

DIVERSE INTELLIGENCE SERIES | 2018

DESCUBRIMIENTO DIGITAL

THE ONLINE LIVES OF LATINX CONSUMERS



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FOREWORD

Technology has fundamentally changed the consumer experience, but disproportionately so for the Latinx community, who are in the midst of an intense transformation in their forms of expression and expectations, both within their community and with brands and the digital world. In a period of population shifts, fragmentation, and intense competition for attention, Hispanics are using technology and social media to rewrite the rulebook. Their combination of relative youth, demand for cultural connectivity and nuanced content has placed Hispanics at the center of trendsetter culture.

Sociologists believe that technology contributes to the demand for authentic cultural connectivity. As U.S. Hispanics make digital gains and advances at a higher rate than the total market, they are increasingly demanding authentic, culturally relevant content and connections. They also show behavioral differences in how they communicate, inform, shop, consume content and mobilize for social justice.

U.S. Hispanics are seeking to engage with brands that speak to them authentically. They are looking for brand experiences that are tailored, multi-faceted, with 360° touchpoints delivered by brands that understand their needs and align with their values. By maintaining their roots and using technology to amplify their values and aspirations, Hispanics are continuing to advance and striving to redefine the future while staying deeply connected to their cultural roots.

This report examines the impact of digital technologies on the Latinx experience and cultural expression. We uncover how, from music and television to social media and shopping, increased access to technology has fundamentally changed the U.S. Hispanic experience as well as these consumers' lifestyles and behaviors and recommend how brands can lean in to engage with this rapidly increasing population.

EDITOR'S NOTE

Nielsen uses the term Latinx in this report to connote unspecified gender. The decision is a nod toward greater inclusion of women, LGBT+ and non-binary Hispanics and the growing popularity of the term in social media and academic writing.

EXECUTIVE SUMMARY

U.S. Hispanics are digitally empowered rapidly moving to the forefront of technology adoption. Their visibility highlights an increase in cultural inclusivity and civic representation as well as recognition of the community's strides. With continuing progress in educational pursuits, economic gains and more, the Latinx community and its influence on the new American mainstream are undeniable on many fronts.

A Demographic and Business Imperative. Hispanic population and labor force growth are setting pace to be the next demographic phenomenon, with Hispanics accounting for over half of the U.S. population growth from 2016 to 2020 and up to 80% by 2040–2045. Hispanics accounted for 75% of all U.S. labor force growth between 2010 and 2016, meaning their economic clout will grow exponentially as they enter their prime earning years. The relatively younger median age of U.S. Hispanics (27 versus 42 for non-Hispanic Whites) and longer life expectancy put a premium on their main acquisition years as they increasingly become a prime driving force in the U.S. economy for decades to come. As the Latinx slice of the population and workforce pie enlarges, so will their value to astute marketers who grasp the advantage of establishing culturally relevant ties in a hypersocial digital world.

Spanish Language Is Identity Affirming. The use of Spanish language and cultural connections are critical to U.S. Hispanic identity and lifestyle. As the Latinx population has seen a steady increase in young, bilingual, U.S.-born Hispanics (as well as a significant ambicultural* Afro-Latinx population), language remains one of the most important connections to culture and heritage. Among U.S. Hispanics, 73% agree that it's important to them that their children continue their family's cultural traditions, and the same percentage agree that their cultural/ethnic heritage is an important part of who they are. The large number of multigenerational U.S. Hispanic households also contributes to the continued usage of Spanish in the home and relevant ties to Hispanic culture.

Technology Adopters and Adapters. U.S. Hispanics and their multicultural counterparts are at the forefront of technology adoption, entrenched in the center of the media universe with social media/apps/mobile video usage, digital music consumption, radio listening, TV viewing, gaming and web activities all revolving around them. Today's Latinx population is pacesetting the adoption of new technology within their friend groups. Thirty-five percent of U.S. Hispanics agree that they are among the first of their friends to try new technology products (over-indexing non-Hispanic Whites by 36%), and 54% of Hispanics agree they are willing to pay more for top-quality electronics. Avid social networkers, U.S. Hispanics also over-index in a myriad of other internet uses, such as consuming entertainment, seeking out product information, saving money and furthering higher education.

Digitally Dynamic and Smartphone Reliant. The internet is a natural first resource for U.S. Hispanics, as 60% were born or grew up in the internet age, versus only 40% of non-Hispanic Whites. Today's Latinx consumers didn't transition to the internet; they were raised with it. The internet is a primary vehicle for everything Hispanics do, from cultural connectivity to infotainment to online purchasing. A smartphone is the key connector, as U.S. Hispanics over-index the U.S. total population by 9% for smartphone ownership, and 99% of U.S. Hispanic households have a wireless-phone service. With 27% of Hispanics living in multigenerational households, the younger generations have much influence on older Hispanics. In fact, those 50 and older have become particularly tech savvy, as they over-index non-Hispanic Whites by 36% for agreeing they like to have a lot of electronic gadgets, and by 28% for agreeing they often discuss their knowledge of technology or electronic products with others.

*Note: Ambicultural(s) is a registered service mark of EthniFac ts, LLC, and is used with their permission.

Social Media, the Digital Comunidad. Latinx consumers are gregarious by nature, engaging in social interaction and activities more than their non-Hispanic White counterparts. Thus, social media is an excellent extension of that behavior and conversation. U.S. Hispanics over-index for the amount of time they spend on social networking sites, with 52% spending 1 or more hour(s) per day (compared with 38% of non-Hispanic Whites) and 24% spending 3 or more hours per day (compared with 13%). The digital world is a primary source for relevant, authentic content, offering a convenient means of connecting with personal and extended communities. Music and digital entertainment take center stage among the most consumed content.

Super Cyber-shoppers and Researchers. U.S. Hispanics are avid online shoppers who use search engines and other apps to hunt for product information and deals prior to purchase. The vast majority (82%) of U.S. Hispanics agree that the internet is a great way to gather information on products and services they're considering purchasing, and 78% agree it is a great way to actually buy products. Furthermore, 49% agree they used the internet in the last 30 days for shopping, while 69% agree they made an internet purchase in the last 12 months.

Purpose-Driven Consumers. Marketers and advertisers can connect with the brand-loyal Latinx community by authentically aligning on certain social issues. From the environment to educational opportunities, U.S. Hispanics are more likely to purchase brands that support a cause they care about (57%, over-indexing by 9%), and 80% agree that when they find a brand they like, they stick with it. Building and keeping trust is a vital part of that loyalty, as brands must develop meaningful dialogue with Hispanics, with relevant content that shows they care about the Latinx community, and then utilize the power of social media to engage.

New Mainstream Mavericks. Hispanic influence on the U.S. mainstream, evidenced via pop culture, music, food, and Latinx entertainment personalities, has never been more prevalent or visible. From the many awards and accolades recently bestowed upon Latinx actors, directors, musicians and movies, it is clear that America is warmly embracing Latinx characters, creators, storylines and culture. This includes and extends into the digital space, as evidenced by the rise in celebrity of Hispanic social-media influencers on YouTube, such as gaming personality Ruben Dobles Gunderson and Dulce Candy Ruiz, a Mexican-born YouTube superstar.



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SECTION I

HISPANIC GROWTH AND ADVANCEMENTS

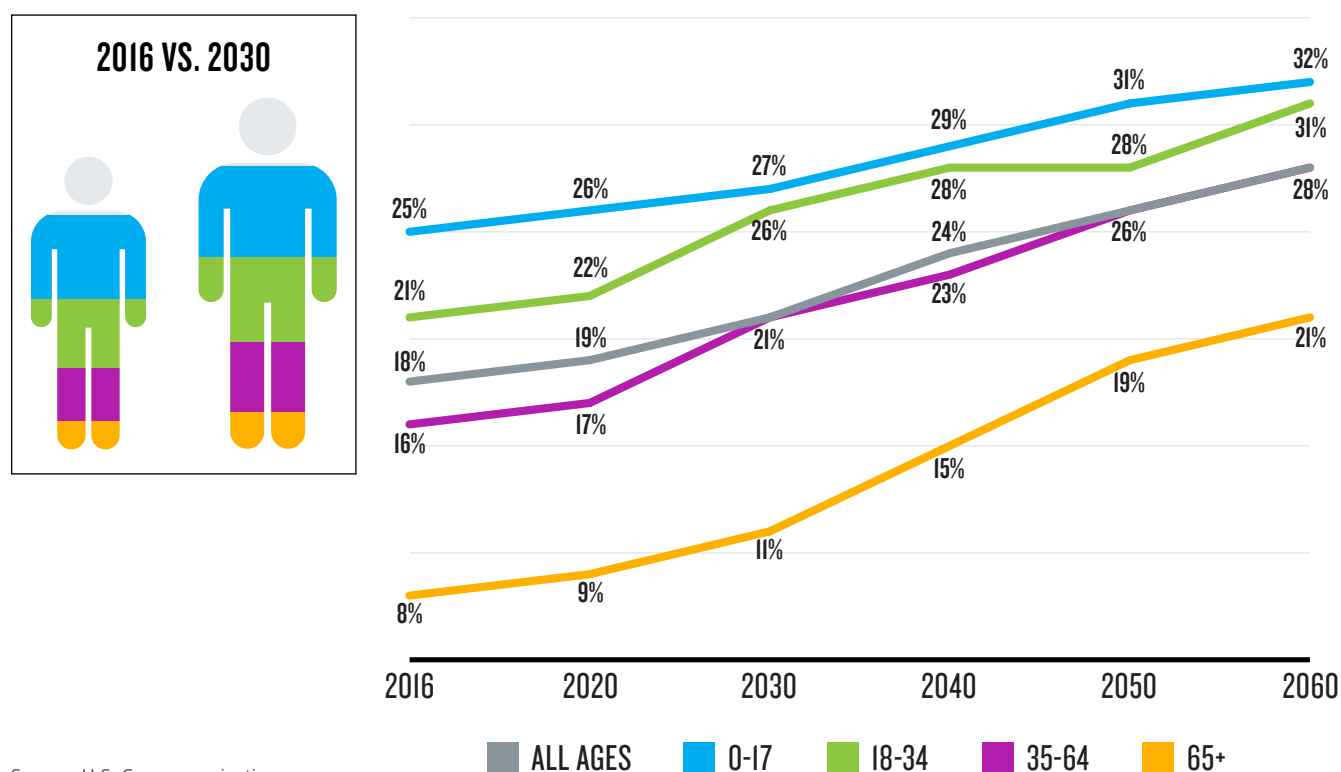
HISPANIC POPULATION GROWTH AND ADVANCEMENT

Most recent U.S. Census figures show 57.4 million Hispanics living in the United States. The largest U.S. ethnic or racial group, Hispanics constitute 18% of the total U.S. population. Their relative youth and avid adoption of all things digital results in their influence on the American economy far exceeding their numbers. Therefore, they represent one of the most immediate growth opportunities—or, in some cases, the entire growth opportunity—for marketers that want to keep their finger on the pulse of what's happening in America today and what's coming next.

Hispanics represent an even larger percentage of the total U.S. population of younger age groups (which aligns with their accelerated technological adoption). Looking to the future, projections show growth in their share of the population in all age groups. In 2016, U.S. Hispanics were 25% of the total U.S. population under the age of 18, compared with only 8% of the total 65-and-older population. By 2060, according to Census Bureau projections, 30% or more of the population under age 35 will be Hispanic, while at least 20% of the 35-and-older age group will be Hispanic.

BY 2060, ACCORDING TO CENSUS BUREAU PROJECTIONS, 30% OR MORE OF THE POPULATION UNDER AGE 35 WILL BE HISPANIC

PROJECTED HISPANIC GROWTH BY AGE (U.S. CENSUS PROJECTIONS, MARCH 2018)

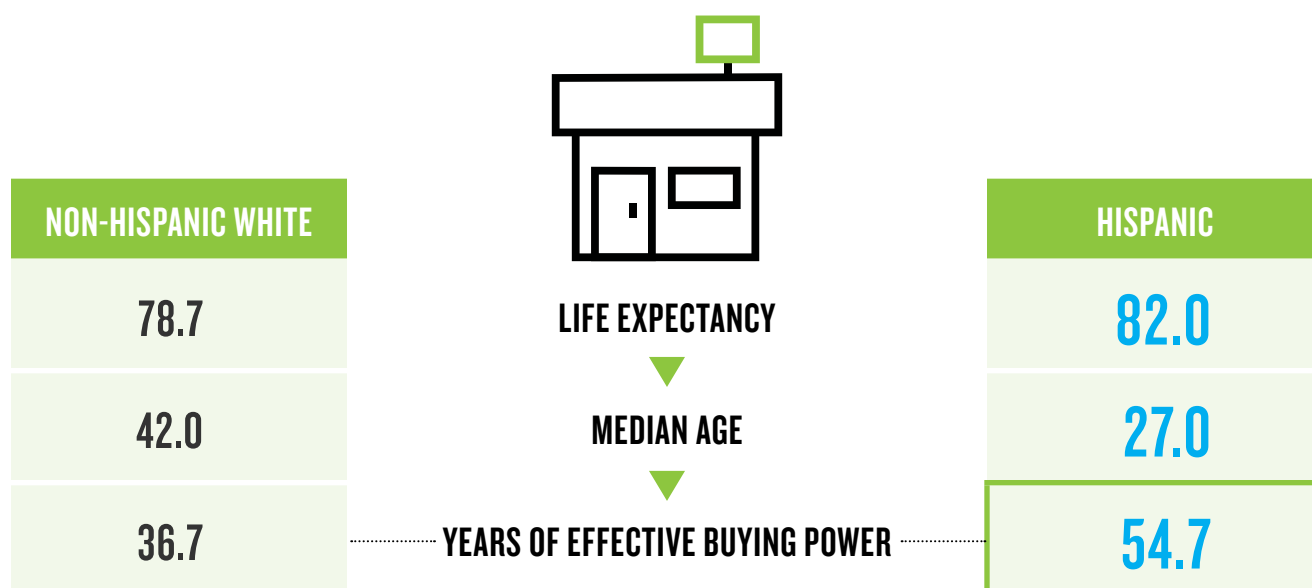


Source: U.S. Census projections



A YOUNG COMMUNITY WITH MORE YEARS OF EFFECTIVE BUYING POWER

Comparing the median age of the U.S. Hispanic population (meaning half are younger and half are older) with that of the non-Hispanic White population, the relative youth is even more pronounced: Hispanics have a median age of 27, versus 42 for non-Hispanic Whites. This, combined with a longer life expectancy, means that Hispanics have almost 55 years of effective buying power, versus about 37 for non-Hispanic Whites. This statistic powerfully highlights the long-term economic benefit to marketers of building loyalty to their goods and services with the Latinx market.



Source: CDC NCHS 2016 Life Expectancy/ACS 2016 Median Age: Sourced by Ethnifacts

SPANISH LANGUAGE: A CULTURAL CONNECTOR

The U.S.-born Hispanic population is increasing, and as Hispanic immigration to the U.S. is decreasing, cultural traditions and Spanish language are still integral parts of the U.S. Hispanic experience, shaping their digital content consumption. Spanish-language and bilingual content is actively sought out by Latinx consumers online, in music, and on television. Because language is central as a cultural connector, it's no surprise that 72% of Hispanics (and 75% of Hispanic households) speak Spanish at home. In fact, 27% of U.S. Hispanics lived in multigenerational family households in 2016. When multiple generations live in one household, older generations, who tend to be Spanish dominant, are significantly engaged in and contribute to familial activities such as child rearing, shopping and media choices.

This cultural connection is important to the U.S. Latinx: 73% of U.S. Hispanics agree that it's important to them that their children continue their family's cultural traditions, and 73% also agree that their cultural ethnic heritage is an important part of who they are. So, while the majority of U.S. Hispanics are U.S. born, culture, tradition and language remain the bedrock of all aspects of daily engagement.



72% OF HISPANICS
AND 75% OF HISPANIC HOUSEHOLDS
SPEAK SPANISH AT HOME



27% OF U.S. HISPANICS
LIVED IN MULTIGENERATIONAL FAMILY
HOUSEHOLDS IN 2016



73% OF U.S. HISPANICS
AGREE THAT IT'S IMPORTANT TO THEM THAT THEIR CHILDREN
CONTINUE THEIR FAMILY'S CULTURAL TRADITIONS

73% OF U.S. HISPANICS
AGREE THAT THEIR CULTURAL ETHNIC HERITAGE
IS AN IMPORTANT PART OF WHO THEY ARE



FAST-RISING COLLEGE ENROLLMENT

Latinx achievements in education and income levels are increasing as younger Hispanics age into college years and into jobs in the workplace. With 32% of Hispanics currently under the age of 18 and approaching college enrollment years, the enrollment of Hispanic students in degree-granting institutions is expected to increase 26% between 2015 and 2026, compared with 1% for non-Hispanic Whites, 20% for non-Hispanic Blacks and 12% for non-Hispanic Asians.* The percentage of Hispanics enrolling directly in college is increasing. Between 2014 and 2016, 69% of Hispanic high school graduates enrolled directly in college, up from 58% between 2003 and 2005. Educational advancements are being seen throughout all Hispanic demographic groups.

**THE PERCENTAGE
OF HISPANICS
ENROLLING
DIRECTLY IN
COLLEGE IS
INCREASING**








*Projections of Education Statistics to 2026 (NCES 2018-019), U.S. Department of Education, Washington, DC: National Center for Education Statistics

DRIVERS OF GROWTH IN HOUSEHOLD CREATION, PURCHASING AND SPENDING

Hispanics have accounted for 60% of the cumulative net increase in U.S. home ownership between 2010 and 2016, and a dominant 75% of net home ownership growth from 2015 to 2016 (U.S. Census Bureau statistics). With an average household size of 3.25, these Hispanic households are the largest of any race or ethnicity. These larger households contain more children, as 49% of all Hispanic households include children under 18, and Hispanic households are more likely to be multigenerational. This intergenerational influence has had profound effects, including younger generations encouraging digitally fluency among older generations.

LATINX DEMOGRAPHIC GAINS

	U.S. HISPANIC HOUSEHOLDS	U.S. NON-HISPANIC HOUSEHOLDS
 AVERAGE HOUSEHOLD SIZE	3.25	2.43
 HOUSEHOLD INCLUDES CHILDREN UNDER AGE 18 (% OF HOUSEHOLDS)	49%	27%
 MULTIGENERATIONAL HOUSEHOLDS (% OF POPULATION)	27%	16%
 MEDIAN HOUSEHOLD INCOME	\$50,000	\$59,000
 AVERAGE ANNUAL HOUSEHOLD EXPENDITURE	\$37,107	\$41,759

Sources: U.S. Census Bureau Census Income and Family Data Tables, 2017; U.S. Census Bureau, Current Population Survey, March and Annual Social and Economic Supplements, 2017; Pew Research Center Analysis of Decennial Census data & American Community Survey data through 2016 Consumer Expenditure Survey, U.S. Bureau of Labor Statistics, August, 2017; U.S. Census Bureau, 2015 and 2016 American Community Surveys, and 2015 and 2016 Puerto Rico Community Surveys

According to the Selig Center, the U.S. Hispanic market reached \$1.5 trillion in buying power in 2017. Due to high birth rates, increased entrepreneurship, and a rising level of educational attainment, U.S. Hispanic buying power increased from \$1 trillion in 2010 and is expected to reach \$1.9 trillion by 2022.

The median U.S. Hispanic household income is \$50,000 with an annual expenditure of \$37,107, compared with \$41,759 for total U.S. non-Hispanic households, driven largely by the fact they are still entering their prime earning years. However, U.S. Hispanics spend more than the average of the total population on specific spending categories, including food at home, rented dwellings, phone services, apparel and services, gasoline and motor oil, and public transportation.

SECTION I TAKEAWAYS

- 1** 60% of Hispanics were born or grew up in the internet age, versus only 40% of non-Hispanic Whites making the internet their first resource for just about everything they do. Hispanics make up 25% of the total U.S. population under the age of 18, compared with only 8% of the total 65-and-older population. By 2060, 30% or more of the population under age 35 will be Hispanic, while at least 20% of the 35-and-older age group will be Hispanic.
- 2** Investing in Hispanic consumers will return a better ROI over time. The median age of the U.S. Hispanic population is 27 versus 42 for non-Hispanic Whites. This, combined with a longer life expectancy, means that Hispanics have almost 55 years of effective buying power, versus about 37 for non-Hispanic Whites.
- 3** Spanish-language and bilingual content is actively sought out by Latinx consumers online, in music, and on television. Language is central as a cultural connector and 72% of Hispanics (and 75% of Hispanic households) speak Spanish at home. In addition, 27% of U.S. Hispanics live in multi-generational family households meaning older Hispanics are having cultural influences on younger and younger Hispanics are heavily influencing older Hispanics and their digital behaviors and media choices.
- 4** Latinx achievements in education and income levels are increasing as younger Hispanics age into college years and into jobs in the workplace. Enrollment of Hispanic students in degree-granting institutions is expected to increase 26% between 2015 and 2026, compared with 1% for non-Hispanic Whites, 20% for non-Hispanic Blacks and 12% for non-Hispanic Asians.
- 5** The U.S. Hispanic market reached \$1.5 trillion in buying power in 2017. Due to high birth rates, increased entrepreneurship, and a rising level of educational attainment, U.S. Hispanic buying power increased from \$1 trillion in 2010 and is expected to reach \$1.9 trillion by 2022.



SECTION II

WELL-CONNECTED AND INFORMED CONSUMPTION

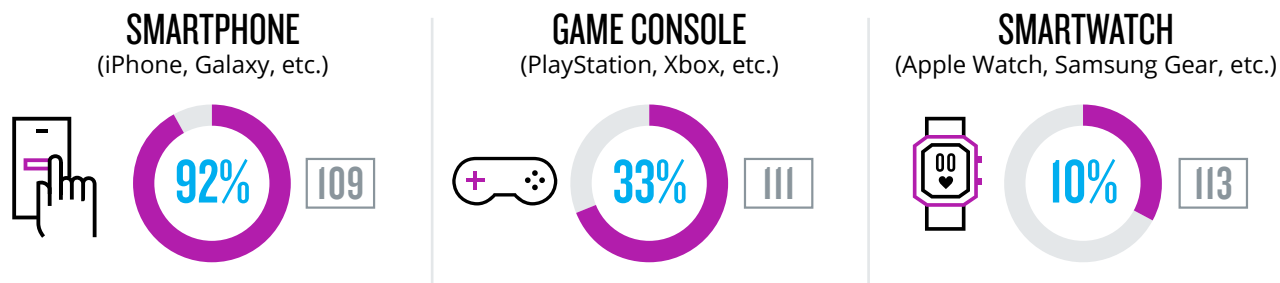
DEVICES: OWNERSHIP AND ACCESS

WELL-INFORMED AND INFLUENTIAL TECH CONSUMERS IN ALL AGE GROUPS

U.S. Hispanics' avid adoption of all things digital and mobile, particularly when it comes to advancements in social, entertainment and community-focused tech, makes these consumers critical technology bellwethers in many areas. Among U.S. Hispanics, 35% agree that they are among the first of their friends and colleagues to try new technology products (over-indexing against non-Hispanic Whites by 36%). In addition, 53% agree they prefer products that offer the latest in new technology, and 36% agree they like to have a lot of gadgets (over-indexing by 32%). Hispanics 18+ over-index against non-Hispanic Whites by 9% for smartphone ownership, by 11% for game console ownership, and by 13% for smartwatch ownership.

CONNECTED AND SOCIAL THROUGH TECH

HISPANIC 18+ DEVICE OWNERSHIP



INDEX: U.S. HISPANICS/NON-HISPANIC WHITES

Read as: 92% of Hispanics 18+ own a smartphone, which is 9% higher than their non-Hispanic white counterparts

Source: Nielsen Scarborough Hispanic DST Multi-Market 2017 Release 2 *Reissue 04-10-2018* Total (Jun 2016–Nov 2017)

When it comes to technology, U.S. Hispanics are well-informed consumers who also offer, seek out and enjoy recommendations. Their behaviors with respect to these activities demonstrate their inclination to offer communal social support. Today's Hispanics like to do research, read reviews and ask the advice of others before making a purchase.

Tech and electronics purveyors will find that their Hispanic customers are powerful marketers. They should consider referral and feedback programs aimed at Hispanics, who are very likely to share their technology brand experiences and can be key influencers of other Hispanics and the nation at large. Thirty-nine percent of U.S. Hispanics 18+ agree they often take the opportunity to discuss their knowledge of technology or electronic products with others (over-indexing against non-Hispanic Whites by 25%). Further, 43% give advice to others looking to buy technology or electronics products (over-indexing by 39%), and 57% agree that when they find a technology or electronics product they like, they typically recommend it to the people they know (over-indexing by 9%).



Tech-forward attitudes are evident across all generations of U.S. Hispanics. Those aged 50 and older over-index against their non-Hispanic White counterparts by 56% for agreeing that they are among the first of their friends and colleagues to try new technology products. In fact, U.S. Hispanics 50 and older also over-index by 36% for agreeing they like to have a lot of gadgets, and by 28% for agreeing that they often take the opportunity to discuss their knowledge of technology or electronic products with others. As the *madrinas* and *padrinos* of the Latinx community, Hispanics 50+ will willingly share their opinions about a tech brand; they over-index by 47% for agreeing that they give others advice when they are looking to buy technology or electronics products, and by 12% for agreeing that when they find a technology or electronics product they like, they typically recommend it to the people they know.

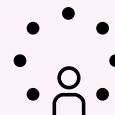
KNOWLEDGEABLE AND INFLUENTIAL BUYERS

WHEN BUYING TECHNOLOGY OR ELECTRONICS, U.S. HISPANICS 18+:

55% AGREE THAT THEY ENJOY READING ABOUT NEW TECHNOLOGY PRODUCTS



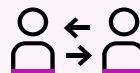
58% AGREE THAT THEY ENJOY LEARNING ABOUT TECHNOLOGY OR ELECTRONIC PRODUCTS FROM OTHERS



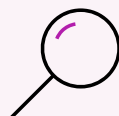
62% LIKE TO READ REVIEWS



59% ASK THE ADVICE OF OTHERS



63% DO AS MUCH RESEARCH AS POSSIBLE BEFORE BUYING TECHNOLOGY OR ELECTRONICS PRODUCTS



57% AGREE THAT WHEN THEY FIND A TECHNOLOGY OR ELECTRONICS PRODUCT THEY LIKE, THEY TYPICALLY RECOMMEND IT TO THE PEOPLE THEY KNOW



Source: Nielsen Scarborough Hispanic DST Multi-Market 2017 Release 2 *Reissue 04-10-2018* Total (Jun 2016–Nov 2017)

DIGITAL AND BROADCAST MEDIA USAGE: REACH AND TIME ON DEVICE

The media category with the highest reach among U.S. Hispanics ages 18 and older continues to be radio, at 37 million. The No. 2 category, live and DVR/time-shifted TV, isn't far behind (reach of 34 million). And with more than 84% of U.S. Hispanics agreeing they carry their cell phone everywhere they go, it's no surprise that apps and internet on a smartphone have the third-highest reach (30.7 million).

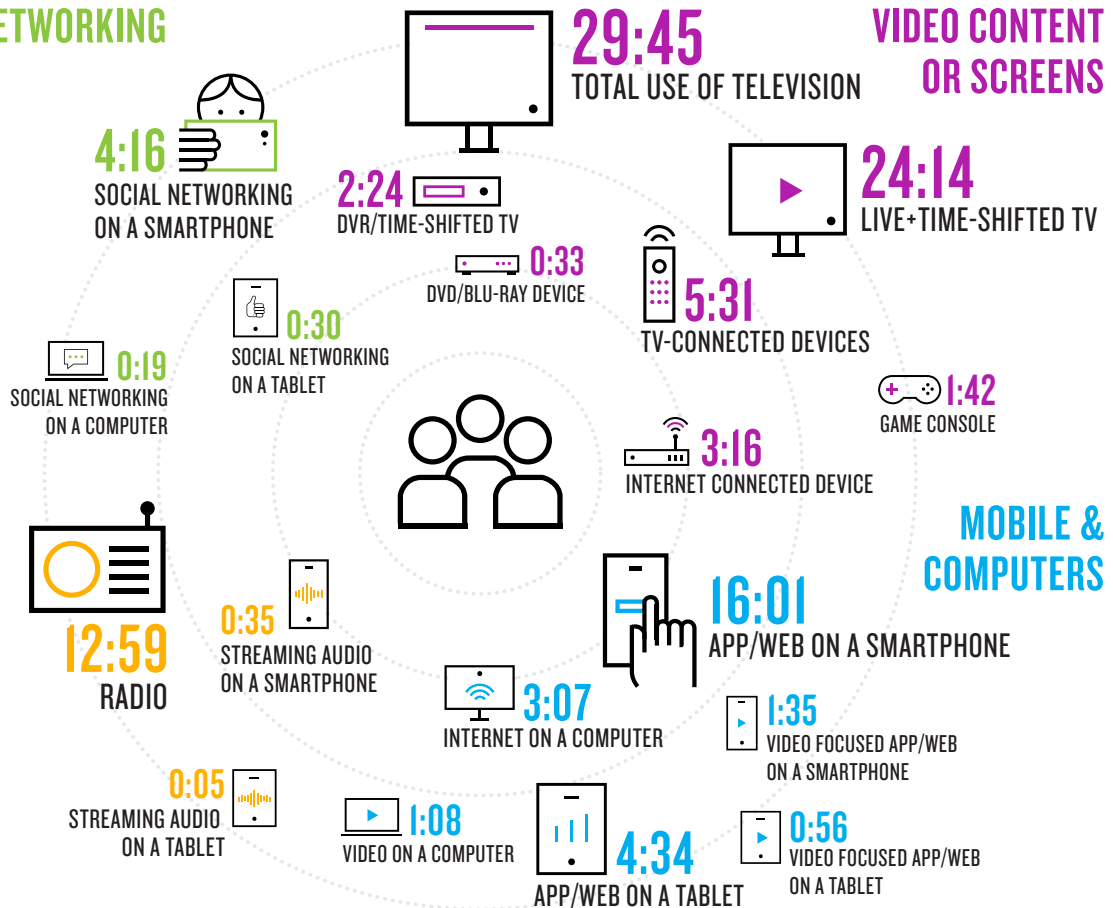
With the over-18 U.S. Hispanic population at around 39 million, these reach numbers mean that the vast majority of Hispanic adults are regularly engaging with multiple types of media. This offers marketers and advertisers a diverse range of viable options for reaching Hispanic consumers.

While radio has the highest active reach, U.S. Hispanics spend the most time on live and DVR/time-shifted TV. They also spend more time than the average for the total population on radio, game consoles and multimedia devices, as well as on smartphone apps, internet and video.

LATINX MEDIA UNIVERSE

WEEKLY TIME SPENT WITH DEVICES (HISPANIC 18+)

SOCIAL NETWORKING




WEEKLY REACH BY MEDIUM (HISPANIC 18+)

	REACH (000s)
Total Use of Television	35,274
Live+Time-Shifted TV	33,992
Time-Shifted TV	15,850
TV-Connected Devices	20,420
DVD/Blu-ray Device	4,583
Game Console	6,905
Internet Connected Device	14,564
Radio	37,051
Internet on a Computer	18,128
Social Networking	7,650

	REACH (000s)
Video on a Computer	8,401
App/Web on a Smartphone	30,691
Video Focused App/Web	24,209
Streaming Audio	17,793
Social Networking	27,849
App/Web on a Tablet	16,802
Video Focused App/Web	10,583
Streaming Audio	4,938
Social Networking	11,027

Source: Nielsen Q1 2018 Nielsen Total Audience Report



SIXTY-TWO PERCENT OF U.S. HISPANICS AGREE THAT THEY THINK OF THEIR MOBILE PHONE AS A SOURCE OF ENTERTAINMENT

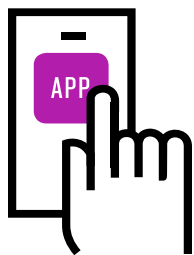
MOBILE-FIRST CONSUMERS ACROSS GENERATIONS

With Hispanics over-indexing the U.S. total population by 9% for smartphone ownership, it is no surprise that 99% of U.S. Hispanic households have a wireless-phone service. Similarly, internet activities have strikingly high reach among U.S. Hispanics (30.6 million for apps and web, 27.8 million for social networking, 24.2 million for videos on a smartphone and 17.8 million for streaming audio). The majority of U.S. Hispanics (83%) agree that having one mobile device that can do everything is very convenient.

For U.S. Hispanics, the mobile phone is not just for information and connecting, but also an important source of leisure activities. Sixty-two percent of U.S. Hispanics agree that they think of their mobile phone as a source of entertainment (over-indexing against non-Hispanic Whites by 25%). Consuming an average of over 16 hours per week on apps, internet, and video on smartphones, Hispanics consider quality very important. In fact, Latinx consumers agree that they expect the quality of video on their cellphone to be as good as that of their TV (over-indexing by 28%). With a mobile-first mentality, 57% of U.S. Hispanics say they are interested in watching video clips on their cellphone (over-indexing against non-Hispanic Whites by 22%), and 40% are interested in watching live TV on their cellphone (over-indexing by 59%).

Consistently leaning into consumption trends, 20% of U.S. Hispanics agree they would be willing to pay a monthly subscription fee to receive live TV on their cellphone (over-indexing by 62%), and 25% would be willing to receive advertisements on their cellphone in exchange for services like live TV (over-indexing by 57%). Currently, 30% of U.S. Hispanics aged 18 to 49, and 9% of those aged 50 and older, use their smartphone to watch or download movies or TV programs from the internet (over-indexing against non-Hispanic Whites by 16% and 68%, respectively).

Mobile as a primary source of content consumption is prevalent within all U.S. Hispanic age groups. In fact, Hispanics aged 50 and older over-index against their non-Hispanic White counterparts by 35% for agreeing that they think of their cellphone as a source of entertainment, by 37% for agreeing they expect the quality of video on their cellphone to be as good as that of their TV, by 35% for agreeing they are interested in watching video clips on their cellphone, and by 105% for agreeing they would be willing to pay a monthly subscription fee to receive live TV on their cellphone.



ONLINE WITH A PURPOSE

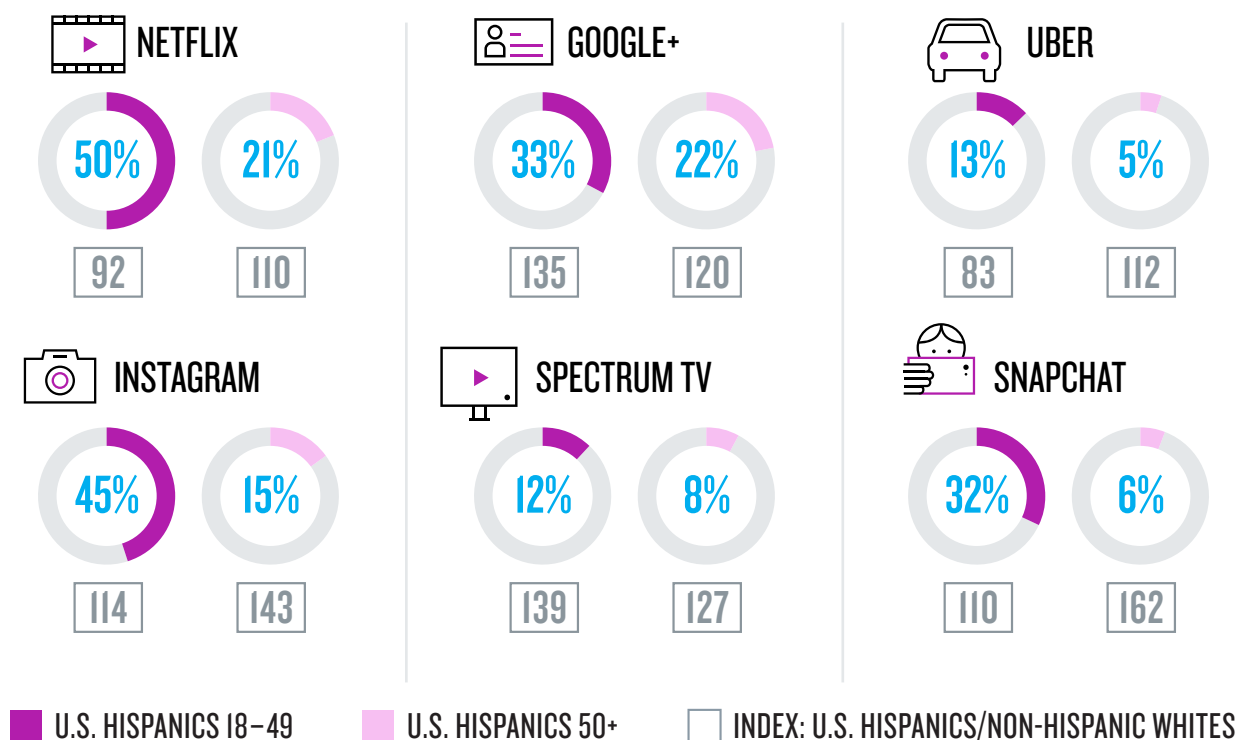
THE INTERNET: CENTRAL TO COMMUNITY AND CONNECTION

The majority (92%) of U.S. Hispanic households have access to the internet, and the internet is such an important part of U.S. Hispanics' lives that 58% agree they would feel disconnected without it. The need for connection to their community, culture and family, as well as to brands, trends, the news and the rest of the world, is a driving force behind Hispanics' varied and over-indexing usage of the internet. Eighty-three percent of Hispanics agree the internet is a great way to communicate with family and friends, which is part of why 55% of Hispanics spend five or more hours each week online, and 34% spend 10 or more hours each week online.

Besides serving as a conduit for information, the internet is also a genuine source of entertainment. Sixty-four percent of U.S. Hispanics agree that going online is a favorite free-time activity, and 82% agree it has allowed them to learn things they wouldn't have learned otherwise.

POPULAR WEBSITES AND APPS WITH HISPANICS

(USED IN PAST 30 DAYS VS. NON-HISPANIC WHITES)



Source: Nielsen Scarborough Hispanic DST Multi-Market 2017 Release 2 *Reissue 04-10-2018* Total (Jun 2016–Nov 2017)

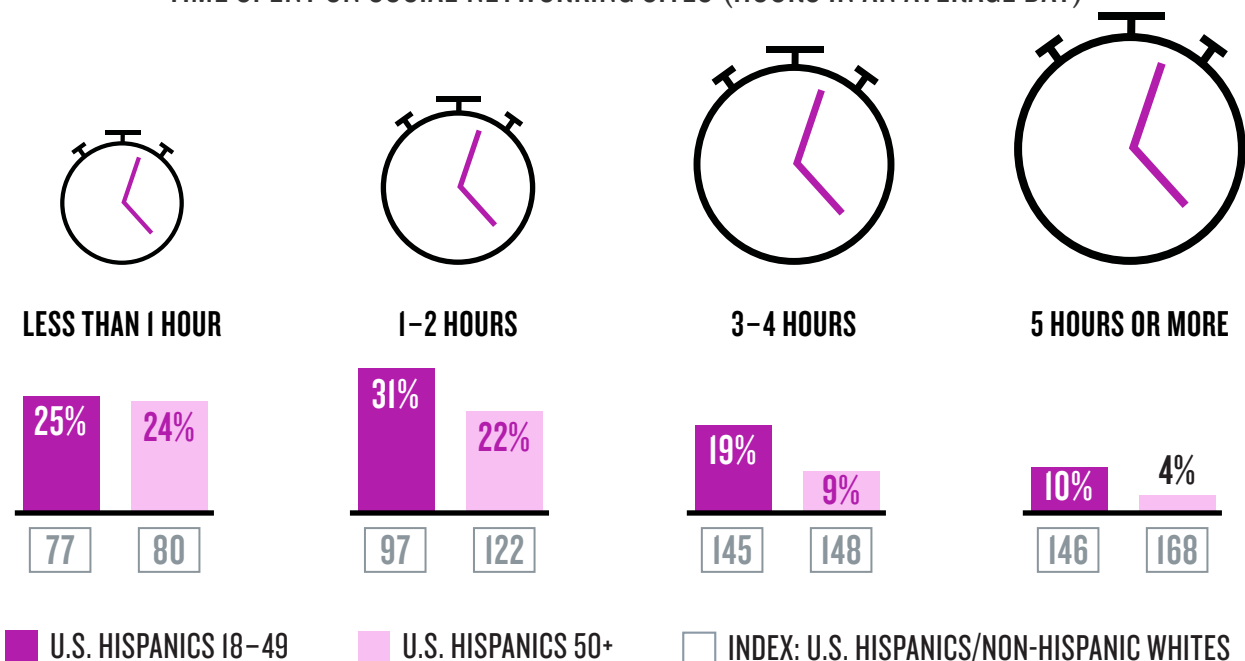


SOCIAL MEDIA: THE DIGITAL SOURCE OF *COMUNIDAD*

U.S. Hispanics have a voracious appetite for relevant, authentic content, and because social media is the most convenient means of connecting with one's personal and extended communities, as well as one of the largest resources of Hispanic-relevant and Hispanic-created content, it is a perfect fit. As a result, U.S. Hispanics spend more time on social-networking sites, with 52% of U.S. Hispanics 18+ spending one or more hours per day on social-networking sites (compared with 38% of non-Hispanic Whites) and 24% spending three or more hours per day (compared with 13% of non-Hispanic Whites). For U.S. Hispanics aged 18–49, the average number of hours per day spent on social-networking sites is two, and they over-index against their non-Hispanic White counterparts for time spent in excess of three hours per day.

SPENDING TIME WITH SOCIAL

TIME SPENT ON SOCIAL-NETWORKING SITES (HOURS IN AN AVERAGE DAY)



Source: Nielsen Scarborough Hispanic DST Multi-Market 2017 Release 2 *Reissue 04-10-2018* Total (Jun 2016–Nov 2017)

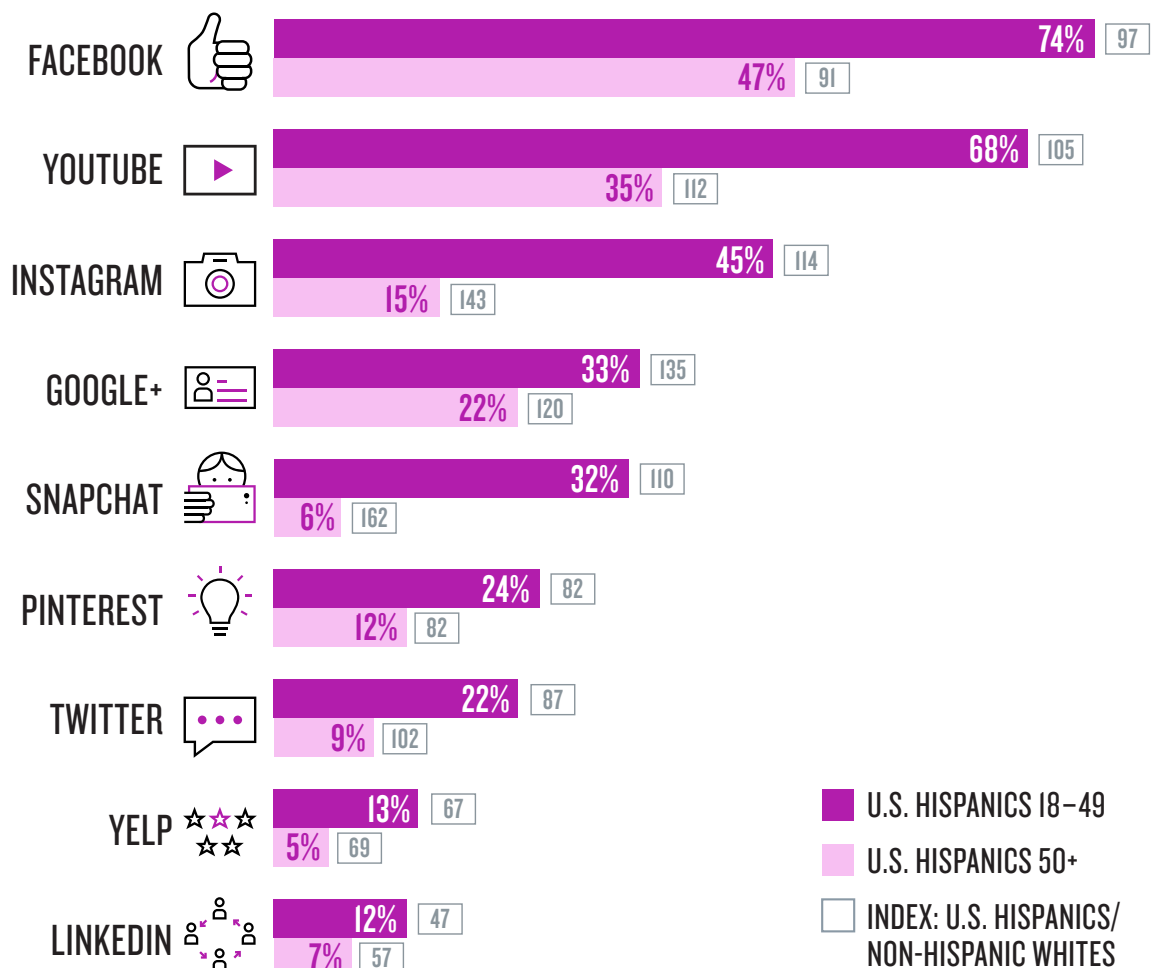
In social-media usage and engagement, Hispanics in the U.S. over-index relative to their non-Hispanic counterparts, with more than three-quarters (77%) saying they've used social-media sites in the past 30 days. Social media also aligns with Latinx consumers' desire to be connected influencers among friends, family and colleagues. Thus, dialogue and image-based social media are especially prevalent, with 66% of Hispanics 18+ having used Facebook (over-indexing by 5%), 36% having used Instagram (over-indexing by 54%), 30% having used Google+ (over-indexing by 42%), 25% having used Snapchat (over-indexing by 61%) and 18% having used Twitter (over-indexing by 14%) in the last 30 days.

Additionally, some of the strongest platforms for Hispanics are those that include video content, with 58% saying they used YouTube (over-indexing by 16%) in the past 30 days. Equally impressive, Hispanics share the content they consume on social five times more often than non-Hispanic Whites do.

U.S. Hispanics aged 18–49 over-index against their non-Hispanic White counterparts for having used YouTube, Instagram, Google+ and Snapchat. U.S. Hispanics who are 50 and older over-index against their non-Hispanic White counterparts for having used all those same social-networking sites and Twitter.

SUPER SOCIAL, SUPER MOBILE

SOCIAL-NETWORKING WEBSITES VISITED AND APPS USED IN PAST 30 DAYS



Source: Nielsen Scarborough Hispanic DST Multi-Market 2017 Release 2 *Reissue 04-10-2018* Total (Jun 2016–Nov 2017)

When asked why they use social media, Hispanics over-index against non-Hispanic Whites for the vast majority of reasons. One possible interpretation is that individual Hispanics are using social media for a greater variety of reasons than are individual non-Hispanic Whites.

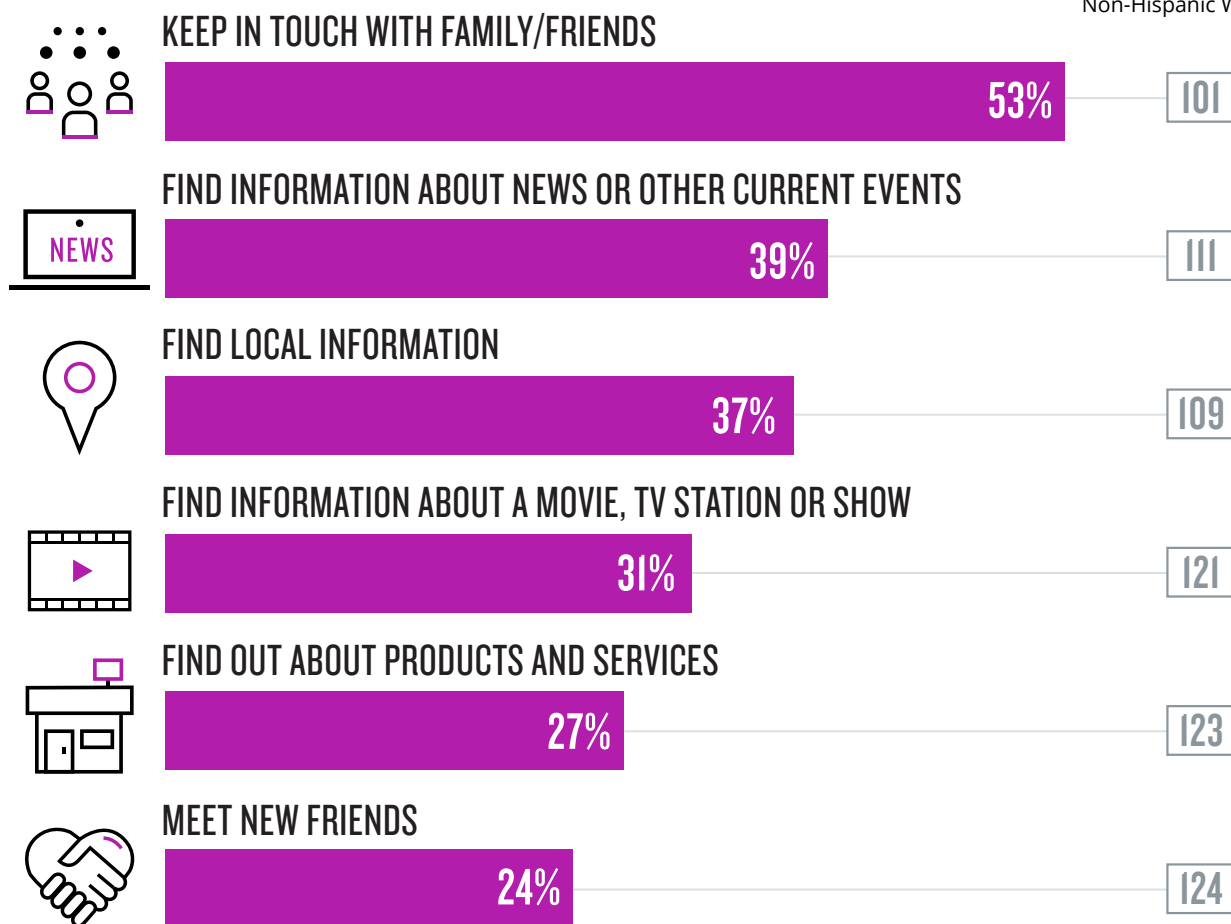
The most common reason U.S. Hispanics identify for visiting or using social-networking sites is to keep in touch with family and friends. Additionally, they over-index on all other reasons that involve staying connected, whether that be to their community, events, news information, new friends or brands. In fact, their highest-indexing reasons can be very practical for consumers—for example, to receive exclusive offers, coupons or other discounts (over-indexing against non-Hispanic Whites by 42%) and to gain access to VIP or members-only events (over-indexing by 82%).

THE MOST COMMON REASON U.S. HISPANICS IDENTIFY FOR VISITING OR USING SOCIAL-NETWORKING SITES IS TO KEEP IN TOUCH WITH FAMILY AND FRIENDS

IMPORTANT REASONS* FOR VISITING OR USING SOCIAL-NETWORKING WEBSITES

INDEX

Hispanic 18+/
Non-Hispanic White 18+



*Reasons rated very or somewhat important.

Source: Nielsen Scarborough Hispanic DST Multi-Market 2017 Release 2 *Reissue 04-10-2018* Total (Jun 2016–Nov 2017)



Hispanics are prominent and making strides in social media as influencers on a variety of topics, including beauty, food, child care, crafts, along with many other forms of expression. Two of the arenas where Hispanics have a growing influence are gaming and beauty. Hispanic social-media gaming personalities such as Ruben Dobles Gunderson (with 28 million subscribers) are influencing non-Hispanic gamers around the world. Also taking social media by storm is Dulce Candy Ruiz, a Mexican-born YouTube superstar. With over 2 million subscribers, the YouTube beauty guru represents the voice of the Latina in social media. With a Nielsen N-Score* of 65 and a soaring 80 for likability among non-Hispanic Whites, Dulce's captivating dialogue and Latina style are an inspirational story of social media crossover success.

ONLINE AS AN INFOTAINMENT HUB AND CONDUIT FOR BUSINESS

The majority of U.S. Hispanics didn't transition to the internet, but were raised on it due to their relative youth. Given that 60% of Hispanics were born or grew up in the internet age, versus only 40% of non-Hispanic Whites, the internet is naturally their first resource for just about everything they do. In addition to being avid social networkers, U.S. Hispanics also over-index for using the internet in a myriad of other ways, such as for accessing entertainment, finding information, saving money, shopping, dating and taking college courses. As with U.S. Hispanics' social-media usage, what is possibly the most interesting about their internet usage is the wide variety of ways they are, as individuals, taking advantage of the internet's benefits.

60% OF HISPANICS WERE BORN OR GREW UP IN THE INTERNET AGE, VERSUS ONLY 40% OF NON-HISPANIC WHITES

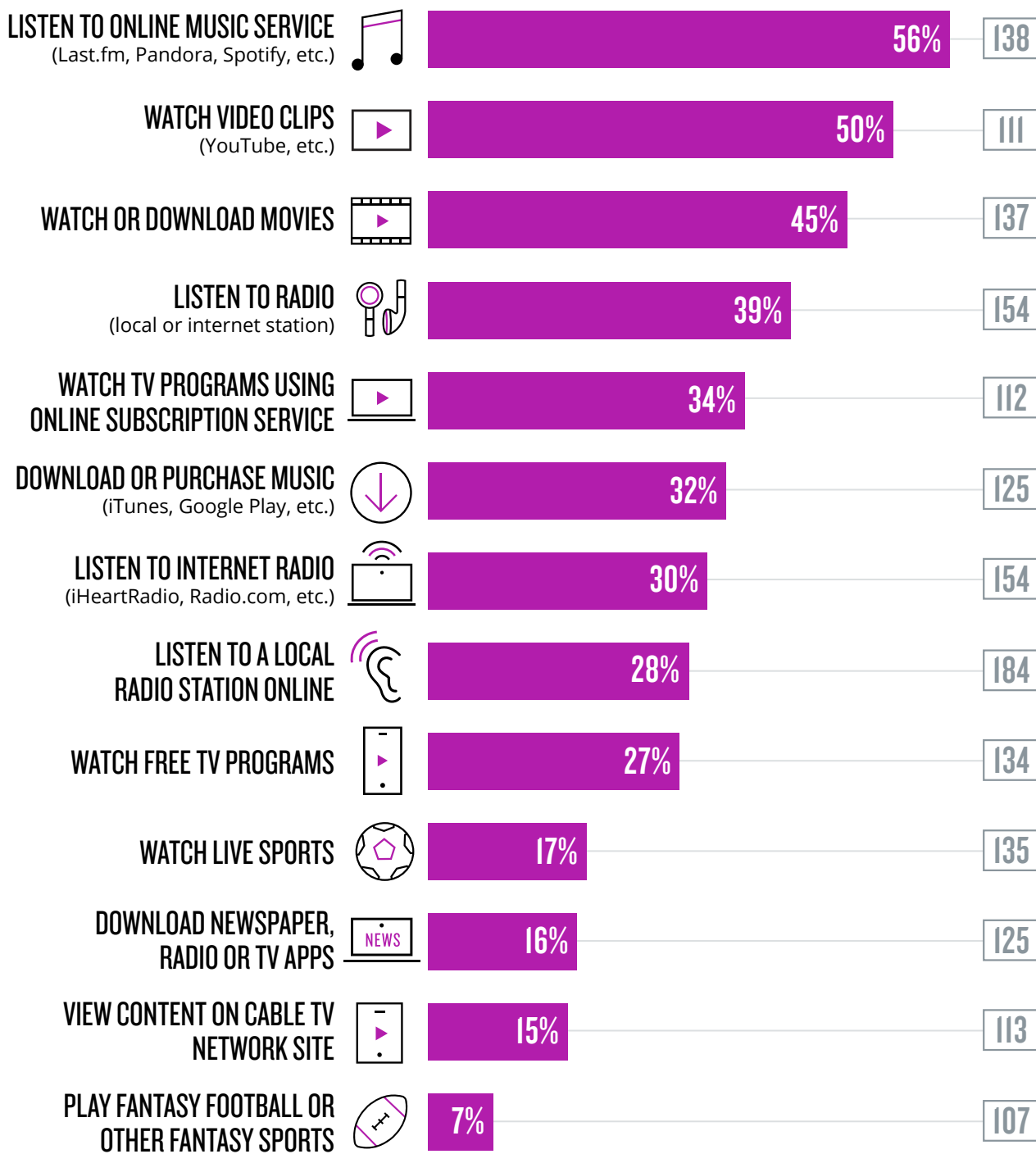
In the world of entertainment, U.S. Hispanics over-index for listening to online music services and to various formats of radio, as well as for downloading music. They also over-index for watching or downloading video clips, movies, TV programs, live sports, media apps and cable TV, and for playing fantasy sports. They participate in much of this on their mobile smartphone.

*N-Score assesses a celebrity's casting and endorsement potential.

USES OF INTERNET AND APPS FOR ENTERTAINMENT ON ANY DEVICE (PAST 30 DAYS)

INDEX

Hispanics 18+/
Non-Hispanic Whites 18+



Source: Nielsen Scarborough Hispanic DST Multi-Market 2017 Release 2 *Reissue 04-10-2018* Total (Jun 2016 - Nov 2017)

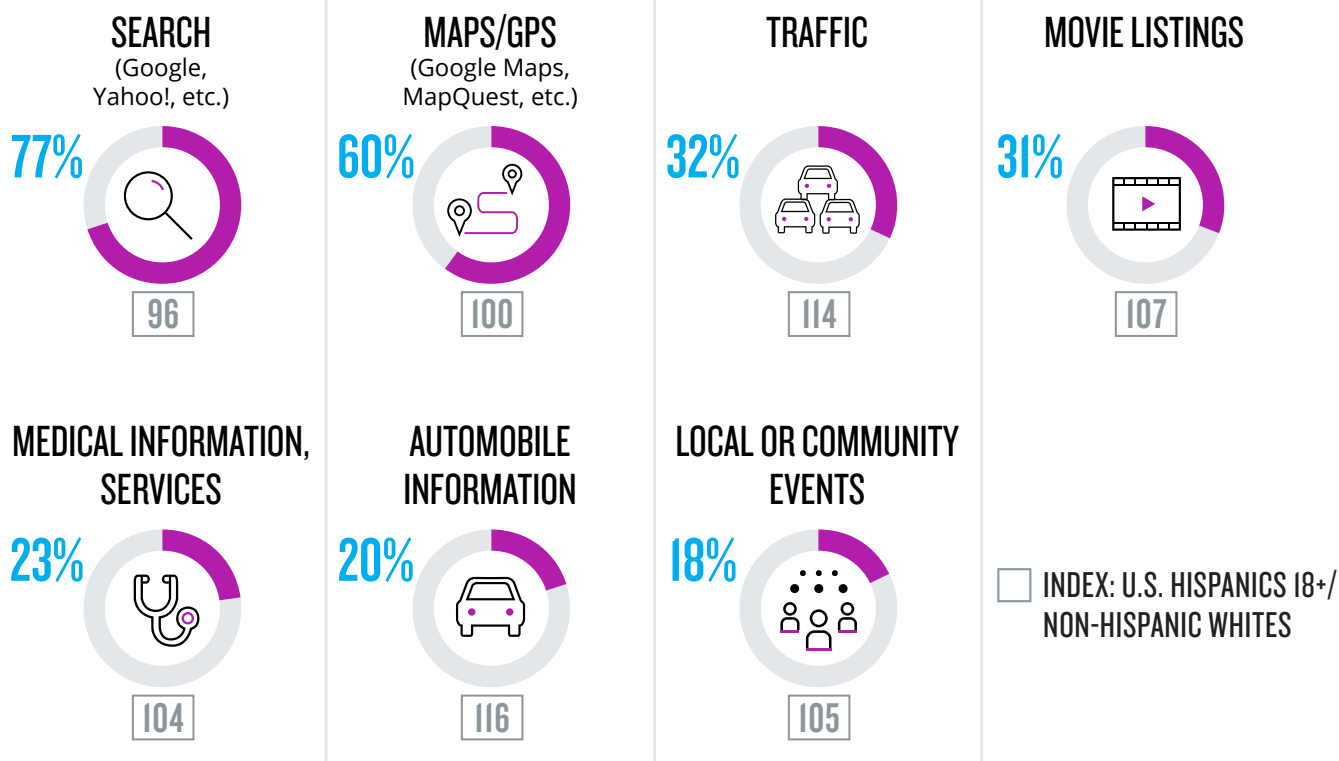
Hispanics' desire to stay connected extends beyond social media and entertainment. In terms of gathering information, U.S. Hispanics over-index against non-Hispanic Whites for finding traffic, local and community events, movie listings, automobile information and medical information and services. The ability to seek and find this information in-culture and in-language makes a seamless connection to many of their everyday ambicultural* lifestyles of being 100% American and 100% Latinx.

U.S. Hispanics don't use the internet just to find information; they also like to share it. Harking back to their previously mentioned inclination to be influencers among their friends, family and colleagues, 38% of U.S. Hispanics agree they like to share their opinions about products and services by posting reviews and ratings online (over-indexing against non-Hispanic Whites by a whopping 46%).

38% OF U.S. HISPANICS AGREE THEY LIKE TO SHARE THEIR OPINIONS ABOUT PRODUCTS AND SERVICES BY POSTING REVIEWS AND RATINGS ONLINE

INFORMATION SEEKERS

USES OF INTERNET AND APPS TO FIND INFORMATION ON ANY DEVICE (PAST 30 DAYS)



Source: Nielsen Scarborough Hispanic DST Multi-Market 2017 Release 2 *Reissue 04-10-2018* Total (Jun 2016–Nov 2017)

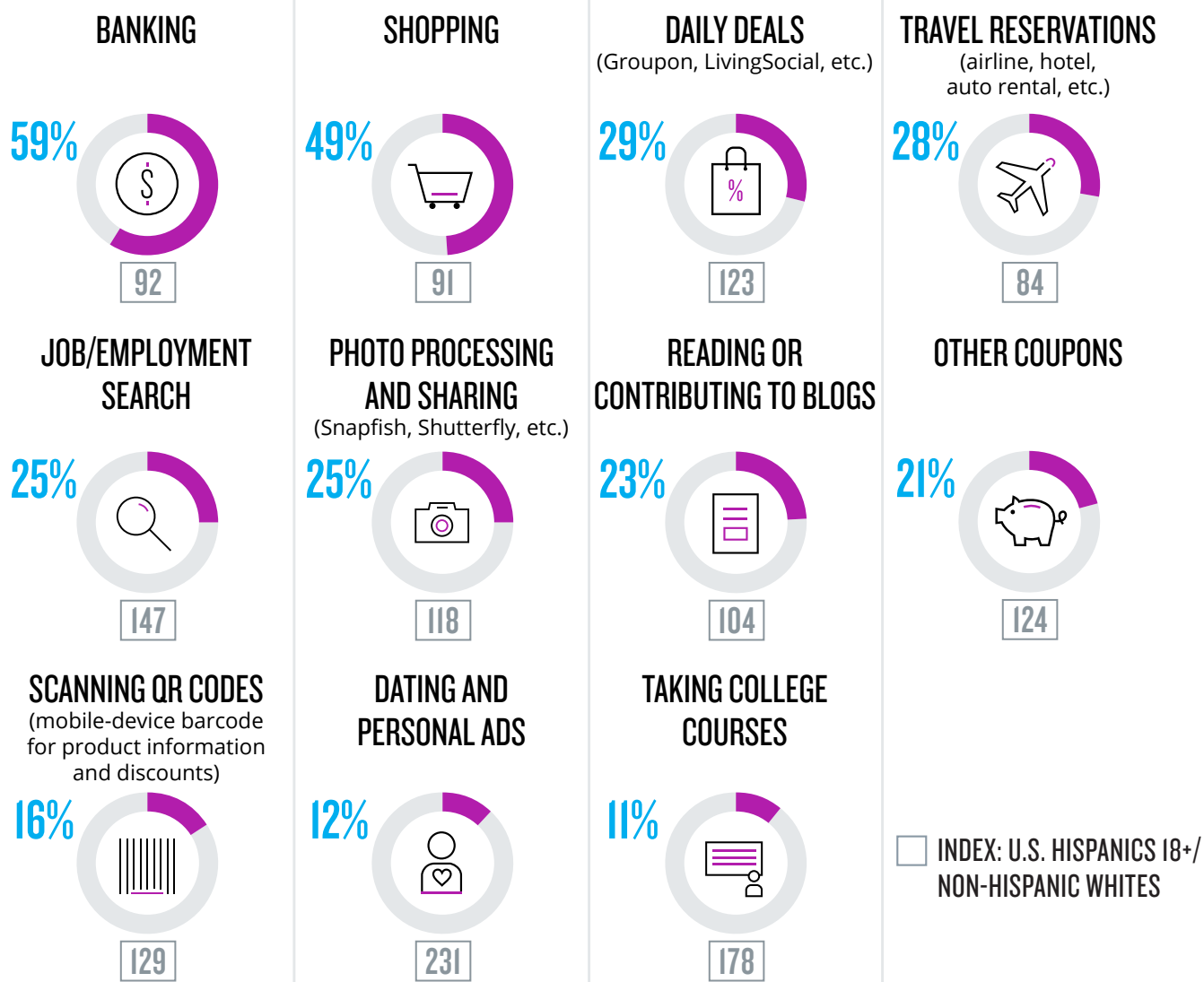
*Note: Ambicultural(s) is a registered service mark of EthniFac ts, LLC, and is used with their permission.

36% OF HISPANICS AGREE THAT THEY ONLY PURCHASE PRODUCTS ONLINE WHEN THEY HAVE A COUPON OR PROMOTIONAL CODE FOR THE SITE

Avid deal seekers, Hispanics have always over-indexed for using couponing and discount codes, and that is no different online. In fact, 36% agree that they only purchase products online when they have a coupon or promotional code for the site (over-indexing by 27%). U.S. Hispanics also over-index for using the internet for job searches, personal ads, college courses, and photo processing. While they under-index for using the internet for banking (most likely due to their younger age), 54% of U.S. Hispanics agree they are happy to use their phone to carry out day-to-day banking transactions (over-indexing by 24%). Providers of banking and financial services should consider this online preference and comfort when addressing the needs of this growing young population who will soon be entering their peak earning years.

CONNECTING, COUPONING AND CONSUMING CONTENT

USES OF INTERNET AND APPS FOR TRANSACTIONS ON ANY DEVICE (PAST 30 DAYS)



Source: Nielsen Scarborough Hispanic DST Multi-Market 2017 Release 2 *Reissue 04-10-2018* Total (Jun 2016–Nov 2017)

ONLINE SHOPPING AND DIGITAL ADVERTISING

ONLINE BUYING AND THE IMPORTANCE OF DIGITAL INFLUENCE

The internet is one of the primary resources for U.S. Hispanics when it comes to researching potential purchases and completing the sale. Eighty-two percent of U.S. Hispanics agree that the internet is a great way to gather information on products and services they're considering purchasing, and 78% agree it is a great way to actually buy those products. In terms of consumer behavior, 49% agree they used the internet in the last 30 days for shopping, while 69% agree they made an internet purchase in the last 12 months. Thirty-one percent of U.S. Hispanics indicate that they spent \$500 or more online in the last 12 months, with 18% saying they spent \$1,000 or more online.

As discussed, Hispanics are inherently social, and they use social channels for gathering information and recommendations, as well as to tap into a dimension of Latinx culture that is often not well understood: the desire to align with a brand experience based on trust. For Hispanics, an important part of the purchase process is giving and receiving advice. This encompasses the act of receiving advice and recommendations by reading reviews from trusted friends and influencers prior to a purchase, as well as the act of offering personal recommendations to others. The digital manifestations of this are that 64% of U.S. Hispanics agree that before purchasing a product online, they typically read online reviews submitted by others, and 38% agree they like to share their opinions about products and services by posting reviews and ratings online (over-indexing relative to non-Hispanic Whites by 46%).



**78% OF HISPANICS
AGREE THE INTERNET
IS A GREAT WAY
GREAT WAY TO
ACTUALLY BUY
THOSE PRODUCTS**

BROWSING AND BUYING

ITEMS HISPANICS MOST COMMONLY SHOPPED/BOUGHT ONLINE (PAST 12 MONTHS)

CLOTHING OR ACCESSORIES



45% SHOPPED

39% BOUGHT

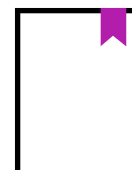
AIRLINE TICKETS



28% SHOPPED

23% BOUGHT

BOOKS



28% SHOPPED

22% BOUGHT

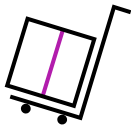
Source: Nielsen Scarborough Hispanic DST Multi-Market 2017 Release 2 *Reissue 04-10-2018* Total (Jun 2016–Nov 2017), GfK/MRI Attitudinal Insights.

For Latinx consumers, confidence in a purchase, including value and savings, is an important factor influencing a decision to buy online. Specifically, 64% of U.S. Hispanics agree that they like to compare prices across different sites before purchasing something online, 62% agree that the offer of free shipping attracts them to a shopping website, and more than one-third (36%) agree that they only purchase products online when they have a coupon or promotional code for the site. From these responses, we can surmise that digital technologies such as mobile coupons, loyalty programs and other shopping apps will continue to be central to U.S. Hispanics' online shopping experience.

FOR U.S. HISPANICS, CONFIDENCE IN A PURCHASE, INCLUDING VALUE AND SAVINGS, IS AN IMPORTANT FACTOR INFLUENCING A DECISION TO BUY ONLINE.



64% AGREE THAT THEY LIKE TO COMPARE PRICES ACROSS DIFFERENT SITES BEFORE PURCHASING SOMETHING ONLINE



62% AGREE THAT THE OFFER OF FREE SHIPPING ATTRACTS THEM TO A SHOPPING WEBSITE



36% AGREE THAT THEY ONLY PURCHASE PRODUCTS ONLINE WHEN THEY HAVE A COUPON OR PROMOTIONAL CODE

Source: Nielsen Scarborough Hispanic DST Multi-Market 2017 Release 2 *Reissue 04-10-2018* Total (Jun 2016–Nov 2017), GfK/MRI Attitudinal Insights



GROWTH IN ONLINE FOOD AND NONFOOD GROCERY PURCHASING





When it comes to online nonfood grocery shopping, Hispanics have the highest average dollars per buyer, the highest over-indexing dollars per buyer, and the highest year-over-year growth for dollars per buyer in categories that go along with the larger and multigenerational family structure. Disposable diapers (\$90), electronics (\$76), baby needs (\$62), pet food (\$76), housewares/appliances (\$59) and pet care (\$56) all rise to the top for the highest average dollars per buyer. The categories of nonfood groceries where U.S. Hispanics over-index the most for online dollars per buyer against non-Hispanic Whites are baby needs (by 44%), men's toiletries (by 38%), household cleaners (by 30%) and disposable diapers (by 30%). The most year-to-year growth in dollars per buyer is being seen in household cleaners (37%), first aid (29%) and laundry supplies (24%).

In terms of online food purchases, Hispanics tend to buy items that are economical for larger families or that are commonly used at social events. They have the highest dollar per buyer spend on jams, jellies and spreads (\$40) and bottled water (\$32), which are also the categories where they over-index the most against non-Hispanic Whites (by 129% and 67%, respectively). Meanwhile, they are showing the most year-over-year growth in online dollars per buyer in bottled water (90%) and pasta (80%).

POSITIVE ATTITUDE TOWARD DIGITAL ADVERTISING

Hispanics' desire to stay informed results in relatively high positivity toward advertising. Roughly one-third of Hispanics agree that advertising on mobile phones provides meaningful or useful information about product use, bargains, and new products and services. Even larger shares agree that advertising on the internet does the same. Hispanics also over-index against non-Hispanic Whites for having these positive opinions about media advertising. Of these two digital advertising media, internet is the more engaging and has more ad responsiveness among Hispanics. Mobile phones, however, over-index more against non-Hispanic Whites.

ATTITUDES TOWARD THE USEFULNESS OF ADVERTISING

	ADVERTISING ON MOBILE PHONES		ADVERTISING ON THE INTERNET	
	U.S. HISPANICS 18+	INDEX TO NON-HISPANIC WHITES 18+	U.S. HISPANICS 18+	INDEX TO NON-HISPANIC WHITES 18+
    PROVIDES MEANINGFUL INFORMATION ABOUT PRODUCT USE OF OTHER CONSUMERS	32%	187	40%	133
PROVIDES USEFUL INFORMATION ABOUT BARGAINS	35%	178	46%	129
PROVIDES USEFUL INFORMATION ABOUT NEW PRODUCTS AND SERVICES	34%	171	45%	122

How to read: 32% of U.S. Hispanics 18+ agree advertising on mobile phones provides them with meaningful information about product use of other consumers.

Source: Nielsen Scarborough Hispanic DST Multi-Market 2017 Release 2 *Reissue 04-10-2018* Total (Jun 2016–Nov 2017), GfK/MRI Attitudinal Insights. Includes respondents who say they agree strongly or somewhat with given statement.

CULTURAL CONNECTION THROUGH MUSIC

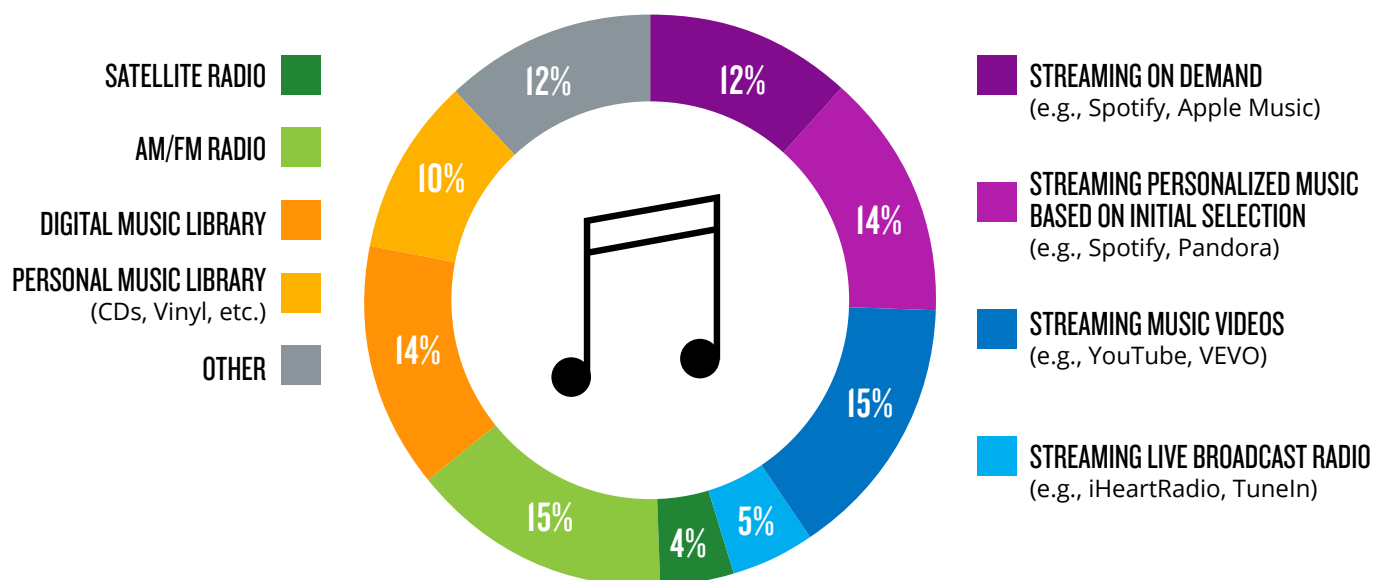
MUSIC: MEANT TO BE DISCOVERED AND SHARED

Music is both personal and social and is an important cultural connector allowing Latinx consumers to listen to content that speaks authentically to them in a relevant and appealing way. It is also one of the most authentic ways for marketers to build a lasting relationship with Latinx consumers. U.S. Hispanics spend about 32 hours each week with music. Breaking that down by format, 15% of listening is terrestrial radio, 4% is satellite radio, 14% is digital music library, and 46% is some type of streaming. Another 10% of listening is via physical copies, while 12% is from miscellaneous other sources such as TV music channels.

Streaming, representing almost half (46%) of all music listening, is an important part of Latinx music consumption. The MediaTech Trender Q1 2018 Report shows that 45% of U.S. Hispanics currently use an online music service (compared with only 40% of non-Hispanic Whites), and 35% say they are interested in using or subscribing to a streaming service in the coming months. Nielsen Music 360 2017 reports that more than half (52%) of U.S. Hispanics agree that listening to playlists is an important part of their music streaming experience, and 57% agree that access to their favorite AM/FM radio station 24/7 is an important feature when choosing a music streaming service.

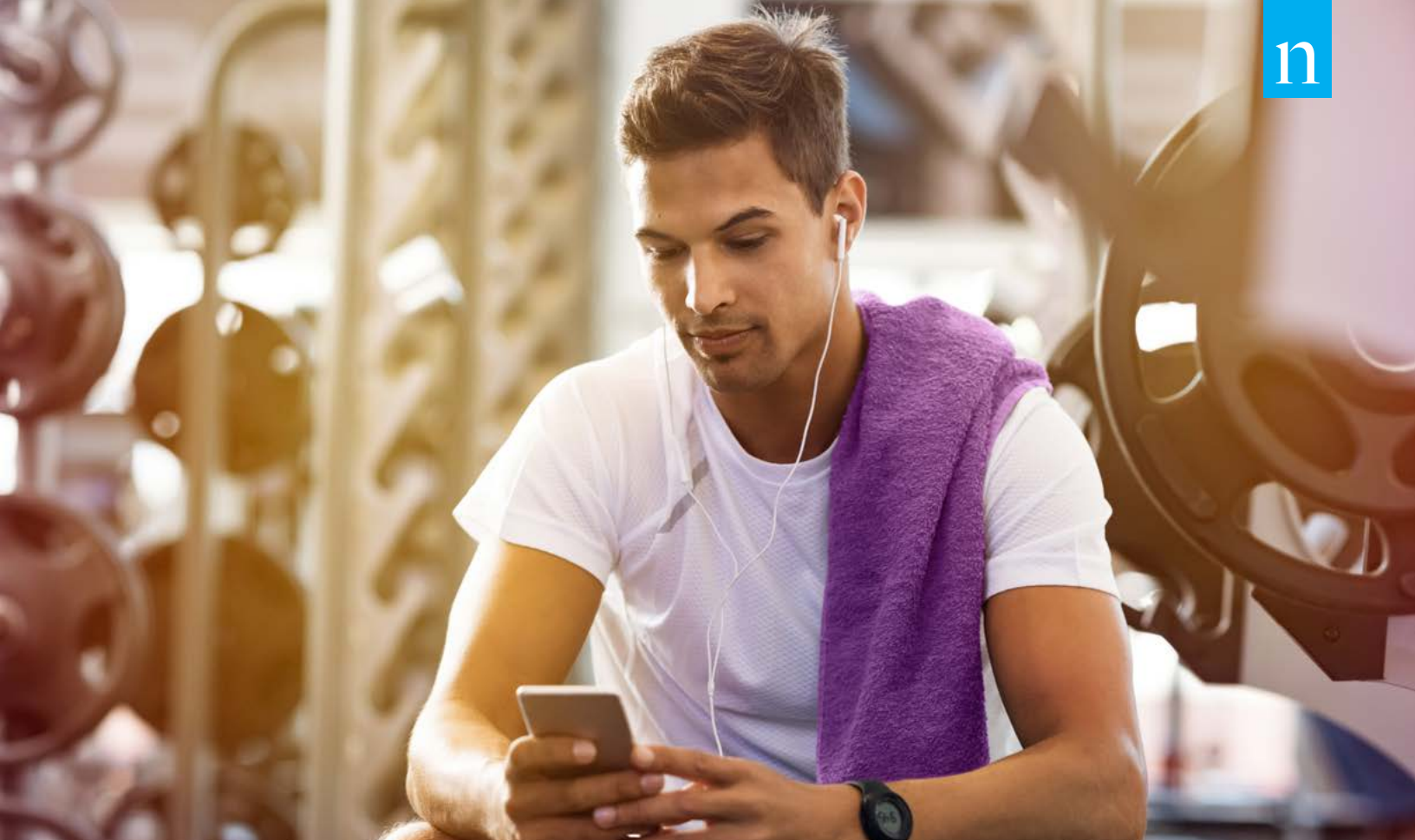
**U.S. HISPANICS
SPEND ABOUT
32 HOURS EACH
WEEK WITH MUSIC**

HISPANICS AND MUSIC-LISTENING PLATFORMS



Read as: U.S. Hispanic music consumers spend 12% of their weekly music time streaming music on demand via platforms like Spotify and Apple Music.

Source: Nielsen M360 2017, Spotlight on Hispanics



Terrestrial radio is critical to reaching U.S. Hispanics, as they spend an average of 12 hours and 59 minutes weekly listening to AM/FM radio—more time than the average spent on radio by the total U.S. On a weekly basis, AM/FM radio reaches 96% of U.S. Hispanics aged 18 and older, the highest reach of any medium. Additionally, Hispanics 18 and older listen to radio an average of 5.1 days per week,* making it also the most frequently consumed type of media.

Sixty-three percent of U.S. Hispanics say they listen to radio online (over-indexing against non-Hispanics by 31%). Additionally, in the past 30 days, 56% of Hispanics reported listening to an online music service (over-indexing by 38%), 30% reported listening to internet radio (over-indexing by 54%) and 28% to a local radio station online (over-indexing by 84%). By age, 74% of U.S. Hispanics aged 18–49 and 37% aged 50 and older listen to radio online (internet, local or music service). (Scarborough)

The various listening sources are somewhat interconnected. Fifty-three percent of U.S. Hispanics say they discover new music through AM/FM radio, while 34% say they discover it through online music websites.** Then they buy, listen to and watch that new music in multiple formats. The discovery of live music events also is tied to radio and streaming, as well as to social media. Thirty-one percent of live music goers say they found out about the event via YouTube, while 19% found out via radio. Additionally, 49% discovered live music events on Facebook, 27% on Instagram and 31% from friends and family.

An important cultural connector, music is often shared. In fact, 25% of U.S. Hispanics share music video links with family and friends (over-indexing against total U.S. adults by 40%). The visual connection to music is important for Latinx consumers as well; of those who used YouTube in the last year, 88% watched music videos on the site, which fulfills their desire for a truly immersive cultural music experience.

*Nielsen RADAR 137, June 2018

**Nielsen M360 2017, Spotlight on Hispanics

ENGAGING WITH, NOT JUST LISTENING TO, MUSIC

Latinx music fans are deeply engaged in the conversation surrounding music, artists and even music consumption. They are loyal music fans, as evidenced by the fact that 70% of Hispanics say they use social media to follow musicians they like (over-indexing against the total population by 43%). They also engage with the brands that have a relationship with their favorite artist; 78% of Hispanics view a brand more favorably if the brand sponsors a concert or tour—an important fact for marketers in their strategies.

According to Nielsen Music 360, on average, U.S. Hispanics aged 13 and older use four physical devices to listen to music each week. And as they rapidly adopt new music technology, smart assistants like Google Home and Alexa are on the rise. The point of entry for smart assistants may be as a music speaker, but as time goes on, there can be an increase in streaming media subscriptions, with usage spilling into other activities such as shopping and assistant tasks. Hispanic consumers are leading the way when it comes to interest in and adoption of smart speakers and audio streaming services. As audio becomes more accessible and interfacing with streaming services becomes frictionless, radio broadcasters, artists and content creators are focusing on cutting through in the new landscape.

For U.S. Hispanics, the listening experience is evolving with the advancement of new platforms. For example, according to Nielsen's MediaTech Trender Q1 2018 report, 21% of Hispanics 13 and older have a smart speaker in the home, more than the total population. And 45% are currently using a streaming service for music, radio and podcasts, putting their usage five percentage points higher than for their non-Hispanic White counterparts. We can expect the number to increase, as a full 58% of Hispanics agree they are interested in owning the device in the future and 35% say they are interested in using or subscribing to a streaming service soon.

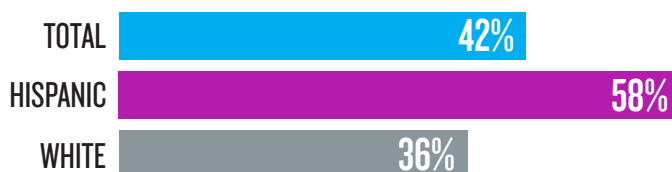
SMART SPEAKERS* DEVICE IN HOUSEHOLD



AUDIO STREAMING SERVICES** USED FOR MUSIC, RADIO OR PODCASTS



VERY OR SOMEWHAT INTERESTED IN OWNING



VERY OR SOMEWHAT INTERESTED IN USING OR SUBSCRIBING



Source: Nielsen MediaTech Trender Report, Q1 2018.

*Smart speaker device: Wireless speaker and voice command device with an integrated virtual assistant that offers interactive actions and hands-free activation (e.g. Amazon Echo Dot, Google Home)

**Audio streaming service for listening to music, radio or podcasts (e.g. Spotify, iHeartRadio, TuneIn, Pandora, Apple Music, Soundcloud, etc.)

CROSSOVER: THE NEW NORM

Music is one of many areas where Hispanic influence on the mainstream is evident. Latin music became mainstream music in 2017, when for the first time in modern history, the Billboard Hot 100 charts held a record for the number of predominantly Spanish-language songs—19 to be exact. With collaborations between Latin artists and mainstream artists, music listeners were introduced to Latinx talent with danceable hits. In 2017, Luis Fonsi and Daddy Yankee's Spanish-language smash "Despacito" and its remix featuring Justin Bieber topped the Hot 100 chart. "Despacito" was the biggest song of the year in terms of sales plus on-demand streaming, and it led the Digital Song Sales chart. Additionally, J. Balvin and Willy William's Spanish-language song "Mi Gente," aided in part by a remix featuring Beyoncé, had a total consumption volume of 1.8 million combined song sales and On-Demand audio stream equivalent songs.

Part of the new mainstream success of Latin music can be attributed to streaming services recognizing the power of Latin music. Streaming numbers are a large part of the Billboard Hot 100. And as major streaming services have increased the availability of Latin music, its exposure and consumption have increased exponentially, not only among Hispanics, but among all other U.S. adults as well.

IN 2017, FOR THE FIRST TIME IN MODERN HISTORY, THE BILLBOARD HOT 100 CHARTS HELD A RECORD FOR THE NUMBER OF PREDOMINANTLY SPANISH-LANGUAGE SONGS





U.S. HISPANICS ARE 58% MORE LIKELY THAN THEIR NON-HISPANIC WHITE COUNTERPARTS TO HAVE SEEN FOUR OR MORE MOVIES IN A THEATER IN THE LAST 30 DAYS

TV & MOVIES

LATINX INFLUENCE ON TV AND MOVIES: GOING MAINSTREAM

Hispanic influence on the mainstream and non-Hispanic adoption of Hispanic culture are evident in across the entertainment industry, including film. From the many awards and accolades recently bestowed upon Latinx directors and actors to the success of features like Disney's "Coco," it is obvious that America is readily embracing Hispanic characters, creators and story lines.

Forty-four percent of U.S. Hispanics agree that they feel really good about seeing celebrities in the media who share their ethnic background. New media options are serving as a platform to explore and express that heritage and to shine a spotlight on Hispanic artists and celebrities.

A CRAVING FOR LIVE AND SHARED ENTERTAINMENT EXPERIENCES

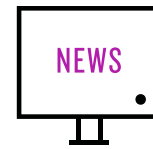
When it comes to visiting movie theaters, Hispanics are the opening act of consumers. They are 58% more likely to have seen four or more movies in theaters than their non-Hispanic White counterparts. From a digital standpoint, more than half of all U.S. Hispanics (56%) have watched or downloaded movies or TV programs from the internet (over-indexing against non-Hispanic Whites by 24%). For U.S. Hispanics 18–49, that number is 67%, and for those 50 and older, 30% are watching and downloading (over-indexing by 14%).

Shared entertainment events are important in Latinx households, and that includes pay-per-view events. Hispanics over-index against non-Hispanic Whites by 180% for having watched one live event in the past 12 months. U.S. Hispanic households are also well connected to other entertainment options, with more than one-third of Hispanic households (38%) subscribing to hardwired cable TV service, and 25% to satellite (over-indexing by 22%).

TV: GENRES, CONNECTION AND RELEVANCE

Like all Americans, Hispanics enjoy a variety of programming genres and they consume them both through traditional and digital methods. When compared with TV consumption by non-Hispanic Whites, U.S. Hispanic TV consumption demonstrates a strong connection to the local community. U.S. Hispanics are more likely than non-Hispanic Whites to consume local evening, morning and late news (over-indexing by 3%, 5% and 77%, respectively). This provides an opportunity to connect to the local community through programming and is often supplemented with digital activities such as following, liking, posting and sharing. U.S. Hispanics are also nearly twice as likely to watch children's programming (over-indexing by 97%), which is no surprise, considering the higher prevalence of children within Hispanic households. Other TV genres topping the list of the most watched by U.S. Hispanics are movies, comedies, sports and documentaries. These top genres hold steady for all Hispanics, whether foreign or U.S. born.

Nearly a quarter (23%) of U.S. Hispanics watch *novelas*, a higher percentage than watch reality TV, talk shows or game shows. Latinx viewers of *novelas* often watch as a cross-generational family, very often live while sharing shock and surprise on social media. This manner of viewing *novelas* offers the cultural connectivity that Hispanics seek and that is so important in reaching this market.



**U.S. HISPANICS
ARE MORE LIKELY
THAN NON-
HISPANIC WHITES
TO CONSUME LOCAL
EVENING, MORNING
AND LATE NEWS**

TV PROGRAMS: GENRES WATCHED

	U.S. HISPANICS 18+	INDEX TO NON-HISPANIC WHITES 18+
Movies	63%	109
Comedies	51%	97
Local news, evening	45%	103
Documentaries	38%	106
Local news, morning	37%	105
Local news, late	33%	177
Food/cooking shows	31%	99
Kids' shows	24%	197
<i>Novelas</i>	23%	2850

Source: Nielsen Scarborough Hispanic DST Multi-Market 2017 Release 2 *Reissue 04-10-2018* Total (Jun 2016–Nov 2017)

LIVE AND SHARED EXPERIENCES OF BROADCAST PROGRAMS

For broadcast television, *telenovelas* dominate regular programming viewed by U.S. Hispanics, showing that Spanish-language, in-culture programs are a huge draw. Nine of the 10 most watched shows (with five or more episodes) are *telenovelas*. The only non-*telenovela* in the top 10 is “NFL Sunday on Fox,” a sports program. A testament to Hispanics’ love for sports and music, these two genres drew the most U.S. Hispanic viewers for broadcast specials (programs with fewer than five episodes), with World Series games taking up seven spots and a Thanksgiving NFL game on CBS, the Latin Grammys, and the Latin American Music Awards taking the other three.

PASSION FOR SPORTS

Being community oriented and culturally connected, Hispanics, not surprisingly, are huge sports enthusiasts, actively following teams and joining fandoms, which are their own cultural communities. Their level of sports enthusiasm is evident in cable rankings; the shows with the most U.S. Hispanic viewers are almost entirely sports related. Among U.S. Hispanics, the top 10 cable shows with five or more episodes or telecasts include baseball, football, wrestling and soccer programs, while the top 10 shows with fewer than five episodes also include soccer, baseball and football programs.

Hispanics have a passion for watching competitive sports that goes beyond just the cable shows already mentioned. U.S. Hispanics significantly over-index against non-Hispanic Whites for having watched NBA playoffs, Mexican League Soccer, Mexican Soccer National Team, pro boxing, European soccer, UFC and much more.

WIRED AND WATCHING

CABLE PROGRAM RANKINGS (5 OR MORE EPISODES)

	NETWORK	PROGRAM (5 OR MORE EPISODES)	U.S. HISPANIC VIEWERS (000)
1	TBS Network	MLB NLCS	832
2	Fox Sports 1	MLB AL Champions Series	805
3	ESPN	NFL Regular Season	793
4	USA Network	WWE Entertainment	418
5	Fox Deportes	MLB World Series on FoxD	400
6	TBS Network	MLB Division Series	399
7	Fox Sports 1	MLB ALCs Post	372
8	Univision Deportes	Liga MX Sat	355
9	Fox Sports 1	MLB AL Division Series	339
10	USA Network	WWE Smackdown	333

THE TOP 10 CABLE SHOWS WITH THE MOST U.S. HISPANIC VIEWERS ARE ALMOST ENTIRELY SPORTS RELATED



Source: Cable Program Rankings, P18+, Sept 25, 2017–Dec 31, 2017

SPORTS WATCHED ON TV

BROADCAST OR CABLE (PAST 12 MONTHS)

	U.S. HISPANICS 18+	INDEX TO NON- HISPANIC WHITES 18+
NBA Playoffs	21%	112
NBA Finals	19%	108
Mexican League	19%	1431
Mexican Soccer National Team	18%	1369
Pro Boxing	16%	314
European Soccer	15%	264

Source: Nielsen Scarborough Hispanic DST Multi-Market 2017 Release 2 *Reissue 04-10-2018* Total (Jun 2016–Nov 2017)

As evidenced by their TV-viewing habits, U.S. Hispanics clearly are intensely interested in sports. While the NFL (33%), MLB (25%) and Olympics (33%) are the sports in which U.S. Hispanics say they have the most interest, Hispanics over-index against non-Hispanic Whites for interest in the NBA (by 20%), pro boxing (by 195%) and Mexican soccer (by 683%).

U.S. Hispanics are consuming a variety of sports not only on TV and cable, but also on the radio. Fútbol, for example, has constituted a source of cultural pride and built an additional way to stay connected to culture and community. More than weekend diversions, sports are an integral part of the Latinx social experience, and woven into the dialogue of the community.



Melding their love of sports and community and seeking deeper connections with their teams of choice, modern, digitally connected Latinx sports fans stay engaged via social media and online fan pages. Up to 13% of total U.S. Hispanics age 18 and older are showing their fandom through social media. U.S.-born Hispanics over-index against non-Hispanic Whites for following NFL or local football teams on social media, while both foreign- and U.S.-born Hispanics over-index for following MLB, Minor League or local baseball; NBA or local basketball; and MLS or local soccer teams. As Hispanics continue to allocate so much of their time to sports engagement, sports entities can best engage these passionate fans with authentic experiences supporting their personal and shared love of the game and the heroes.



FANS AND FOLLOWS

SPORTS AND TEAMS FOLLOWED ON FACEBOOK, TWITTER, INSTAGRAM OR SNAPCHAT

	U.S. HISPANICS 18+	INDEX U.S. HISPANICS TO NON-HISPANIC WHITES 18+	FOREIGN- BORN U.S. HISPANICS 18+	INDEX: FOREIGN- BORN U.S. HISPANICS TO NON-HISPANIC WHITES 18+	U.S.-BORN HISPANICS 18+	INDEX: U.S.-BORN HISPANICS TO NON-HISPANIC WHITES 18+
MLS or local team	4%	273	4%	253	4%	287
NBA or local team	9%	198	7%	149	11%	240
Minor League Baseball	1%	163	1%	163	1%	175
MLB or local team	10%	120	9%	108	11%	131
NFL or local team	13%	113	9%	81	16%	141

Read as: 4% of U.S. Hispanics aged 18+ follow an MLS or local soccer team on Facebook, Twitter, Instagram or Snapchat.

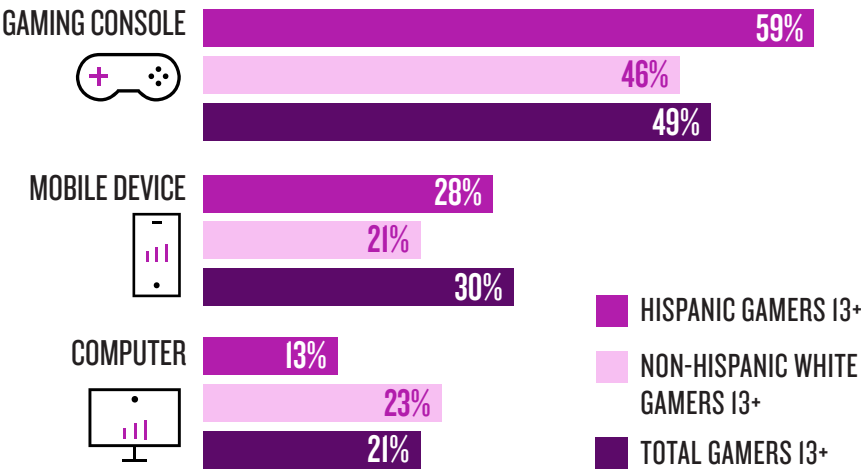
Source: Nielsen Scarborough Hispanic DST Multi-Market 2017 Release 2 *Reissue 04-10-2018* Total (Jun 2016–Nov 2017)

GAMING

HISPANICS AT THE TOP OF THEIR GAME

Given that Hispanics are voracious digital consumers, it follows that gaming and the social-media dialogue that surrounds it offer them a very attractive opportunity to connect. In fact, according to Nielsen’s Gaming 360 report, in 2018, 72% of U.S. Hispanics 13 and older self-identify as gamers, with 40% saying they use two or more devices for gaming. With three high-profile gaming console launches over the past 18 months, it is not surprising that 33% of U.S. Hispanic households own a gaming console and 59% who are 13 and older prefer to game on a gaming console such as Xbox, Nintendo or PlayStation (over-indexing against their non-Hispanic White counterparts by 13%). In contrast, 28% prefer to game on a mobile device, and 13% on a computer.

PLATFORM PREFERENCE



Source: Nielsen Gaming 360 2018

U.S. Hispanic gamers 13 and older report devoting 11% of their leisure time to playing video games. But they not only enjoy playing video games, they also enjoy watching game-related content, both live streamed and prerecorded. Sixty-four percent of Hispanic gamers say they turn to YouTube as their main source of game-related video. Twitch is gaining momentum as the second-most-popular source of gaming content, with 22% of U.S. Hispanic gamers watching. Staying on top of the gaming dialogue is equally important, with 44% of Hispanic gamers reporting they keep up with recent gaming news and trends, compared with just 32% for total gamers. Competition and community make the gaming industry an important entertainment source to watch as marketers and manufacturers seek to authentically connect with the youthful Latinx community moving into the future.



SOURCES FOR WATCHING GAME CONTENT

OUTLET	HISPANIC GAMERS 13+	TOTAL GAMERS 13+
YouTube	64%	69%
Twitch	22%	21%
GameSpot	17%	19%
Steam	11%	14%
Reddit	18%	14%
IGN	7%	12%

Source: Nielsen Gaming 360 2018

SECTION II TAKEAWAYS

- 1** Hispanics are likely to share their tech preferences and be key influencers. Thirty-nine percent of U.S. Hispanics agree they discuss their knowledge of technology or electronic products with others (over-indexing non-Hispanic Whites by 25%). Those 50 and older over-index non-Hispanic Whites by 56% for agreeing they are the first of their friends and colleagues to try new tech products. 38% of all U.S. Hispanics agree they like to share their opinions about products and services by posting reviews and ratings online (over-indexing by 46%).
- 2** Hispanics over-index the total population by 9% for smartphone ownership and 99% of U.S. Hispanic households have a wireless-phone service. The media category with the highest reach among U.S. Hispanics ages 18 and older is radio, at 37 million. The No. 2 category, live and DVR/time-shifted TV, has a reach of 34 million. Apps and internet on a smartphone have the third-highest reach at 30.7 million.
- 3** Hispanics have a voracious appetite for relevant and authentic online content and social media as a means of connecting with their personal and extended communities. Fifty-two percent of U.S. Hispanics spend one or more hours per day on social networking sites (compared with 38% of non-Hispanic Whites) and 24% spending three or more hours per day (compared with 13% of non-Hispanic Whites).
- 4** Hispanics over-index on digital behaviors that involve staying connected to their community, events, news information, new friends or brands. Marketers should understand that Hispanics want to receive exclusive offers, coupons or other discounts (over-indexing non-Hispanic Whites by 42%) and to gain access to VIP or members-only events (over-indexing by 82%).
- 5** Hispanics use digital tools for a wide variety of purposes. They are avid online deal seekers with 36 % agreeing that they only purchase products online when they have a coupon or promotional code (over-indexing by 27%). U.S. Hispanics also over-index for using the internet for job searches, personal ads, and college courses. Fifty-four percent of U.S. Hispanics agree they are happy to use their phone to carry out day-to-day banking transactions (over-indexing by 24%).
- 6** Forty-nine percent of Hispanics have shopped on the internet in the last 30 days, while 69% agree they made an internet purchase in the last 12 months. Thirty-one percent of U.S. Hispanics have spent \$500 or more online in the last 12 months, with 18% spending \$1,000 or more online.
- 7** Music is an important cultural connector – in 2017 the Billboard Hot 100 charts held a record for the number of 19 predominantly Spanish-language songs. Forty-five percent of U.S. Hispanics use an online music service, but terrestrial radio is still important as 53% say they discover new music through AM/FM radio. Latinx music fans are deeply engaged in conversation surrounding music and artists. As loyal music fans, 70% say they use social media to follow musicians (over-indexing against the total population by 43%) and 78% view a brand more favorably if the brand sponsors a concert or tour.
- 8** Competition and community make gaming an important entertainment source. Seventy-two percent of U.S. Hispanics 13 and older self-identify as gamers, with 40% saying they use two or more devices for gaming.



SECTION III

REMIXING REPRESENTATION



**MANY ASPECTS OF
LATINX CULTURE,
INCLUDING FOOD,
MUSIC, SPORTS AND
FILM TASTES, HAVE
CROSSED OVER TO
NON-HISPANICS**

EXPRESSING IDENTITY AND CULTURAL FLUIDITY

U.S. Hispanics are a diverse group, with friends, family and spouses from diverse ethnic and racial backgrounds. As an ambicultural community, Hispanics are steadfast in their cultural identity while also fully taking advantage of mainstream American culture. As Hispanics are part of the American fabric, many aspects of Latinx culture, including food, music, sports and film tastes, have crossed over to non-Hispanics. Today's general market necessarily has intercultural crossover, and marketers' and advertisers' acknowledgment of that will serve them well as they work to authentically and culturally connect with the burgeoning Hispanic community.

For Hispanics, there is a noted desire to maintain and build connections with cultural roots. With the rise of new web and social-media content platforms that authentically connect with Millennial and Gen Z, English-speaking and bilingual Hispanics, Latinx consumers are discovering new ways of expressing identity and cultural fluidity.

BRAND LOYALTY: COMMUNITY AND QUALITY

Community involvement and activism have always been very important aspects of U.S. Hispanic culture, and that activism carries over into U.S. Hispanics' purchase decisions as well. One of the important brand decision makers for U.S. Hispanics is a company's involvement in and dedication to the issues that affect the Latinx community. Fifty-seven percent of U.S. Hispanics agree they are more likely to purchase brands that support a cause they care about (over-indexing non-Hispanic Whites by 9%), and 43% agree they expect the brands they buy to support social causes (over-indexing by 26%). Additionally, the majority (58%) of U.S. Hispanics agree they are willing to pay more for a product that is environmentally safe, and 53% agree a company's environmental record is important to them in their purchasing decisions (over-indexing by 8%). These community values hold true for ages 18–49, as well as for those 50 and up.

Quality and met expectations are two of the other main reasons why U.S. Hispanics choose one brand over another. Although 75% of Hispanics agree their No. 1 goal when shopping is to save as much money as possible, 64% agree they buy based on quality, not price, and 60% agree they are typically willing to pay more for high-quality items. Brand name is not necessarily important, however, if a generic and store brand's quality and price are equal or better. Seventy-one percent of U.S. Hispanics agree generic or store brand products are as effective as brand-name products, and 67% agree price is more important to them than brand names.

Family and friends are brand and product influencers as well. Forty-five percent of U.S. Hispanics agree they often seek the advice of others before making a purchase (over-indexing non-Hispanic Whites by 5%). More specifically, 49% agree that their children have a significant impact on the brands they choose (over-indexing by 33%), and 48% agree they buy the brands their parents used. Once the brand decision has been made, though, loyalty is strong. Eighty percent of U.S. Hispanics agree that when they find a brand they like, they stick to it, and 70% agree that if a product is made by a company they trust, they'll buy it even if it is slightly more expensive.

SUPPORTERS OF COMMUNITY VALUES

WHEN MAKING PURCHASE DECISIONS, U.S. HISPANICS:

57%

AGREE THEY ARE MORE
LIKELY TO PURCHASE
BRANDS THAT SUPPORT
A CAUSE THEY CARE
ABOUT



43%

AGREE THEY
EXPECT THE BRANDS
THEY BUY TO SUPPORT
SOCIAL CAUSES



58%

AGREE THEY ARE
WILLING TO PAY MORE
FOR A PRODUCT THAT IS
ENVIRONMENTALLY SAFE



53%

AGREE A COMPANY'S
ENVIRONMENTAL
RECORD IS IMPORTANT
TO THEM IN THEIR
PURCHASING DECISIONS



Source: Nielsen Scarborough Hispanic DST Multi-Market 2017 Release 2 *Reissue 04-10-2018* Total (Jun 2016–Nov 2017), GfK/MRI Attitudinal Insights

TRUST AS A FOUNDATION FOR LOYALTY

Earning a trustworthy relationship is very important to U.S. Hispanics. They value authenticity and are looking to connect with brands that embrace their culture and values. Marketers must build trust by truly aiming to understand how the Latinx culture defines the values and identity of the Hispanic consumer.

Hispanics rely heavily on their trusted community of friends, relatives and other sources for advice and information about products or services, and they weigh the reputation of the companies selling to them. Therefore, it's vital that brands reach and stay positively engaged with these consumers' social networks. In the digital age, it is more important than ever to align with and build trust with Latinx community influencers. Hispanics now turn to their social-media networks to share their opinions on items or services they've used or to seek the opinion of their trusted network on items they are looking into purchasing. Thus, brands must develop meaningful campaigns with relevant content that shows they understand and are aligned with the Latinx community and Latinx values.

DIGITAL DEMOCRATIZATION

The democratization of technology has broken down barriers and has created greater opportunities for U.S. Hispanics to share their voice. In everything from travel to banking to medicine, new digital technology has made services more accessible. It has also made finding in-language and culturally astute providers infinitely easier. Perhaps the biggest impact of technological advancements, though, has been in the arts and entertainment fields. Barriers to entry have eroded, and Hispanic content creators and influencers can go directly to their audience. The technology required to compose and mix music, to shoot or edit a movie, to create 3D animation, or to publish a book or article is now easily accessible, making everyone a potential content creator and influencer. Additionally, the exponential reach of social networks like Facebook, YouTube, Snapchat, Pinterest and Twitter has supplanted the prohibitive cost of marketing and distribution and gives content creators unparalleled access to millions of followers. Music, film, publishing and other creative endeavors have become fully and irreversibly democratized through technology, and this has given the world the opportunity to enjoy a host of talented Hispanic artists, as well as to explore and learn more about Hispanic cultures and the U.S. Hispanic experience.



SECTION III TAKEAWAYS

- 1** As an ambicultural community, Hispanics are sustaining their cultural identity while also fully taking advantage of mainstream American culture. Many aspects of Latinx culture, including food, music, sports and film tastes, have crossed over to non-Hispanics. There are a plethora of new web and social-media content platforms that authentically connect with Millennial and Gen Z, English-speaking and bilingual Hispanics, allowing Latinx consumers to discover new ways of expressing identity and cultural fluidity.
- 2** Community involvement and activism are important aspects of U.S. Hispanic culture. 57% agree they are more likely to purchase a brand that supports a cause they care about, 43% expect the brands they buy to support social causes, and 58% agree they are willing to pay more for a product that is environmentally safe.
- 3** In the digital age, it is more important than ever to align with and build trust with Latinx community influencers. Hispanics turn to their social-media networks to share their opinions on items or services they've used or to seek the opinion of their trusted network on items they are looking into purchasing. Brands must develop meaningful campaigns with relevant content that shows they understand and are aligned with the Latinx community and Latinx values.
- 4** The democratization of technology has broken down barriers and created greater opportunities for U.S. Hispanics to share their voice. The exponential reach of social networks like Facebook, YouTube, Snapchat, Pinterest and Twitter has supplanted the prohibitive cost of marketing and distribution and gives content creators unparalleled access to millions of followers.

CONCLUSION

Empowered by technology and anchored by a communal culture, U.S. Hispanics are striving and thriving at the confluence of fast-changing demographic, economic and digital consumer market trends. Their influence on the U.S. mainstream, propelled by gaining momentum as prodigious digital-content creators and consumers, is further bolstered by a corresponding expectation of authenticity and accountability in how marketers and brands speak to Latinx aspirations and social concerns. From gaming and sports to TV, movies and music, Hispanics are employing the cutting-edge social-media and interactive-content platforms that let them watch, listen, shop and freely express their evolving intercultural identities. Today's Latinx community is young, bilingual, ambicultural and embarking on their acquisition years. More likely to be native born, in an internet age, they are digitally affluent and seek brand experiences that recognize their unique contributions and value.

METHODOLOGIES

Insights used in this report were sourced from the following Nielsen analytical tools and solutions. All tools offer their own representative levels of consumer insights and behavior across Hispanic, non-Hispanic White and total respondents (based on data collection, survey/panel design, and/or fusion approaches).

NIELSEN HOMESCAN PANEL DATA

The Homescan national panel consists of a randomly dispersed sample of households that is intended to be representative of, and projectable to, the Total U.S. market. Panel members use hand-held scanners and/or a mobile app to record items with a UPC code purchased from any outlet. Data for this report is based on Homescan panel data from the following period: 52 weeks ending, April 14, 2018. The Homescan National panel is representative of both English and Spanish speakers.

NIELSEN SCARBOROUGH

Nielsen Scarborough Hispanic DST Multi-Market 2017 Release 2 *Reissue 04-10-2018* Total (Jun 2016 - Nov 2017) (Base: Age of respondent summaries: Adults 18+ - Projected 141,409,449, Respondents: 124,124). GfK/MRI Attitudinal Insights Module: By integrating 400+ attitudinal statements and segmentations with Nielsen Scarborough's data set, this analysis reflects consumer psychographics in the studied categories among both English and Spanish-speaking adults in the top 36 Hispanic Demographic Market Areas (DMAs).

N-SCORE

N-Score is Nielsen's syndicated Talent Analytics application that enables users to evaluate the endorsement or casting potential for personalities across various industries. N-Score aligns fans of celebrities with their affinity towards specific behaviors, brands or media consumption. By polling U.S. consumers on a weekly basis on specific attributes, awareness, and sentiment, NScore provides metrics that help inform a personality's ability to move products, enhance brand reputation and add value to content. The survey is offered in English and Spanish.

NIELSEN NPOWER

Audience estimates based on a nationally representative panel of people whose televisions are metered with a device called the National People Meter (NPM), which detects exposures to codes embedded in content. A comprehensive questionnaire is also collected of the panel and is conducted in English and Spanish.

NIELSEN MUSIC 360

Nielsen's Music 360 study is a comprehensive, in-depth study of consumer interaction with music in the United States. Interviews were conducted among 2,500 Gen Pop consumers (13+ years of age) and to bolster analyses, additional interviews were conducted among Hispanic Americans with the option to complete the survey in either English or Spanish.

NIELSEN MEDIATECH TRENDER

Nielsen's MediaTech Trender is a quarterly consumer tracking study launched in Q1 2018 by Nielsen Media Analytics. The online survey is offered in both English and Spanish to a U.S. general population sample 13 years or older. Based on Q1 2018 data.

TIME SPENT AMONG USERS AND REACH OF USERS

Total Use of Television, Live+Time-shifted TV, Live TV, Time-shifted TV, TV-Connected Devices (DVD, Game Console, Internet Connected Device) 01/01/2018 – 04/01/2018 via Nielsen NPOWER/National Panel; Radio 03/30/2017 – 03/28/2018 via RADAR 137 and Radio Nationwide Fall 2017; Computer, Smartphone, Tablet via Total Media Fusion sourced from Nielsen Media Impact. For digital data, weeks that cross calendar months are not included. Weeks included for digital – 01/01/18, 01/08/18, 01/15/18, 01/22/18, 02/05/18, 02/12/18, 02/19/18, 03/05/18, 03/12/18, 03/19/18. Digital data was produced on 06/01/18 and slight variations in data processed after this point reflect ongoing updates.

Note: Time spent among U.S. population includes whether or not they have the technology, and data sources can be added or subtracted as appropriate. Time spent among users of each medium would include different bases by source, and data sources should not be added or subtracted. Time spent among U.S. population includes visitor viewing and time spent among users excludes visitor viewing resulting in occurrences of reported time spent for U.S. population to be higher than users. Some amount of simultaneous usage may occur across devices. Sum of individual sources may vary slightly from total due to rounding.

TELEVISION METHODOLOGY

Live+DVR/Time-shifted TV includes Live usage plus any playback viewing within the measurement period. DVR/Time-shifted TV is playback primarily on a DVR but includes playback from video on demand, DVD recorders, server based DVRs and services like Start Over. TV-connected devices (DVD, Game Console, Multimedia Device) would include content being viewed on the TV screen through these devices. This would include when these devices are in use for any purpose, not just for accessing media content. For example, Game Console would also include when the game console is being used to play video Games. Multimedia Devices is a combination of usage of the Internet Connected Devices viewing source and Audio-Video viewing sources. It would include viewing on an Apple TV, Roku, Google Chromecast, Smartphone, Computer/Laptop, etc. connected to the TV. Reach for television and TV-connected devices includes those viewing at least one minute within the measurement period.

Data used in this report is inclusive of multicultural audiences. Hispanic consumer audiences are comprised of both English and Spanish speaking representative populations.

NIELSEN GAMING 360 REPORT

Annual data for the Nielsen 360° Gaming Report is collected via consumer online surveys in Q1 of each year using Nielsen's proprietary, high-quality ePanel in the United States. Groups surveyed: Teens/Adults Aged 13+: 2000+ interviews among 50% Male / 50% Female sample. Post-survey, raw data is weighted to ensure representation of the US General Population based on US Census data.

NIELSEN AD INTEL

Nielsen Ad Intel is a comprehensive source of advertising intelligence that can track the full range of competitive advertising activity. It monitors the media landscape—across 18 different media types and throughout all 210 Nielsen Designated Market Areas (DMAs).

Media coverage includes the following:

- Network TV
- Syndication TV
- National Cable TV
- Spanish-Language Network TV
- Spanish-Language Cable TV
- Spot TV
- Spot Radio
- Network Radio
- National Consumer Magazines
- Local Magazines*
- National Newspapers
- Local Newspapers
- Local Sunday Supplements
- National Sunday Supplements
- Outdoor
- Coupons*
- Internet

*Exclusive media type

RADAR

AM/FM Radio includes listening to programming from AM/FM radio stations or network programming.

Audience estimates for 48 large markets are based on a panel of people who carry a portable device called a Portable People Meter (PPM) that passively detects exposure to content that contains inaudible codes embedded within the program content. Audience estimates from the balance of markets and counties in the U.S. are based on surveys of people who record their listening in a written diary for a week.

The estimates in this report are based on RADAR and the National Regional Database. RADAR reports national network radio ratings covering the U.S. using both PPM and Diary measurement and it is based on a rolling one-year average of nearly 400,000 respondents aged 12+ per year.

Listening to HD radio broadcasts, Internet streams of AM/FM radio stations and Satellite Radio is included in the Persons Using Radio estimates in this report where the tuning meets our reporting and crediting requirements of at least five minutes of usage.

Data used in this report is inclusive of multicultural audiences. Hispanic consumer audiences are comprised of both English and Spanish speaking representative populations.

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ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global measurement and data analytics company that provides the most complete and trusted view available of consumers and markets worldwide. Our approach marries proprietary Nielsen data with other data sources to help clients around the world understand what's happening now, what's happening next, and how to best act on this knowledge. For more than 90 years Nielsen has provided data and analytics based on scientific rigor and innovation, continually developing new ways to answer the most important questions facing the media, advertising, retail and fast-moving consumer goods industries. An S&P 500 company, Nielsen has operations in over 100 countries, covering more than 90% of the world's population. For more information, visit www.nielsen.com.



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