, and the General Market. Television, Radio, Newspaper, Magazines, and the Internet are the media channels explored in this chapter. For Hispanics, data for English and Spanish media usage by channel is presented.

CHAPTER VIII: CATEGORY-SPECIFIC FINDINGS

This section includes information on household ownership of a number of products and services as well as attitudes and intentions.

CHAPTER IX: TOP 50 HISPANIC, AFRICAN-AMERICAN, AND ASIAN-AMERICAN MARKETS

Summary demographic information for the Top 50 of each of the key multicultural markets (Hispanic, African-American, and Asian-American) is provided in this section.

2010 U.S. DIVERSITY SHOPPER INSIGHTS REPORT

New this year, and only available to purchasers of the 2010 U.S. Diversity Markets Report, is the Diversity Shopper Insights Report. This report, which can be purchased separately, examines the Shopping Styles and Path to Purchase through the lens of the Hispanic and African-American shopper.

Synovate has developed a proprietary Shopping Styles Segmentation, which identifies four distinct shopping styles: Brand Planners, Preference Planners, System Beaters and Explorers. In the Diversity Shopper Insights Report, we compare shopping styles across 12 categories, including breakfast cereal, coffee/tea, pet food, condiments, crackers, salted snacks, carbonated soft drinks, shampoo/conditioner, toothpaste, analgesics, dishwashing liquid, and laundry detergent among Hispanics vs. African Americans vs. the General Market. We'll also be looking at the degree to which the decision to purchase is being made in store using our Find/Decide analysis and, on a category basis, how decision making differs among ethnic shoppers vs. General Market.

TECHNICAL STATEMENT

The methodology used for the data collection for the 2010 U.S. Diversity Markets Report and Diversity Shopper Insights Report was telephone interviewing using CATI (Computer Assisted Telephone Interviews). Interviewers were selected to work on this project based upon their interviewing and language skills. Hispanic interviewers had little or no accent in English or Spanish. Hispanic respondents were given the opportunity to be interviewed in their language of choice.

A total of 1,874 interviews among Hispanics were conducted. Interviews were distributed according to the size of the DMA of the respondent. We conducted approximately 135 interviews in each of the top 10 Hispanic DMAs in the country to provide a readable sample size in each market. An additional total 250 interviews were conducted in "Tier 2" DMAs, those DMAs ranking 11-20 in Hispanic population. Finally, 280 interviews were conducted among Hispanics residing outside of the top 20 DMAs. This sampling frame enables us to provide market-specific information for the top DMAs and also to compare high versus low density Hispanics.

As in the 2008 edition, we interviewed 913 self-identified African-Americans or Blacks and 1,087 Non-Hispanic/Non-African-American respondents. The African-American sample was defined as those individuals who are not of Hispanic descent and identify themselves as Black or African-American. Any one that was not Hispanic or African-American was categorized as General Market, and this includes those individuals who report being White and are not of Hispanic descent, Asians, Native Americans, or other groups.

The Hispanic sample was composed of purchased Hispanic surname lists. The African-American and General Market samples were conducted using Synovate Panelists.

Interviewing was conducted July to September of 2009. The interviewing time period was 4 p.m. to 9 p.m. local market time. A minimum of 10% of all interviews were monitored and validated.

SAMPLE PLAN:

	Total	Males	Females
Total Hispanics	1,874	915	959
African-Americans	913	424	489
General Market	1,087	529	558

Survey data was weighted to reflect 2010 adult populations. General Market and African-American responses were weighted by region, age and gender. Hispanic responses were weighted by DMA/region, age, gender, and country of birth/descent.

ABBREVIATIONS:

Throughout this report we have used the Top 10 Hispanic Markets in the United States as a point of analysis. Often in the text and tables, these markets have been abbreviated. In rank order of Hispanic population, the top 10 markets are:

- **LA** Los Angeles, California
- **NY** New York, New York
- **HOU** Houston, Texas
- **MIA** Miami, Florida
- **CHI** Chicago, Illinois
- **DAL** Dallas/Ft. Worth, Texas
- **SF** San Francisco, California
- **PHX** Phoenix, Arizona
- **SA** San Antonio, Texas
- **McA** McAllen/Harlingen/Brownsville, Texas

For a complete definition of the market area covered, please refer to the Top Multicultural Markets section of this report.

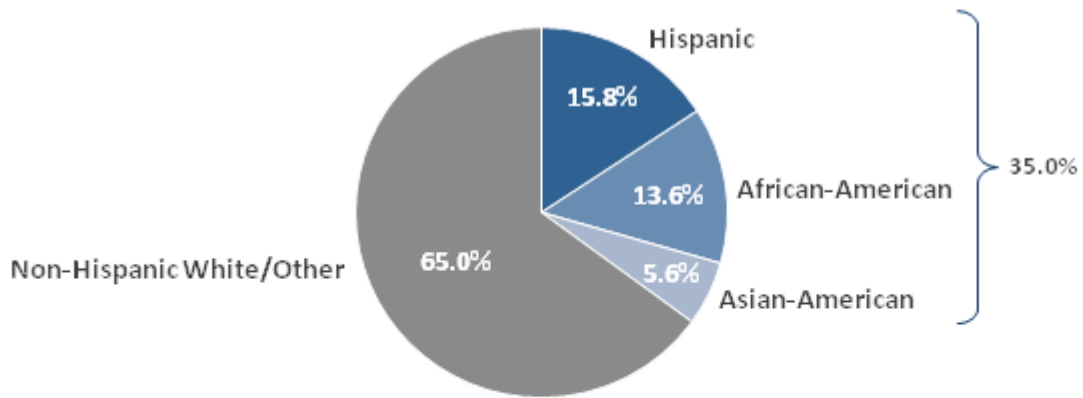
SOURCES:

- Synovate
- U.S. Census Bureau
- U.S. Department of Labor
- U.S. Department of Commerce
- U.S. Department of Health and Human Services

The U.S. multicultural market continues to grow, with Hispanics, African-Americans, and Asian-Americans currently representing slightly more than one-third (35%) of the total U.S. population.

**Minority Populations of the United States
and the Percentage of the Total Population – 2010 (in millions)**

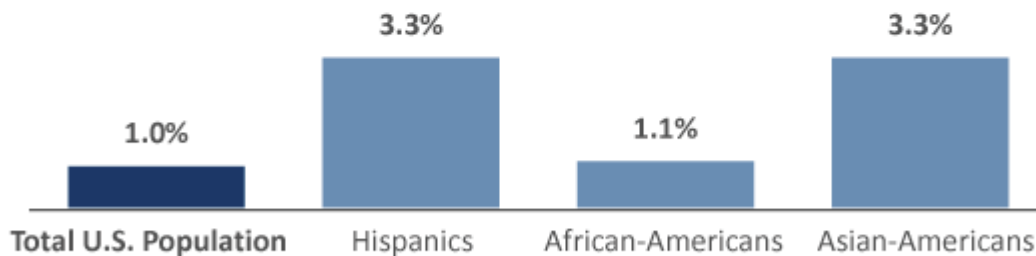
	Total	Hispanic	African-American	Asian-American
Population	308.3	48.7	42.0	17.2
Percent of total population	100%	15.8%	13.6%	5.6%



Source: Synovate, U.S. Census Bureau

The Hispanic and Asian-American populations are growing the fastest, increasing 3.3% on average annually. The African-American segment is increasing at a slightly higher rate (1.1%) than the total U.S. population of 1%. More detail on the populations of each of these multicultural groups can be found in Chapters III, IV, and V.

U.S. Population Growth Rate (2000 – 2010 Annual Growth Rate)

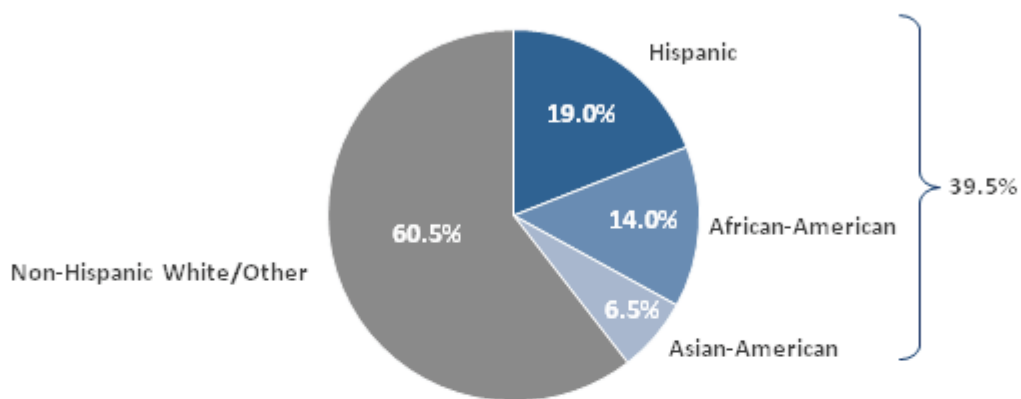


Source: Synovate, U.S. Census Bureau

This combined group is projected to grow to approximately 40% in the next ten years, and then is projected to increase to almost 54% of the total U.S. population in 2050.

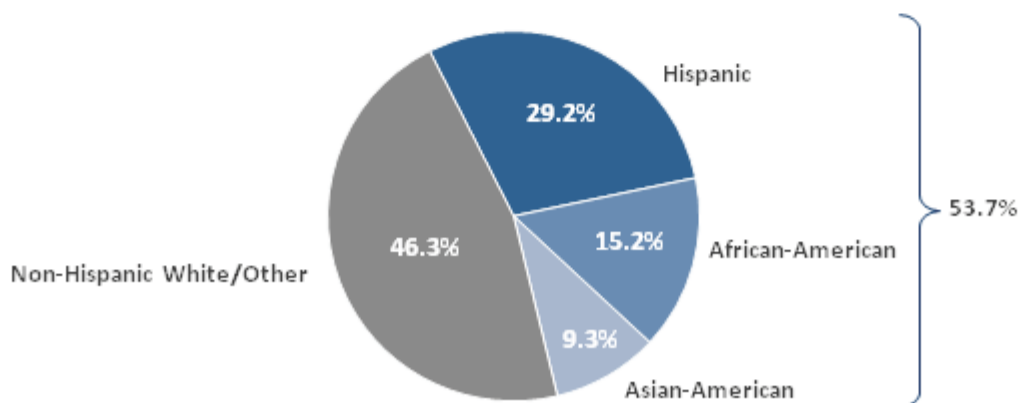
Minority Populations of the United States and the Percentage of the Total Population – 2020 (in millions)

	Total	Hispanic	African-American	Asian-American
Population	336.8	63.9	47.3	21.9
Percent of total population	100%	19.0%	14.0%	6.5%



Minority Populations of the United States and the Percentage of the Total Population – 2050 (in millions)

	Total	Hispanic	African-American	Asian-American
Population	422.6	123.6	64.1	39.4
Percent of total population	100%	29.2%	15.2%	9.3%



Hispanic Buying Power for Top 20 U.S. Hispanic Markets – 2010

Rank	Market	Buying Power
1	Los Angeles	\$159,751,199,540
2	New York	\$99,341,396,808
3	Houston	\$38,138,123,721
4	Miami	\$48,502,723,285
5	Chicago	\$39,128,145,495
6	Dallas/Ft. Worth	\$33,140,799,789
7	San Francisco	\$40,623,262,652
8	Phoenix	\$27,512,581,326
9	San Antonio	\$25,149,489,085
10	McAllen	\$15,904,533,172
Top 10 Markets		\$527,192,254,873
11	Sacramento	\$21,793,034,144
12	Fresno/Visalia	\$15,391,544,053
13	San Diego	\$20,121,357,053
14	Denver	\$15,762,778,108
15	El Paso	\$12,192,824,125
16	Albuquerque	\$15,179,654,269
17	Washington, DC	\$20,640,487,465
18	Philadelphia	\$12,868,231,013
19	Tampa	\$13,183,568,650
20	Atlanta	\$11,516,045,975
Top 11 – 20 Markets		\$158,649,524,854
Top 20 Markets		\$685,841,779,727
Total Hispanic Households		\$957,320,606,548

Source: Synovate, U.S. Census Bureau

C. LANGUAGE SPOKEN AT HOME (“LANGUAGE DOMINANCE”)

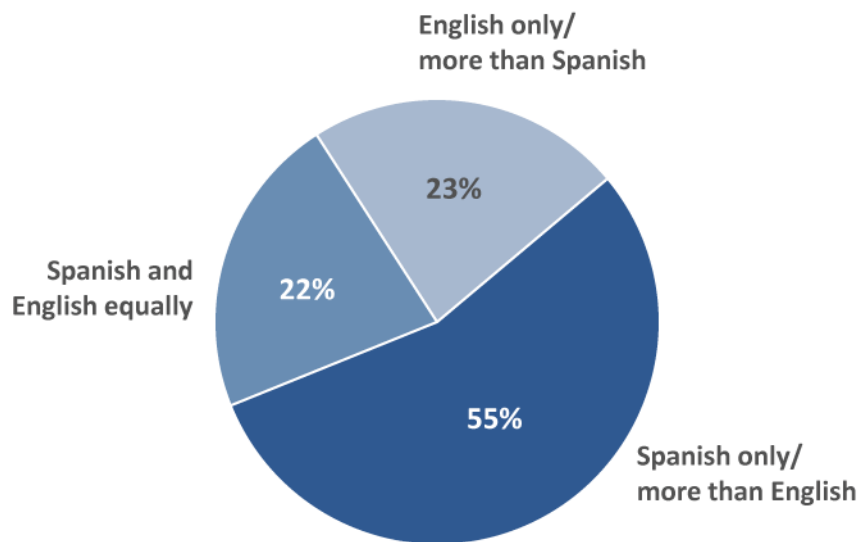
Marketers who classify Hispanics on a language usage criterion often use the language an individual speaks at home as the defining variable. The assumption is that the language spoken at home is the most natural for the individual – the home is the environment in which people feel most comfortable, without the need to project a persona or image. Moreover, consumers are exposed to media and consume purchased goods in the home. Hence, “language spoken most often at home” has become the de facto industry standard for defining language preference and is often used as a proxy for acculturation.

Hispanics are often classified as “Spanish-dominant” (speak only Spanish or Spanish more than English at home), “fully bilingual” (speak both Spanish and English equally at home) or “English-dominant” (speak only English or English more than Spanish at home).

This may be an easy, helpful categorization scheme when targeting communications, but it can be an oversimplification.

When used as a proxy for acculturation, it can be misleading, especially when applied to younger Hispanics. (See Chapter III for a full discussion of acculturation.)

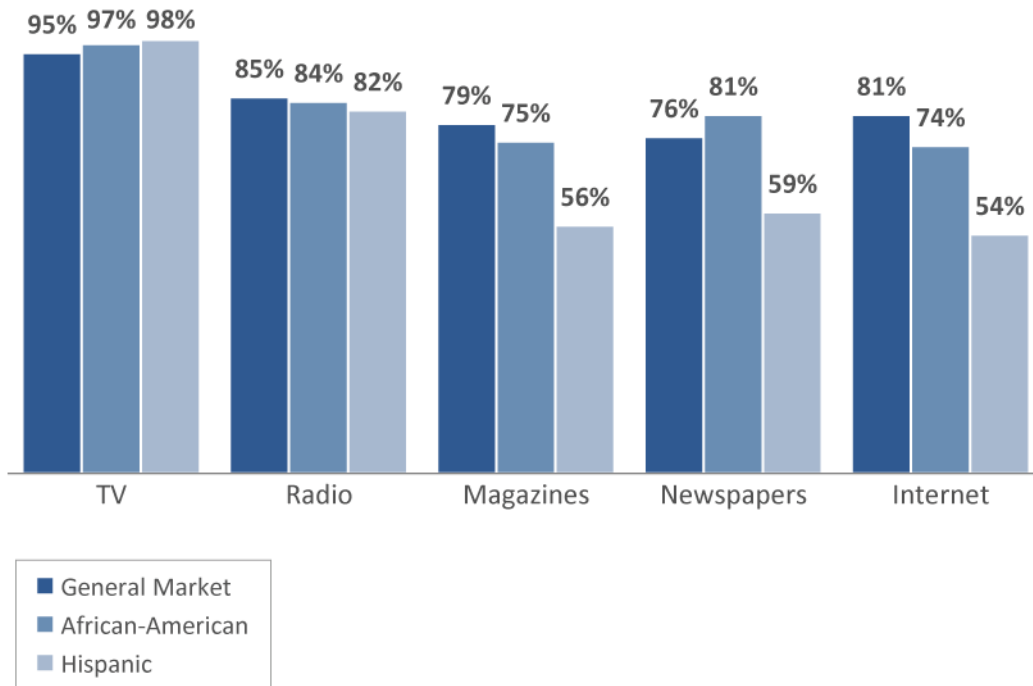
**Language Spoken at Home (“Language Dominance”) –
Hispanic Adults (18+)**



Just over half (55%) of U.S. Hispanics speak Spanish exclusively or more than English at home. The remainder are split between using English as much as Spanish (22%) or more than Spanish (23%).

For marketers, it is important to realize that multicultural groups are as “targetable” as General Market consumers for all media described.

Percent Consuming Media by Race/Ethnic Group – Adults (18+)

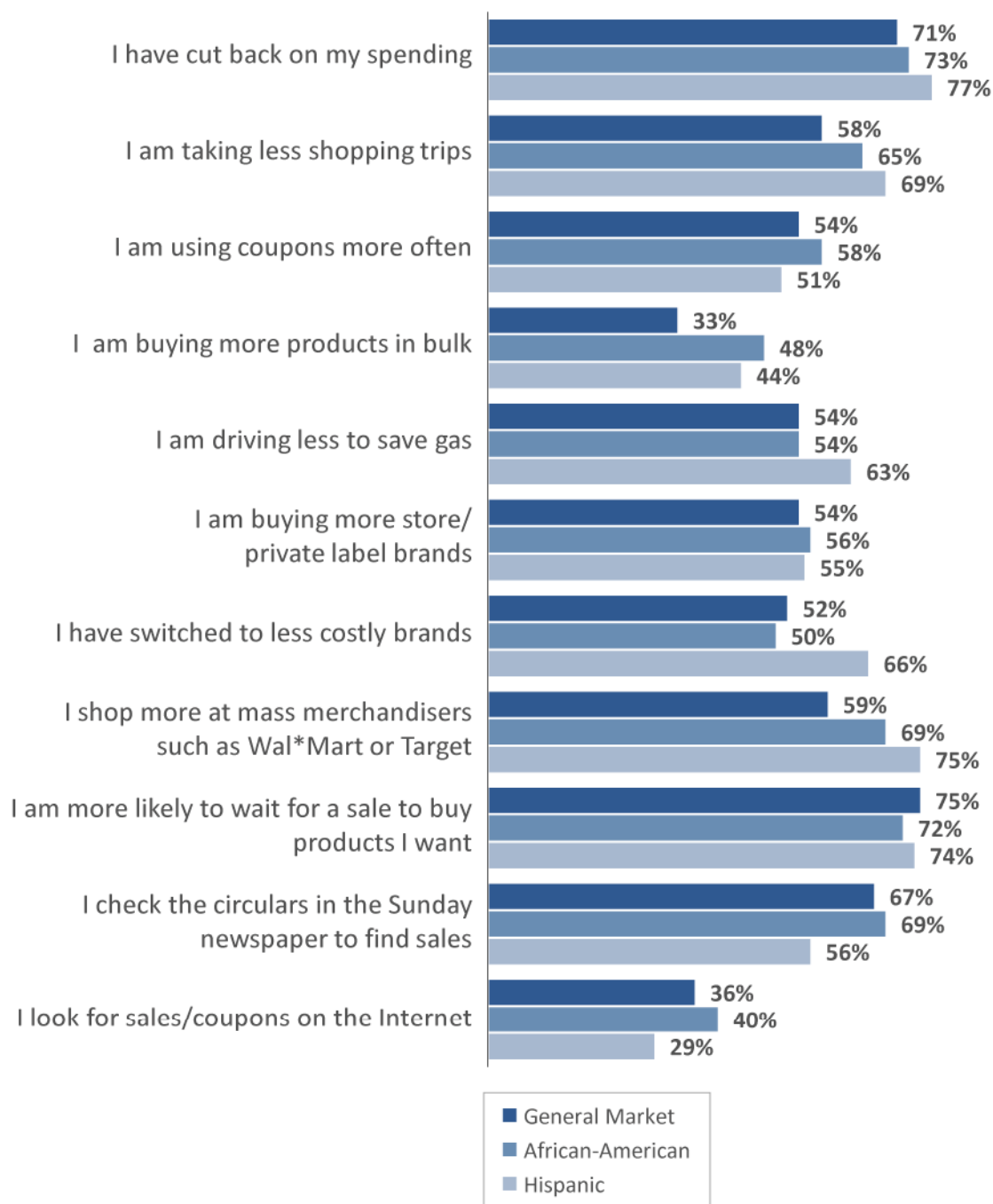


Among the adult population, broadcast media television and radio are consumed by the General Market, African-Americans, and Hispanics in roughly equal proportions. African-Americans’ usage of print media magazines and newspapers is more or less equal to the General Market, although their Internet usage is somewhat lower. Hispanics’ usage is substantially below General Market and African-Americans for print media and the Internet.

A. SHOPPING BEHAVIOR

The current U.S. economic recession has impacted many multicultural consumers on several levels, from double digit unemployment to limits in consumer spending. As such, shopping behaviors have changed in the past year for consumers.

Shopping Behavior vs. Year Ago (Top 2 Box Agreement) – Adults (18+)



New York, NY/NJ/CT

	RANK	% of Total Population	2010 Index of Multicultural Population vs. Total U.S.		
General	1				
Hispanic	2	20.6%	129	130	162
African-American	1	17.7%			
Asian-American	2	9.1%			

2010 Population (000's)					
	Age	Total	Hispanic	African-American	Asian-American
Total Population	18+	16248.2	3263.7	2842.1	1662.0
Male	18+	7737.6	1597.4	1255.3	813.3
	18 – 20	448.5	110.1	102.7	35.9
	21 – 24	551.3	146.7	110.4	51.7
	25 – 34	1347.6	406.6	244.1	174.5
	35 – 49	2449.5	526.3	394.2	291.7
	50 – 54	727.4	117.6	108.5	75.2
	55 – 64	1098.0	160.3	156.6	103.7
	65+	1114.9	129.4	138.5	80.2
Female	18+	8510.6	1666.2	1586.8	848.6
	18 – 20	427.0	106.5	101.8	35.9
	21 – 24	547.5	141.8	121.7	51.8
	25 – 34	1355.9	360.9	279.0	188.7
	35 – 49	2542.5	535.3	485.8	288.7
	50 – 54	771.4	133.4	137.0	74.5
	55 – 64	1252.0	196.0	217.2	110.0
	65+	1613.9	192.0	244.1	98.9
Teens	12 – 17	1743.8	424.4	384.6	163.5
Male	12 – 17	891.3	216.0	194.5	84.9
Female	12 – 17	852.4	208.3	190.1	78.5
Children	0 – 11	3289.7	899.9	687.3	358.9
Children	2 – 11	2742.3	732.7	572.2	293.9
Male	2 – 5	564.9	161.8	116.8	65.9
Female	2 – 5	542.1	157.8	109.4	62.0
Male	6 – 11	834.2	213.0	177.1	80.9
Female	6 – 11	801.1	200.0	168.8	85.0
Total 2+		20734.4	4420.9	3799.1	2119.5
Total		21281.7	4588.1	3914.1	2184.5
Total Households		7808.6	1438.6	1409.1	708.9

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