1996

U.S. HISPANIC MARKET

Strategy Research Corporation

Call us . . .

As stated in the introduction, much of the improvement to this 1996 U.S. Hispanic edition has come from comments and suggestions. We would like to hear from you. This 1996 edition of the U.S. Hispanic Study is a direct result of the valuable input we've received in the past. We, at Strategy Research Corporation, would like to make the next edition even more valuable and useful to you. If you have any ideas, comments or suggestions, please don't hesitate to contact us, either in writing at:

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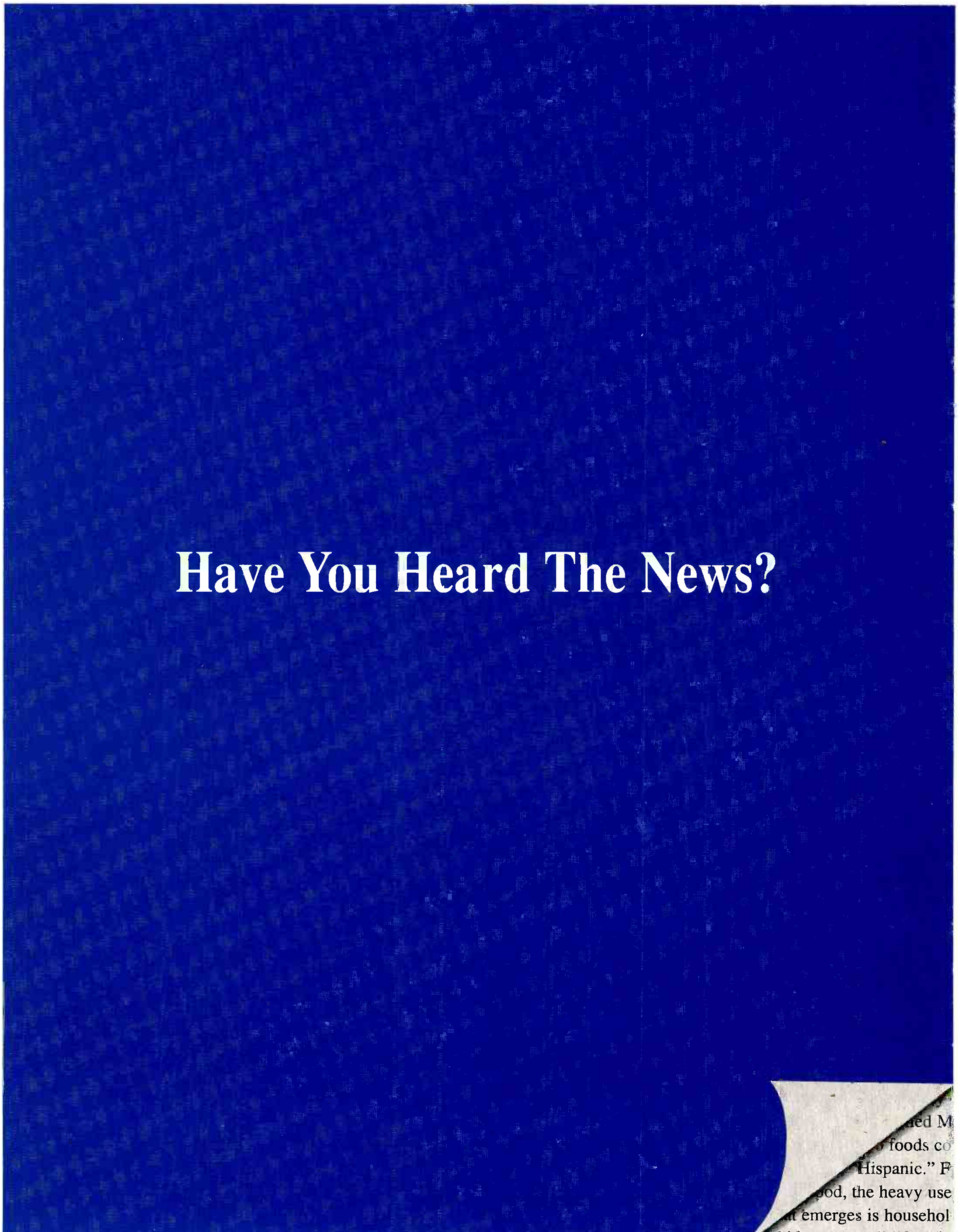
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The Bravo Group
Thomson Consumer Electronics

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1996 U.S. HISPANIC MARKET STUDY

Abbreviations:

Throughout this report we have used the Top 5 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 5 markets are:

LA	Los Angeles, California
NY	New York, New York
MIA	Miami, Florida
CHI	Chicago, Illinois
SF	San Francisco, California.

For a complete definition of the market area covered, please refer to the ADI section of this book.

Definitions:

ADI and **Market** are used interchangeably in this document. The area definitions for each market are from Arbitron's 1993 ADI definitions.

Hispanic Country of Origin: In the 1990 census mailed questionnaire, the question asked was: "Is this person of Spanish/Hispanic origin?" The choices for the answer were as follows: 1) Yes, Mexican, Mexican Am., Chicano; 2) Yes, Puerto Rican; 3) Yes, Cuban; 4) Yes, other Spanish/Hispanic. (Print one group, for example: Argentinean, Colombian, Dominican, Nicaraguan, Salvadoran, Spaniard, and so on.)

The countries listed in the census report were as follows: Mexico; Puerto Rico; Cuba; Dominican Republic; Central America: Guatemala; Honduras; Nicaragua; Panama; San Salvador; Other Central America; South America: Colombia; Ecuador; Peru; Other South America; Other Hispanic: (Based on the respondent's write-in) included such things as Basque, Spain, Spanish, Iberian, Espanola, Latin American, Latino, Hispanic, Californio, Tejano, Nuevo Mexicano, and Spanish American, to name a few.

Hispanic: Hispanic is a term of self-definition. During the data collection, the respondent was asked "Are you of Hispanic origin or descent?"

Sources:

Chambers of Commerce
City Planning Commissions
Market Statistics, Inc.
U.S. Bureau of the Census
U.S. Department of Labor
U.S. Department of Commerce
Strategy Research Corporation

I.

INTRODUCTION

I. INTRODUCTION

1996 U.S. Hispanic Market Study

This document is designed to be utilized by those in advertising, marketing, strategic market planning, product and brand management, and market research. A great deal of effort has been put into the research and analysis to produce the most reliable and definitive work on the subject.

This document is divided into sections or topics, many of which have been expanded and some of which are new, since the 1994 edition. For example, a new section on language use among Hispanics in the United States has been added, and for the first time we included population numbers on Puerto Rico which, as a commonwealth, yields similar market conditions found in the States. Also, although not considered Hispanic because they speak Portuguese, we have included population estimates for Brazilians in the U.S.

Perhaps the major change made is in the sections with data comparisons between Hispanic and Non-Hispanic segments. In those sections, comparisons to the African American segment have been included as well.

Overall, there is more information contained in this 1996 edition than in past editions. The sections of the book are the following:

Population & Demography

After this introduction, the next section in the study will cover Hispanic population from 1950 with projections to 2050. Population characteristics are explored including growth generators, such as birth rates and immigration. The population projections are middle series projections and include Hispanic, Asian, African American and Total.

Language

This new section expands reporting of language use among Hispanics. Specifically covered are first language learned to speak and language used in various situations.

Market Characteristics

Following the Population and Demography section, Market Characteristics covers the country of Origin, place (country) of birth, length of residency, and employment status.

Acculturation & Cultural Components

The Acculturation and Cultural components section explores acculturation levels, direction, and their component information.

Media Usage

The Media Usage section shows the level of Spanish language media use among the Hispanic population.

Public Opinion

The next section, Public Opinion, deals with attitudes toward and current perceptions of immigration in the U.S. among Hispanic, and Non-Hispanic communities, as well as comparative lifestyle measurements.

Brand Building & Advertising

Brand building shows a new and interesting approach to northbound and southbound brand building efforts with Hispanics, as well as some new data on advertising and language.

S*T*A*R Personality Ratings

The S*T*A*R Personality Ratings is a new section which provides highlights from the most recent S*T*A*R PR™ Reports for Hispanic Adults and Teens; a syndicated national report measuring the awareness and favorability of key personalities and celebrities such as actors/actresses, music entertainers, and TV announcers/show hosts.

Selected Product Usage

The Product Usage section covers past 30-day incidence of use for 200-plus personal and household products, incidence of credit card ownership and fast food patronage.

Top 50 Hispanic Markets

The last section of the book is the Top 50 Hispanic Markets section, providing summary information including population -- total and by county, buying power, Telephone/Cable/VCR penetration and available media outlets. Puerto Rico is included for the first time.

Technical Statement:

The methodology used for data collection was telephone interviewing. A total of 3,000 CATI (Computer Assisted Telephone Interviewing) RDD (Random Digit Dialing) interviews were conducted in the sample universe. The Markets sampled were Los Angeles, New York, Miami, San Francisco and Chicago. The sample was controlled to yield 1,000 Hispanic Public Opinion, 1,000 Hispanic Product Usage, and 1,000 Non-Hispanic Product Usage and selected Public Opinion.

Of the 1,000 Non-Hispanic interviews conducted, 300 were among African Americans in the 5 market area. The questionnaire length varied from 15 to 25 minutes. Interviewers were selected to work on this project by their skills as interviewers as well as their language skills. These interviewers had little or no accent of any kind in Spanish, and no accent in English. Of those interviews conducted with Hispanics, 73 percent were conducted in Spanish.

The questionnaire itself took about a month to design and write. Data collection was conducted during July and August 1995; approximately the same time of year as for the 1994 data. A minimum of 20% of the interviews were validated. All data was collected and processed in-house at Strategy Research Corporation in Miami, Florida.

About Strategy Research Corporation & the Authors

Thank You, from all of us at Strategy Research Corporation, for purchasing and referencing this market study. The first national study of the Hispanic market segment was conducted and published by Strategy Research Corporation in 1980, following 10 years of producing similar (market) studies for individual metropolitan areas such as Miami, Los Angeles and New York.

Strategy Research Corporation is a full service marketing research firm conducting proprietary and public studies throughout the Americas and the Caribbean. At its headquarters in Miami, there is a full focus group facility, and a central telephone center with 20 CATI interviewing stations and 12 paper and pencil stations. Strategy Research Corporation offers a wide variety of research products including custom research applications tailored to specific client needs.

During the past year SRC has conducted projects in the following:

categories . . .

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Insurance
Market (segment) studies
Petroleum
Pharmaceutical
Print and Electronic Media
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Telecommunications
Tourism
Recent Immigrants

methodologies . . .

Copy Testing
Product Placement and Testing
ATU's & Tracking
Customer Satisfaction
Focus Groups
Triads
In-Depth One-on-One's
Executive Interviews
Computer Aided Telephone
Computer Aided Personal
Intercept & Central Location
Door-to-Door

languages . . .

English
Spanish
Portuguese
French
Creole

geographical regions . . .

North America
Central America
South America
Caribbean

The designers and authors of this book are outstanding researchers and analysts, good writers, quite hard-headed, but also good-natured blokes.

At the top of the order we have Mr. Richard W. Tobin, the founder, President and CEO of SRC who had the vision to publish this book. He is a dynamic, creative yet gentle man who vigorously drives us to achieve excellence.

RICHARD W. TOBIN

Mr. Tobin has headed Strategy Research Corporation, headquartered in Miami, Florida, for almost 25 years. He is a marketing economist, experienced in developing marketing research studies as well as population and market forecasts.

As President and CEO, he has directed the firm's growth to serve many local, national and international clients. As a result of his direction;

- Strategy Research Corporation interviews a quarter of a million people every year throughout the U.S. and Latin America as well as the Caribbean.
- SRC specializes in marketing strategy studies for major multinational corporations and other companies.
- The company designs and analyzes multi-country studies, brand equity studies, market strategy studies, advertising studies, customer satisfaction studies and market entry studies as well as microeconomic studies.

Mr. Tobin is also the visionary behind the ***U.S. Hispanic Market Study*** and the ***Latin American Market Planning Handbook***, also published by SRC.

Next are Richard H. (Rick) Tobin, Raul J. Lopez and John A. Holcombe. These are the authors who made it happen.

RICHARD H. (RICK) TOBIN

Mr. Rick Tobin is *Senior Vice President* at Strategy Research Corporation, Miami, Florida. He has over 19 years of experience doing business in Latin America, the Caribbean and the U.S. and is skilled in many areas of strategic marketing. Mr. Tobin has devised strategic product analysis for multinational companies and has also designed political campaign strategies.

Mr. Tobin is also responsible for setting up data collection offices in the U.S. and in Latin American markets.

Since its creation 15 years ago, Mr. Tobin has played an integral part in every edition of SRC's ***U.S. Hispanic Market Study***. He designed and tested the Hispanic acculturation model used by SRC. He is responsible for organizing, tabulating and writing a large portion of the 1996 edition of the book.

Mr. Tobin is fluent in Spanish and has traveled extensively throughout the Americas, and is sensitive to the nuances of different Latin cultures.

RAUL J. LOPEZ

Mr. Lopez is *Senior Vice President* and Director of Syndicated Research at Strategy Research Corporation, Miami, Florida. For the past 16 years he has directed SRC's S*T*A*R (Spanish Television Audience Research) studies, providing essential television audience viewing estimates for Spanish-language networks and stations, advertisers and advertising agencies. He was instrumental in creating the first Spanish television network audience research report in 1986, and in designing Spanish television network overnight reports in 1988.

In addition, Mr. Lopez has designed and implemented hundreds of quantitative and qualitative custom research projects and is an experienced focus group moderator. For the past 12 years he has also been responsible for putting together the SRC ***U.S. Hispanic Population*** report.

From the first edition published in 1980, Mr. Lopez has contributed greatly to the composition of SRC's ***U.S. Hispanic Market Study***. He is responsible for organizing and writing several sections of the 1996 edition of the book.

A native of Cuba, Raul was raised in the United States and is fully Bilingual.

JOHN A. HOLCOMBE

Mr. Holcombe is *Associate Research Director, Latin America* at Strategy Research Corporation, Miami, Florida. He oversees and directs full-service market research projects in Latin America and the Caribbean for Strategy's multinational clientele.

He was one of the principal authors of SRC's ***1994*** and ***1996 U.S. Hispanic Market Study***, and authored the ***1995 Latin American Market Planning Handbook***, published by SRC. John is also responsible for the continuing development of SRC's Latin American market research capabilities.

He learned to speak Spanish in Mexico City and Tijuana, Mexico and has traveled extensively throughout the Americas.

II.

POPULATION & DEMOGRAPHY

II. POPULATION & DEMOGRAPHY

A. Introduction

This section of the 1996 U.S. Hispanic Market study presents information and data released by the United States Department of Commerce, Bureau of the Census. The data is both primary and secondary, and includes information collected during the 1990 U.S. Census, future population projections from U.S. Census Current Population Reports, and data gathered from other readily and not so readily available sources.

At the bottom of each table, SRC has provided the year and source of the data presented in said table. In the case of Census reports, the name and report number are provided. Wherever available, SRC has presented 1996 data; however, some tables show data for 1996, 1993, 1992, 1991 or 1990 information. This occurred only where updated information was not available.

The information contained in this section, with a few exceptions, is exclusively Census data. Some of the data categories found in this section may be repeated in other sections of this edition. However, the other presentations of these data categories will be from Strategy Research Corporation and other primary sources.

The 1996 U.S. Hispanic population estimate is taken from the Middle Series of the latest Census release (November 1993) of their **Current Population Reports - Population Projections of the United States, by Age, Sex, and Hispanic Origin: 1993 to 2050**, by Jennifer Cheeseman Day. The report number is P25-1104. In this report three different components of change are projected:

> For each of the components of population change -- fertility, life expectancy, and net immigration -- three different sets of assumptions for future growth are applied. The series using the middle assumption for each component is designated the "middle series." U.S. Census - Current Population Reports, P25-1104

Technical Note

Much of the data in this section are taken from the 1990 U.S. Census, Summary Tape Files (STF 1B and 3) on CD-ROM, and pertains to those who stated in the 1990 Census that they were Hispanic.

In actual practice, these data were developed from the "long form" of the 1990 Census which was mailed to residents of the USA. Due to the methodology, critics have suggested that the Census excluded many persons who were culturally more Latino than American in their level of acculturation. There are several reasons why this criticism might be valid:

- Recent immigrants who had lived in the U.S. for a very short period of time may not have received or participated in the census long form questionnaire.
- Those with little familiarity with English may have declined to fill out the questionnaire.
- Due to a cultural lack of trust in governmental inquiries on the part of recent immigrants.
- Due to the fact that one or more household members is residing illegally in the US and thus the questionnaire was not completed.

If any one of these reasons is valid, the Census would tend to have a sizable under-representation of these Hispanics in their demographic and language counts. On the other hand, the U.S. Census made a greater effort in 1990 to reach Hispanics who were less than fully assimilated into the U.S. mainstream in an attempt to mitigate prior under-representation of these persons.

B. 1996 U.S. Hispanic Population Estimate

The U.S. Census Bureau estimates the January 1, 1996, U.S. Hispanic population to be

27,230,000

C. Proportion Of Total 1996 U.S. Population

According to the latest Census projections, released in November 1993, the U.S. Hispanic population now accounts for slightly over 10% of the total U.S. population of 264.8 million.

TOTAL AND U.S. HISPANIC POPULATION
1996

Total U.S. Population	264,765,000
Total Hispanic Population	27,230,000
Hispanic Population As a Percent of Total U.S. Population	10.3%

Source: *U.S. Census Bureau*
Current Population Reports, P25-1104
Strategy Research Corporation

D. U.S. Hispanic Population Growth: 1950 - 1996

The total population of the United States has increased from 151.3 million in 1950 to approximately 264.8 million in 1996; an increase of over 75% or 113.5 million people.

During the same period, the number of Hispanics residing in the U.S. has increased from an estimated 4.0 million in 1950 to 27.2 million in 1996. This addition of roughly 23.2 million Hispanics represents an increase of almost 600%. From 1950 to 1996, Hispanics accounted for approximately 20% of the country's total population growth.

TOTAL U.S. POPULATION AND TOTAL U.S. HISPANIC POPULATION 1950-1996

	Population	
	Total U.S. (In Millions)	U.S. Hispanics (In Millions)
1950	151.3	4.0
1960	179.3	6.9
1970	203.2	9.0
1980	226.5	14.6
1991	251.4	24.9
1994	259.3	25.5
1996	264.8	27.2

Source: *U.S. Census Bureau, 1990*
Current Population Reports, P25-1104
Market Statistics, Inc.
U.S. Immigration and Naturalization Service
Strategy Research Corporation

E. 1996 Hispanic Population: Markets And States

1. Top 50 Hispanic Markets

The table on the following page presents the estimated 1996 Hispanic populations for the top twenty U.S. Hispanic markets. As indicated, the top three markets of Los Angeles, New York and Miami have a combined total of over 10 million Hispanic residents, representing almost 2 out of every five (39.1%) of the total 1996 U.S. Hispanic population.

The next seven most populated Hispanic markets in the country, including San Francisco, Chicago, Houston and San Antonio (each with over one million Hispanics), contain another 6.5 million Hispanics, or roughly 24% of the total 1996 U.S. Hispanic population. The top ten markets then, total over 17 million Hispanic residents, or 63% of the country's total Hispanic population.

The 1996 Hispanic population estimates for markets 11 through 20, which include El Paso, Albuquerque, Fresno, Phoenix, and Sacramento, (each with better than one-half million Hispanics) amounts to over 4.7 million, or about 17.4% of the total U.S. Hispanic population.

The top twenty Hispanic markets in the U.S. have a combined total of nearly 22 million Hispanic residents, accounting for more than four-fifths (80.4%) of the country's total 1996 Hispanic population.

The next table presents the 1996 Hispanic population estimates for the balance of the top fifty U.S. Hispanic markets. In 1996, Hispanics in the top 50 Markets total an estimated 26 million and represent approximately 95% of the total Hispanic population. In a number of these top 50 markets, Hispanics represent a large proportion of the total population. For example, in Los Angeles and Miami Hispanics account for 37% of the total population, whereas in El Paso, McAllen and Laredo Hispanics represent 73%, 90% and 98% of the total, respectively.

HISPANIC POPULATION FOR TOP TWENTY U.S. HISPANIC MARKETS 1996

Market	Rank	Hispanic Population (000)	Percent Of Total U.S. Hispanic Population	Percent Hispanic Of Total Mkt. Population
Los Angeles	1	6,012.3	22.1%	37.3%
New York	2	3,278.1	12.0	16.4
Miami	3	1,358.1	5.0	37.1
Top 3 Markets		**10,648.5**	**39.1%**	-
San Fran.-San Jose	4	1,120.1	4.1%	16.9%
Chicago	5	1,106.8	4.1	11.8
Top 5 Markets		**12,875.4**	**47.3%**	-
Houston	6	1,078.6	4.0	23.5
San Antonio	7	1,018.0	3.7	51.0
McAllen/Brnsvile	8	803.8	3.0	90.3
Dallas-Ft. Worth	9	740.0	2.7	14.2
El Paso	10	644.8	2.4	73.0
Top 10 Markets		**17,160.6**	**63.0%**	-
San Diego	11	642.7	2.4	23.6%
Albuquerque	12	637.7	2.3	38.2
Fresno	13	632.5	2.3	40.1
Phoenix	14	586.6	2.2	18.0
Sacramento	15	553.3	2.0	16.6
Denver	16	378.6	1.4	12.5
Philadelphia	17	355.5	1.3	4.6
Corpus Christi	18	335.7	1.2	58.4
Washington DC	19	310.5	1.1	5.7
Boston	20	289.7	1.1	5.0
Sub-Total		**4,722.8**	**17.3%**	-
Top 20 Markets		**21,883.4**	**80.4%**	-
Total U.S. Hispanic		**7,230.0**	**100.0%**	-

Source: *Market Statistics, Inc.*
U.S. Census Bureau
Strategy Research Corporation

HISPANIC POPULATION FOR TOP 21 - 50 U.S. HISPANIC MARKETS 1996

Market	Rank	Hispanic Population (000)	Percent Of Total Market Population
TUCSON	21	285.0	29.5%
AUSTIN	22	248.5	22.0
TAMPA-ST. PETERSBURG	23	233.4	6.8
SALINAS	24	223.1	32.9
ORLANDO	25	200.0	7.5
LAREDO	26	186.4	97.7%
BAKERSFIELD	27	180.4	29.6
HARTFORD	28	175.7	6.8
EL CENTRO-YUMA	29	166.6	60.2
SANTA BARBARA	30	158.0	25.3
ODESSA-MIDLAND	31	153.1	37.8%
SEATTLE-TACOMA	32	139.5	3.6
LAS VEGAS	33	137.8	13.0
LUBBOCK	34	124.5	32.1
SALT LAKE CITY	35	122.8	5.7
COLORADO SPRINGS	36	119.7	16.8%
PORTLAND	37	119.6	4.6
WEST PALM BEACH	38	115.0	8.2
WACO-TEMPLE	39	111.5	14.1
PALM SPRINGS	40	109.0	29.8
YAKIMA	41	107.4	19.6%
AMARILLO	42	101.8	21.4
DETROIT	43	101.3	2.1
ATLANTA	44	92.7	2.2
MILWAUKEE	45	84.2	4.0
PROVIDENCE, R.I.	46	72.3	4.8%
CLEVELAND	47	70.1	1.8
NEW ORLEANS	48	62.5	3.6
SPRINGFIELD	49	61.6	9.3
KANSAS CITY	50	59.5	2.9
SUBTOTAL 21-50 MKTS		**4,123.0**	**15.1%***
TOTAL 50 MARKETS		**26,006.4**	**95.5%***
TOTAL U.S. HISPANIC		**27,230.0**	**100.0%**

*Percent of total U.S. Hispanic population

Source: *Market Statistics, Inc.*
U.S. Census Bureau
Strategy Research Corporation

2. Top Hispanic States

The following two-page table depicts Strategy Research Corporation's population estimates for ten states and their major markets with the largest Hispanic populations as of January 1, 1996. The asterisk next to a market indicates that the market crosses state boundaries and that only the in-state population is used for the calculation. For example, the New York market contains 2,424,200 Hispanics in New York state counties and 766,800 Hispanics in New Jersey counties.

These ten states account for 90% of the country's total Hispanic population. The top three states, California (36%), Texas (21%), and New York (9%), account for almost two-thirds (66%) of the total U.S. Hispanic population with a combined total of nearly 18 million Hispanic residents.

Five U.S. states (California, Texas, New York, Florida, and Illinois) have Hispanic populations of over 1 million. Additionally two other states (Arizona and New Jersey) have over 900,000 Hispanics. New Mexico contains nearly a quarter of a million Hispanics, while Colorado has over 500,000. Massachusetts rounds out the list with over 350,000 Hispanics.

The combination of five western and southwestern states -- California, Texas, Arizona, New Mexico and Colorado -- account for 17.6 million Hispanics or 65% of the total Hispanic population. New York and New Jersey contain 3,471,100 Hispanics representing 12.7% of the U.S. total. Florida's 2,039,000 Hispanics represent 7.5% of the U.S. total. While most of the Hispanics in Florida are in the Miami market area, the markets of Tampa and Orlando also have a significant Hispanic population nearly one-half million in 1996.

TOP TEN U.S. STATES WITH LARGEST HISPANIC POPULATION 1996

State / Mkt.	1996 Hispanic Population (000)	Percent Of Total U.S. Hispanic Population
California	**9,802.2**	**36.0%**
Los Angeles	6,012.3	22.1
San Fran.-San Jose	1,120.1	4.1
San Diego	642.7	2.4
Fresno	632.5	2.3
Sacramento	553.3	2.0
Salinas-Monterey	223.1	0.8
Bakersfield	180.4	0.7
Santa Barbara	158.0	0.6
Palm Springs	109.0	0.4
El Centro*	103.1	0.4
Other Areas	67.7	0.2
Texas	**5,603.1**	**20.6%**
Houston	1,078.6	4.0
San Antonio	1,018.0	3.7
McAllen/Browns.	803.8	3.0
Dallas-Ft. Worth	740.0	2.7
El Paso*	545.3	2.0
Corpus Christi	335.7	1.2
Austin	248.5	0.9
Laredo	186.4	0.7
Odessa/Midland*	149.7	0.5
Lubbock	124.5	0.5
Waco-Temple	111.5	0.4
Amarillo*	80.2	0.3
Other Areas	180.9	0.7
New York	**2,567.5**	**9.4%**
New York City*	2,424.2	8.9
Other Areas	143.3	0.5
Florida	**2,039.0**	**7.5%**
Miami	1,358.1	5.0
Tampa/St. Pete.	233.4	0.9
Orlando/Daytona	200.0	0.7
WP Beach/Vero Beach	115.0	0.4
Other Areas	132.5	0.5

*In state only

Continued......

TOP TEN U.S. STATES WITH LARGEST HISPANIC POPULATION 1996
(Continued)

State / ADI	1996 Hispanic Population (000)	Percent Of Total U.S. Hispanic
Illinois	**1,113.7**	**4.1%**
Chicago*	1,047.9	3.8
Other Areas	65.8	0.2
Arizona	**938.0**	**3.4%**
Phoenix*	577.5	2.1
Tucson*	281.2	1.0
Other Areas	79.3	0.3
New Jersey	**903.6**	**3.3%**
New York City*	766.8	2.8
Philadelphia*	136.8	0.5
New Mexico	**734.0**	**2.7%**
Albuquerque*	608.2	2.2
Other Areas	125.8	0.5
Colorado	**534.7**	**2.0%**
Denver*	370.4	1.4
Colorado Springs	119.7	0.4
Other Areas	44.6	0.2
Massachusetts	**355.1**	**1.3%**
Boston*	276.0	1.0
Springfield	61.6	0.2
Providence*	15.8	0.1
Other Areas	1.7	0.0
Sub-Total	**24,590.9**	**90.3%**
Other Areas	**2,639.1**	**9.7**
TOTAL U.S.	**27,230.0**	**100.0%**

*In state only

Source: *U.S. Bureau of the Census, 1990*
Current Population Reports, P25-1104
Market Statistics, Inc.
Strategy Research Corporation

F. Hispanic Population Projections

1. Population Pressure

One of the major factors influencing Hispanic population growth in the United States is population pressure in Latin America which is caused by a combination of underdevelopment, economic instability and political unrest. As shown on the following table, population pressure in Latin America increased dramatically during the past forty years, and is likely to continue until economic growth in Gross Domestic Product (GDP) is at least equal to population growth for a sustained period of time. Although population growth rates have fallen dramatically across the region since 1960, the needs and demands of over 50% of the populace continue to be un-met[1]. In turn, the demands placed on the United States by immigration from Latin America are likely to continue in the foreseeable future.

POPULATION PRESSURE IN LATIN AMERICA 1950 - 2050

Year	Total Population: Latin America (Millions)	Total Population: U.S./Canada (Millions)	Index US/Can = 100
1950	151.6	166.0	91
1980	348.6	227.0	154
1994	455.2	286.3	159
1996	470.0	292.3	161
Projections			
2000	500.0	305.0	164
2020	645.0	355.0	182
2025	681.4	371.0	184
2050	950.0	425.0	224

Source: *U.S. Bureau of the Census*
Current Population Reports, P25-1104
1995 United Nations Population Division
Strategy Research Corporation

1 Strategy Research Corporation. **1995 Latin American Market Planning Handbook**. 1995.

2. Population Projections: Internal Growth And Immigration

This subsection of the Population and Demography section presents the future changes in the composition of the U.S. population with a focus on the U.S. Hispanic population. Much of the data presented is derived from the U.S. Census Current Population Report (P25 Series). The Census Current Population Report provides data on several population groups in the United States. For the purposes of our population report the following are presented in all or some of the tables: White, Non-Hispanic White, Hispanics, Non-Hispanic Black and Asian. The group labeled White contains White-Hispanics. In the sections of this book where Strategy Research survey data is presented "Whites/Others" refers to Non-Hispanic Whites.

According to the Census Middle series projections, the population of Blacks, Asians and Hispanics is expected to increase significantly over the next six decades. It is further expected that these groups will increase their proportions of the total population and that the White population proportion will decrease. This decrease will be even greater for the Non-Hispanic White group.

> A combination of three factors contribute to this shift in population distribution over the next six decades: differential fertility, net immigration, and age distribution among the race and Hispanic-origin groups. Higher fertility rates and net immigration levels would elevate the increased proportions of the expanding groups. At the same time, the non-Hispanic population would experience an increase in the numbers of deaths as more and more of this population enters older age groups where the risk of mortality is highest.
>
> By the turn of the century, the White percentage of population would decrease from 84 percent to less than 82 percent of the population. About 13 percent of the population would be Black, 4 percent of the population would be Asian and Pacific Islander, and the remaining 1 percent of the population would consist of American Indians, Eskimos, and Aleuts. People of Hispanic origin would be 11 percent of the total population. The non-Hispanic White population would decrease to 72 percent of the White population.
>
> By 2050, 71 percent of the total population would be White, 16 percent Black, 1 percent American Indian, Eskimo and Aleut, and 10 percent Asian and Pacific Islander. The Hispanic-origin population would increase to 23 percent, and the non-Hispanic White population would decline to 53 percent.

Similar distribution changes would occur in both the highest and lowest series, though less so in the lowest series and more so in the highest series. U.S. Census - Current Population Reports, P25-1104.

Census Report (P25-1104) shows the following middle series estimates for U.S. Hispanic population: 1996 - 27.2 million, 2000 - 30.7 million, 2010 - 40.0 million, 2025 - 56.3 million, 2050 - 87.4 million.

The main cause of this new Hispanic population estimate is a modification of the birth rate for Hispanic women. The birth rate for Hispanic females was reported to be 2.65 per woman in 1992 (P25-1092), while this year's report (P25-1104) shows a birth rate of 2.90 per woman.

Although the Census has indicated that "Net immigration is projected to be predominant factor in future population growth," in their middle series projections they are estimating only 322,000 new Hispanic arrivals per year through 2050. Critics suggest that this may be an extremely conservative and unrealistic number. Furthermore, the principle that the Hispanic immigration total would be constant throughout the next six decades, is also considered unrealistic.

The following table shows U.S. Hispanic population totals for 1980 and 1996, and the Census middle series projections to the year 2000. As indicated, the January 1, 1996 estimated Hispanic population is approximately 27.2 million, as compared with the 1980 census-enumerated total of 14.6 million. The Census estimates that by the year 2000, the total number of Hispanics residing in the U.S. will reach approximately 30.7 million. This will represent a gain of some 3.5 million persons during the balance of this decade, or an average annual increment of just under one million persons. This is very close to the annual rate of growth experienced during the past decade.

HISPANIC POPULATION OF THE UNITED STATES 1980-2000

	1980 (000)	1996 (000)	2000 (000)	Change '80-'96 Number (000)	Change '80-'96 Pct	Change '96-'00 Number (000)	Change '96-'00 Pct
TOTAL	**14,603.7**	**27,230.0**	**30,723.0**	**12,626.3**	**86.5%**	**3,493.0**	**12.8%**

Source: U.S. Bureau of the Census
Current Population Reports, P25-1104
Strategy Research Corporation

According to the Census Middle Series projections, from their Current Population Reports (P25-1104), the U.S. Hispanic population will continue to grow during the next six decades. By the year 2010, Hispanics in the United States will number roughly 40 million and by the year 2050 over 87 million.

These projections assume a constant net immigration of 322,000 per year. As we have noted, critics suggest that this net immigration figure may be conservative. In fact, past evidence suggests that among Hispanics, net immigration has traditionally been equal to or greater than the net natural increase in population.

HISPANIC POPULATION OF THE UNITED STATES 1996-2050

Census Middle Series Projections

	January 1, Population (000)	Net Change (000)	Natural Increase (000)	Births (000)	Deaths (000)	Net Immigration (000)
1993	24,662	850	528	619	91	322
1994	25,512	856	534	629	95	322
1995	26,368	862	539	639	100	322
1996	**27,230**	**866**	**544**	**648**	**105**	**322**
1997	28,096	871	548	658	109	322
1998	28,966	876	554	668	114	322
1999	29,842	881	559	679	120	322
2000	**30,723**	**888**	**565**	**690**	**125**	**322**
2005	35,239	931	609	757	148	322
2010	40,028	1,002	680	855	175	322
2015	45,186	1,073	750	956	206	322
2020	50,658	1,123	801	1,041	240	322
2025	56,349	1,159	837	1,117	280	322
2030	62,214	1,194	872	1,198	326	322
2035	68,262	1,233	910	1,287	377	322
2040	74,498	1,268	945	1,378	433	322
2045	80,893	1,295	973	1,464	492	322
2050	**87,413**	**1,318**	**996**	**1,544**	**548**	**322**

Source: *U.S. Bureau of the Census*
Current Population Reports, P25-1104

Using the High Immigration alternative series (which maintains Births and Deaths from the middle series), the U.S. Hispanic population would reach 32.5 million in the year 2000, 65 million by 2025, and 106 million by 2050. The individual component distribution for the High Immigration alternative was not provided in the Census-Current Populations Reports (P25-1104) and thus could not be shown on any table in this report.

The following table presents the percent change of the Hispanic population by natural increase and net immigration. Throughout the six decades of data presented, the Census shows natural increase as contributing more to the net growth than net immigration. Some experts believe that in actuality, net immigration contributes more to net growth than natural increase.

PERCENT CHANGE OF HISPANIC POPULATION OF THE UNITED STATES 1996-2050

Census Middle Series Projections

	January 1, Population (000)	Net Change Pct	Natural Increase Pct	Net Immigration Pct
1993	24,662	3.4%	2.1%	1.3
1994	25,512	3.4	2.1	1.3
1995	26,368	3.3	2.0	1.2
1996	**27,230**	**3.2**	**2.0**	**1.2**
1997	28,096	3.1	2.0	1.1
1998	28,966	3.0	1.9	1.1
1999	29,842	3.0	1.9	1.1
2000	**30,723**	**2.9**	**1.8**	**1.0**
2005	35,239	2.6	1.7	0.9
2010	40,028	2.5	1.7	0.8
2015	45,186	2.4	1.7	0.7
2020	50,658	2.2	1.6	0.6
2025	56,349	2.1	1.5	0.5
2030	62,214	1.9	1.4	0.5
2035	68,262	1.8	1.3	0.5
2040	74,498	1.7	1.3	0.4
2045	80,893	1.6	1.2	0.4
2050	**87,413**	**1.5**	**1.1**	**0.4**

Source: *U.S. Bureau of the Census*
Current Population Reports, P25-1104

Population projections in the Census Current Populations Report (P25-1104) for the Low and High series are presented with July 1 dates. All other population projections in this U.S. Hispanic report are presented with January 1 dates. For the purpose of comparability, the data in the following table, which provides projection comparisons for Low, Middle and High series, are presented with July 1 dates.

Using the Low series assumptions, the U.S. Hispanic population would still be a significant part of the total U.S. population. In the Low series, Hispanic population would be 32 million by the year 2005 and reach 57 million by the year 2050. In the High series, Hispanic population is expected to reach 32 million by the year 2000, surpass the 100 million mark by 2040 and hit 128 million by 2050.

HISPANIC POPULATION OF THE UNITED STATES 1996-2050

July 1, Population

	Low Series (000)	Middle Series (000)	High Series (000)
1996	27,016	27,662	28,260
2000	29,473	31,166	32,699
2005	32,373	35,702	38,767
2010	35,223	40,525	45,494
2015	38,193	45,719	52,949
2020	41,235	51,217	61,104
2025	44,209	56,927	69,989
2030	47,049	62,810	79,684
2035	49,781	68,877	90,287
2040	52,450	75,130	101,872
2045	55,071	81,539	114,499
2050	57,643	88,071	128,255

Source: *U.S. Bureau of the Census*
Current Population Reports, P25-1104
Strategy Research Corporation

3. The Future Of Hispanic Immigration

The preceding pages presented Hispanic population projections as estimated by the U.S. Census Bureau. Strategy Research Corporation believes that their approach to the issue of immigration is both too simplistic and conservative for at least three reasons: (1) it does not address the controversial subject of illegal immigration, (2) it assumes no change in the number of yearly Hispanic immigrants through the year 2050, and (3) it does not take into account current trends in the nation's attitude toward immigration or current political movement toward immigration reform.

Strategy Research survey data, which is presented in detail later this book, indicates that 76.7% of U.S. Hispanic adults were born outside of the United States, and that 43.8% of Hispanic-American adults have lived here 10 years or less. This indicates that 13.5 million Hispanic adults are foreign-born, and that about 7.7 million Hispanics arrived in the U.S. within the past 10 years. That would average out to a yearly rate of 770,000 new arrivals, not including any children that may be brought along with them. This is significantly higher than the 322,000 Hispanic immigrants per year projected by the Census. Further complicating the issue, some Hispanics return to their country of origin after several years, such as the Nicaraguans and Salvadorans, creating an ebb and flow of immigration and enriching the population with new arrivals.

Any individual endeavoring to work in the U.S. Hispanic market must be actively aware that a certain portion of this population is comprised of illegal immigrants. The economic and/or political factors that have caused many people from Latin American countries to seek a better life for themselves and their families by illegally entering the U.S. have, in general, not improved. In fact, for our closest neighbor, Mexico, the economic situation took a dramatic downturn in the first months of 1995. There is no reason to believe that the stream of Hispanic illegal immigrants entering the country will abate as a result of any causes external to the United States.

What then, could cause a change in the flow of Hispanic immigrants to the U.S.? We believe that only severe legislative changes implemented by the Federal government in various departments could stop the current influx of Hispanic immigrants. Although debate on immigration policy has taken place before, the United States is currently at a crossroads on the issue. State and Federal governments are under increasing pressure to establish control of the borders. Most Americans (70%), including Hispanic-Americans (63%), believe that the United States cannot control its international borders. Many Hispanics and Non-Hispanics feel threatened by the continuous increase in the immigrant population.

The Public Opinion section of this report provides some fascinating data on several key questions with regard to the issue of immigration to the United States. One out of every three Non-Hispanics in the U.S. feels that the number of immigrants allowed to enter the U.S. should be decreased and 40% feel it should not be allowed to increase. Two out of every three Non-Hispanics believe that in the next five years, it will become more difficult to enter the United States illegally.

Eighty-seven percent of Hispanics feel the same way. Meanwhile, 60% of Non-Hispanics and 73% of Hispanics think that deportations of illegals will increase in the next five years. The tone of this data indicates that people expect the government to stem the tide of current legal immigration, and to crack down on illegal immigration.

Can the various local, state and federal governments succeed in stemming the influx of illegal aliens? Roughly three out of every five U.S. residents, both Hispanic and Non-Hispanic, believe that illegal immigration will increase over the next five years -- in spite of increased efforts to curtail the flow. Only very stringent legislation and well coordinated inter-departmental efforts will succeed in securing the U.S. borders. The final strength of the governmental efforts will depend ultimately upon the mood of the people. If the United States were to suffer a serious economic downturn, then the pressure on all levels of U.S. governments would certainly become sufficient to enact the kinds of laws and procedures necessary to close the borders.

In the meantime, a combination of real economic pressures and fear resulting from a historical lack of understanding of recent immigrant arrivals has caused many Non-Hispanic Americans to become extremely concerned about the future ethnic make-up of their cities, counties and states. This has already caused an increase in legislation and other procedures aimed specifically at immigrants, of which the vast majority are Hispanic. The most notorious examples of these include increased patrols and staffing for the U.S. Border Patrol, rules requiring the use of English in government business, and Proposition 187 in California which denies all public schooling, social and health services to illegal immigrants except in emergencies.

How would curtailing Hispanic immigration affect the U.S. Hispanic market? Although there are various degrees of assimilation, the Hispanic immigrant has always maintained a strong ethnic identity. Hispanic immigrants to the U. S. have generally not assimilated into the American "melting pot" the way immigrant groups have in the past. We believe that there are several reasons for this, the most important of which include:

1. Proximity to their homelands allows more frequent contact.
2. Modern technology which permits easier travel and communication with their countries of origin.
3. The availability of a powerful and sophisticated media in their native language.
4. The continuous influx of new arrivals that replace those U.S. Hispanics who do assimilate.

The first three factors are either constant or continue to improve; thus, they tend to slow down the momentum of assimilation. If the fourth factor, immigration, is cut off, then eventually this would have a negative effect on the U.S. Hispanic market. In the long run, 2 or 3 generations down the line, the number of fully-assimilated Latinos would greatly outnumber the unassimilated. At that point, there may not be a need to market separately and in Spanish to this population, just as one does not necessarily market in Italian to an Italian-American market descended from immigrants who arrived at the beginning of this century.

However, the current political and economic strength of Hispanics, coupled with the influence of the aforementioned factors relating to geography, technology and media, may create considerable resistance to the assimilation process.

As a result of the many factors at work in this highly dynamic market, it is impossible to predict with certainty what would happen if government managed to actually arrest the flow of Latin American immigration to the U.S. Given the potential strength of the opposing forces at work here, we could face the proverbial situation of the irresistible force meeting the immovable object. We could face a worsening situation where economic pressures in foreign countries drive more immigrants toward our borders, while internal factors work to force us toward a closure of these borders.

In any case, those interested in marketing to the U.S. Hispanic community must be keenly aware of the various national and international, economic and political phenomena that could affect their businesses in both the short and the long term. SRC's ***U.S. Hispanic Market Studies***, now annual, are designed to help these business people keep a close eye on their market.

4. Minority Populations Of The United States

Using the Middle series assumptions, the Hispanic population will surpass the Non-Hispanic Black population around the year 2006. By the year 2010 Hispanics will represent 13.5 percent of the total U.S. population and by the year 2050, the total combined minorities of Hispanics, Non-Hispanic Blacks and Asians, will represent nearly half (46.6%) of the total population.

MINORITY POPULATIONS OF THE UNITED STATES AS A PERCENTAGE OF THE TOTAL POPULATION 1995-2050

July 1, Population

		Hispanic	Non-Hispanic Black	Asian
Low Series	2000	10.9%	12.3%	3.8%
	2005	11.7	12.5	4.3
	2015	13.4	12.8	5.2
	2050	20.2	13.6	8.7
Middle Series	1996	10.4%	12.0%	3.6%
	2000	11.3	12.2	4.1
	2005	12.4	12.4	4.8
	2010	13.5	12.6	5.4
	2020	15.7	13.0	6.5
	2030	17.9	13.4	7.7
	2040	20.2	13.9	8.7
	2050	22.5	14.4	9.7
High Series	2000	11.6%	12.8%	4.4%
	2005	12.9	12.4	5.2
	2015	15.5	12.7	6.7
	2050	24.6	13.7	10.6

Source: *U.S. Bureau of the Census*
Current Population Reports, P25-1104
Strategy Research Corporation

From 1990 - 2050, the Hispanic population will have the second highest growth rate of any group reported in Census Current Population Reports. The U.S. Hispanic population will grow by 290.5% by the year 2050. This compares with 91.7% for Non-Hispanic Blacks and 436.4% for Asians.

POPULATION CHANGE BY RACE AND HISPANIC ORIGIN 1990-2050

July 1, Population

	White	Non-Hispanic White	Hispanic	Black	Asian
Total Percent Change					
1990-2050	36.5%	9.2%	290.5%	91.7%	436.4%
Average Annual Percent Change					
1990-1995	0.86%	0.56%	3.45%	1.47%	5.11%
1995-2000	0.71	0.41	3.02	1.28	4.39
2000-2005	0.62	0.30	2.72	1.18	3.75
2005-2010	0.59	0.26	2.53	1.16	3.27
2010-2020	0.59	0.24	2.34	1.13	2.76
2020-2030	0.49	0.11	2.04	1.00	2.28
2030-2040	0.36	-0.06	1.79	0.93	1.90
2040-2050	0.30	-0.16	1.59	0.90	1.60

Source: *U.S. Bureau of the Census*
Current Population Reports, P25-1104
Strategy Research Corporation

After 1995, Hispanics will represent the largest segment of total population growth. During the last two decades of this period (2030-2040 and 2040-2050), Hispanics will account for over half of the net population growth (57% and 63% respectively).

PERCENT OF TOTAL POPULATION GROWTH BY RACE AND HISPANIC ORIGIN 1990-2050

July 1, Population

Projections	White	Non-Hisp. White	Hispanic	Black	Asian
1990-1995	65.5%	38.1%	30.3%	16.0%	14.7%
1995-2000	61.9	31.0	34.1	16.3	17.5
2000-2005	58.7	24.7	37.7	17.0	19.5
2005-2010	57.3	21.4	39.7	17.6	20.1
2010-2020	56.8	19.0	41.9	17.8	20.2
2020-2030	52.7	9.1	48.2	18.6	22.7
2030-2040	45.4	-	57.3	21.2	26.1
2040-2050	40.7	-	63.0	23.7	27.5

Source: U.S. Bureau of the Census
Current Population Reports, P25-1104
Strategy Research Corporation

G. Population And Demographic Profile

1. World Rank

The countries of the world with the largest Hispanic populations are listed on the following table. As of its 1996 Census, Mexico still has the largest Hispanic population of any Hispanic country, with approximately 95 million persons. Spain is the second largest, with 39.7 million, followed by Colombia with 34.7 million, and Argentina with 33.8 million. The United States' 1996 Hispanic population of 27.2 million was the fifth-largest of any country in the world. By the year 2025, the U.S. will have the second largest Hispanic population in the world.

POPULATION OF MAJOR HISPANIC COUNTRIES AND U.S. HISPANIC POPULATION 1989, 1996 AND 2025

Country	POPULATION 1989 (Millions)	1996 (Millions)	2025 (Millions)
Mexico	83.5	94.7	136.6
Spain	39.0	40.2	42.5
Colombia	30.6	35.5	49.3
Argentina	32.0	35.0	46.1
United States	**23.7**	**27.2**	**56.3**
Peru	21.4	24.2	36.7
Venezuela	18.8	22.2	34.8
Chile	12.6	14.4	19.8
Ecuador	10.2	11.6	17.8
Cuba	10.4	11.1	12.6
Guatemala	8.7	11.1	21.7
Dominican Republic	6.9	7.9	11.2
Bolivia	6.9	7.6	13.1
El Salvador	5.4	5.9	9.7
Honduras	4.8	5.8	10.7
Paraguay	4.4	5.1	9.0
Nicaragua	3.6	4.6	9.1
Puerto Rico	3.4	3.7	4.9
Costa Rica	2.9	3.5	5.6
Uruguay	3.0	3.2	3.7
Panama	2.3	2.7	3.8

Source: *U.S. Bureau of the Census, Center for International Research*
1995 United Nations Population Division
Strategy Research Corporation

2. COUNTRY OF ORIGIN

Mexicans continue to represent the largest group of Hispanics residing in the United States, with a total of over 17 million persons, or 64.2% of the country's total number of Hispanics. The second largest group of Hispanics is represented by those whose origins are in Central and South America; they account for roughly 15% of the Hispanic total, numbering some 3.9 million as of 1996. Puerto Ricans, at 2.9 million, account for almost 11% of the U.S. Hispanic population, followed by 1.3 million Cubans, accounting for roughly 5% of U.S. Hispanics.

COUNTRY OF ORIGIN
U.S. HISPANIC POPULATION
1996

Nationality	Number (000)	Percent of Total
Mexico	17,481.7	64.2%
Central and South America	3,948.4	14.5
Puerto Rico	2,859.1	10.5
Cuba	1,307.0	4.8
Other Hispanic	1,633.8	6.0
TOTAL	**27,230.0**	**100.0%**

Source: U.S. Bureau of the Census, 1990
Current Population Reports, P20-465RV
Strategy Research Corporation

The number of Hispanics whose origins are in Central and South American countries grew at the fastest pace among U.S. Hispanic origin populations during the past 16 years. Their numbers increased from 1.7 million to over 3.9 million, a growth of over 133%. Mexicans represented the second-fastest growing Hispanic group, doubling (100.0%) their numbers during the period. The Cuban-American population also experienced a substantial gain, increasing by 63%, or slightly over half a million people during the past 16 years.

CHANGE IN COUNTRY OF ORIGIN OF U.S. HISPANIC POPULATION GROWTH 1980 - 1996

Country/Place of Origin	Total Hispanic Population 1980 (000)	Total Hispanic Population 1996 (000)	Change 1980-1996 Number (000)	Change 1980-1996 Percent
Mexico	8,740.0	17,481.7	8,741.7	100.0%
Central/South America	1,693.3	3,948.4	2,255.1	133.2
Puerto Rico	2,014.0	2,859.1	845.1	42.0
Cuba	803.0	1,307.0	504.0	62.8
Other Hispanic	1,353.4	1,633.8	280.4	20.7
Total	14,603.7	27,230.0	12,626.3	86.5%

Source: U.S. Bureau of the Census, 1990
Current Population Reports, P25-1104/P20-465RV
Strategy Research Corporation

3. Age/Gender Distribution

The following table depicts the country's Hispanic population by age category for men and women and for children of both sexes.

U.S. HISPANIC POPULATION
AGE/SEX DISTRIBUTION
1996

	Population (000)	Percent Distribution
Men		
0-11 Years	3473.0	12.8%
12-17 Years	1438.5	5.3
18-20 Years	697.5	2.6
21-24 Years	977.5	3.6
25-34 Years	2,697.0	9.9
35-49 Years	2,720.0	10.0
50-54 Years	478.0	1.8
55-64 Years	671.0	2.5
65 Plus Years	659.5	2.4
Sub-Total	**13,812.0**	**50.7%**
Median Age	**26.2**	**--**
Mean Age	**27.9**	
Women		
0-11 Years	3,342.5	12.3
12-17 Years	1,368.5	5.0
18-20 Years	661.5	2.4
21-24 Years	873.0	3.2
25-34 Years	2,356.5	8.7
35-49 Years	2,630.5	9.7
50-54 Years	512.0	1.9
55-64 Years	760.5	2.8
65 Plus Years	913.0	3.3
Sub-Total	**13,418.0**	**49.3%**
Median Age	**27.1**	**--**
Mean Age	**29.4**	
Under 18 years		
0-11 Years	6,815.5	25.0
12-17 Years	2,807.0	10.3
Sub-Total	**9,622.5**	**35.3%**
Total Persons	**27,230.0**	**100.0%**
Median Age	**26.6**	
Mean Age	**28.6**	

Source: U.S. Bureau of the Census
Current Population Reports, P25-1104
Strategy Research Corporation

4. Household Size

Historically, the average Hispanic household size in the United States has been higher than the average for non-Hispanic households. According to the Census, the average number of persons residing in a Hispanic household in the U.S. is 3.41. The largest household sizes are reported for Mexicans (3.78), and the smallest for Cubans (2.65). According to the Census, the average household size among Non-Hispanics is 2.63. The next table presents U.S. Hispanic household size as projected by Strategy Research Corporation.

NUMBER OF PERSONS IN HISPANIC HOUSEHOLDS 1993

Persons Per Household	Total	COUNTRY OF ORIGIN: Mexico	Puerto Rico	Cuba	South & Central America	Other Hispanic
1 Person	15.0%	13.0%	18.8%	21.0%	12.2%	23.9%
2 Persons	22.3	19.6	25.9	31.7	22.0	28.8
3 Persons	19.5	18.6	20.3	22.1	21.9	18.9
4 Persons	19.4	19.1	21.2	16.5	22.4	16.5
5 Persons	12.1	13.5	9.4	6.2	13.8	7.9
6 Persons	6.2	8.1	2.8	1.6	5.3	3.2
7+ Persons	5.4	8.1	1.5	0.8	2.3	0.8
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average Persons Per Household	3.41	3.78	2.85	2.65	3.25	2.78

Source: U.S. Bureau of the Census
Current Population Reports, P20-475
Strategy Research Corporation

5. U.S. Hispanic Households

Based upon traditional Census undercounts of minority markets, information presented by various organizations representing individual markets, hundreds of thousands of interviews with Hispanic families, and 24 years researching the Hispanic market, Strategy Research Corporation believes that the actual average U.S. Hispanic household size is 3.58. The total number of U.S. Hispanic households in 1996 is:

7,606,000

HISPANIC HOUSEHOLDS FOR TOP TWENTY U.S. HISPANIC MARKETS 1996

Market	Rank	Hispanic Households (000)
Los Angeles	1	1,480.1
New York	2	1,011.6
Miami	3	468.5
San Fran.-San Jose	4	306.7
Chicago	5	288.3
Houston	6	288.3
San Antonio	7	287.8
Dallas-Ft. Worth	8	198.9
McAllen/Brnsvile	9	197.9
Albuquerque	10	202.3
Top 10 Markets		**4,730.4**
El Paso	11	171.9
Phoenix	12	163.1
San Diego	13	157.0
Fresno	14	155.1
Sacramento	15	148.4
Denver	16	116.0
Philadelphia	17	100.4
Corpus Christi	18	94.9
Washington DC	19	90.2
Boston	20	82.9
Sub-Total		**1,279.9**
Top 20 Markets		**6,010.3**
Total U.S. Hispanic		**7,606.0**

Source: *Market Statistics, Inc.*
U.S. Census Bureau
Strategy Research Corporation

6. Buying Power

Strategy Research Corporation estimates that the Buying Power of the U.S. Hispanic market for January 1, 1996 will be:

$228,112,000,000

A total market buying power of just over $228 billion computes to a mean per household buying power of approximately $30,000.

HISPANIC BUYING POWER FOR TOP TWENTY U.S. HISPANIC MARKETS 1996

Market	Rank	Hispanic Buying Power (000,000)
Los Angeles	1	$50,642
New York	2	29,672
Miami	3	13,678
San Fran.-San Jose	4	10,140
Chicago	5	9,071
Houston	6	8,740
San Antonio	7	8,545
McAllen/Brnsvile	8	6,359
Dallas-Ft. Worth	9	6,042
Albuquerque	10	5,534
Top 10 Markets		**$148,423**
San Diego	11	$5,377
El Paso	12	5,317
Fresno	13	4,926
Sacramento	14	4,609
Phoenix	15	4,571
Denver	16	3,148
Washington Dc	17	2,950
Philadelphia	18	2,846
Corpus Christi	19	2,793
Boston	20	2,580
Sub-Total		**$39,117**
Top 20 Markets		**$187,540**
Total U.S. Hispanic		**$228,112**

Source: *Market Statistics, Inc.*
U.S. Census Bureau
Strategy Research Corporation

Buying Power is shown for all Top 50 Markets in the Market Section of this Report.

7. Household Income

According to Strategy Research Corporation estimates, the Mean Household Income for the U.S. Hispanic population in 1996 will be:

$37,500

The following table compares household income based upon a combination of Census data and information secured by Strategy Research Corporation. These data indicate that Cubans have the highest mean household income ($45,200) among the major Hispanic groups. Mexicans, at $35,900 per household are just below the national average of $36,500.

U.S. HISPANIC
HOUSEHOLD INCOME
1996

		COUNTRY OF ORIGIN				
Household Income	Total	Mexico	Puerto Rico	Cuba	South & Central America	Other Hispanic
Mean	$37,500	$36,500	$33,400	$45,200	$40,000	$44,400
Median	$29,500	$29,700	$23,300	$33,800	$31,300	$35,200

Source: U.S. Bureau of the Census
Current Population Reports, P20-475
Strategy Research Corporation

The following table shows the growth of median household incomes among U.S. Hispanics by their country of origin for 1980 through 1996. Cuban-Americans have the highest median household income among the various Hispanic groups ($33,800).

MEDIAN HISPANIC HOUSEHOLD INCOME
BY COUNTRY OF ORIGIN
1980 - 1996

	1980	1985	1996
Total U.S. Hispanic	**$14,712**	**$19,900**	**$29,500**
Hispanic Origin			
Cuba	$18,245	$24,400	$33,800
Other Hispanic, including Central and South American	$16,230	$23,000	$31,300
Mexican	$14,765	$20,200	$29,700
Puerto Rican	$10,734	$14,200	$23,300

Source: U.S. Bureau of the Census
Current Population Reports, P20-465RV
Strategy Research Corporation

H. Brazilians Residing In The U.S.

The 1990 U.S. Census provides the following data on Brazilians residing in the United States: Total number of Brazilians residing in the United States in 1990 65,875. According to the 1990 U.S. Census, approximately 62% (41,100 out of 65,875) of Brazilians living in the United States are concentrated in five main market areas. However, for the very same factors we have cited as potential causes for an undercount of Hispanics, critics suggest that the Census count of Brazilians is extremely low.

- Recent immigrants who have lived in the U.S. for a very short period of time may not have received or participated in the long-form Census questionnaire.
- Those with little familiarity with English may have declined to fill out the questionnaire.
- Due to a cultural lack of trust in governmental inquiries on the part of recent immigrants.
- Due to the fact that one or more household members is residing illegally in the U.S. and thus did not complete the questionnaire.

In fact, it should be noted that the only place Brazilians could identify their country of origin on the Census long-form questionnaire is under "Ancestry". Brazilians are not classified as Hispanic, and therefore are counted as either white or black.

Furthermore, the number of Brazilians residing in the United States has experienced rapid growth since 1990 due to the transformation from a military government to a democratically elected government; under the military regime visas to leave Brazil were severely restricted.

Very conservative estimates indicate that the Brazilian population of the United States appears to be growing at a significant rate of roughly 15% per year. Thus the Strategy Research Corporation conservative estimate for the U.S. Brazilian population for January 1, 1996 is:

125,162

Sources within the Brazilian community put the Brazilian-American population figure much higher. Many estimate that at least 250,000 Brazilians are now currently residing in the U.S., with strong concentrations in New York-New Jersey, Miami-Ft. Lauderdale, and Boston. Later this year, SRC plans to undertake the first Brazilian-American Market Study, at which time we will publish a revised population estimate.

1996 Projections in Top Five Markets

The main market areas for Brazilian-American migration have been New York-New Jersey, Boston and Miami-Ft. Lauderdale which have increased by roughly 150% since 1990. Together, five markets account for over 75% of the Brazilian-American population in the United States. The 1996 population estimates for the main population concentrations are presented below.

BRAZILIAN-AMERICAN POPULATION PROJECTIONS BY MARKET 1996

Market	1990	1996
New York-New Jersey	20,000	50,000
Boston	6,800	17,500
Miami-Ft. Lauderdale	5,000	10,900
Los Angeles	5,300	10,400
Wash. DC	4,000	6,700
Five Market Total	**41,100**	**95,500**
Five Market Pct. of Total	**62.4%**	**76.3%**
Total	65,875	125,162

Source: Strategy Research Corporation
U.S. Bureau of the Census, 1990
U.S. INS

UNDUPLICATED

Readership: 90.1% of Diario's Subscribers do not receive any other daily newspaper*.

Sensitivity: To delicate issues affecting the Hispanic Community throughout 42 years.

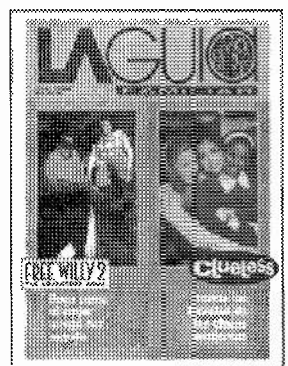
News Coverage: Of local, national & international events of interest to our community.

* Diario Las Américas' Readers Profile by Strategy Research Corporation, 1993

III.

LANGUAGE

We Reach Over 760,000 Hispanic Households Weekly



246,000
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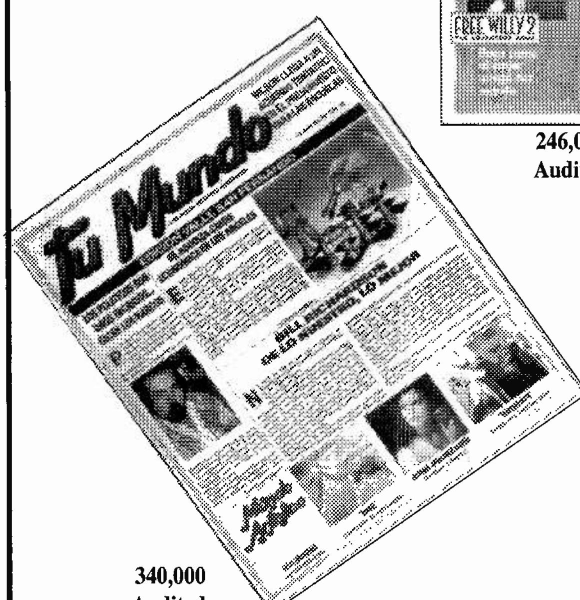

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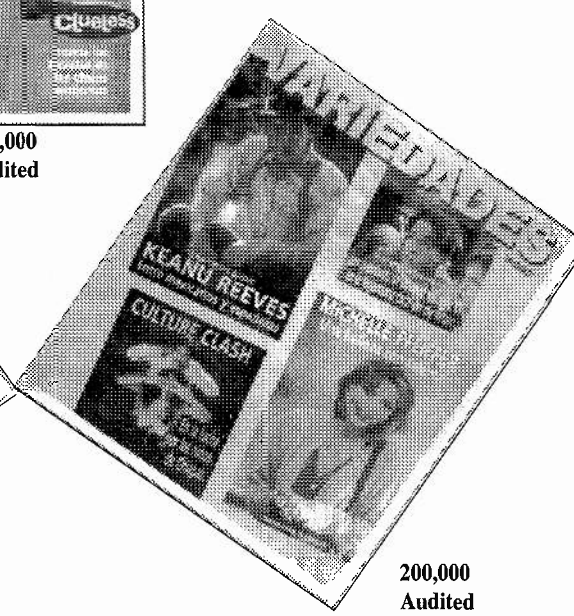

200,000
Audited

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III. LANGUAGE

A. Overview

Unlike the African American ethnic segment, the Hispanic segment is defined primarily on a linguistic basis. The definition of a market segment on a linguistic basis is a tenuous one. As a immigrant market segment matures in the United States, American English will tend to be used more and more and the linguistic definition of the segment thus becomes less and less applicable.

The first language learned to speak, the language spoken in the home, and the cultural values given a child during his impressionable years sets the basis for the way the adult later views himself and the world. The first language learned to speak, if it is used exclusively during the formative years of a child, will generally be the easiest for the adult to use later, particularly if he received education in that language.

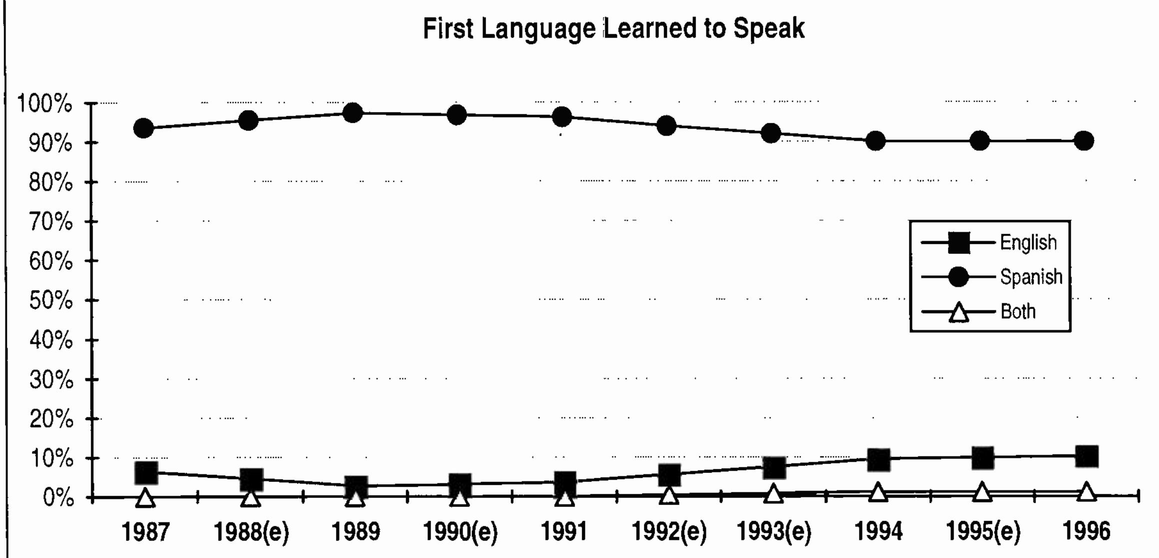
Because the segment is based on language, language use characteristics are a key measurement in understanding this unique market segment; people, in general, react more favorably to marketing when approached in their "own" language.

The Hispanic market in the United States, in terms of language, shows signs of a *maturing market segment* as immigration has been relatively flat during the past five years. Signs of a maturing market include a higher incidence of English language use in social situations and the work environment.

For the first time since 1987, English is used more in the work environment than Spanish by the Hispanic working population. This tends to indicate a change in the employment characteristics of the segment, and may point toward a decrease in the proportion of Hispanics employed in "informal" or small Hispanic-owned businesses, and a shift toward non Hispanic-owned businesses. The employment in small Hispanic businesses is typical of the recent Hispanic immigrants as a whole.

B. First Language Learned To Speak

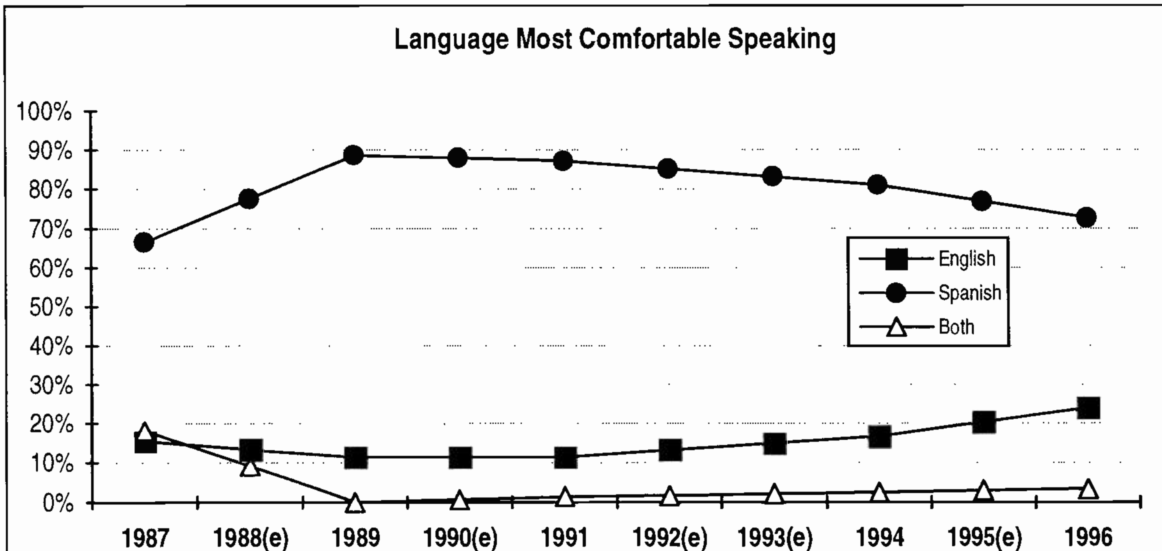
This is an important question due to a language's function in the cognitive development of thought and expression. Succinctly put, it is easier to express your thoughts and feelings in your native language. Looking at data collected by Strategy Research Corporation over the past ten years, the ***1987 U.S. Hispanic Market Study*** showed that 94% of adult Hispanics reported learning Spanish as their first language. The highest measurement of learning Spanish first was in 1989 at 97 percent. This proportion has been slowly declining to its current level of 89 percent. In the 1989 measurement, three percent cited English as the first language. This has increased to the current level of 10 percent. The remainder, 1%, could not make a distinction and stated that they had learned both languages first.



Source: *Strategy Research Corporation*

C. Language Most Comfortable Speaking

Again looking at historical data collected by Strategy Research Corporation over the past ten years, the ***1987 U.S. Hispanic Market Study*** showed that 67% of adult Hispanics were most comfortable speaking Spanish. This measurement peaked in 1989 when 87 percent of Hispanic adults reported that they were most comfortable speaking Spanish. Again, this has been generally declining to its current level of 73% in 1996. English as the language Hispanics are most comfortable speaking language has been increasing from 1989 (11%) to its current level of 24%. The remainder, three percent, state that they are equally comfortable in both languages.

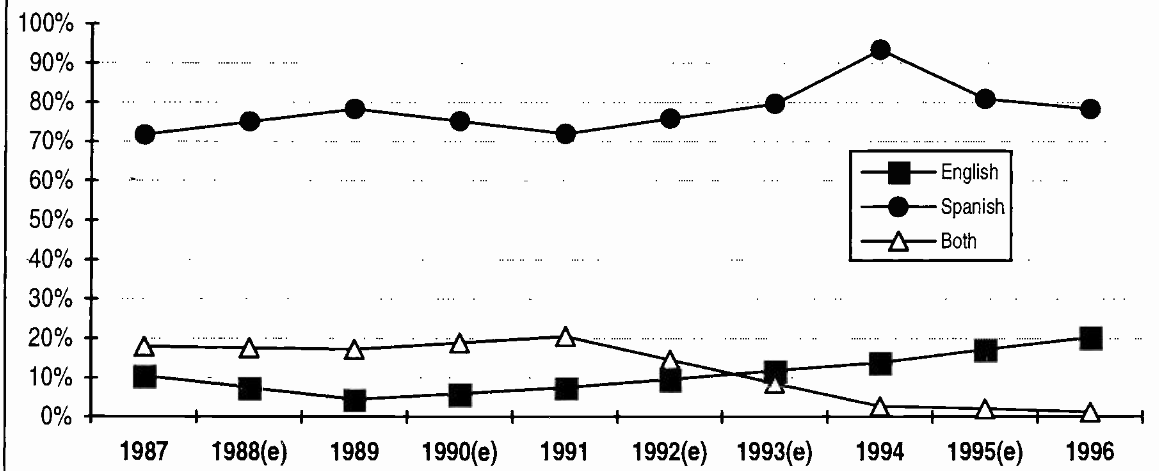


Source: *Strategy Research Corporation*

D. Language spoken most frequently at home

Historically, data collected by Strategy Research Corporation among Hispanics over the past ten years shows Spanish as the language spoke at home most frequently by about 75% of adults. The highest measurement of Spanish as the language spoken at home was in 1994, at 83 percent. In this 1996 study, 78% state Spanish is the language spoken most frequently at home. Since 1989 English as the language spoken most frequently at home has been increasing from 5% to its current level of 20 percent. This increase from previous years is due to the declining use of *both* English and Spanish *equally* in the home. Three percent state that they speak Spanish and English equally at home in 1996 compared to 17 and 21 percent in 1989 and 1991, respectively.

Language Spoken Most Frequently at Home

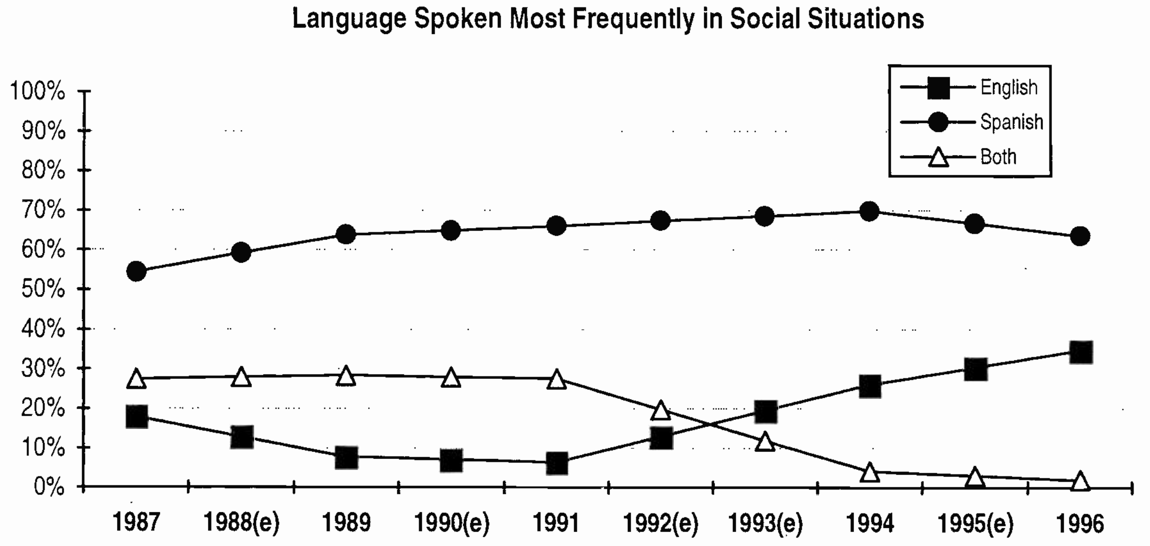


Source: Strategy Research Corporation

E. Language Spoken Most Frequently In Social Situations

As in the language spoken at home, the number of Hispanic adults stating that Spanish and English are spoken equally in social situations has decreased over the past seven years. The use of Spanish has remained fairly constant, but the use of English in these situations has increased.

Historically, incidence of Spanish as the language most frequently spoken in social situations has hovered around the 65 percent level. The highest such measurement was in 1994 at 70%. In the 1996 study, 64% state they speak Spanish most frequently in social situations. Since 1989, the percentage who say they speak English most frequently in social situations has increased from only 8% of Hispanic adults, to 35% today. Again, this increase is the direct result of the declining use of both English and Spanish equally in these situations. Two percent state that they use both languages equally in social situations in 1996, as compared to about 28 percent in 1987 through 1991.

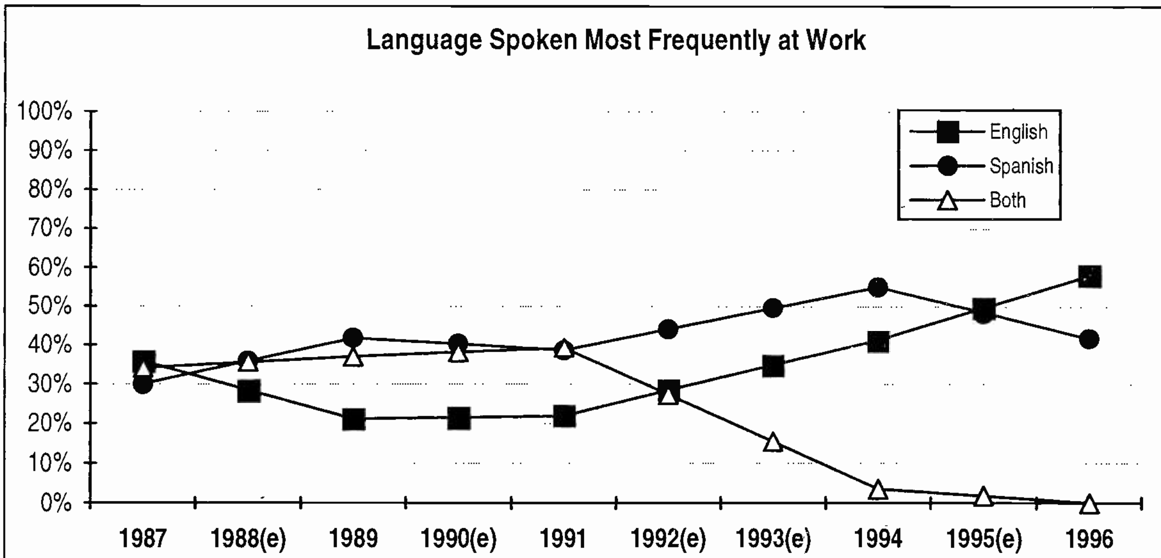


Source: Strategy Research Corporation

F. Language Spoken Most Frequently At Work

As with the language spoken at home and in social situations, the number of Hispanic adults stating that Spanish and English are spoken equally, at work, has decreased over the past seven years. The use of Spanish most frequently increased from '87 to '94, and the use of English at work has also increased.

The historical data shows Spanish as the language spoken most frequently at work increasing from 30 percent, in 1987, to 55 percent in 1994, and then decreasing to 42 percent in 1996. Since the 1989 level of 21 percent, English as the language at work has increased to the current level of 58 percent.



Source: Strategy Research Corporation

G. The Spanish Language in the U.S. and Immigration

Familiarity with, and use of, the English language is increasing among the Hispanic population in the United States. The preceding graphical analyses of SRC's historical data clearly shows that the use of both Spanish and English equally has diminished over time, solidifying the use of one primary language over the other.

The use of Spanish in this segment is driven to some degree by immigration levels; new immigrants will tend to refresh the use of the Spanish language among those already in the country. As a result, new Latino immigrants are needed to maintain the "Hispanic-ness" of the segment. Without relatively high immigration levels, the Hispanic segment will adopt English and in time, fully acculturate into mainstream American culture; the language of which is English.

Later in the section on Public Opinion, we will see that in spite of current and pending legislation to restrict immigration, the public fully expects relatively high immigration levels (both legal and illegal) to continue. Should the weight of public opinion prove correct, the Hispanic market should be continuously refreshed and renewed in Spanish, for the foreseeable future.

H. Survey Tabulations

The following tables show the tabulations used in the analysis of this section. Included in the tabulations are the data used in this section. The cross-tabulations shown are: Market and Acculturation. All data shown this section are Hispanic Adults 18 years of age or older.

On any given line, the first number is a percentage based on the total of all respondents in that column. Where a second figure appears, figure is an index on the total column.

All tables shown have Chi-square significance testing at 95% confidence. The +/- indicate significance and direction against the expected value.

Language

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Language First Learned To Speak						
English	10.0	10.0	10.2	4.9-	14.4	13.0
	100	100	102	49	144	130
Spanish	88.8	89.6	86.8	93.7+	85.4	86.5
	100	101	98	106	96	97
Other	1.2	0.4	3.0+	1.4	0.2	0.5
	100	35	249	115	19	40
Language Most Comfortable						
English	23.4	22.4	26.5	13.5-	30.1	28.6
	100	96	113	58	129	122
Spanish	73.2	74.0	69.7	83.8+	67.8	68.5
	100	101	95	114	93	94
Other	3.4	3.7	3.8	2.7	2.1	2.9
	100	109	112	80	63	86
Language Most Frequently Spoken At Home						
English	19.9	20.7	21.7	8.9-	24.5	23.8
	100	104	109	45	123	120
Spanish	78.6	77.7	76.1	90.5+	75.1	75.0
	100	99	97	115	96	95
Other	1.5	1.6	2.2	0.6	0.4	1.2
	100	109	151	38	25	80
Language Most Frequently Used - Socially						
English	33.9	33.8	35.7	25.8-	42.3+	33.1
	100	100	105	76	125	98
Spanish	64.2	63.9	63.0	72.6+	55.9-	64.6
	100	100	98	113	87	101
Other	1.9	2.2	1.3	1.6	1.8	2.2
	100	119	70	86	97	120
Language Most Frequently Used At Work						
English	47.7	46.2	50.0	37.9-	57.2+	55.3
	100	97	105	79	120	116
Spanish	35.8	37.8	35.8	40.1	25.0-	30.2
	100	105	100	112	70	84
Don't Work	16.4	16.1	14.2	22.1+	17.8	14.5
	100	98	86	134	108	88

Language

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Language First Learned To Speak										
English	10.0	31.4+	9.3	1.2-	1.4-	13.1+	33.2+	3.3+	0	10
Spanish	88.8	66.8-	89.4	98.2+	98.1+	85.4-	66.2+	95.3+	0	144
Other	1.2	1.8	1.3	0.6	0.4	1.5	0.6	1.4+	0	215
Language Most Comfortable										
English	23.4	66.9+	23.9	1.3-	4.6-	30.3+	69.9+	10.0+	0	14
Spanish	73.2	26.8-	72.3	97.7+	93.7+	65.7-	23.0+	87.7+	0	381
Other	3.4	6.3+	3.8	0.9-	1.7	4.0	7.0+	2.3+	0?	33
Language Most Frequently Spoken At Home										
English	19.9	62.0+	19.3	1.1-	0-	27.3+	58.8+	8.7+	0	15
Spanish	78.6	34.5-	79.3	98.3+	100.0+	70.7-	39.4+	89.9+	0	228
Other	1.5	3.5+	1.4	0.6	0-	2.0	1.8+	1.4+	0	74
Language Most Frequently Used - Socially										
English	33.9	76.1+	35.8	9.3-	15.5-	40.7+	77.1+	21.4+	0	28
Spanish	64.2	21.5-	62.0	89.8+	83.4+	57.2-	21.5+	76.6+	0	356
Other	1.9	2.4	2.2	0.9	1.1	2.1	1.4+	2.0+	0	146
Language Most Frequently Used At Work										
English	47.7	75.8+	53.2+	22.1-	30.7-	54.0+	76.7+	39.4+	0	51
Spanish	35.8	9.3-	31.2-	58.8+	46.2+	32.0-	13.6+	42.3+	0	312
Don't work	16.4	14.9	15.5	19.2	23.0+	14.0-	9.8+	18.4+	0	188

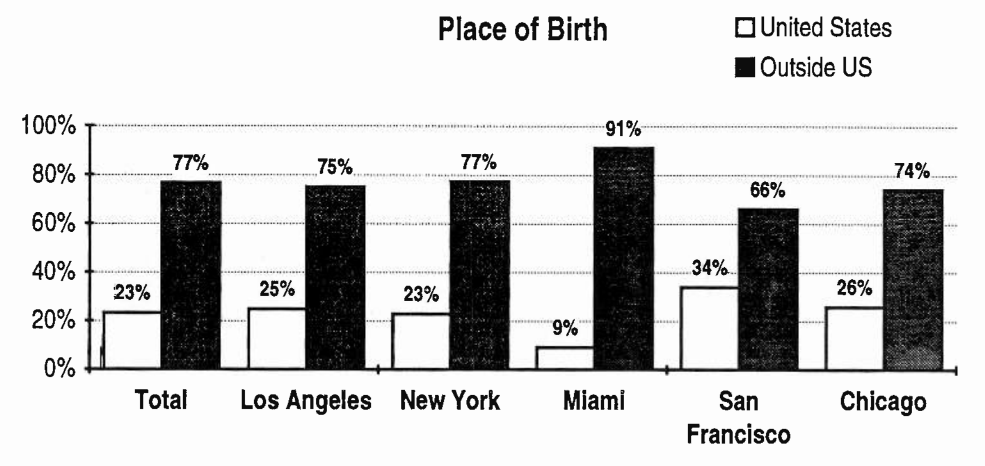
IV.

MARKET CHARACTERISTICS

IV. MARKET CHARACTERISTICS

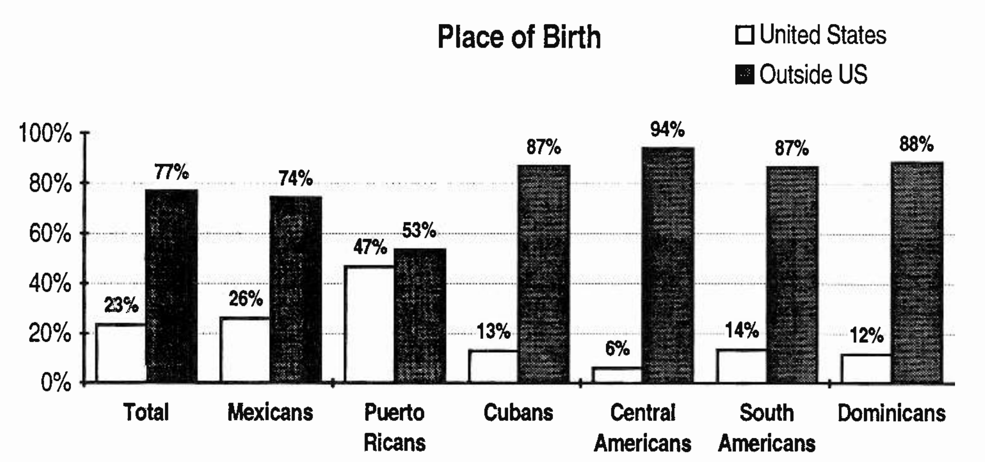
A. Place of Birth & Country of Origin

Over all five markets surveyed, 77%, or three out of four adult Hispanics were born outside the U.S. This proportion of foreign-born Hispanics reaches its peak in Miami at 91%, and is lowest in San Francisco at 66%.



Source: Strategy Research Corporation

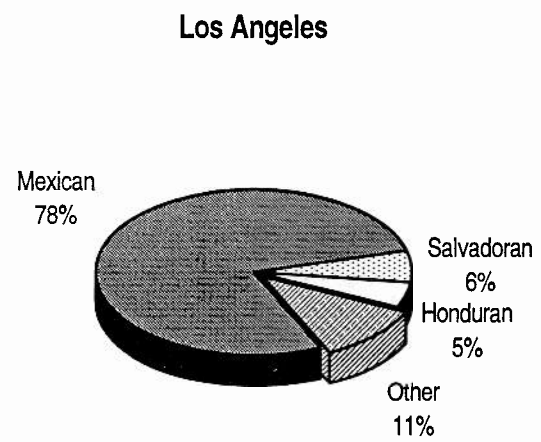
Among the various ethnic groups that comprise the Hispanic market, close to half of the Puerto Ricans were born in the U.S., as were about one-quarter of Mexicans. Nine of every ten Central Americans will be foreign-born immigrants, as will about 87% of all Cubans, South Americans, and Dominicans.

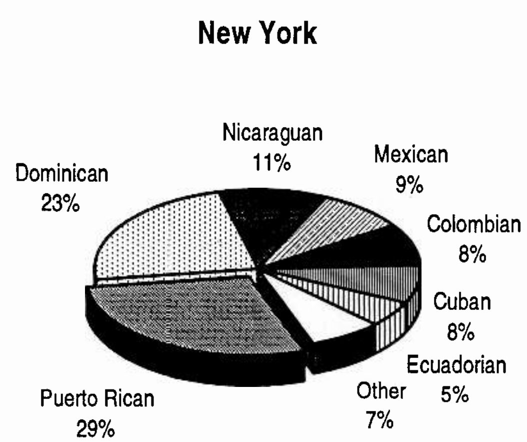


Source: Strategy Research Corporation

B. Country of Origin or Descent

In the five markets surveyed, Mexicans account for the largest ethnic group; overall 51%. Other sizable groups include Cubans - 10%, Puerto Ricans - 9%, Dominicans - 6%, Salvadorans - 6%, Guatemalans - 5%, and Colombians - 4%. Other Central American countries such as Nicaragua (2%) have continued to send sizable numbers of immigrants to the U.S. as well.



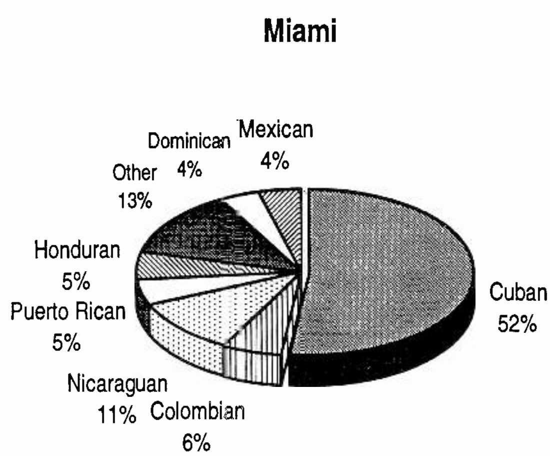


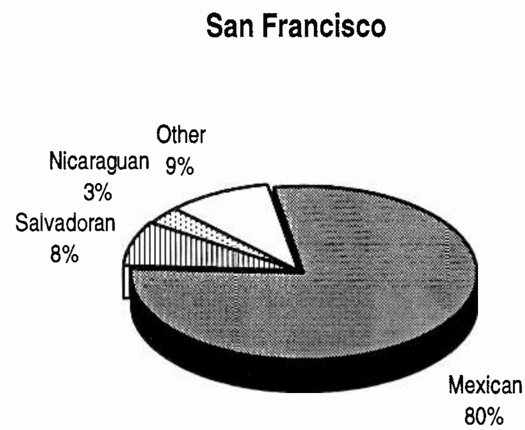
Source: Strategy Research Corporation

However, the real mix of Hispanic ethnic groups is still best viewed on a market-to-market basis. Seventy-eight percent of Hispanics in Los Angeles are Mexican. Central Americans have concentrated in this city over the past five years, however, and certain groups such as Salvadorans (6%) and Guatemalans (5%) are making their presence felt.

New York's Hispanic ethnicity continues to diversify. Often considered a "Puerto Rican market," Puerto Ricans currently account for 29% of New York's 1996 Hispanic population, while Dominicans have grown to 23% of the market. South and Central American groups are beginning to make their presence felt in the Big Apple as well; 5% identified themselves as Ecuadorian, and 8% as Colombian. Nicaraguans have now topped 10% of the population.

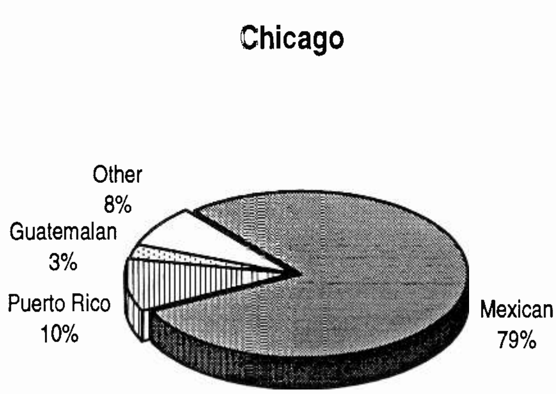
Over the last five years, Miami's Hispanic mosaic has diversified to point where all of the ethnic groups barely fit on a pie chart. Nicaraguans, in our survey, constituted the second largest group in Miami (11%), and Colombians (6%) the third. Cubans (52%) still make-up over half of the Hispanic market in Miami.

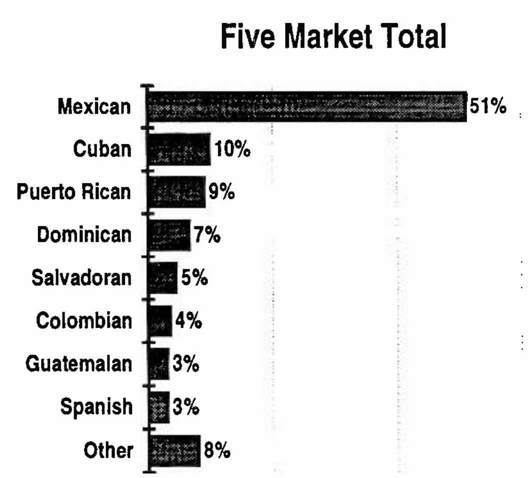




Source: Strategy Research Corporation

To gain an understanding of how the Hispanic market has shifted in the 1990's, consider that in 1989, Mexicans represented 75% of the Los Angeles ADI, 75% of the San Francisco ADI, and 43% of the Chicago ADI. Puerto Ricans constituted 45% of the New York ADI, and 28% of the Chicago ADI. Cubans, represented 65% of the Miami Hispanic community.



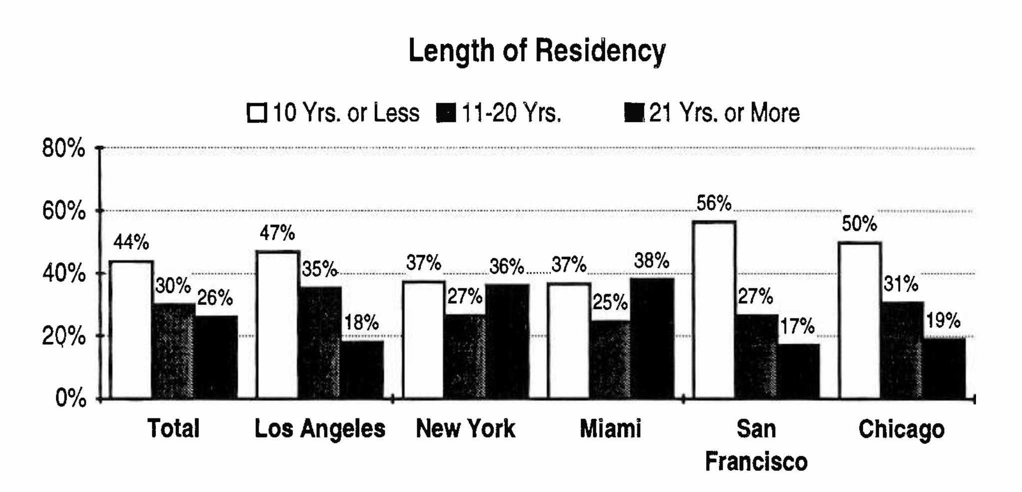


Source: Strategy Research Corporation

In the early part of this decade then, populations have been on the move. Central Americans and Dominicans, Colombians and other South Americans are all beginning to make an impact on the top five Hispanic markets in the United States.

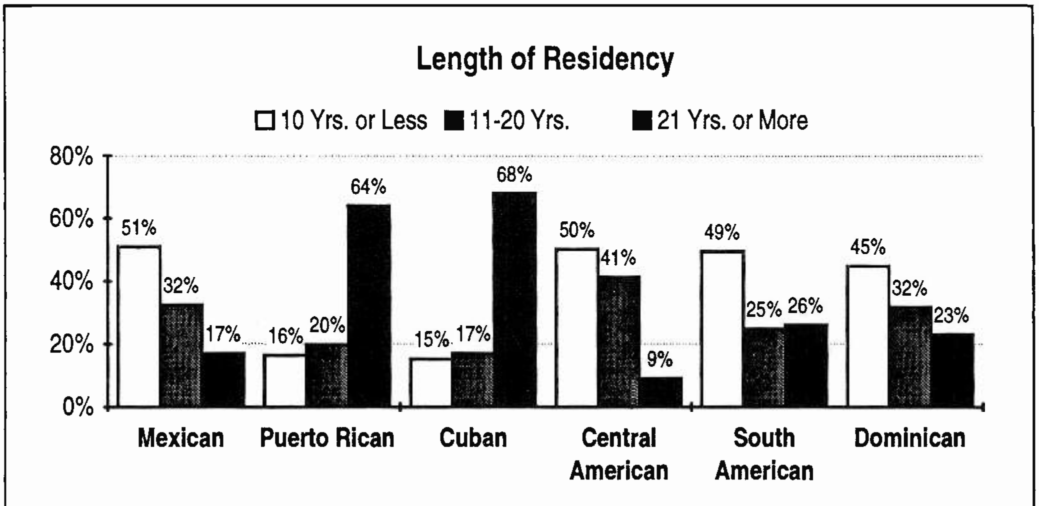
C. Length of Residence

Latinos, as an immigrant group, are a relatively "young" in the sense that 44% of the adults in the top five Hispanic markets have lived in the United States 10 years or less. San Francisco Latinos have been here the least amount of time; 56% 10 years, or less with a mean length of residency of 13.5 years.



Source: Strategy Research Corporation

New York and Miami have the "oldest" populations of Hispanics; 36% and 38% respectively have lived in the U.S. 21 years or more. The average Latino in New York has lived in the U.S. for 17 years, and the average Hispanic in Miami for just under 18 years.



Source: Strategy Research Corporation

By ethnic group, mean length of residency in the U.S. shows some striking differences:

Mexican	13.5	Central American	11.9
Puerto Rican	26.2	South American	14.0
Cuban	23.8	Dominican	13.8

D. Employment

For those age 18 and over, 58.4% are employed over 30 hours per week in the five markets surveyed. Full-time employment is highest in Chicago (65%), and unemployment is highest in Miami (9%).

Employment Status
Hispanics 18 years old & older

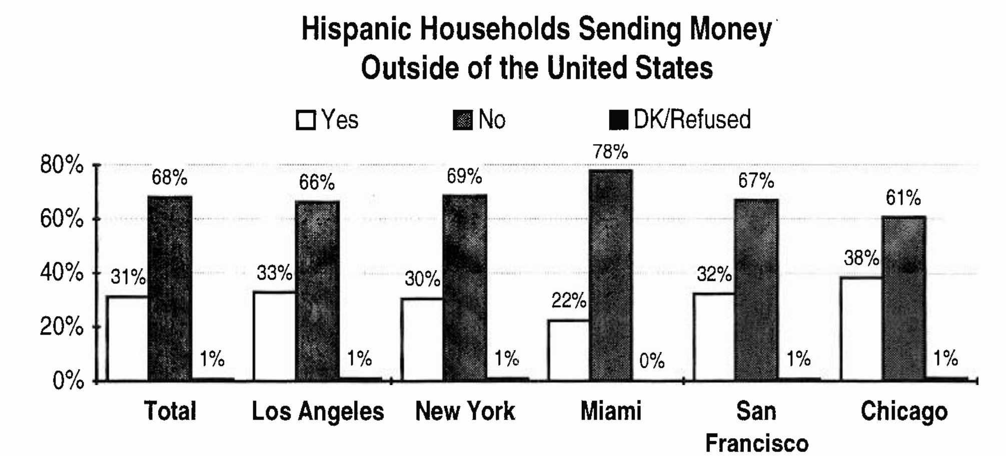
	Total	Los Ang.	New York	Miami	San Fran.	Chicago
Employed 30+ hours/week	58.4%	59.4%	58.2%	52.0%	56.7%	64.9%
Employed less than 30 hours/week	8.5	9.5	7.6	8.4	10.1	4.7
Unemployed	6.6	6.0	7.8	8.9	4.1	5.3
Retired	7.9	5.7	8.1	16.5	9.5	4.7
Student	3.5	3.9	3.0	3.4	2.9	3.7
Housewife	12.6	13.2	11.8	8.8	15.1	14.2
Disabled	2.1	2.2	2.9	1.4	1.1	1.5
Refused/Other	0.5	0.2	0.6	0.4	0.5	1.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Source: Strategy Research Corporation

Miami also has the highest percentage of retired (16.5%) Latinos, and the lowest percentage of respondents classifying themselves as housewives (8.8%).

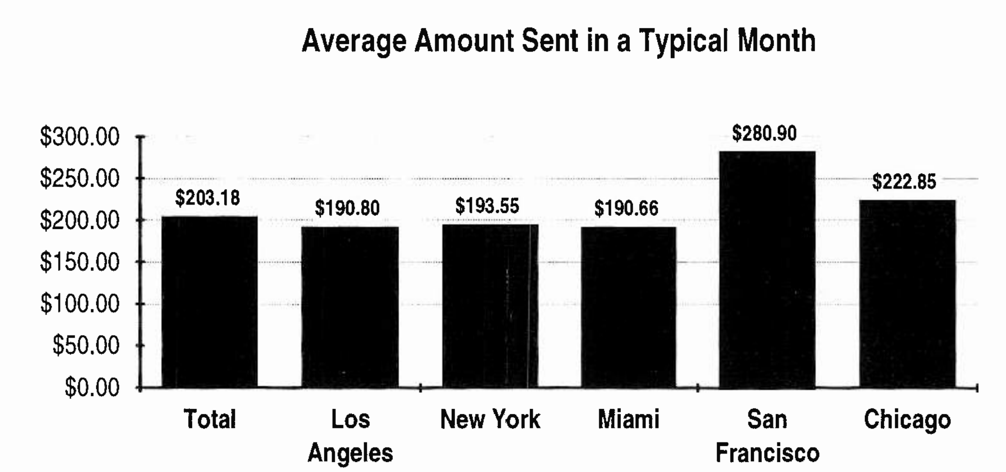
E. Sending Money Outside the U.S.

We include sending money outside of the United States as a "market characteristic" for two reasons: (1) because it obviously impacts Hispanic household Buying Power in each market, and an infrastructure is needed to meet Hispanic demand.



Source: Strategy Research Corporation

Across all five markets, 31% of all Hispanic households send money to family members in their country of origin. Incidence reaches a peak in Chicago (38%), and a low in Miami (22%), where it is much more difficult to send money to Cuba.



Source: Strategy Research Corporation

In a typical month, the average Hispanic household sends $203.18 to their family in their country of origin. San Francisco Latino households send an average of $280.90 in a typical month, and Miami households an average of $190.66.

The following table calculates the number of households sending money for each market, a monthly estimate, and high, middle and low projected annual amounts.

SENDING MONEY OUTSIDE THE U.S.: 1996 PROJECTED AMOUNTS

Market	Total HH	Pct. Sending Money	Total HH's Sending Money	Avg. Amount Sent in Typical Month per HH	Total Avg. Monthly Amount per Market	High Projection: 12 months per year (Mil)	Middle Projection: 9 months per year (Mil)	Low Projection: 6 months per year (Mil)
Los Angeles	1,480,100	32.7%	483,993	$190.80	$92,345,807	$1,108.15	$831.11	$554.07
New York	1,011,600	30.4%	307,526	$193.55	$59,521,735	$714.26	$535.70	$357.13
Miami	468,500	22.3%	104,476	$190.66	$19,919,299	$239.03	$179.27	$119.52
San Francisco	306,700	32.2%	98,757	$280.90	$27,740,954	$332.89	$249.67	$166.45
Chicago	288,300	38.2%	110,131	$222.85	$24,542,604	$294.51	$220.88	$147.26
Totals	**3,555,200**		**1,104,883**		**$224,070,399**	**$2,688.84**	**$2,016.63**	**$1,344.42**

Source: Strategy Research Corporation

Over all five markets, a total of 1.1 million Hispanic households say they send money to family members outside the United States. By market, the average amount sent in a "typical" month varies, from a high of $280 in San Francisco, to a low of $190 in Miami. In a typical month, 1.1 million households are sending $224 million out of the United States. Depending on which series of projections you most believe in, we estimate that these households are sending a combined $1.3 billion to $2.7 billion to their families in their countries of origin.

The average amount sent has risen dramatically since the last measurement we took in 1994. Here are the average amounts reported for the top five Hispanic markets:

Market	1994	1996
Los Angeles	$178	$191
New York	$97	$194
Miami	$124	$191
San Francisco	$145	$281
Chicago	$143	$222

The reasons for these increases are unknown, however one good reason may be devaluation of the Mexican peso, which sparked the current economic crisis in Mexico and has seriously affected Mexican household buying power. Mexican households in the U.S. are currently sending an average of $222.50 in a typical month; the highest amount for all nationalities, with the exception of Puerto Rican households, which average $284.50. By comparison, Cuban households send an average $157, Central American households $180, and South American households $152. Dominican household send the least, with an average of $134.

F. Survey Tabulations

The following tables show the tabulations used in the analysis of this section. The cross tabulations are shown by Market. All data shown this section pertain to Hispanic Adults 18 years of age or older.

On any given line, the first number is a percentage based on the total of all respondents in that column. Where a second figure appears, figure is an index on the total column.

All tables shown have Chi-square significance testing at 95% confidence. The +/- indicate significance and direction against the expected value.

Place Of Birth

	Total	Los Angeles	New York	Miami	San Fran	Chicago
United States	23.3	24.9	22.8	9.1-	33.9+	25.8
	100	107	98	39	145	111
Another Country	76.7	75.1	77.2	90.9+	66.1-	74.2
	100	98	101	119	86	97

Country of Origin or Descent

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Argentina	0.2	0	0.3	0.7	0.9	0
	100	0	109	294	400	0
Bolivia	0.6	0.8	0.6	0.5	0.3	0.2
	100	126	101	87	44	34
Brazil	0.3	0	1.0+	0	0	0
	100	0	382	0	0	0
Chile	0.4	0	0.5	1.7+	0.3	0
	100	0	145	447	91	0
Colombia	3.5	0.7-	8.4+	5.7	0.6-	2.2
	100	21	245	167	16	64
Costa Rica	0.5	0.4	1.1	0.2	0.3	0
	100	72	215	47	67	0
Cuba	9.8	2.8-	7.8	52.4+	0.8-	2.2-
	100	28	79	532	8	22
Dominican Republic	6.6	0-	23.2+	4.2	0.3-	0.2-
	100	0	350	63	5	3
Ecuador	2.2	0.9-	5.4+	2.2	0-	1.5
	100	42	245	98	0	67
El Salvador	4.5	6.1+	2.4-	3.2	7.8+	0.2-
	100	137	53	72	174	5
Guatemala	3.0	4.8+	1.6	0.4-	2.1	2.7
	100	159	52	14	69	90
Honduras	2.0	1.0-	3.1	5.3+	1.2	0.4
	100	48	153	262	58	22
Mexico	50.5	77.6+	8.6-	3.7-	75.0+	78.6+
	100	154	17	7	149	156
Nicaragua	2.2	1.0-	0.6-	10.9+	3.3	0.2
	100	45	25	492	147	10
Panama	0.1	0	0.3	0	0	0
	100	0	382	0	0	0
Paraguay	0	0	0	0	0.3+	0
	100	0	0	0	1113	0
Peru	1.0	0.3-	2.3+	0.6	1.9	0.6
	100	31	221	58	184	59
Puerto Rico	9.3	0.6-	28.5+	5.1-	1.3-	10.3
	100	6	307	55	14	111
Spain	2.5	2.8	3.2	0.6	3.5	0.3
	100	113	126	24	140	11
Uruguay	0.1	0	0.3	0	0	0
	100	0	382	0	0	0
Venezuela	0.7	0.2	0.9	2.5+	0	0.4
	100	33	136	373	0	59

Length Of Residence In The United States

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Less Than 1 Year	1.2	0.3-	2.5+	0.9	1.4	2.6
	100	23	205	73	113	213
1 - 10 Years	42.6	46.6+	34.7-	35.7-	55.0+	47.2
	100	109	81	84	129	111
11 - 20 Years	30.3	35.2+	26.5	24.6	26.5	30.6
	100	116	87	81	87	101
21 - 30 Years	16.3	10.7-	24.5+	23.7+	8.6-	13.6
	100	66	150	146	53	84
31 - 40 Years	7.5	6.4	7.5	13.7+	4.0	5.5
	100	86	100	184	53	74
41 - 50 Years	1.9	0.8-	4.1+	0.8	3.9	0.4
	100	43	217	45	206	24
51+	0.2	0	0.3	0.5	0.7	0
	100	0	136	262	344	0
Don't Know	0	0	0	0	0	0
	0	0	0	0	0	0
Mean	15.39	14.25	17.13	17.83	13.47	13.27

Employment

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Employed more than 30 hours per week	58.4	59.4	58.2	52.0-	56.7	64.9
	100	102	100	89	97	111
Employed less than 30 hours per week	8.5	9.5	7.6	8.4	10.1	4.7
	100	111	89	99	119	55
Unemployed	6.6	6.0	7.8	8.9	4.1	5.3
	100	91	119	136	62	81
Retired	7.9	5.7-	8.1	16.5+	9.5	4.7
	100	72	103	209	120	60
Student	3.5	3.9	3.0	3.4	2.9	3.7
	100	111	85	99	83	106
Housewife	12.6	13.2	11.8	8.8	15.1	14.2
	100	105	94	70	120	112
Disabled	2.1	2.2	2.9	1.4	1.1	1.5
	100	103	136	67	50	73
Refused	0.3	0.2	0.3	0.2	0.3	0.3
	100	94	98	83	132	128
Other	0.2	0	0.3	0.2	0.2	0.7
	100	0	175	125	122	351

Sending Money Outside Of U.S.

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	31.1	32.7	30.4	22.3-	32.2	38.2
	100	105	98	72	104	123
No	68.1	66.3	68.6	77.7+	67.0	60.6
	100	97	101	114	98	89
Don't Know/Unsure/Refused	0.8	1.0	1.0	0	0.8	1.1
	100	115	117	0	97	138

Dollar Amount Sent In Average Month

	Total	Los Angeles	New York	Miami	San Fran	Chicago
$1 - 50	18.5	20.9	18.8	17.9	8.8	16.3
	100	113	101	97	47	88
$51 - 100	21.9	21.8	16.7	32.2	20.9	26.2
	100	100	76	147	96	120
$101 - 200	25.2	23.5	27.8	31.8	25.7	19.6
	100	93	110	126	102	78
$201 - 300	6.5	3.4	10.7	6.1	9.7	7.5
	100	52	165	94	149	116
$301 - 500	11.8	15.5	6.7	3.7	8.6	18.3
	100	131	57	32	73	155
$501+	3.2	1.3	2.8	2.1	14.5+	3.6
	100	40	89	65	455	111
No answer/Refused	13.0	13.7	16.5	6.2	11.8	8.7
	100	105	127	48	91	67
Mean	203.18	190.80	193.55	190.66	280.90	222.85

V.

ACCULTURATION & CULTURAL COMPONENTS

V. ACCULTURATION & CULTURAL COMPONENTS

A. Defining the Hispanic Market in the United States

As seen in the previous sections, best estimates place 27 million people of Hispanic origin in the United States today. This population segment of the United States is made up of immigrants from 22 Spanish-speaking countries as well as Americans who see themselves of Hispanic origin. This population is the **fifth** largest Spanish-speaking population in the world, behind Mexico, Spain, Colombia, and Argentina. The growth of this segment, will make it the second largest 'Hispanic' population in the world by the year 2025.

Unlike most ethnic segments in the United States, the Hispanic market is defined on its linguistic similarity. The Hispanic market, like the U.S. market, is made up of the four human races. In Spanish there are terms to describe the different mixes of people. These terms do not have an equivalent in English. A mulatto is a person of African and European ancestry. The mestizo is a person of European and Native American (Indian) ancestry.

In this section we will show the acculturation process, some of the factors that drive acculturation in general and within this segment specifically.

B. Acculturation

First, acculturation is defined:

ac•cul•tur•a•tion n 1: cultural modification of an individual, group, or people by adapting to or borrowing traits from another culture; *also* : a merging of cultures as a result of prolonged contact 2: the process by which a human being acquires the culture of a particular society from infancy. *Merriam-Webster's Collegiate Dictionary Tenth Edition*

Acculturation happens both by passive and active means. A passive manner of acculturation can be explained as acculturation through contact or exposure. An active manner of acculturation can be explained as the seeking of personal transformation through learning and exposure.

Acculturation, through personal contact, is a two-way street. As a person learns about the foreign culture from another, the one's native culture is taught to the other. In order for two or more humans to communicate, there must be some common ground. In order to establish that common ground, some exchange of information will take place. Acculturation works in both directions.

The question "when will they assimilate?", is a difficult one. A person will acculturate to the degree that is comfortable for that individual. The second generation, more likely to be educated in the U.S., will be like those they grow up in proximity to. If the population in that area is very densely Hispanic, the child will grow up more Hispanic than one growing up in a densely non-Hispanic area. As long as immigration continues, there will be a Hispanic market in the United States. New immigration slows the acculturation process of those already in the U.S. This is based upon exposure and personal identification. If personal identification is closely related to those new immigrants, the individual will not acculturate rapidly. If personal identification is closely related to the mainstream U.S. population, the individual will acculturate more rapidly.

In this 1996 study, there is some polarization of the Hispanic market segment, in terms of language and acculturation. The growing 'Partially Acculturated' portion of this market segment is now 60% of Hispanics in the Top 5 Hispanic Markets.

In the United States, there has been an open attitude toward different cultures. There is a perception of economic pressure at certain levels and in certain areas of the country from new immigrants. With positive economic conditions, things will remain fairly stable. With, however, a downturn in the economy, pressure on the different groups will rise, contributing to increased polarization of the segments. The weak economy of the 1990's to date, has increased the economic pressure on the lower income group of the U.S. compared to the levels of the 1980's. Typical immigration patterns dictate that many new immigrants will compete in the job market with lower income residents. This has two effects in the U.S. today, 1) lower income non-Hispanics are not supportive of open immigration, and 2) those Hispanics already in the U.S. wouldn't mind closing the door behind them. (see Public Opinion)

As stated in the 1994 U.S. Hispanic Market Study section 4, p49 the culture in the U.S. can be related to a stew. It is not a salad nor a melting pot. It's a stew.

Describing the acculturation process in the 1994 U.S. Hispanic Market Study, we discussed some of the population characteristics that speeded or slowed the acculturation process. As discussed, population density and size play a critical factor in this process. Also, in 1994, based upon population and density in many areas of the country, 'typical' acculturation is not required of a new immigrant. This, coupled with the tolerance of the U.S. general culture to the Hispanic culture, allows a non-acculturational situation to exist. This may change as new immigrants are faced with pressure to be a part of the U.S. society. Current naturalization drives for qualified residents, and potential restrictions on government services for undocumented immigrants have affected, and will continue to affect, the acculturation process of Hispanics in the United States.

The Miami ADI encompasses Dade, Broward, Monroe and Palm Beach Counties. In the metropolitan area of Miami, Florida, defined by Dade County, the total population is approximately 2 million people. The population of Dade County, Florida is a majority Hispanic. In this situation, the dominant culture in that area is the Hispanic culture. With a Spanish language infrastructure, all goods and services available in Spanish, a new immigrant acculturates very slowly. Miami is the least acculturated of the top 5 Hispanic markets in the United States.

Overall the Hispanic population of these five markets, represents almost 50% of the U.S. Hispanic population in the United States. The Hispanic population is 13 percent - highly acculturated, 60 percent - somewhat acculturated and 27 percent - relatively unacculturated. This is a change from what we've found historically, with a larger proportion of the population now in the partially or somewhat acculturated group.

The population size of this market segment allows a cultural inertia to exist. In other words, the population size and density has reached a point that acculturation to the general market is not required.

The acculturation model used in this section describes the market in terms of similarity to the general market. It describes the tolerance and comprehension of the Hispanic market to general market themes.

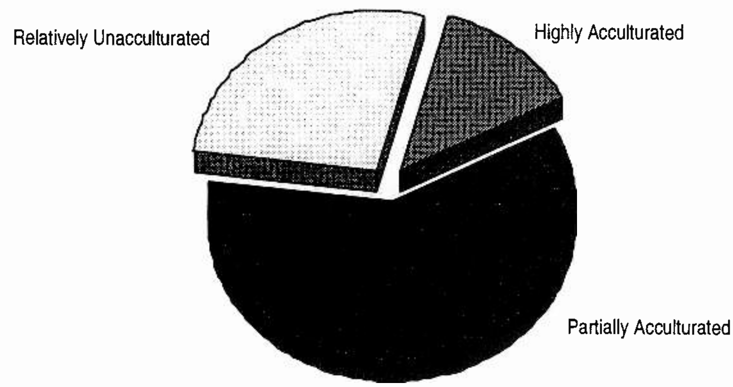
The Hispanic market is shown here grouped into Highly acculturated, Partially acculturated and Relatively unacculturated. These acculturation measurements do not take into consideration such demographics as income, education, or occupation.

Keep in mind that acculturation levels are a point in time measurement only. Acculturation is not a straight road that one gets on until becoming something else. An immigrant will acculturate to a point. This level of acculturation is different for diffent people. Apparently, this level of acculturation requires some effort to maintain, and the person decides to get back to their roots. At any point in time an individual may decide to reject the 'new' culture. As in the research presented in 1994, the 'get back to your roots' phenomenon actually tends to be the norm. This is particularly true among Hispanics born outside of the United States. Among those Hispanics born in another country, the reverse in apparent acculturational trend occurs after 11 to 20 years in this country.

The acculturation groups used here are simple divisions of the spectrum of acculturation. The difference between a person who scores lower in the Highly acculturated group and one who score high in the Partially acculturated group are virtually indistiguishable.

Those that fall into the Highly acculturated group represent 13 percent of the population, Partially acculturated 60 percent, and those Relatively unacculturated 27 percent.

Acculturation Segments among Hispanic Adults 18+

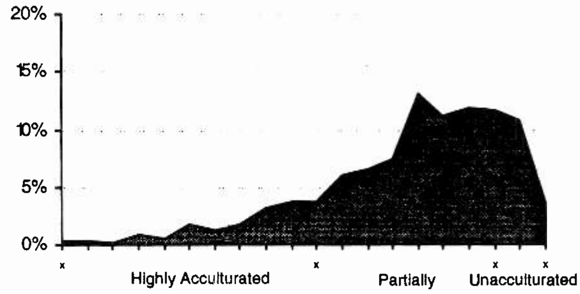


Source: Strategy Research Corporation

The acculturation level of Hispanic adults in the Top 5 Hispanic markets varies. The following graphs depict the Total and the Top 5 Hispanic markets. In these graphs the vertical axis represents the percent of the Adult Hispanic population. The horizontal axis represents the Acculturation level of that population.

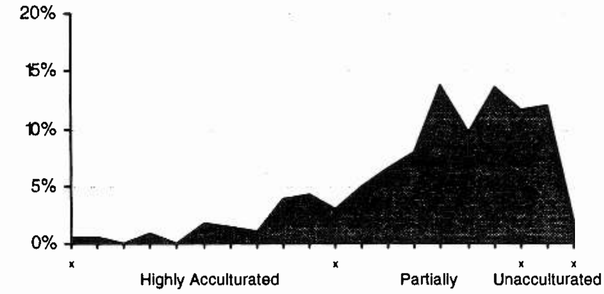
As an example, in the first graph "Population Distribution of Adult Hispanics by Acculturation Level - Total," it is clear that most of the adult Hispanics fall in the partially acculturated to relatively unacculturated range.

Population Distribution of Adult Hispanics by Acculturation Level- TOTAL



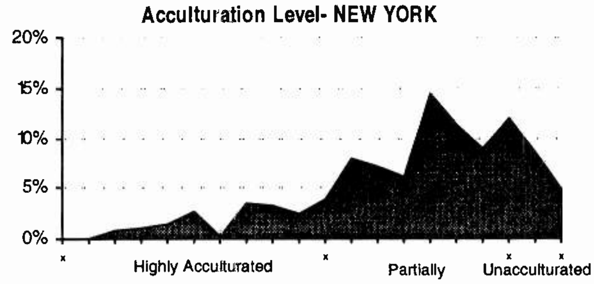
Source: Strategy Research Corporation

Population Distribution of Adult Hispanics by Acculturation Level- LOS ANGELES



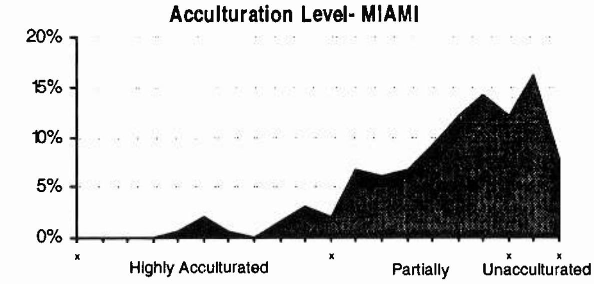
Source: Strategy Research Corporation

Population Distribution of Adult Hispanics by Acculturation Level- NEW YORK



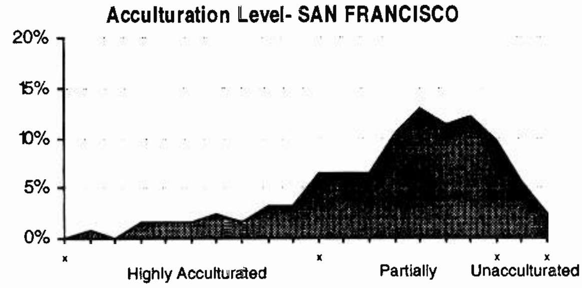
Source: Strategy Research Corporation

Population Distribution of Adult Hispanics by Acculturation Level- MIAMI



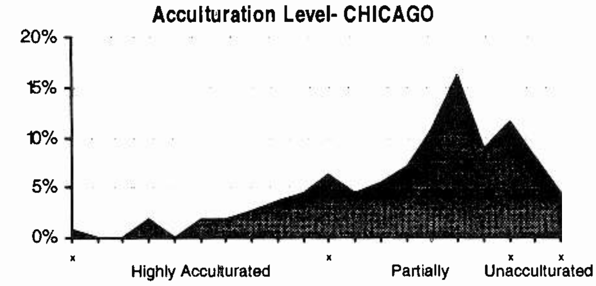
Source: Strategy Research Corporation

Population Distribution of Adult Hispanics by Acculturation Level- SAN FRANCISCO



Source: Strategy Research Corporation

Population Distribution of Adult Hispanics by Acculturation Level- CHICAGO



Source: Strategy Research Corporation

C. Direction of Acculturation

In conclusion, acculturation into the general market is not a requirement for the Hispanic immigrant. The Hispanic immigrant today, has a complete Spanish language infrastructure available to him or her. In any of the larger Hispanic markets in the U.S., virtually all goods and services are available in Spanish.

Since the 1994 U.S. Hispanic Market Study there have been some changes in the market toward acculturation. In the 1994 report, 7 percent of Hispanics wanted to be more like the general U.S. population, compared with 20 percent in 1996. The increase in this area is countered by 79 percent in 1996 vs. 58 percent becoming more Hispanic. In this particular measurement, the Hispanic market has polarized compared with the measurement taken in 1994.

Those Hispanic Adults remaining the same, in terms of acculturational level, were 35 percent in 1994 and are one percent in 1996. Politically and socially, there have been pressures on this market that would tend to explain the movement away from staying the same.

Also in the 1994 analysis we noted that of the adult Hispanic population, for every one adult culturally moving toward the General U.S. market, eight were moving toward the Hispanic market. At this time, because of the polarization mentioned previously, for every Hispanic adult moving toward the General U.S. market, four are becoming more Hispanic.

By acculturation level, 35 percent of those Hispanic adults in the "Highly Acculturated" group are becoming more like the General market, as are 24 percent of those 'Partially Acculturated' and 5 percent of the 'Relatively Unacculturated' adults.

HISPANIC ADULTS 18+
ACCULTURATIONAL DIRECTION BY ACCULTURATION LEVEL

	Total	Highly Acculturated	Partially Acculturated	Relatively Unacculturated
Direction Of Acculturation:				
To General Market	20.3%	34.8%	24.1%	5.0%
Staying The Same	0.8	1.5	1.0	0.0
To Hispanic Market	78.9	63.7	74.9	95.0

Source: Strategy Research Corporation

D. Survey Tabulations

The following tables show the tabulations used in the analysis of this section. Included in the tabulations are the data used in this section. The cross-tabulations shown are: Market and Acculturation. All data shown this section are Hispanic Adults 18 years of age or older.

On any given line, the first number is a percentage based on the total of all respondents in that column. Where a second figure appears, the figure is an index on the total column.

All tables shown have Chi-square significance testing at 95% confidence. The +/- indicate significance and direction against the expected value.

Acculturation Score

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Highly Acculturated	13.1	12.8	14.8	6.3-	16.4	17.6
	100	98	113	48	125	134
Partially Acculturated	59.7	61.3	57.5	56.6	64.4	57.7
	100	103	96	95	108	97
Relatively Unacculturated	27.2	25.9	27.7	37.1+	19.2-	24.7
	100	95	102	137	71	91
Spanish Dominant	26.9	26.4	26.0	33.7+	24.0	23.7
	100	98	97	126	89	88
Non-Spanish Dominant	73.1	73.6	74.0	66.3-	76.0	76.3
	100	101	101	91	104	104
Direction Of Acculturation						
Becoming More General Market	20.3	21.3	17.7	22.9	18.5	20.8
	100	105	87	113	91	103
Staying The Same	0.8	1.2	0	1.1	0.6	0.8
	100	151	0	136	78	102
Becoming More Hispanic	78.9	77.5	82.3	76.0	80.9	78.4
	100	98	104	96	103	99

First Number is Percent of Total, Second figure is Index on Total Column

How Would You Describe Yourself?

		ACCULTURATION LEVEL							Index	Index
	TOTAL	Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	US Born - Wh/Ot	Non-US Born - US Brn
Hisp first - Amer second	73.6	42.6-	73.3	89.1+	83.0+	70.1-	46.3+	81.4+	0	176
Equally Hisp and Amer	16.2	25.9+	17.7	8.3-	15.0	16.7	28.2+	12.8+	0	45
Amer first - Hisp second	10.2	31.5+	9.0	2.7-	1.9-	13.2+	25.6+	5.8+	0	23

Acculturation Score

		ACCULTURATION LEVEL							Index	Index
	TOTAL	Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	US Born - Wh/Ot	Non-US Born - US Brn
Highly Acc	13.1	100.0+	0-	0-	4.6-	16.3+	32.9-	7.4-	0	22
Partially Acc	59.7	0-	100.0+	0-	61.8	58.9	67.1+	57.5+	0	86
Relatively UnAcc	27.2	0-	0-	100.0+	33.7+	24.8	0-	35.1+	0	0
Spanish Dominant	26.9	9.3-	27.8	33.3+	100.0+	0-	11.8-	31.2+	0	264
Non-Spanish Dominant	73.1	90.7+	72.2	66.7-	0-	100.0+	88.2+	68.8-	0	78
Direction Of Acculturation										
Becmg More Gnrl Mkt	20.3	34.8+	24.1+	5.0-	20.8	20.1	16.8	21.3+	0	127
Staying The Same	0.8	1.5	1.0	0	0	1.1	2.2-	0.4-	0	17
Bcmng More Hisp	78.9	63.7-	74.9-	95.0+	79.2	78.8	81.0+	78.3+	0	97

Language . . .

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Language First Learned To Speak										
English	10.0	31.4+	9.3	1.2-	1.4-	13.1+	33.2+	3.3+	0	10
Spanish	88.8	66.8-	89.4	98.2+	98.1+	85.4-	66.2+	95.3+	0	144
Other	1.2	1.8	1.3	0.6	0.4	1.5	0.6	1.4+	0	215
Language Most Comfortable										
English	23.4	66.9+	23.9	1.3-	4.6-	30.3+	69.9+	10.0+	0	14
Spanish	73.2	26.8-	72.3	97.7+	93.7+	65.7-	23.0+	87.7+	0	381
Other	3.4	6.3+	3.8	0.9-	1.7	4.0	7.0+	2.3+	0	33
Language Most Frequently Spoken At Home										
English	19.9	62.0+	19.3	1.1-	0-	27.3+	58.8+	8.7+	0	15
Spanish	78.6	34.5-	79.3	98.3+	100.0+	70.7-	39.4+	89.9+	0	228
Other	1.5	3.5+	1.4	0.6	0-	2.0	1.8+	1.4+	0	74
Language Most Frequently Used - Socially										
English	33.9	76.1+	35.8	9.3-	15.5-	40.7+	77.1+	21.4+	0	28
Spanish	64.2	21.5-	62.0	89.8+	83.4+	57.2-	21.5+	76.6+	0	356
Other	1.9	2.4	2.2	0.9	1.1	2.1	1.4+	2.0+	0	146
Language Most Frequently Used At Work										
English	47.7	75.8+	53.2+	22.1-	30.7-	54.0+	76.7+	39.4+	0	51
Spanish	35.8	9.3-	31.2-	58.8+	46.2+	32.0-	13.6+	42.3+	0	312
Don't work	16.4	14.9	15.5	19.2	23.0+	14.0-	9.8+	18.4+	0	188

What is your Age

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
18-24	21.0	19.0	23.0	13.8-	20.3	19.9	35.8+	16.5+	314	46
25-34	30.5	22.0-	30.9	36.2+	28.6	32.1	21.6	33.2+	95	154
35-49	26.9	26.6	24.9	27.8	24.6	26.4	21.6-	28.5	76	132
50-64	14.1	19.6+	14.0	15.6	16.7	14.6	12.4-	14.6-	67	117
65+	7.6	12.8+	7.1	6.5	9.8	7.0	8.5-	7.3-	45	85
Mean	37.80	41.31	37.16	38.59	39.16	37.70	35.94	38.37	-	-

Employment

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Employed > 30 hrs pw	58.4	59.9	59.2	56.8	50.8-	61.5	60.1+	57.8+	114	96
Employed <30 hrs pw	8.5	5.9	9.9	7.1	8.5	8.7	14.4+	6.7-	118	47
Unemployed	6.6	4.4	4.7-	9.9+	8.6+	5.2	4.7	7.1	92	151
Retired	7.9	15.2+	7.3	5.7	9.1	7.5	8.3-	7.8-	43	93
Student	3.5	3.7	4.2	1.1-	3.9	3.1	5.4+	2.9	178	54
Housewife	12.6	8.4	12.6	15.9	17.3+	11.3	5.8	14.7+	135	254
Disabled	2.1	1.4	1.6	3.4	1.1	2.4	1.3	2.4	62	187
Refused	0.3	1.0+	0.3	0.1	0.3	0.4	0	0.3+	0	0
Other	0.2	0.2	0.2	0	0.4	0	0	0.2	0	0

Including yourself, how many people live in your household?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
1	7.4	13.8+	5.9	7.8	7.0	7.6	7.5-	7.4-	32	99
2	14.2	20.9+	14.4	12.0	15.5	14.3	16.9-	13.4-	56	79
3	19.5	15.0	21.5	15.6	12.2-	21.5+	22.2+	18.6	127	84
4	25.1	23.2	24.3	23.5	25.7	23.3	25.6+	25.0+	149	98
5	17.1	18.6	16.3	19.1	19.0	16.8	16.1+	17.4+	225	108
6	9.0	6.4	10.4	8.6	10.7	8.9	7.1+	9.5+	254	133
7	4.5	1.8	4.9	6.0	5.0	4.7	3.9+	4.8+	430	123
8	1.7	0.2	1.2	4.2+	1.9	1.9	0.3	2.1+	0	626
9	0.6	0	0.7	1.0	1.2	0.5	0.1	0.8+	52	613
10+	0.8	0	0.5	2.1+	1.8	0.6	0.3	1.0	34	398
Refused	0	0	0	0	0	0	0	0	0	0
Mean	3.97	3.39	3.95	4.33	4.17	3.91	3.67	4.06	-	-

And how many people are over 18 years of age?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
1	12.7	18.0+	11.1	13.6	12.7	12.7	10.8-	13.3-	41	123
2	44.9	46.7	45.5	46.0	44.9	46.1	42.4	45.6	90	108
3	21.1	20.0	22.5	17.0-	18.5	21.5	25.3+	19.9+	149	79
4	11.9	6.6-	11.1	13.3	13.7	10.2	13.3+	11.5+	173	86
5	6.3	8.4	6.1	5.3	5.7	6.3	6.5+	6.3+	381	97
6	2.0	0.4	2.7	2.6	3.6	1.9	1.5+	2.2+	887	144
7	0.8	0	0.8	1.5	0.7	0.9	0.3	1.0+	0	379
8	0.2	0	0.1	0.6	0	0.3	0	0.2	0	0
9	0	0	0.1	0	0.1	0.1	0	0.1+	0	0
10	0	0	0	0.1	0.1	0	0	0	0	0
Mean	2.65	2.42	2.68	2.68	2.70	2.63	2.68	2.64	-	-

And how many people are between 12 and 17 years of age?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
0	71.1	73.5	70.8	67.5	70.2	70.3	72.0-	70.9-	83	98
1	18.0	14.0	18.3	19.5	16.6	18.6	17.3+	18.2+	186	105
2	7.7	11.1	8.4	7.5	9.2	8.2	7.6+	7.8+	203	102
3	2.7	1.4	2.1	5.4+	3.3	2.8	2.7+	2.7+	985	101
4	0.3	0	0.4	0	0.7+	0.1	0.4	0.3	249	73
5	0.1	0	0	0.1	0	0	0	0.1	0	0
Mean	0.43	0.40	0.43	0.51	0.48	0.44	0.42	0.44	-	-

And how many people are between 6 and 11 years of age?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
0	69.4	79.0+	69.4	65.1	70.2	69.2	75.0-	67.7-	86	90
1	19.8	14.3	18.9	23.1	16.8	20.4	15.3+	21.2+	176	138
2	8.7	6.5	9.9	8.8	11.3	8.3	7.5+	9.1+	262	122
3	1.8	0.3	1.8	1.9	1.2	1.8	2.3+	1.7+	246	73
4	0.2	0	0.1	1.0+	0.5	0.2	0	0.3	0	0
5	0	0	0	0	0	0	0	0	0	0
6	0.1	0	0	0.1	0.1	0	0	0.1+	0	0
Mean	0.44	0.28	0.44	0.51	0.45	0.43	0.37	0.46	-	-

And how many people are under 6 years of age?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
0	64.4	73.2+	67.8+	57.2-	63.5	66.4	73.0-	61.8-	86	85
1	22.9	19.8	22.2	23.7	21.4	22.6	17.1+	24.7+	179	144
2	10.7	4.7-	8.9	17.7+	13.6	9.6	7.9	11.6+	167	147
3	1.7	2.3	0.7-	1.5	0.6	1.3	1.9	1.7	189	88
4	0.2	0	0.5	0	0.8+	0.1	0.1	0.2+	328	230
Mean	0.50	0.36	0.44	0.64	0.54	0.46	0.39	0.54	-	-

Market

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Los Angeles	44.7	42.7	44.8	41.5	42.9	43.9	47.7+	43.8+	172	92
New York	26.2	28.9	24.8	26.2	24.9	26.0	25.6-	26.3-	70	103
Miami	12.1	6.6-	13.0	18.8+	17.3+	12.5	4.7	14.3+	109	305
San Francisco	9.0	11.1	9.6	6.3	8.0	9.3	13.1	7.7-	92	59
Chicago	8.0	10.7	7.7	7.2	7.0	8.3	8.9-	7.8-	52	87

Are you the primary grocery shopper in your household?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Yes	65.6	58.9	65.3	75.4+	73.3+	65.0	57.7-	68.0-	75	118
No	34.3	40.7	34.6	24.6-	26.7-	34.9	42.2+	31.9+	185	76
Don't Know/Unsure/Ref	0.1	0.3	0.1	0	0	0.1	0.1	0	0	39

Place Of Birth

	ACCULTURATION LEVEL								
								Index	Index
		Hghly	Prtly			Non-	Born	Born	US	Non-US
		Acc	Acc	Unacc	Span	Span	In The	Outside	Born -	Born -
	TOTAL	0-49	50-84	85-100	Dmnt	Dmnt	U.S.	U.S.	Wh/Ot	US Brn
United States	23.3	56.3+	25.2	0-	9.9-	27.0+	100.0+	0-	123	0
Another Country	76.7	43.7-	74.8	100.0+	90.1+	73.0-	0-	100.0+	0	0

Length Of Residence In The United States

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Less than 1 Year	1.2	0	0.2-	2.6+	1.2	1.0	0	1.2	0	0
1 - 10 Years	42.6	24.5-	38.2-	52.3+	46.2	40.2	0	42.6+	0	0
11 - 20 Years	30.3	33.3	31.9	29.7	31.1	31.3	0	30.3	0	0
21 - 30 Years	16.3	18.0	20.4+	11.2-	14.6	18.1	0	16.3	0	0
31 - 40 Years	7.5	15.2+	8.3	3.1-	5.9	7.5	0	7.5	0	0
41 - 50 Years	1.9	9.1+	1.0	1.0	1.0	1.9	0	1.9-	0	0
51+	0.2	0	0	0.1	0.1	0.1	0	0.2-	0	0
Mean	15.39	21.56	16.47	12.18	14.41	15.77	0	15.39	-	-

Country of Origin or Descent

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Argentina	0.2	0.7	0.3	0.2	0.2	0.3	0.2	0.3	0	151
Bolivia	0.6	0.9	0.7	0.3	0.5	0.7	0.8	0.5	0	69
Brazil	0.3	0	0.4	0.5	0	0.5	0	0.4	0	0
Chile	0.4	0	0.3	0.4	0.8	0.1	0.3	0.4	0	141
Colombia	3.5	2.6	2.8	2.2	3.5	2.3	2.2	3.8	0	176
Costa Rica	0.5	0	0.2	1.3+	0.1	0.6	0	0.7	0	0
Cuba	9.8	4.2-	10.6	14.3+	12.2	10.3	5.5-	11.2	0	201
Dominican Republic	6.6	2.3-	7.2	7.7	7.2	6.5	3.3-	7.6	0	232
Ecuador	2.2	3.3	2.1	2.6	1.9	2.6	0.7-	2.7	0	407
El Salvador	4.5	5.8	3.5	5.7	2.6	5.1	1.9-	5.2	0	272
Guatemala	3.0	3.1	2.8	3.2	1.8	3.4	0.1-	3.9+	0	3407
Honduras	2.0	0-	2.7	3.0	3.5	2.0	0.7-	2.5	0	363
Mexico	50.5	49.2	51.3	48.5	53.1	49.2	56.0+	48.8	0	87
Nicaragua	2.2	0.2	2.5	4.0+	2.6	2.6	0.2-	2.8	0	1240
Panama	0.1	0.7+	0	0	0	0.1	0.3	0	0	0
Paraguay	0	0	0.1	0	0	0.1	0	0	0	0
Peru	1.0	1.0	1.0	1.4	1.8	0.9	0-	1.3	0	0
Puerto Rico	9.3	16.4+	9.8	3.9-	7.0	9.8	18.5+	6.4-	0	35
Spain	2.5	8.4+	1.3-	0-	0.6	2.3	8.3+	0.8-	0	9
Uruguay	0.1	0	0.2	0	0	0.1	0	0.1	0	0
Venezuela	0.7	1.2	0.3	0.7	0.7	0.5	1.1	0.5	0	49

Respondent Sex

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Male	50.0	49.8	52.2	40.5-	41.5-	51.4	52.9+	49.1	111	93
Female	50.0	50.2	47.8	59.5+	58.5+	48.6	47.1-	50.9	90	108

Language Of Interview

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
English	26.1	65.2+	27.5	3.3-	7.1-	32.8+	73.4-	11.7-	-	16
Spanish	73.9	34.8-	72.5	96.7+	92.9+	67.2-	26.6+	88.3+	-	332

VI.

MEDIA USAGE

VI. MEDIA USAGE

A. Overview

After reading the Cultural Components and Language Sections prior to this one, you should be understanding the importance of the Spanish language to the Latin population in the United States. The common belief has been that the process of assimilation of immigrant groups in the U.S. would eventually make the need for specific marketing efforts obsolete; the truth is the opposite. In fact, our acculturation modeling shows a shift in the attitudes of Hispanics; after about 15 years in the United States, the acculturation process actually reverses, and Hispanics make a conscious effort to be more Hispanic in spite of increasing levels of exposure to the U.S. culture and media. What is driving the increased use of Spanish Media in this country is not Spanish Dependency - immigrants dependent on the Spanish media because they don't speak English - but *Spanish preference.*

Among Hispanics 18 years or older 73% say that they are most comfortable speaking Spanish and 79% are speaking Spanish most in the home. The fact that 79% of Hispanics 18 years and older speak Spanish most in the home is important because most media usage takes place in the home.

Media usage was measured by incidence of using a given medium, as well as the number of hours of that medium used in a normal or average day.

B. Incidence of Media Use

The incidence of Media use was measured by language of media used, and is reported here in terms of total incidence of use and incidence of use by language.

MEDIA USAGE
AMONG HISPANIC ADULTS 18+

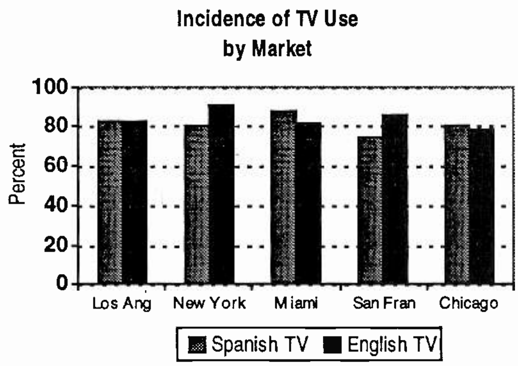
Incidence of Usage:	Spanish	English
98% Watch TV in	84%	82%
92% Listen to the Radio in	72	61
73% Read the Newspaper in	44	48
68% Read Magazines in	41	45

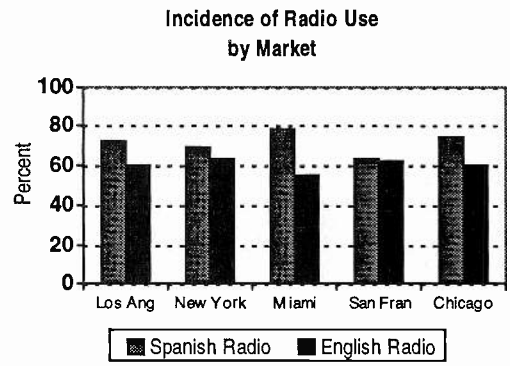
Source: Strategy Research Corporation

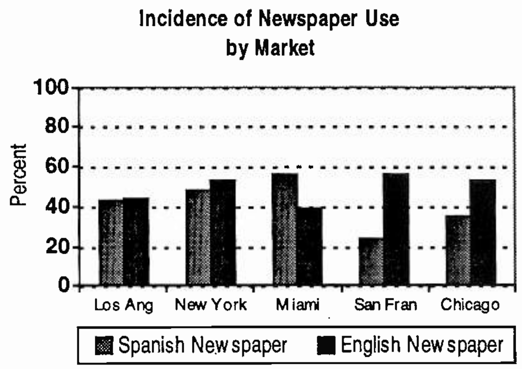
A majority of Hispanics watch television and listen to the radio every day. Almost three-quarters read newspapers and read magazines. Over 7 out of 10 Hispanics watch television and listen to the radio in Spanish.

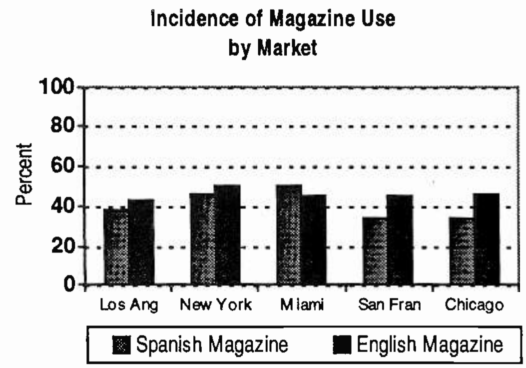
The incidence of media use by media type varies only slightly on a market by market basis. Overall, the incidence of TV use among Hispanic adults 18+ is 98 percent, Radio - 92 percent, Newspapers - 73 percent and Magazines - 68 percent. San Francisco tends to have a lower incidence of media use than the other markets.

Among the markets surveyed, more variation in the incidence of media usage is apparent when examining the data by media language used. Miami has a higher incidence of Spanish language media use in every category than the other markets.









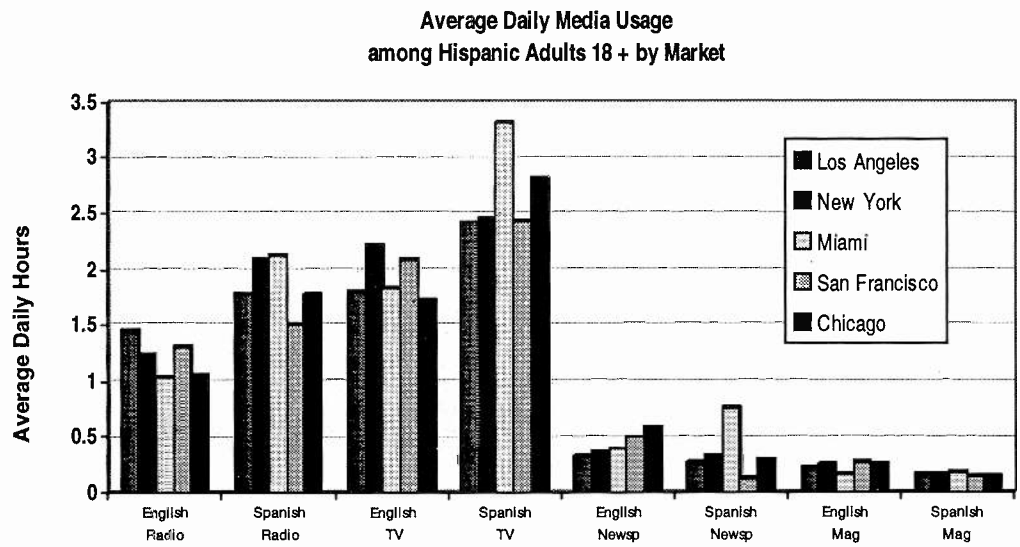
Source: Strategy Research Corporation

C. Average Hours of Daily Media Use

In an average day, Hispanics use Spanish language media for their news - information - entertainment approximately 5 hours per day, compared with 3 hours and 50 minutes of English media.

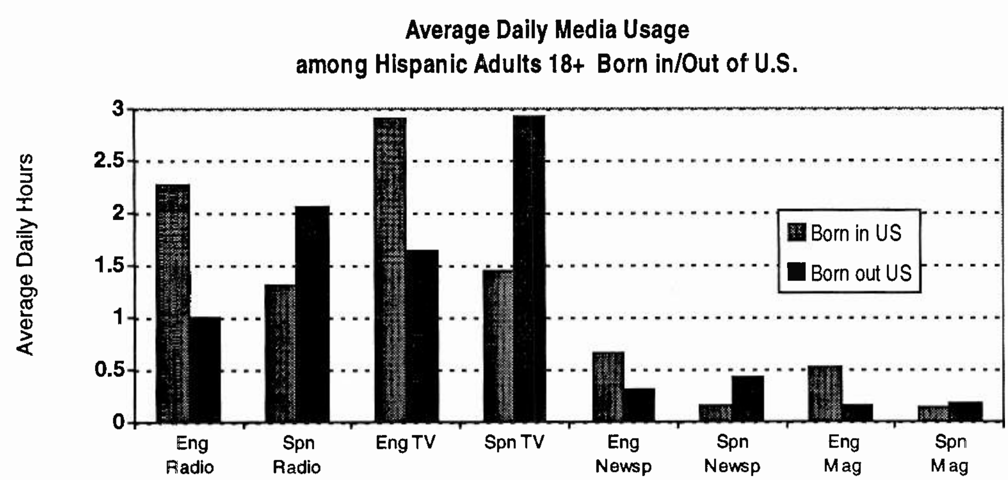
Of the 5 hours of Spanish media used, one hour - 53 minutes are radio, 2 hours 35 minutes are television, 21 minutes are newspapers and 10 minutes are magazines.

In the graph below, average daily hours of media usage is shown for Hispanic adults 18+, by market.



Source: Strategy Research Corporation

Those Hispanics born outside of the United States spend more time with Spanish language media, on the average, than do their counterparts born in the U.S.



Source: Strategy Research Corporation

D. Television Viewing

Eighty four percent of Hispanic adults 18+, watch Spanish language television. During a typical day, adult Hispanics watch 2 hours and 35 minutes of Spanish Television compared to 1 hour and 55 minutes of English language television. Overall 60% of the average hours per day watching television is spent watching Spanish language television.

Hispanic women spend more time watching TV than men. On an average daily basis, women watch Spanish language TV approximately 3 hours, men 2 hours 12 minutes.

Of those Hispanics watching Spanish language television, 85 percent have watched Univision and 80 percent have watched Telemundo during the past week. Also, during the past week, 75 percent stated watching Telenoticias, 38 percent - Galavision, 30 percent -MTV Latino, and 20 percent - HBO en Español.

E. Other Media Usage

On a daily basis, Hispanics in the United States spend about 3 hours and 10 minutes listening to the radio. Sixty percent of the average daily listening hours are spent with Spanish radio. This equates to about 1 hour 53 minutes.

In the Hispanic market segment approximately 45 minutes per day are spent reading newspapers, on the average. Fifty-percent of the time, the newspaper is in Spanish.

The time spent reading magazines is the only media activity in which English is used more than Spanish. An average of about two hours per week is reported for reading magazines of which 1 hour and 10 minutes are in English, and about 50 minutes in Spanish.

F. Survey Tabulations

The following tables show the tabulations used in the analysis of this section. The cross-tabulations shown are: Market and Acculturation. All data shown this section pertain to Hispanic Adults 18 years of age or older.

On any given line, the first number is a percentage based on the total of all respondents in that column. Where a second figure appears, figure is an index on the total column.

All tables shown have Chi-square significance testing at 95% confidence. The +/- indicate significance and direction against the expected value.

Incidence of Media Usage

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Incidence Of Media Usage						
Listen To Radio	92.1	91.8	93.7	92.4	86.4-	93.9
	100	100	102	100	94	102
Listen To Radio In English	60.7	60.6	63.4	55.0	62.4	60.1
	100	100	105	91	103	99
Listen To Radio In Spanish	71.6	72.0	69.2	78.7+	62.9	74.3
	100	101	97	110	88	104
Watch TV	98.0	97.0	99.0	100.0	97.3	97.2
	100	99	101	102	99	99
Watch TV In English	84.3	82.3	90.6+	81.2	85.5	78.2
	100	98	107	96	101	93
Watch TV In Spanish	81.7	81.9	80.6	87.8+	74.6	80.4
	100	100	99	108	91	99
Read Newspaper	72.5	69.5	80.4+	70.2	68.0	71.5
	100	96	111	97	94	99
Read Newspaper In English	47.7	44.4	53.5+	39.3-	55.6	53.5
	100	93	112	82	116	112
Read Newspaper In Spanish	43.8	42.9	47.8	55.7+	23.4-	35.2
	100	98	109	127	53	80
Read Magazine	68.1	66.9	70.1	71.0	63.5	67.2
	100	98	103	104	93	99
Read Magazine In English	45.4	43.2	49.5	44.6	45.0	45.8
	100	95	109	98	99	101
Read Magazine In Spanish	41.0	37.4	46.2	49.8+	33.8	34.1
	100	91	113	121	83	83
Total English Media	88.1	86.9	93.3+	82.4-	90.6	84.8
	100	99	106	94	103	96
Total Spanish Media	89.8	88.9	90.0	96.6+	83.4-	88.1
	100	99	100	108	93	98

Of those using each Media type:

Average Daily Hours of Media Usage

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Average Media Usage (Hours Per Day)						
Radio Hours	3.60	3.72	3.72	3.49	3.24	3.18
Radio Hours In English	1.71	1.93	1.63	1.38	1.73	1.41
Radio Hours In Spanish	1.89	1.78	2.09	2.12	1.51	1.77
TV Hours	4.52	4.21	4.67	5.15	4.51	4.54
TV Hours In English	1.93	1.79	2.22	1.83	2.08	1.72
TV Hours In Spanish	2.59	2.42	2.44	3.32	2.43	2.82
Newspaper Hours	0.73	0.60	0.70	1.16	0.62	0.89
Newspaper Hours In English	0.38	0.32	0.36	0.39	0.50	0.58
Newspaper Hours In Spanish	0.35	0.28	0.33	0.77	0.12	0.30
Magazine Hours	0.39	0.39	0.42	0.35	0.42	0.40
Magazine Hours In English	0.23	0.22	0.26	0.16	0.27	0.25
Magazine Hours In Spanish	0.16	0.16	0.16	0.18	0.15	0.14
Total English Media Hours/Day	4.26	4.27	4.48	3.76	4.58	3.97
Total Spanish Media Hours/Day	4.99	4.64	5.02	6.39	4.21	5.03

Do You Watch Television In Spanish?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	81.7	81.9	80.6	87.8+	74.6	80.4
	100	100	99	108	91	99
No	18.3	18.1	19.4	12.2-	25.1	19.6
	100	99	106	66	137	107
Don't Know/Unsure/Refused	0	0	0	0	0.3	0
	100	0	0	0	1152	0

Do you watch television in English?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	84.3	82.3	90.6+	81.2	85.5	78.2
	100	98	107	96	101	93
No	14.5	16.0	8.6-	17.3	14.3	21.8
	100	110	59	119	98	150
Don't Know/Unsure/Refused	1.2	1.8	0.8	1.5	0.3	0
	100	145	68	126	23	0

Of those watching Spanish language TV:

Spanish Language Channels/Networks Watched During Past Week

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Univision or a Univison Station	84.7	82.8	86.2	85.7	89.5	83.2
	100	98	102	101	106	98
Telemundo or a Telemundo Station	79.5	80.2	77.8	78.6	72.8	90.3+
	100	101	98	99	92	114
Galavision	37.6	39.6	42.7	23.5-	38.3	38.1
	100	105	113	62	102	101
Gems	8.7	6.6	11.1	10.1	8.2	9.9
	100	76	128	116	95	115
HBO en Espanol	19.5	16.9	23.9	16.9	22.9	21.5
	100	86	122	87	117	110
Ole TV	4.2	0	0	26.8+	0	0
	100	0	0	637	0	0
Telenoticias	75.4	72.3	81.4+	71.4	76.4	79.6
	100	96	108	95	101	106
Canal Sur	10.9	6.1-	8.8	32.0+	7.9	4.6
	100	56	81	294	73	42
Viva Television Network	13.1	16.9+	12.8	8.0	5.0-	11.2
	100	129	98	61	38	85
MTV Latino	29.7	28.5	37.8+	21.0-	24.1	32.9
	100	96	127	71	81	110
Prime Ticket en Espanol	9.6	12.2	9.3	4.7-	6.8	8.3
	100	128	97	50	71	87
Showtime en Espanol	16.1	17.9	17.0	10.3	15.0	15.3
	100	112	106	64	93	95

Do you listen to the radio in English?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	60.7	60.6	63.4	55.0	62.4	60.1
	100	100	105	91	103	99
No	39.2	39.4	36.2	44.6	37.3	39.9
	100	101	93	114	95	102
Don't Know/Unsure/Refused	0.2	0	0.3	0.4	0.3	0
	100	0	186	252	164	0

Do you listen to the radio in Spanish?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	71.6	72.0	69.2	78.7+	62.9	74.3
	100	101	97	110	88	104
No	28.3	28.0	30.5	21.3-	36.8	25.7
	100	99	108	75	130	91
Don't Know/Unsure/Refused	0.1	0	0.3	0	0.3	0
	100	0	294	0	259	0

Do you read the newspaper in English?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	47.7	44.4	53.5+	39.3-	55.6	53.5
	100	93	112	82	116	112
No	52.3	55.6	46.5-	60.7+	44.2	46.5
	100	106	89	116	84	89
Don't Know/Unsure/Refused	0	0	0	0	0.3	0
	100	0	0	0	1152	0

Do you read the newspaper in Spanish?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	43.8	42.9	47.8	55.7+	23.4-	35.2
	100	98	109	127	53	80
No	55.4	55.9	51.2	44.3-	76.3+	64.8
	100	101	92	80	138	117
Don't Know/Unsure/Refused	0.8	1.2	1.0	0	0.3	0
	100	152	121	0	36	0

Do you read magazines in English?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	45.4	43.2	49.5	44.6	45.0	45.8
	100	95	109	98	99	101
No	54.5	56.8	50.5	55.1	54.7	54.2
	100	104	93	101	100	99
Don't Know/Unsure/Refused	0.1	0	0	0.3	0.3	0
	100	0	0	433	423	0

Do you read magazines in Spanish?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	41.0	37.4	46.2	49.8+	33.8	34.1
	100	91	113	121	83	83
No	58.6	62.6	52.7-	49.8-	65.9	65.5
	100	107	90	85	112	112
Don't Know/Unsure/Refused	0.4	0	1.0	0.4	0.3	0.4
	100	0	264	114	73	97

Incidence of Media Usage

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Incidence Of Media Usage										
Listen To Radio	92.1	91.4	92.2	92.1	95.7+	90.3	90.9	92.4	0	102
Listen To Radio - Eng	60.7	79.0+	64.9+	39.9-	47.1-	67.3+	82.3+	54.2-	0	66
Listen To Radio - Span	71.6	40.5-	72.2	87.9+	93.6+	60.9-	48.2-	78.6+	0	163
Watch TV	98.0	94.4-	98.4	99.3	100.0+	97.1	96.4	98.5	0	102
Watch TV In English	84.3	87.1	86.9	76.1-	79.3-	86.7	92.3+	81.9-	0	89
Watch TV In Span	81.7	51.2-	82.0	98.0+	99.6+	72.9-	56.1-	89.3+	0	159
Read Newspaper	72.5	74.8	74.9	65.3-	68.4	74.5	84.9+	68.8-	0	81
Read News In Eng	47.7	69.3+	54.1+	19.9-	31.1-	55.9+	80.1+	38.0-	0	47
Read News In Span	43.8	14.8-	44.8	57.7+	58.5+	36.6-	19.2-	51.2+	0	267
Read Magazine	68.1	82.6+	69.8	55.6-	64.9	69.6	85.5+	62.9-	0	74
Read Magazine - Eng	45.4	70.5+	49.5+	21.1-	28.6-	53.6+	77.0+	36.0-	0	47
Read Magazine - Span	41.0	27.0-	40.4	50.2+	55.1+	34.1-	25.8-	45.5+	0	177
Total English Media	88.1	93.3+	91.0+	78.0-	83.3-	90.4+	98.6+	84.9-	0	86
Total Spanish Media	89.8	66.3-	91.2	99.7+	100.0+	84.8-	72.3-	95.0+	0	131

Of those using each Media type:

Average Daily Hours of Media Usage

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Average Media Usage (Hours Per Day)										
Radio Hours	3.60	2.99	3.87	3.30	5.47	2.69	4.34	3.38	4.34	3.38
Radio Hours In English	1.71	2.11	1.90	1.03	1.40	1.87	3.03	1.32	3.03	1.32
Radio Hours In Spanish	1.89	0.88	1.97	2.26	4.07	0.82	1.30	2.06	1.30	2.06
TV Hours	4.52	3.58	4.70	4.61	6.59	3.51	4.36	4.57	4.36	4.57
TV Hours In English	1.93	2.34	2.11	1.27	1.77	2.01	2.91	1.64	2.91	1.64
TV Hours In Spanish	2.59	1.24	2.59	3.34	4.81	1.50	1.45	2.93	1.45	2.93
Newspaper Hours	0.73	0.57	0.82	0.59	0.87	0.66	0.79	0.71	0.79	0.71
News Hours In Eng	0.38	0.48	0.46	0.13	0.25	0.44	0.64	0.30	0.64	0.30
News Hours In Span	0.35	0.09	0.37	0.47	0.62	0.22	0.15	0.41	0.15	0.41
Magazine Hours	0.39	0.44	0.45	0.23	0.40	0.39	0.64	0.32	0.64	0.32
Magazine Hours - Eng	0.23	0.37	0.27	0.06	0.11	0.29	0.52	0.15	0.52	0.15
Magazine Hours - Span	0.16	0.07	0.18	0.16	0.30	0.10	0.12	0.17	0.12	0.17
Ttl Eng Media Hrs/Day	4.26	5.30	4.73	2.49	3.53	4.61	7.10	3.41	7.10	3.41
Ttl Span Media Hrs/Day	4.99	2.28	5.10	6.24	9.80	2.64	3.03	5.57	3.03	5.57

Do You Watch Television In Spanish?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Yes	81.7	51.2-	82.0	98.0+	99.6+	72.9-	56.1-	89.3+	0	159
No	18.3	48.6+	18.0	2.0-	0.4-	27.1+	43.8+	10.7-	0	24
Don't Know/Unsure/Ref	0	0.2	0	0	0	0	0.1	0	0	0

Do you watch television in English?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Yes	84.3	87.1	86.9	76.1-	79.3-	86.7	92.3+	81.9-	0	89
No	14.5	12.0	12.3	21.4+	19.2+	12.2	7.6-	16.6	0	218
Don't Know/Unsure/Ref	1.2	0.9	0.8	2.6+	1.5	1.1	0.1	1.6	0	1447

Of those watching Spanish language TV:

Spanish Language Channels/Networks Watched During Past Week

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Univision or Univ Sta	84.7	67.6-	86.1	86.9	89.1+	81.7-	76.4-	86.3	0	113
Telemundo or Tel Sta	79.5	57.8-	79.7	85.4+	78.4	80.2	72.7-	80.7	0	111
Galavision	37.6	37.6	36.9	39.2	38.6	37.0	48.9+	35.5	0	73
Gems	8.7	5.4	8.5	10.1	7.8	9.3	14.5+	7.6	0	52
HBO en Espanol	19.5	12.8	20.1	20.5	18.0	20.6	24.7	18.6	0	75
Ole TV	4.2	1.7	3.7	6.0	4.7	3.9	1.1	4.8	0	457
Telenoticias	75.4	71.2	75.2	77.2	78.6	73.3	74.3	75.6	0	102
Canal Sur	10.9	5.1	10.2	13.9	11.2	10.7	3.8-	12.2	0	324
Viva Television Ntwrk	13.1	16.5	12.0	14.2	13.0	13.1	17.3	12.3	0	71
MTV Latino	29.7	33.7	28.9	30.3	29.8	29.7	41.4+	27.6	0	67
Prime Ticket en Espanol	9.6	9.8	9.9	8.8	10.2	9.1	12.5	9.0	0	72
Showtime en Espanol	16.1	16.8	15.5	17.0	17.0	15.4	17.7	15.7	0	89

Do you listen to the radio in English?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Yes	60.7	79.0+	64.9+	39.9-	47.1-	67.3+	82.3+	54.2-	0	66
No	39.2	20.3-	35.0-	60.1+	52.7+	32.6-	17.6-	45.6+	0	259
Don't Know/Unsure/Ref	0.2	0.6	0.1	0	0.2	0.2	0.1	0.2	0	180

Do you listen to the radio in Spanish?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Yes	71.6	40.5-	72.2	87.9+	93.6+	60.9-	48.2-	78.6+	0	163
No	28.3	59.3+	27.7	12.1-	6.4-	38.9+	51.7+	21.2-	0	41
Don't Know/Unsure/Ref	0.1	0.2	0.1	0	0	0.2	0.1	0.1	0	103

Do you read the newspaper in English?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Yes	47.7	69.3+	54.1+	19.9-	31.1-	55.9+	80.1+	38.0-	0	47
No	52.3	30.6-	45.9-	80.1+	68.9+	44.1-	19.8-	62.0+	0	313
Don't Know/Unsure/Ref	0	0.2	0	0	0	0	0.1	0	0	0

Do you read the newspaper in Spanish?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Yes	43.8	14.8-	44.8	57.7+	58.5+	36.6-	19.2-	51.2+	0	267
No	55.4	85.0+	54.4	41.2-	40.0-	62.9+	80.7+	47.9-	0	59
Don't Know/Unsure/Ref	0.8	0.2	0.8	1.1	1.5	0.4	0.1	1.0	0	914

Do you read magazines in English?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Yes	45.4	70.5+	49.5+	21.1-	28.6-	53.6+	77.0+	36.0-	0	47
No	54.5	29.3-	50.5-	78.7+	71.4+	46.3-	22.9-	64.0+	0	279
Don't Know/Unsure/Ref	0.1	0.2	0	0.2	0	0.1	0.1	0.1	0	51

Do you read magazines in Spanish?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Yes	41.0	27.0-	40.4	50.2+	55.1+	34.1-	25.8-	45.5+	0	177
No	58.6	72.8+	59.0	49.8-	44.3-	65.6+	74.0+	54.0-	0	73
Don't Know/Unsure/Ref	0.4	0.2	0.6	0	0.6	0.3	0.2	0.4	0	187

VII.

PUBLIC OPINION

VII. PUBLIC OPINION

A. Introduction

Immigration, as it often has been in the past, is now a hot topic in the media and among politicians. It is especially hot in America's premier "gateway" cities and states, notably Los Angeles and California, New York City and New York, Miami and Florida, Chicago and Illinois, and Texas.

1990 FOREIGN-BORN POPULATION IN THE UNITED STATES

Country of Birth	Immigrants	Immigrants
Mexico	**4,298,014**	**26.3%**
Philippines	912,674	5.6%
Canada	744,830	4.6%
Cuba	**736,971**	**4.5%**
Germany	711,929	4.4%
United Kingdom	640,145	3.9%
Italy	580,592	3.6%
Korea	568,397	3.5%
Vietnam	543,262	3.3%
China	529,837	3.2%
El Salvador	**465,433**	**2.8%**
India	450,406	2.8%
Poland	388,328	2.4%
Dominican Republic	**347,858**	**2.1%**
Jamaica	334,140	2.0%
Former USSR	333,715	2.0%
Japan	290,128	1.8%
Colombia	**286,124**	**1.8%**
Taiwan	244,102	1.5%
Guatemala	**225,739**	**1.4%**
Haiti	225,393	1.4%
Iran	210,941	1.3%
Portugal	210,122	1.3%
Greece	177,398	1.1%
Laos	171,577	1.0%
Ireland	169,827	1.0%
Nicaragua	**168,659**	**1.0%**
Hong Kong	147,131	0.9%
Peru	**144,199**	**0.9%**
Ecuador	**143,314**	**0.9%**
Yugoslavia	141,516	0.9%
Guyana	120,698	0.7%
France	119,233	0.7%
Cambodia	118,833	0.7%
Trinidad and Tobago	115,710	0.7%
Hungary	110,337	0.7%
Honduras	**108,923**	**0.7%**
Thailand	106,919	0.7%
Latin American (Subtotal)	**6,925,234**	**42.4%**
TOTAL	16,343,354	100.0%

Source: U.S. Bureau of the Census, 1990.

"Immigrants" are defined generically, yet the fact is close to half of today's immigrants, defined by the U.S. Bureau of the Census as the "foreign-born" population residing the United States, are Hispanic. In 1990, Mexicans alone accounted for over one-quarter (26.3%) of the foreign-born populations of more than 100,000 persons in the U.S.

Such is the case that, especially in the gateway cities, when one speaks of "immigrants", one speaks of Latin Americans; of the 1990 foreign-born population in the U.S., 42.4% are from Latin America. If one adds those from countries in the Caribbean and South America which do not speak Spanish, the total comes to 7.7 million, or 47.2%. Furthermore, since Puerto Ricans are U.S. citizens and not counted as "foreign-born", adding the 3.4 million Puerto Ricans living on the mainland in 1990 would put the total over 55%. In other words, about one-half of the immigrants living in the U.S. in 1990 came from our own hemisphere, from a region collectively known as Latin America and the Caribbean.

That immigration is again a topic of debate and proposed legislation is not surprising given that it tends to come around during periods of economic uncertainty. As the U.S. moves toward a global economy while experiencing a spotty, regional and so-called "jobless" economic recovery, immigrants along with "free trade," have become a part of the perceived competition for scarce jobs and income. However, foreign-born immigrants accounted for only 7.9% of the total 1990 U.S. population -- in 1890, the foreign-born population in the U.S. accounted for 14.7% of the total population.

Nevertheless, many recent polls conducted by the media show that a majority of Americans believe that the U.S. is "losing ground" in the fight against illegal immigration, and that immigration in general is "out of control" and should be curbed.

B. Special Report On Immigration: Summary Of Findings

Our own poll of Hispanics and non-Hispanics in Los Angeles, New York, Miami, Chicago and San Francisco paints a similar picture, albeit with some very interesting contradictions and differences. On the following pages, we have graphically presented the findings of several survey questions on immigration and related issues. Here, we would like to briefly summarize those findings.

On the future flow of immigration, there is general agreement that:

The flow of immigrants should be reduced or "stay the same" ...

- By a ratio of 2.6:1, Hispanics say they would like to see the number of immigrants allowed to enter the United States decrease or "stay the same."
- On the same question, non-Hispanic whites say the same by a ratio of 6.7:1.

And over the next 5 years it will become more difficult to enter the U.S. both legally, and illegally ...

- 86% of Hispanics, 68% of non-Hispanic whites, and 64% of African Americans say that over the next five years, it will become "much" or "somewhat more difficult" to enter the United States *legally.*
- 87% of Hispanics, 68% of non-Hispanic whites, and 62% of African Americans say that over the next five years, it will become "much" or "somewhat more difficult" to enter the United States *illegally.*
- 73% of Hispanics, 59% of non-Hispanic whites, and 66% of African Americans say that over the next five years, deportations of illegal immigrants will increase "greatly" or "somewhat."

Yet respondents believe that ILLEGAL immigration will continue to INCREASE ...

- Over half of all Hispanics (58%), non-Hispanic whites (58%), and African Americans (65%) say that over the next five years, illegal immigration into the United States will increase.

Due to the perception that the U.S. cannot control its international borders ...

- About two-thirds or more of all Hispanics (64%), non-Hispanic whites (73%), and African Americans (64%) agree "totally" or "somewhat" that "today, it is fair to say that the U.S. cannot control its international borders."

Such a display of realism, on the part of Hispanics, whites and blacks in the U.S. underlies a basic disbelief that efforts to curb illegal immigration through the passage of legislation or laws will be effective. People in the U.S. realize and accept that it will be difficult to keep immigrants from entering the U.S.

Furthermore, there is general agreement that recent immigration from Latin America has benefited the U.S. economy:

Over the past 10 years, Latin American immigration has had a positive effect on the economy ...

- 57% of Hispanics, 40% of non-Hispanic whites, and 40% of African Americans say that immigration from Latin America has had a "very" or "somewhat positive" effect on the U.S. economy.
- Yet 26% of non-Hispanic whites and 27% of African Americans admit that they "don't know" or are "not sure" whether the effect of immigration from Latin America has been positive *or* negative.

At the same time, however, the populations surveyed exhibit general agreement toward recent changes in at least one U.S. policy to *curb* immigration, and toward the need to expel or punish those who break immigration laws:

Hispanics agree with the change in Cuban asylum status ...

- About two-thirds or more of Hispanics (61%), non-Hispanic whites (63%), and African Americans (52%) agreed "totally" or "somewhat" with ending Cubans' immigration status as "political exiles," forcing them to apply for standard immigrant visas.

Illegal aliens convicted of crimes should be deported, and counterfeiters of immigration documents should serve mandatory time ...

- Vast majorities (over 73%) of all three ethnic segments *favor* the immediate deportation of illegal aliens convicted of any felony crime in the U.S.
- Vast majorities (over 73%) either "totally" or "somewhat" agree that people caught producing, selling or distributing forged immigration or residency documents should receive mandatory jail sentences.

Lastly, the trend toward economic integration in the hemisphere capped by last year's Economic Summit held in Miami, has picked up some steam in the general population. In the five markets we surveyed, increased integration in the economic *and cultural spheres* will be the order of the day in years to come.

Majorities in all three populations surveyed FAVOR a hemispheric free trade agreement ...

- 70 percent of Hispanics, 64% of non-Hispanic whites and 52% of African Americans favor a hemispheric free trade agreement.

And "dual citizenship", where immigrants retain citizenship in their country of origin while seeking and obtaining U.S. citizenship, is an idea that is gaining currency ...

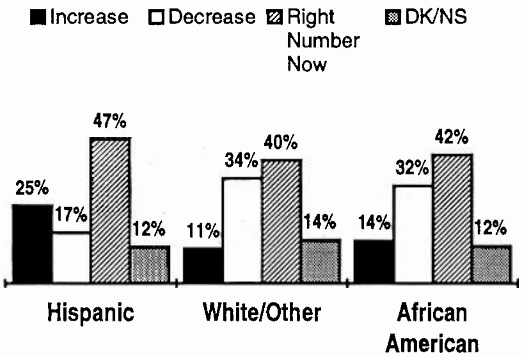
- 74 percent of Hispanic respondents agree "totally" or "somewhat" with allowing dual citizenship in the U.S. Surprisingly strong numbers for the white and black populations were recorded as well; 48% and 44%, respectively.

The following pages present the data to each immigration-related question in a graphical format. Each page shows the actual question text, and graphical analyses by ethnic segment (Hispanic, whites and African Americans), and for Hispanics 18 years old or more by: top 3 markets, acculturation segment, and place of birth.

Please note that many of the graphs do not sum to 100%; physical limitations on the amount of space required us to drop answer categories, or combine top-two box responses (e.g., adding those who responded "totally" to "somewhat" agree). To see the full cross tabulation, please refer to the survey tabulations at the end of the section.

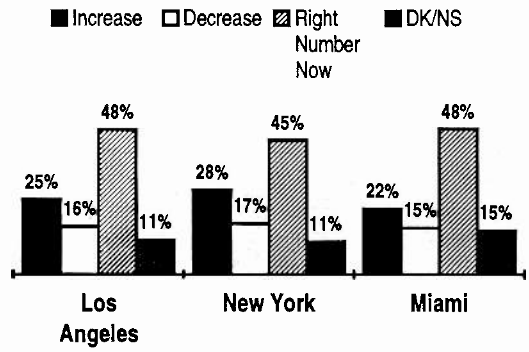
QUESTION: Overall, would you say you would like to see the number of immigrants allowed to enter the United States increase, decrease or do you think it's about the right number now?

By Ethnic Segment ...



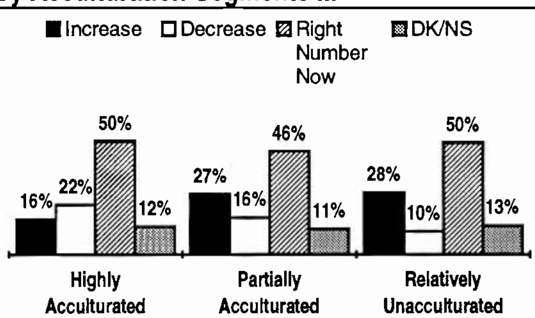
A higher proportion of Hispanics would like to see the number of immigrants allowed into the U.S. increase (25.3%), or feel that we are currently allowing "about the right number" in (47.4%). Meanwhile, over one-third of non-Hispanic Whites/Other feel that the number of immigrants allowed into the country should be decreased.

By Top 3 Hispanic Markets ...



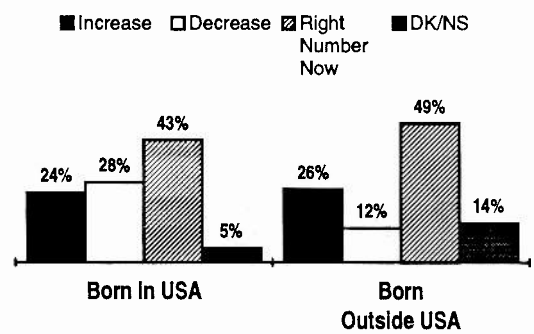
Across the three largest gateway cities, Hispanic opinion is remarkably consistent -- about 25% feel that the number of immigrants allowed to enter should be increased. Still, close to two-thirds would like to see the number stay the same or decrease.

By Acculturation Segments ...



Acculturation plays an important role in opinion on immigration -- 21.9% of Hispanics who are highly acculturated would like to see the number of immigrants allowed in decreased, as compared to only 10.1% of relatively unacculturated Hispanics. Even so, 50.2% of highly acculturated Hispanics feel the number of immigrants is "about the right number" now, as compared to 42.1% of African Americans and 40.3% of non-Hispanic Whites/Other.

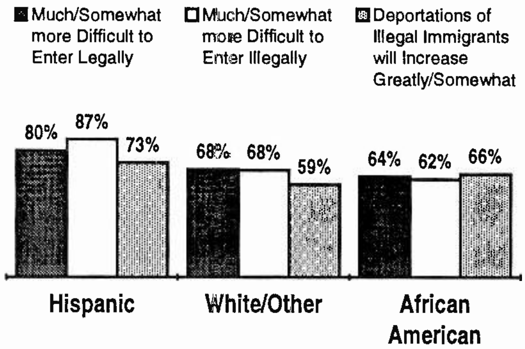
By Place of Birth ...



While 27.9% of those Hispanics born in the U.S. would like to see the number of immigrants admitted decreased, only 11.9% of those born outside the U.S. say the same. About 14% of those Hispanics born outside the U.S. claim they are "not sure" if immigration should increase, decrease or stay the same.

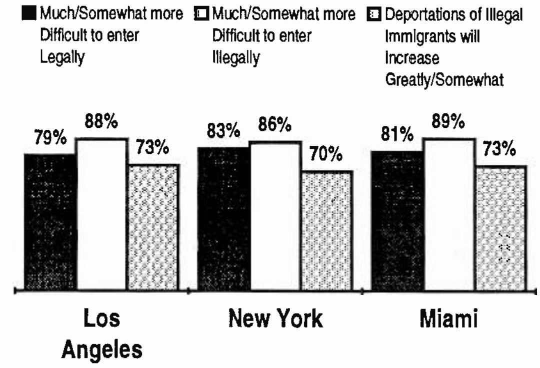
QUESTION: Over the next five years do you believe that it will become easier or more difficult to enter the United States legally? Illegally? Do you believe that deportations of illegal immigrants will increase or decrease?

By Ethnic Segment ...



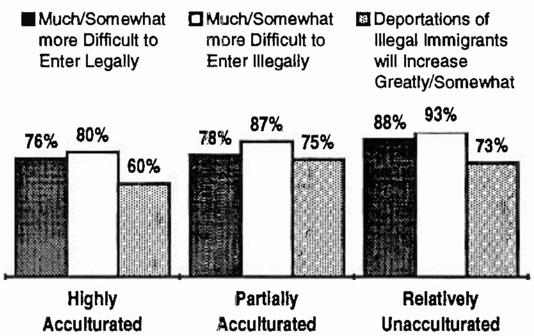
Close to three-quarters or more of all Hispanics believe that *both legal and illegal immigration will become "much" or "somewhat" more difficult*, and deportations of illegal immigrants will increase over the next five years. Two-thirds of Whites and African Americans agree, though not as strongly.

By Top 3 Hispanic Markets ...



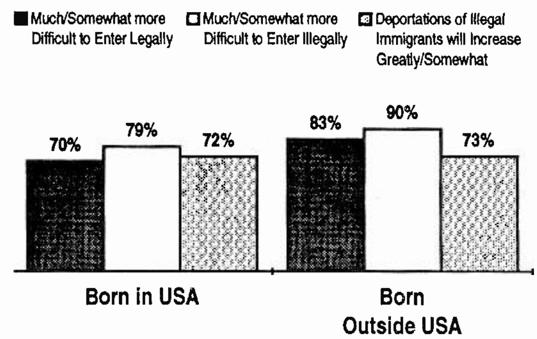
Across all three markets, Hispanics believe by a ratio of over 8:1 that illegal immigration will become more difficult over the next five years. They equally agree that legal immigration will become more difficult, and that deportations will increase. South Americans are most likely to believe that legal and illegal immigration will become "much" or "somewhat" more difficult (96.5% and 95.0%, respectively).

By Acculturation Segments ...



Highly acculturated Hispanics are less likely to believe that immigration will become more difficult or that deportations of illegals will increase. Fully 9 of every 10 relatively unacculturated Hispanics, however, believe that illegal immigration will become "much/somewhat" more difficult over the next five years.

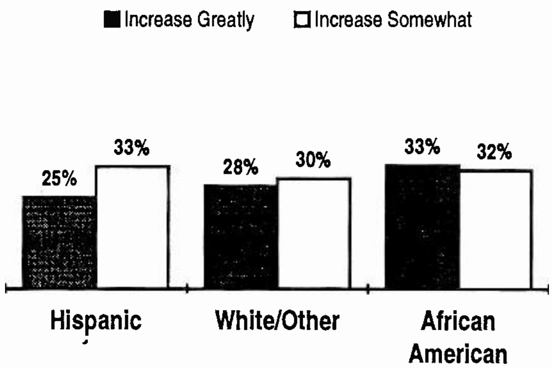
By Place of Birth ...



Place of birth influences immigration opinion as well; Hispanics born in the United States are somewhat less likely to believe that immigration will become more difficult, although 7 out of 10 do believe it will.

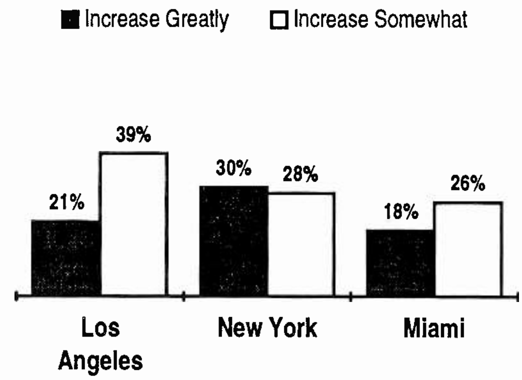
QUESTION: Over the next 5 years, do you believe that illegal immigration will increase or decrease?

By Ethnic Segment ...



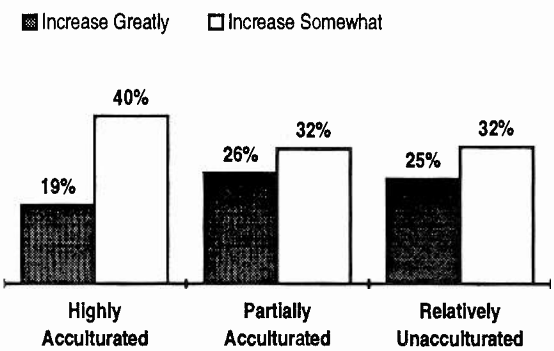
In spite of widespread agreement that illegal immigration will become much more difficult over the next five years, a plurality of all three ethnic groups surveyed see illegal immigration increasing "greatly" or "somewhat."

By Top 3 Hispanic Markets ...



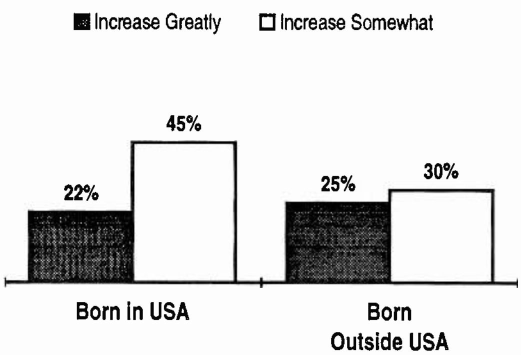
New York Hispanics are the most likely to believe that illegal immigration will increase greatly over the next five years. Miami Hispanics who recently witnessed a large group of Cuban rafters returned to Guantanamo bay, and Los Angeles Hispanics facing Proposition 187, are significantly less likely to believe that illegal immigration will increase "greatly." Being realistic, however, 40% in L.A. say illegal immigration will increase "somewhat."

By Hispanic Acculturation Segments ...



Highly acculturated Hispanics mirror Los Angeles in the view of illegal immigration. From this perspective, it appears that public opinion on illegal immigration has very important regional slants; to wit, partially acculturated and relatively unacculturated Hispanics equally believe illegal immigration will increase.

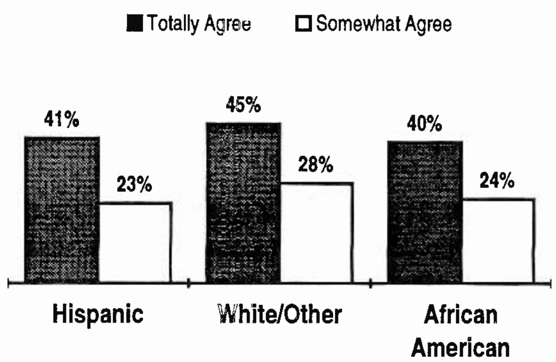
By Hispanic Place of Birth ...



Likewise, place of birth has little effect on whether one believes illegal immigration will increase greatly or somewhat.

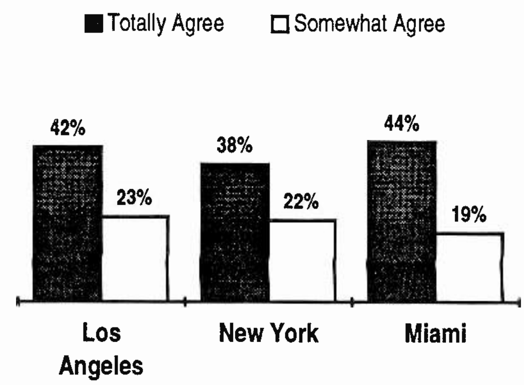
QUESTION: Today, it is fair to say that the United States cannot control its international borders. Do you agree or disagree with this statement?

By Ethnic Segment ...



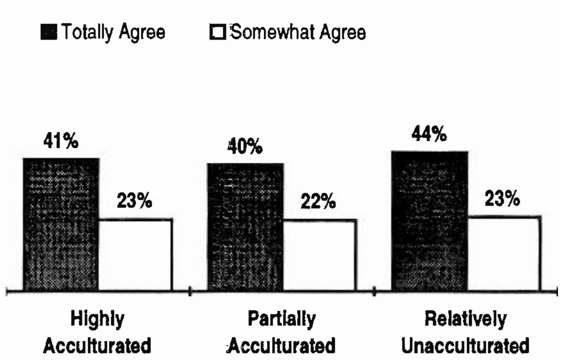
What accounts for the apparent contradiction in opinion on immigration, is the widespread belief that the U.S. cannot control its international borders. Over two-thirds of all three ethnic segments either totally agree or agree somewhat with this statement.

By Top 3 Hispanic Markets ...



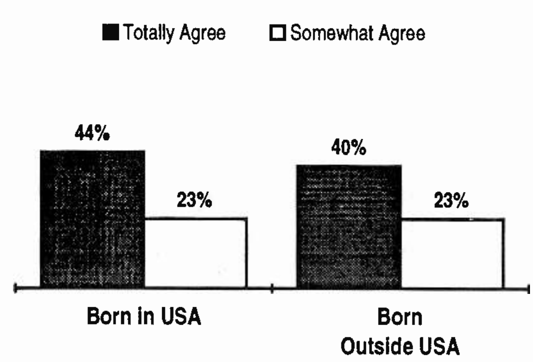
Unlike the issue of illegal immigration increasing or decreasing, Hispanics in the three top markets view the border control issue equally. Cubans, in general, view the Straits of Florida as somewhat more secure; still, 53.8% agree "totally" or "somewhat" that the borders cannot be controlled.

By Hispanic Acculturation Segments ...



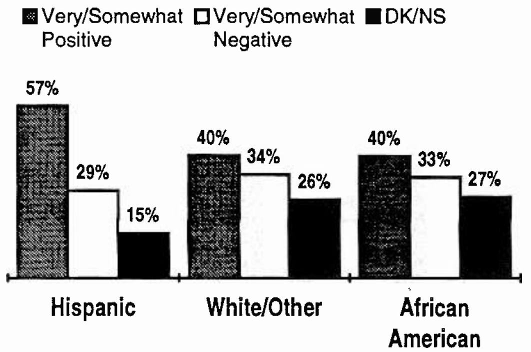
Furthermore, this is not an issue dependent upon level of acculturation, or place of birth; across the board, over 60% "totally" or "somewhat" agree.

By Hispanic Place of Birth ...



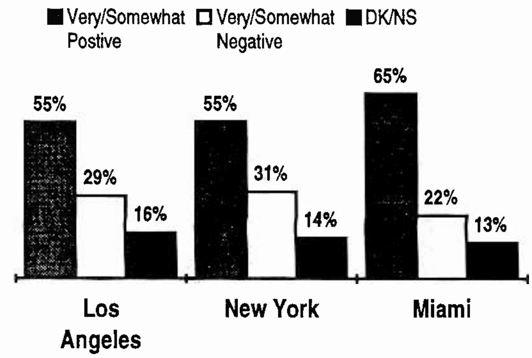
QUESTION: In general, do you believe that immigration from Latin America over the past 10 years has had a positive or negative effect on the U.S. economy?

By Ethnic Segment ...



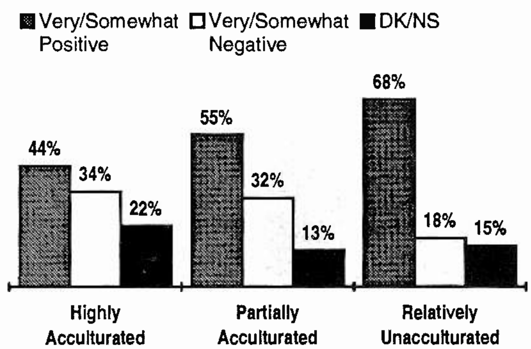
Given the fact that the current shift in attitudes toward immigration in the U.S. has been based upon the supposedly negative effect on the economy (increased job competition, low-skilled labor, etc.), it is interesting that one-out-of-four non-Hispanic Whites/Other and African Americans admit they "don't know" if the effects of Latin American immigration have been positive or negative.

By Top 3 Hispanic Markets ...



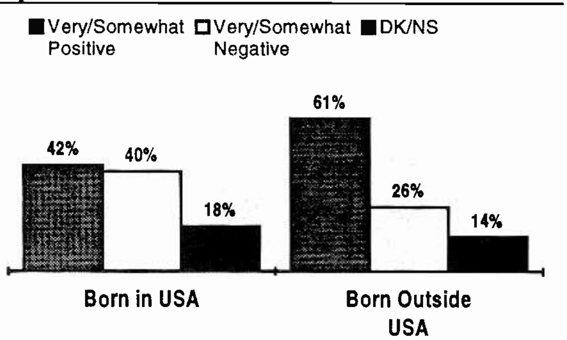
Hispanics, on the other hand, are unanimous in their agreement that the economic impact of Latin American immigration has been "very/somewhat" positive over the past ten years. Significantly more Miami Hispanics (64.9%) believe that the impact has been "very/somewhat" positive. Cubans feel most strongly, with 66.0% saying "very/somewhat" positive, and Puerto Ricans least strongly, with only 43.1% saying the same.

By Acculturation Segments ...



Relatively unacculturated Hispanics are significantly more likely to say the economic impact on the U.S. has been "very/somewhat" positive (67.8%) as compared to highly acculturated Hispanics (43.7%).

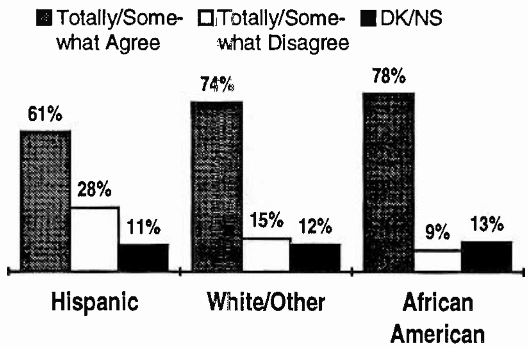
By Place of Birth ...



Likewise, 60.7% of Hispanics born outside the United States say immigration from Latin America over the past 10 years has had a "very/somewhat" positive effect on the U.S. economy.

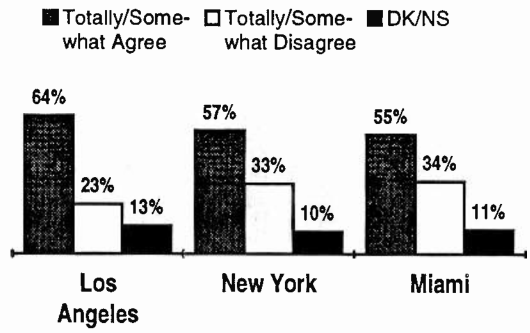
QUESTION: A recent change in U.S. Immigration policy has ended the political asylum status formerly granted to Cubans. As of now, Cubans must apply for an immigration visa as other immigrants do. Do you agree or disagree?

By Ethnic Segment ...



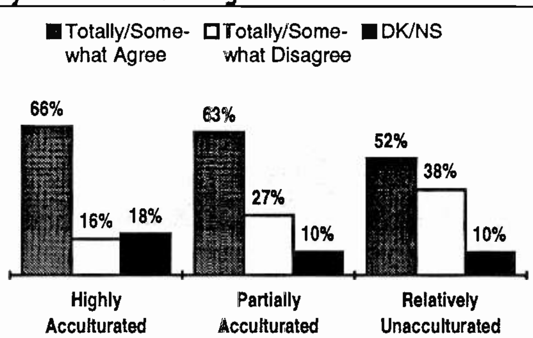
While whites and blacks are significantly more likely to totally/somewhat agree with the change in Cuban asylum status, it may come as a surprise that 61% of Hispanics also do.

By Top 3 Hispanic Markets ...



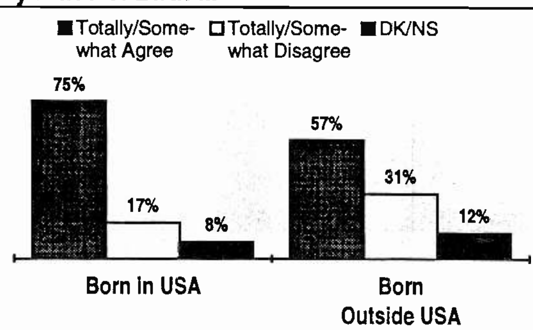
It should not come as a surprise that in Miami, Hispanics are significantly less likely to totally/somewhat agree with the change. Within the Cuban community, public opinion on the issue has polarized: 31.3% totally agree, and 43.6% totally disagree. Very few stand in the middle on this issue. Puerto Ricans, perhaps owing to a long-standing Caribbean rivalry, are most likely to support this change: 56.2% totally agree.

By Acculturation Segments ...



Both acculturation level and place of birth effect Hispanic public opinion on the Cuban asylum issue. Unacculturated Hispanics and those born outside the United States are significantly more likely to totally/somewhat disagree.

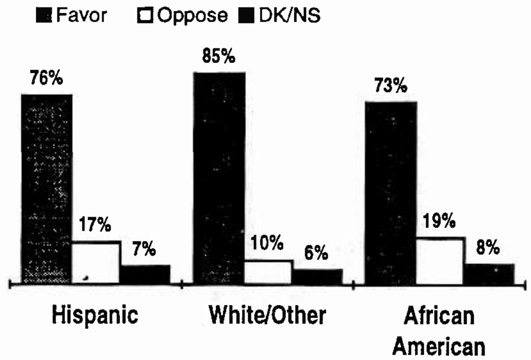
By Place of Birth ...



Three-quarters of those Hispanics born in the United States agree totally or somewhat that Cuban should have to apply for normal immigration visas; a proportion that mirrors the white and black segments of U.S. society in the five markets surveyed.

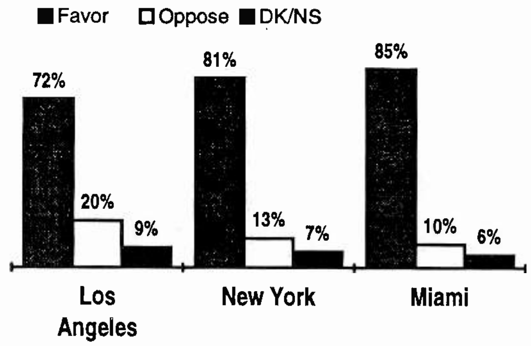
QUESTION: Illegal aliens residing in the United States should be immediately deported to their country of origin if convicted of a felony crime in the U.S. Do you favor or oppose?

By Ethnic Segment ...



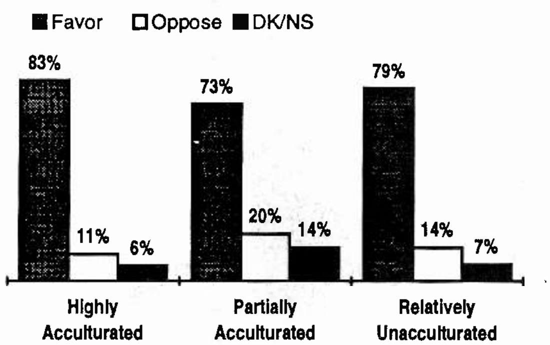
Following the "tough on crime" mood of the country today, a majority would favor immediate deportation of illegal immigrants convicted of felony crimes in the U.S. The non-Hispanic Whites/Other segment is strongest on this measure, with 85% favoring.

By Top 3 Hispanic Markets ...



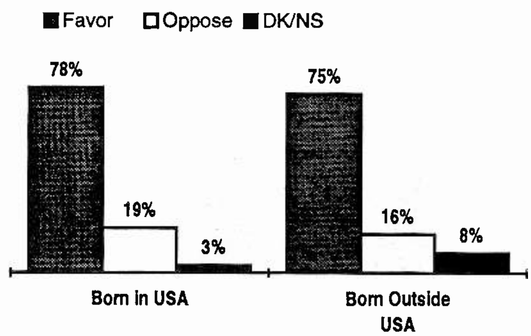
Across the top three markets, Hispanics in Miami are significantly more likely to favor deportation of convicted felonists (although one might wonder to where), than Hispanics are in Los Angeles; 20% in L.A. would oppose such a measure.

By Acculturation Segments ...



Again, this is an issue that Hispanics across the acculturation spectrum favor equally.

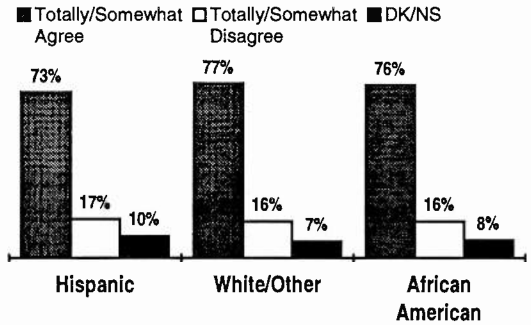
By Place of Birth ...



Place of birth also has little difference on opinions vis-à-vis deportation of illegal aliens convicted of a felony crime.

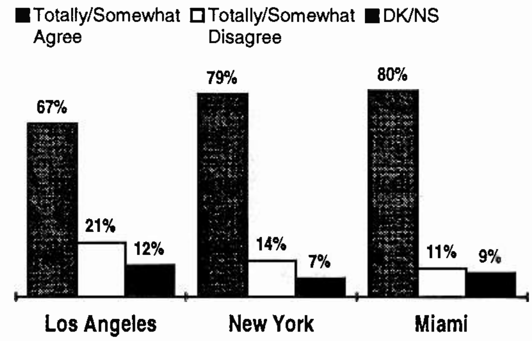
QUESTION: People caught producing, selling or distributing forged or counterfeit immigration or residency documents should receive mandatory jail sentences. Do you agree or disagree?

By Ethnic Segment ...



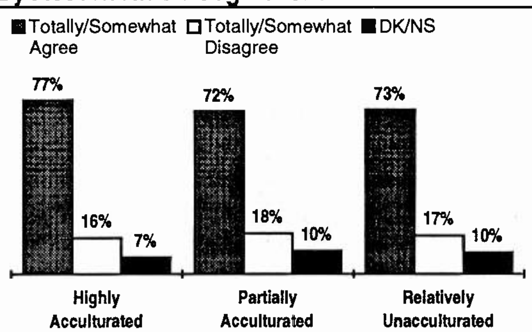
In a question that is hard to disagree with, over 73% of the survey populations agree "totally" or "somewhat" that persons caught forging immigration documents should receive mandatory jail sentences.

By Top 3 Hispanic Markets ...



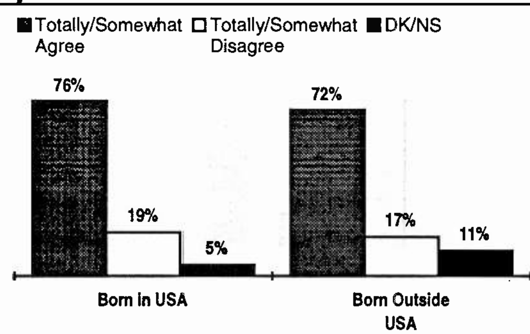
By Hispanic market, there is significantly stronger support for such a punitive measure in Miami and New York, than there is in Los Angeles. In fact, almost one-quarter of Hispanics in Los Angeles (21%) disagree "totally" or "somewhat." By ethnic group, Mexicans (69%) and Central Americans (60%) are least likely to agree with mandatory jail sentences for counterfeiters. Cubans (83%) and South Americans (84%) agree strongest.

By Acculturation Segments ...



Once again, we find that level of acculturation and place of birth have little effect on the results of such widely supported measures.

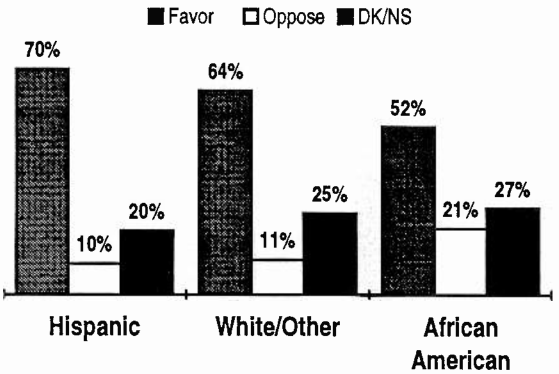
By Place of Birth ...



While unacculturated Hispanics and those born outside the United States tend to favor more lenient immigration restrictions into the US, they are just as likely to exhibit the "slam the door behind you" mentality of many immigrant groups in the U.S.

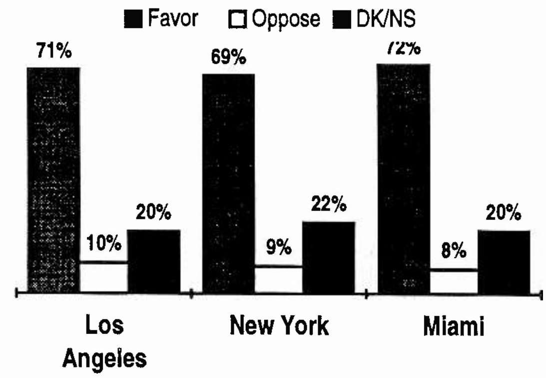
QUESTION: Do you favor or oppose a Hemispheric Free Trade Agreement for all of The Americas?

By Ethnic Segment ...



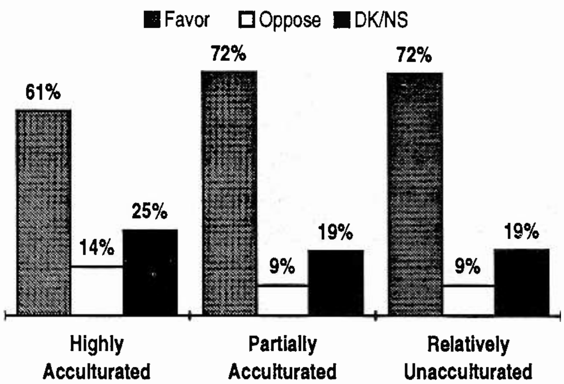
While support for a hemispheric free trade agreement is strongest among Hispanics, close to one-quarter of all three ethnic segments chose to ride the fence on this issue. Recent swings in public opinion against the NAFTA and the Mexico "bailout" after the peso crisis may account for this. Nevertheless, the plurality of widespread support for such a trade agreement bodes well for the future of the NAFTA, and the so-called "Miami Process" for hemispheric free trade.

By Top 3 Hispanic Markets ...



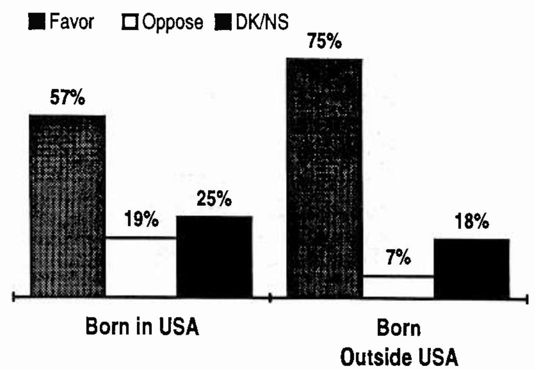
Hispanic support of hemispheric free trade is consistent across the top three US Hispanic markets.

By Hispanic Acculturation Segments ...



On this issue, acculturation level and place of birth have a more pronounced effect. About 60% of highly acculturated Hispanics favor hemispheric free trade -- a proportion that mirrors opinion among African Americans and non-Hispanic Whites/Other.

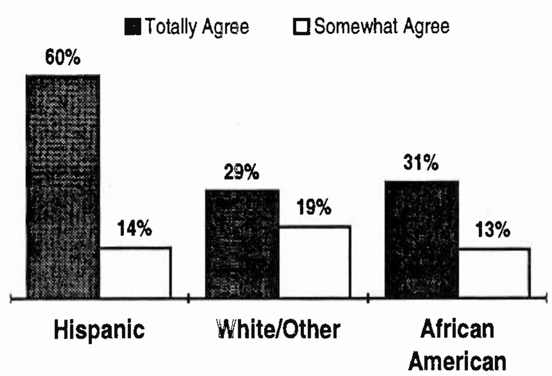
By Hispanic Place of Birth ...



Hispanics born in the United States share similar proportions to the black population. Almost 20% oppose a hemispheric free trade agreement, while 3 out of 4 Hispanics born outside the United States would favor and agreement.

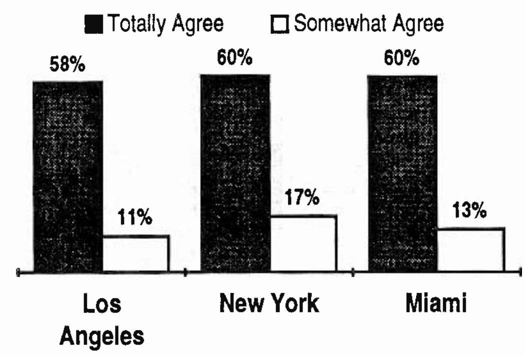
QUESTION: The U.S. should allow recent immigrants from Latin America to retain their citizenship in their country of origin while seeking and obtaining citizenship in the United States -- in effect, to have dual citizenship.

By Ethnic Segment ...



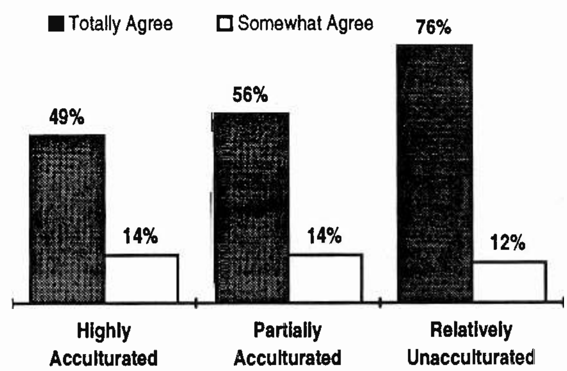
By segment, non-Hispanic Whites/Other and African Americans are significantly less likely to agree with the concept of dual citizenship for Latin immigrants. However, about one-half of each (48.2% for non-Hispanic Whites/Other, and 44.5% for African Americans) either agree totally or somewhat.

By Top 3 Hispanic Markets ...



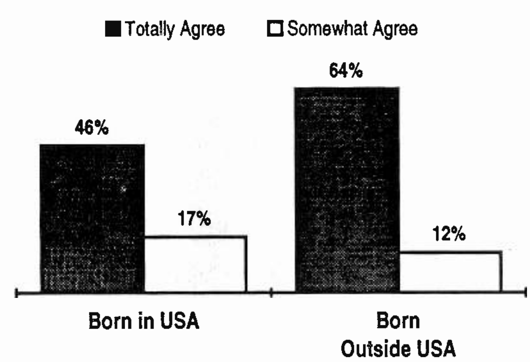
Between the top three markets, little difference is discernible -- a plurality either "totally" or "somewhat" agree that Latin American immigrants should be afforded the opportunity to retain citizenship in their country of origin. Currently, Colombia is the only Latin country which allows its citizens living abroad to retain their Colombian citizenship.

By Hispanic Acculturation Segments ...



Significantly fewer highly acculturated Hispanics in the U.S. totally agree with the concept of dual citizenship, as compared to relatively unacculturated Hispanics. In the next chart, a similar trend can be seen.

By Hispanic Place of Birth ...



Compared to Hispanics born inside the U.S., those born outside are more likely to totally agree with the concept of dual citizenship by a ratio of 1.4 to 1. A significantly higher proportion of Hispanics born in the U.S. "totally disagree" with dual citizenship (22.9%).

C. Lifestyles & Values

"The real America is a nation of consumer states, of communities defined less by their geography than by the passions of their populace." Arthur J. Weiss, author of **Latitudes & Attitudes: An Atlas of American Tastes, Trends, Politics and Passions**

The Hispanic community in the United States is clustered around five major markets, or "gateway" cities, and as such it is often defined by the geographical, ethnic and cultural mosaic of each city. Los Angeles' Hispanic community, for example, is often said to have different product preferences and usage patterns owing to the dominance of Mexicans than does Miami, whose Hispanic populace is largely Cuban, or New York, whose populace is largely Puerto Rican and Dominican. Yet, forgetting product usage for the moment, what are Hispanics' passions? Do their lifestyles and values differ greatly from Los Angeles to Miami? Does ethnicity and geography define their passions, or is it acculturation levels or their places of birth?

In this section we examine the lifestyles and values of Hispanics in the United States; specifically in the five gateway cities of Los Angeles, New York, Miami, San Francisco and Chicago.

For lifestyle, we asked each respondent if they had participated in the following activities in their leisure time during the past month:

- attended a movie at a theater
- watched TV
- rented a video
- gone out dancing
- gotten together with the whole family
- shopped at a mall
- worked out in a gym or health club
- played sports on a team

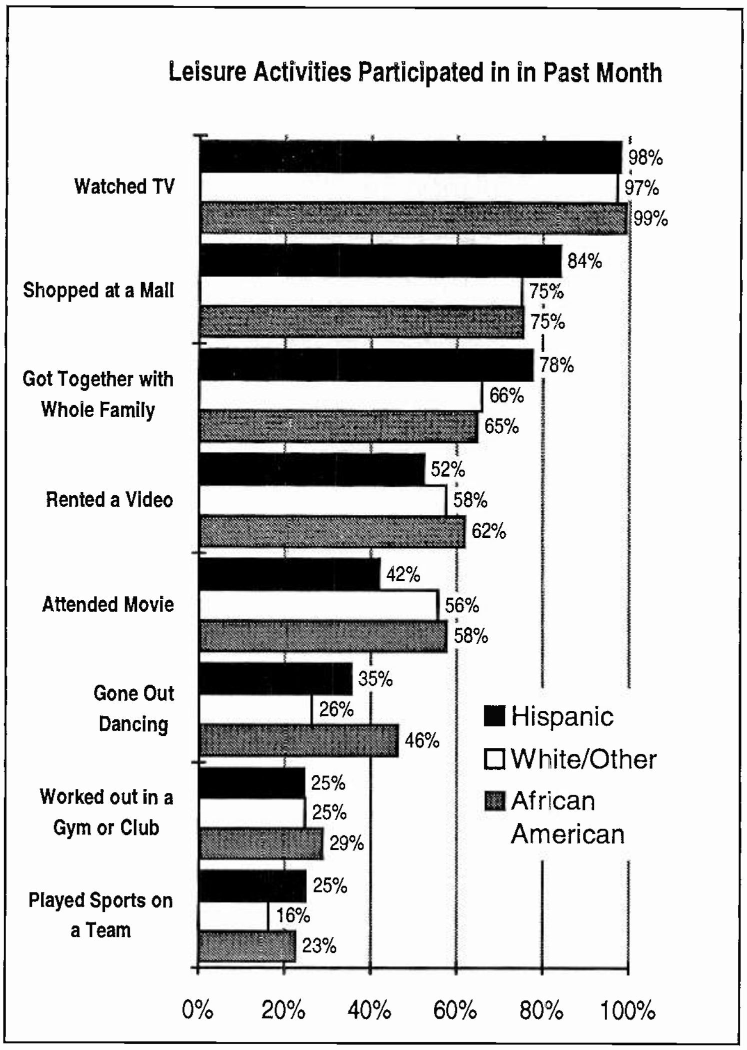
For values, we asked each respondent how important each of the following factors is for "getting ahead in life":

- getting a good education
- knowing the right people
- having successful parents
- working hard
- being talented

If you haven't considered the important clues the answers to these questions might provide you with for your targeted marketing and advertising campaigns, consider this; more than non-Hispanics, Hispanics are significantly more likely to have gotten together with the whole family over the past month and to believe that having successful parents and family is a very important determinant in "getting ahead in life."

Lifestyles by Ethnic Segment

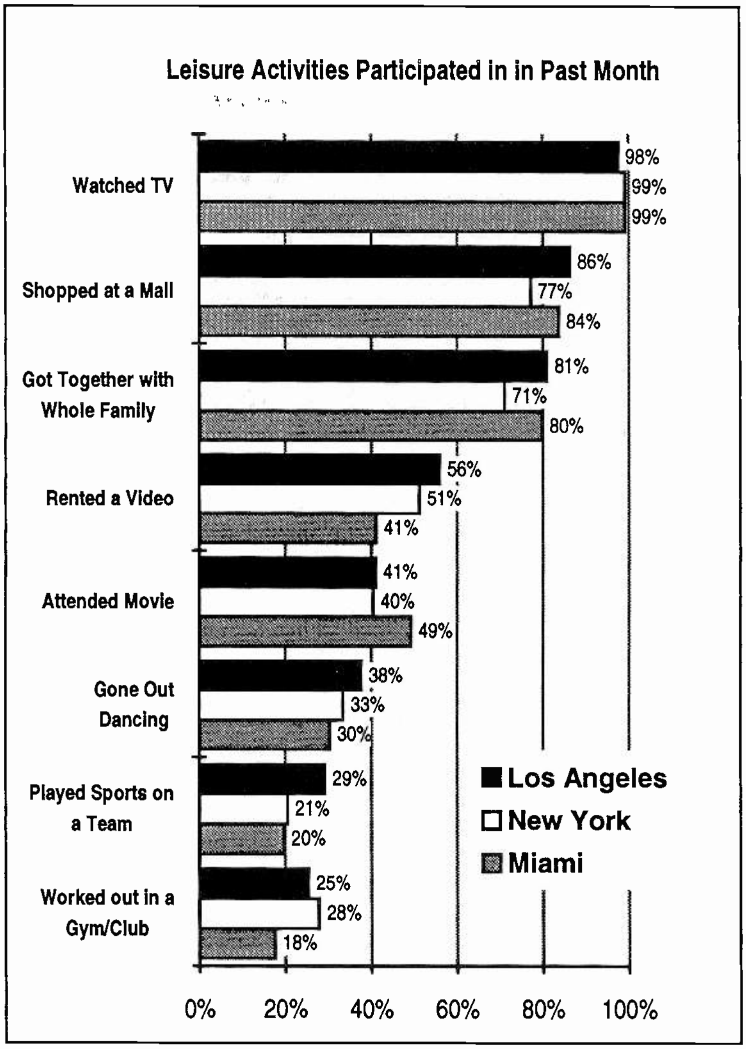
Looking at past month leisure activities by ethnic segment, some similarities and many differences stand out. For example, while virtually 100% of all three ethnic groups say they watched television over the past month, slightly fewer Whites/Other (non-Hispanic Whites/Other) (97%) watched television; it's only a small difference, but it did test as statistically significant.



Surely shopping at the mall is one of America's favorite pastimes, and 84% of Hispanics say they went "malling" as compared to 75% of both non-Hispanic Whites/Other and African Americans. Hispanics were also significantly more likely to have gotten together with the whole family over the past month. As for attending a movie at a theater, a significantly higher percentage of Whites/Others (56%) and African Americans (58%) went over the past month than did Hispanics (42%). African Americans were also significantly more likely to have rented a video (62%) than the other two segments. Hispanics and African Americans were significantly more likely to have gone out dancing and played sports on a team than were non-Hispanic Whites/Other.

Lifestyles By Top 3 Hispanic Markets

Across the top three Hispanic markets in the United States, Hispanics in Los Angeles are more likely to have; rented a video (56%), gone out dancing (38%) and played sports on a team (29%) than were Hispanics in either Miami or New York.

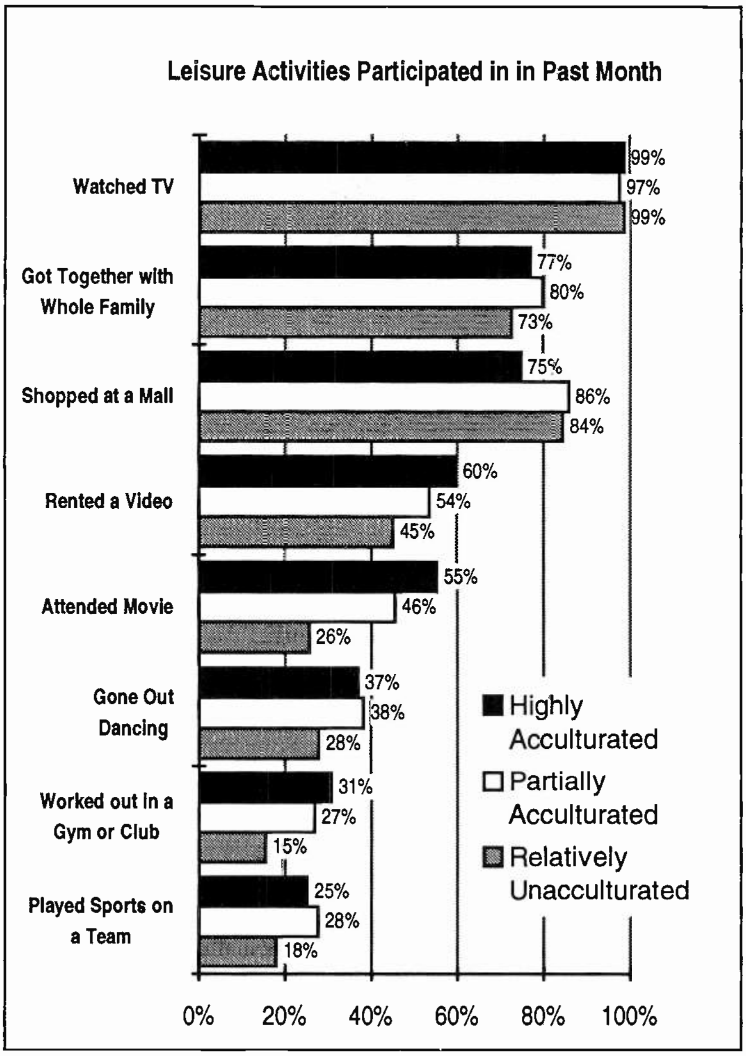


Hispanics in New York are significantly less like to have gotten together with the whole family (71%), or shopped at a mall (77%) -- most likely because they have to travel outside the boroughs to encounter one. New York Hispanics are however more likely to have worked out in a gym or health club in the past month (28%) than were Hispanics in Miami.

In Miami, a significantly higher proportion had attended a movie (49%), and were just as likely to have gotten together with the whole family as were Hispanics in Los Angeles (about 80%). Perhaps Hispanics in Miami are more likely to be outside on the beach, as significantly fewer had rented a video, or worked out in a gym or health club over the past month.

Lifestyles by Acculturation Segment

Outside of watching television and shopping at a mall, "relatively unacculturated" Hispanics participate in our list of activities in significantly lower proportions. Most importantly, their participation in other market-related leisure time activities pale in comparison to partially and highly acculturated Hispanics; only 45% have rented a video, a low of 26% attended a movie in a theater, 15% worked out in a gym or health club, and 28% went out dancing.

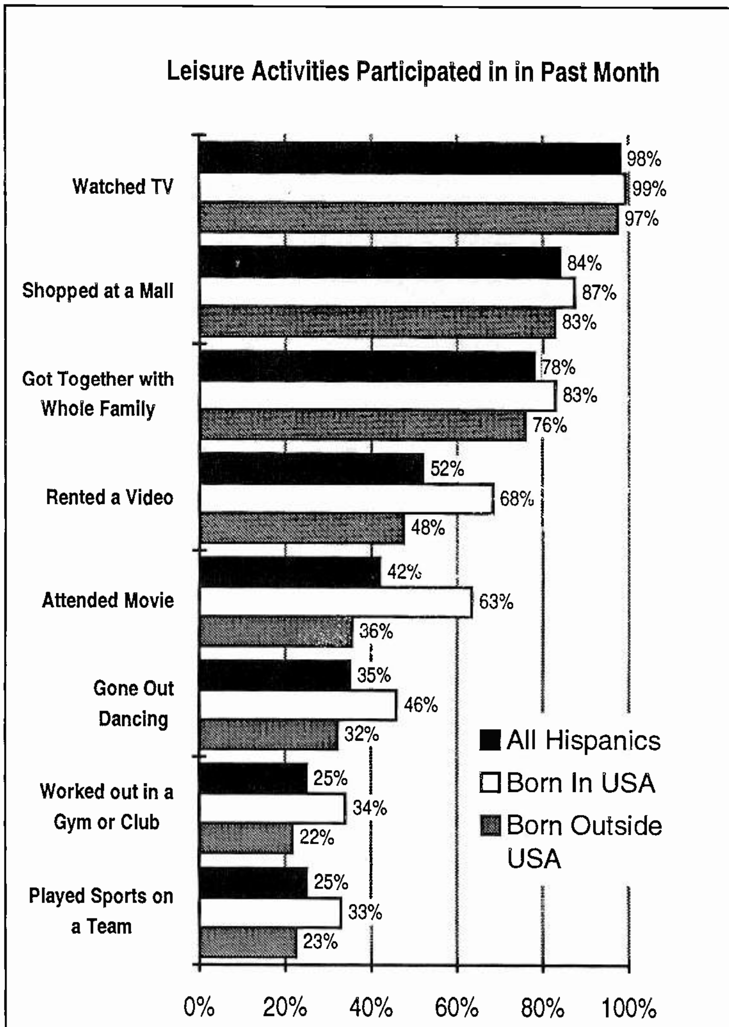


It would appear, upon first glance, that this market is simply not being served in Spanish. However, the problem is more complex. For example, more Spanish-dominant Hispanics attended a movie in the past month (33%) than did those who tally as relatively unacculturated (26%), so it is not strictly an issue of language.

Marketing messages which take level of acculturation into account must also be relevant to the target population. Movies, videos and health clubs would appear to be less relevant to unacculturated Hispanics. Television and shopping, on the other hand, are immediately relevant.

Lifestyles by Place of Birth

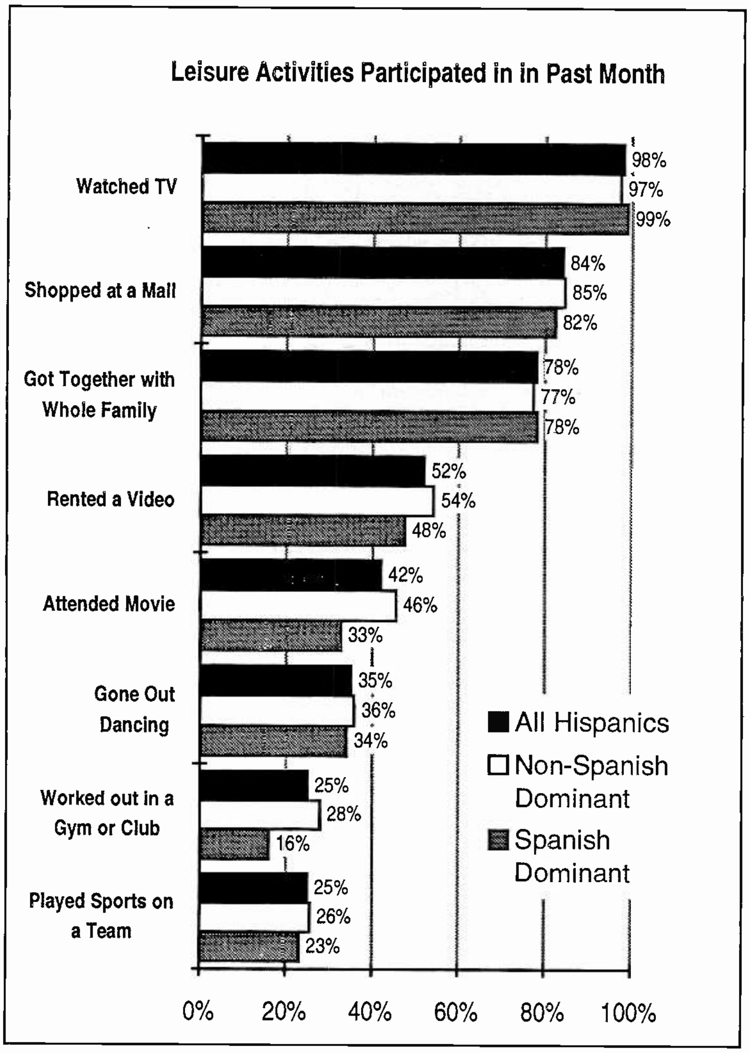
Acculturation differences are highlighted in this chart, which shows the same list of activities by place of birth. Hispanics born in the U.S. are more likely by half to be participating in several activities including; renting videos, attending movies, going out dancing, working out a health clubs, and playing sports on a team.



Watching television, shopping at malls, and getting together with the family appear to be activities in which participation does not diminish for Hispanics regardless of place of birth.

Lifestyles by Language Ability

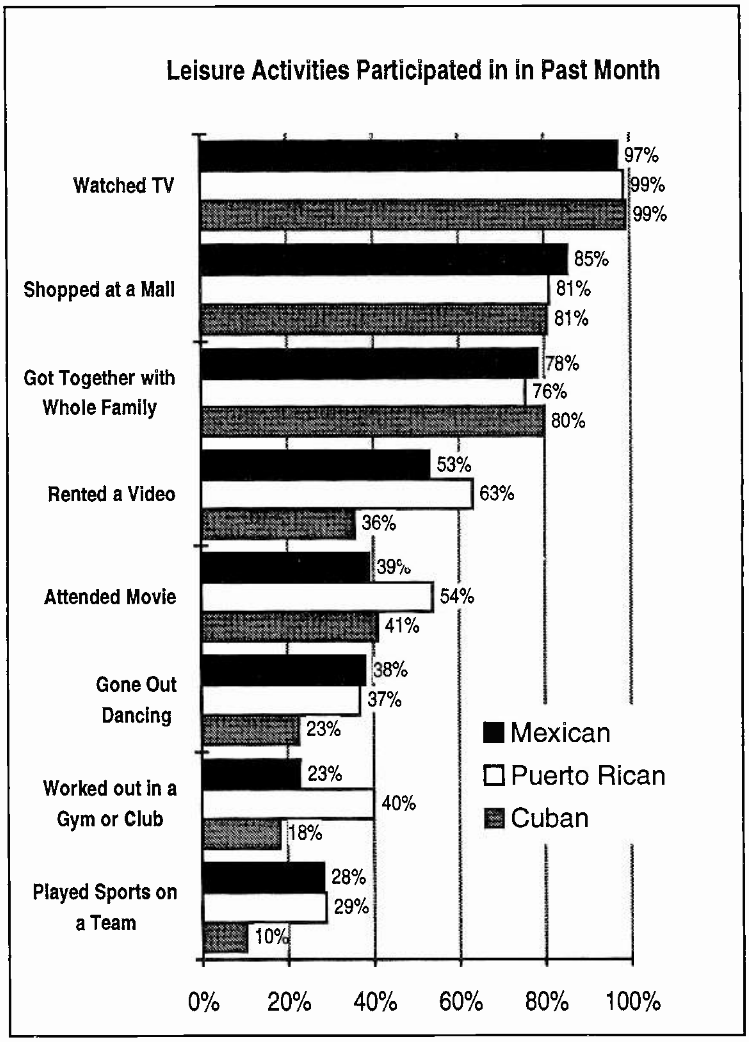
Language ability, defined as those Hispanics who are Spanish-dominant and those who are not, highlights the differences in lifestyle that we have already seen in the acculturation and place of birth analyses. The Spanish-language movie and video market, or lack of it, keeps many Spanish-dominant Hispanics at home watching television.



Otherwise Spanish-dominant Hispanics are just as likely to be shopping at malls, going out dancing, playing sports on a team and getting together with the whole family as Hispanics who are not Spanish-dominant.

Lifestyles by Three Major Ethnic Groups

As an ethnic group, Puerto Ricans are significantly more likely to have rented a video (63%), attended a movie (54%), and worked out at a gym or health club (40%) over the past month. While participation in leisure time activities by Mexicans closely mirrors that of the total Hispanic population in the five market survey area, Cubans are the least likely to have participated in several activities.

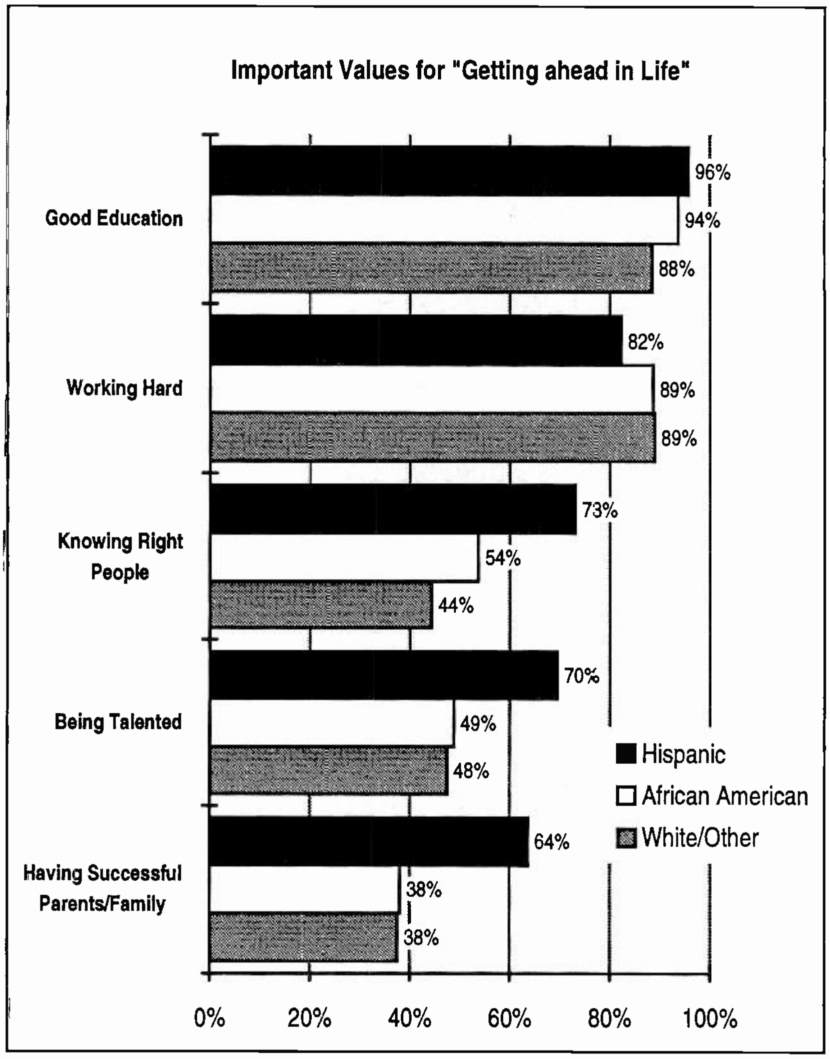


Only 36% have rented a video, for example, and 41% attended a movie. A low of 18% say they worked out in a gym, and only 10% played sports on a team. Miami's insular Spanish-language environment, where 60% of all Cubans are defined as Spanish-dominant, certainly plays a role in influencing their choice of leisure time activities.

Important Values for "Getting ahead in Life" by Ethnic Segment

Turning away from lifestyle to a series of values which may be considered important for "getting ahead in life," we can see many differences between the ethic segments. The following graphs depict the percentage of respondents who replied that the value - working hard, getting a good education, etc. - is "very" important for getting ahead in life.

Hispanics are significantly more likely to believe that all of the factors are important for getting ahead in life. While what are considered to be traditional U.S. values -- getting a good education and working hard -- are important to eight out of ten Hispanics or more, a plurality also feel that knowing the right people, having a successful family, and being talented are also very important.

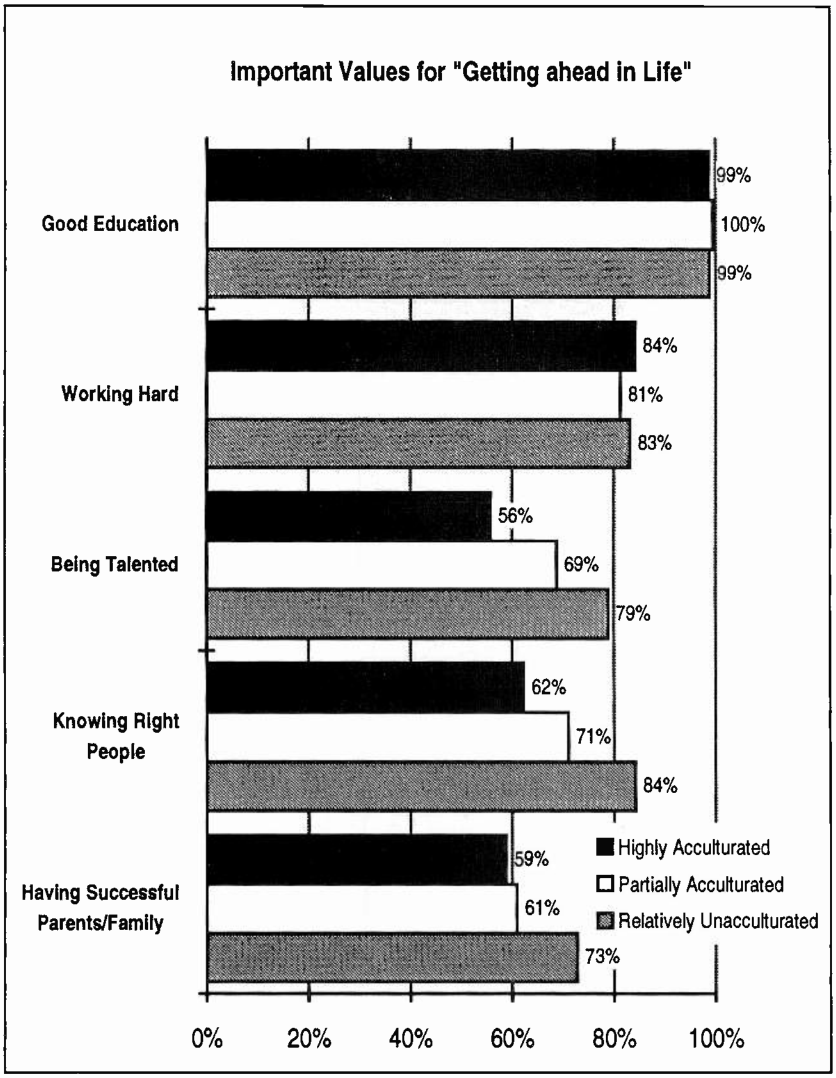


Non-Hispanic Whites/Others and African Americans, on the other hand, are much less likely to feel that talent, knowing the right people, or having a successful family is very important for getting ahead and being successful in the U.S.

Important Values for "Getting ahead in Life" by Acculturation Segment

The important values for getting ahead in life for all Hispanics in our five market sample are the same across the acculturation spectrum. This is an important finding on Hispanic culture in the United States, where Latinos are often described as one the first immigrant groups to strongly retain their cultural values in the face of assimilation.

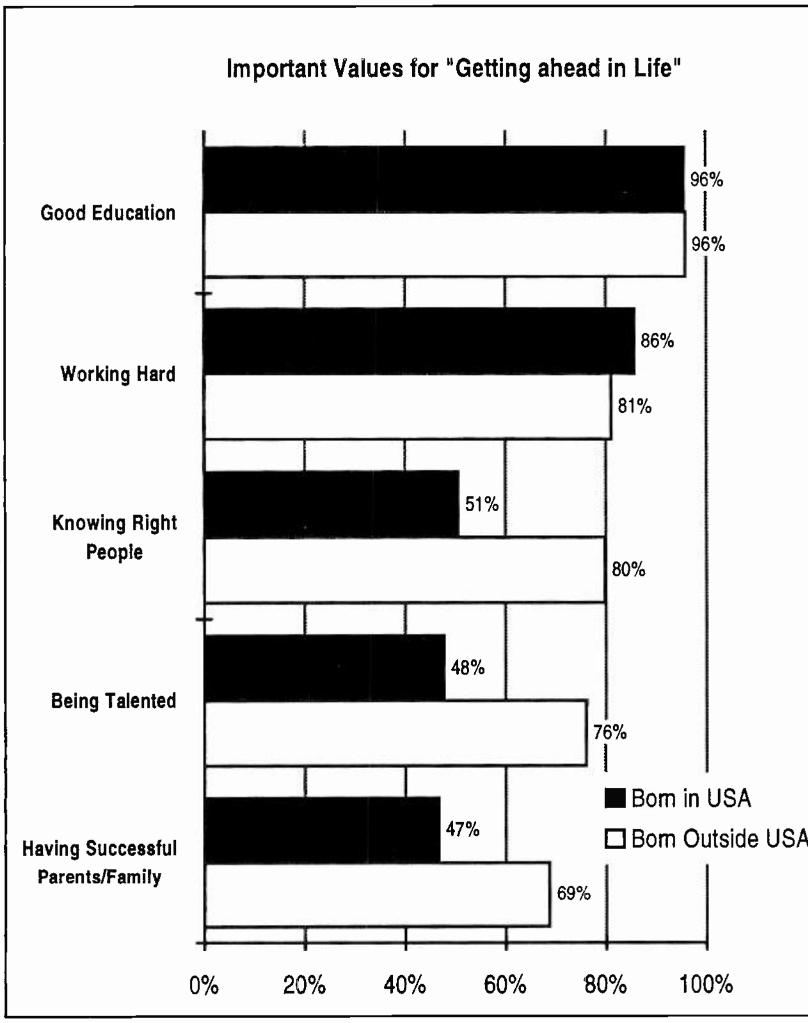
We can see in the graph below that, although talent, knowing the right people and having a successful family diminish slightly in importance for highly acculturated Hispanics, over 80% continue to believe that they are "very" important for getting ahead in life.



Highly acculturated Hispanics, while they have altered their value system in certain ways, still do not think exactly like non-Hispanics; while fewer believe that knowing the right people is very important for getting ahead in life (62%), it is still higher than the percentage of non-Hispanic Whites/Other (44%) and African Americans (54%) who say the same.

Important Values for "Getting ahead in Life" by Place of Birth

Place of birth has a stronger effect on the importance of values for Hispanics than their level of acculturation. The percentage of Hispanics born in the U.S. who say "very" important closely mirrors that of the non-Hispanic segments.



Fewer believe that knowing the right people is very important for getting ahead in life (51%), which is in line with the percentage of Whites/Others (44%) and African Americans (54%) who say the same. Talent and successful families are also perceived to be less important for Hispanics born in the U.S.

D. Survey Tabulations

The following tables show the tabulations used in the analysis of this section. The cross-tabulations shown are: Market, Ethnic Segment, Acculturation. All data shown this section pertain to Hispanic Adults 18 years of age or older.

On any given line, the first number is a percentage based on the total of all respondents in that column. Where a second figure appears, figure is an index on the total column. All tables shown have Chi-square significance testing at 95% confidence. The +/- indicate significance and direction against the expected value.

Overall would you say that you would like to see the number of immigrants allowed to enter the United States increase decrease or do you think it's about the right number now?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Increase	25.3	24.7	27.9	21.7	26.0	25.2
	100	98	111	86	103	100
Decrease	15.6	15.8	16.7	15.4	13.4	13.0
	100	101	107	99	86	83
Same As Now	47.4	48.1	44.6	48.4	50.0	47.9
	100	102	94	102	105	101
Don't Know/Refused	11.8	11.4	10.7	14.5	10.6	13.9
	100	97	91	123	90	118

Over the next 5 years do you believe that it will become easier or more difficult to enter the United States LEGALLY?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Top 2 Box (NET)	80.2	78.6	82.6	81.1	81.4	77.7
	100	98	103	101	102	97
Much More Difficult	51.1	49.4	53.3	52.7	51.2	50.2
	100	97	104	103	100	98
Somewhat More Difficult	29.1	29.2	29.3	28.3	30.2	27.5
	100	101	101	97	104	95
Somewhat Easier	7.3	6.5	7.6	7.0	6.1	12.1
	100	90	105	96	84	166
Much Easier	4.8	4.9	4.3	4.2	5.9	6.2
	100	101	90	88	122	128
Don't Know/Refused	7.7	10.0	5.5	7.7	6.6	4.0
	100	129	71	100	85	52

Over the next 5 years do you believe that it will become easier or more difficult to enter the United States ILLEGALLY?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Top 2 Box (NET)	87.4	88.2	86.4	88.6	86.0	85.1
	100	101	99	101	98	97
Much More Difficult	61.0	59.8	57.4	71.5+	65.0	56.2
	100	98	94	117	107	92
Somewhat More Difficult	26.3	28.4	29.1	17.1-	21.0	28.9
	100	108	110	65	80	110
Somewhat Easier	3.5	1.0-	7.1+	2.3	4.8	5.5
	100	29	205	65	138	157
Much Easier	2.7	3.1	2.6	0.7	2.9	4.7
	100	115	94	25	107	173
Don't Know/Refused	6.4	7.7	3.9	8.4	6.2	4.7
	100	119	60	131	97	73

Over the next 5 years do you believe that deportations of illegal immigrants will increase or decrease?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Top 2 Box (NET)	72.6	73.1	69.6	72.8	77.0	74.5
	100	101	96	100	106	103
Increase Greatly	38.8	35.2	39.8	43.9	41.1	43.4
	100	91	103	113	106	112
Increase Somewhat	33.8	37.9	29.9	28.9	35.8	31.1
	100	112	88	86	106	92
Decrease Somewhat	11.7	12.1	13.9	7.9	10.3	11.2
	100	103	119	67	88	95
Decrease Greatly	5.7	4.7	7.7	5.9	3.7	6.1
	100	83	135	104	66	107
Don't Know/Refused	10.0	10.1	8.8	13.4	9.0	8.2
	100	101	88	134	90	82

Over the next 5 years do you believe that illegal immigration will increase or decrease?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Top 2 Box (NET)	57.8	59.6	58.2	43.8-	60.6	70.2+
	100	103	101	76	105	121
Increase Greatly	24.7	20.5-	29.9+	18.0-	28.5	38.6+
	100	83	121	73	115	156
Increase Somewhat	33.1	39.1+	28.3	25.8-	32.1	31.5
	100	118	85	78	97	95
Decrease Somewhat	20.0	17.6	22.1	23.2	21.8	17.4
	100	88	111	116	109	87
Decrease Greatly	12.4	9.7	14.3	22.7+	8.1	6.7
	100	78	115	183	65	54
Don't Know/Refused	9.8	13.0+	5.5-	10.3	9.5	5.7
	100	133	56	105	97	58

Today it is fair to say that the United States cannot control its international borders?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Top 2 Box (NET)	63.4	65.6	60.1	62.8	64.8	62.2
	100	103	95	99	102	98
Totally Agree	40.8	42.3	37.7	43.8	38.5	40.1
	100	104	92	107	94	98
Somewhat Agree	22.6	23.3	22.4	19.0	26.4	22.2
	100	103	99	84	117	98

Somewhat Disagree	14.6	15.4	15.3	12.0	12.5	14.6
	100	106	105	82	86	100
Totally Disagree	14.0	11.9	15.4	14.4	17.4	16.9
	100	85	110	102	124	120
Don't Know/Refused	7.9	7.1	9.1	10.8	5.2	6.4
	100	89	115	136	65	80

In general, do you believe that immigration from Latin America over thepast 10 years has had a positive or negative effect on the U.S. economy?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Top 2 Box (NET)	56.5	54.8	55.1	64.9+	58.7	52.3
	100	97	97	115	104	93
Very Positive	31.2	31.7	26.3	38.8+	37.0	24.5
	100	102	84	124	119	78
Somewhat Positive	25.3	23.1	28.8	26.1	21.6	27.9
	100	91	114	103	86	110
Somewhat Negative	15.8	14.8	18.8	9.8-	17.7	20.1
	100	94	119	62	112	127
Very Negative	13.1	14.1	11.7	12.5	10.5	15.5
	100	108	90	96	81	118
Don't Know/Refused	14.7	16.2	14.4	12.8	13.1	12.1
	100	111	98	87	89	82

A recent change in U.S. immigration policy has ended the political asylum status formerly granted to Cubans. As of now Cubans must apply for an immigration visa as other immigrants do. Do you Agree or Disagree?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Top 2 Box (NET)	60.7	63.9	57.1	55.1	65.0	60.3
	100	105	94	91	107	99
Totally Agree	44.0	46.2	42.1	42.1	45.9	39.4
	100	105	96	96	104	90
Somewhat Agree	16.7	17.7	15.0	13.0	19.1	20.9
	100	106	90	78	115	126
Somewhat Disagree	8.5	8.3	9.2	4.3-	9.3	13.9
	100	98	109	50	110	164
Totally Disagree	19.5	14.7-	23.3	29.4+	16.6	17.6
	100	75	119	151	85	90
Don't Know/Refused	11.4	13.1	10.4	11.2	9.1	8.2
	100	115	91	98	80	72

Illegal Aliens residing in the United States should be immediately deported to their country of origin if convicted of a felony crime in the United States?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Favor	75.9	71.6-	80.7+	84.5+	72.0	71.5
	100	94	106	111	95	94
Opposed	16.9	19.9	12.5-	10.0-	23.3	21.4
	100	118	74	59	138	127
Don't Know/Unsure	7.2	8.5	6.8	5.5	4.7	7.1
	100	119	95	76	65	99

People caught producing, selling, or distributing forged or counterfeit immigration or residency documents should receive mandatory jail sentences.

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Top 2 Box (NET)	72.7	67.0-	78.5+	79.9+	68.6	75.8
	100	92	108	110	94	104
Totally Agree	57.4	52.8-	61.5	70.0+	48.8	54.1
	100	92	107	122	85	94
Somewhat Agree	15.3	14.1	17.0	9.9-	19.8	21.7
	100	92	111	65	129	142
Somewhat Disagree	10.2	14.7+	6.7-	3.4-	11.7	8.5
	100	144	66	33	115	83
Totally Disagree	7.5	6.1	7.6	7.4	12.4	8.9
	100	82	102	99	166	120
Don't Know/Refused	9.6	12.2	7.2	9.3	7.3	6.8
	100	127	75	97	76	71

The United States should allow recent immigrants from Latin America to retain their citizenship in their country of origin while seeking and obtaining citizenship in the United States - in effect to have dual citizenship.

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Top 2 Box (NET)	73.3	69.5	77.7	73.4	79.8	72.0
	100	95	106	100	109	98
Totally Agree	59.7	58.4	60.4	60.2	63.2	60.0
	100	98	101	101	106	100
Somewhat Agree	13.6	11.1	17.3	13.2	16.6	12.0
	100	82	128	97	122	89

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Somewhat Disagree	8.2	11.4+	6.6	4.9	1.9-	9.2
	100	139	80	60	23	112
Totally Disagree	12.1	13.7	9.0	11.7	14.0	13.1
	100	113	74	97	115	108
Don't Know/Refused	6.4	5.4	6.7	10.0	4.4	5.7
	100	85	106	157	69	90

Do you Favor or Oppose a Hemispheric Free Trade Agreement for all of the Americas?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Favor	70.4	70.7	68.9	72.2	72.8	67.5
	100	100	98	103	103	96
Opposed	9.7	9.7	8.7	7.8	11.3	14.2
	100	101	90	81	117	146
Don't Know/Unsure	19.9	19.6	22.4	19.9	15.9	18.3
	100	98	112	100	80	92

Have you watched TV in the past month?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	97.8	97.6	99.1	99.1	94.2-	96.6
	100	100	101	101	96	99
No	2.2	2.4	0.9	0.9	5.8+	3.4
	100	111	42	43	266	158
Don't Know/Unsure/Refused	0	0	0	0	0	0
	0	0	0	0	0	0

Have you shopped at a mall in the past month?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	83.9	86.3	77.2-	83.7	84.6	92.7+
	100	103	92	100	101	111
No	16.1	13.7	22.8+	16.3	15.4	7.3-
	100	85	141	101	95	45
Don't Know/Unsure/Refused	0	0	0	0	0	0
	0	0	0	0	0	0

Have you got together with the whole family in the past month?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	77.5	80.9	71.1-	79.8	73.0	81.0
	100	104	92	103	94	105
No	22.5	19.1	28.9+	20.2	27.0	19.0
	100	85	128	90	120	84
Don't Know/Unsure/Refused	0	0	0	0	0	0
	0	0	0	0	0	0

Have you rented a (video) movie in the past month?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	52.3	55.9	51.2	41.2-	56.6	51.8
	100	107	98	79	108	99
No	47.7	44.1	48.8	58.8+	43.4	48.2
	100	92	102	123	91	101
Don't Know/Unsure/Refused	0	0	0	0	0	0
	0	0	0	0	0	0

Have you attended a movie at a theater in the past month?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	41.9	41.0	40.4	49.2	41.4	39.5
	100	98	96	117	99	94
No	58.1	59.0	59.6	50.8	58.6	60.5
	100	102	103	88	101	104
Don't Know/Unsure/Refused	0	0	0	0	0	0
	0	0	0	0	0	0

Have you gone out dancing in the past month?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	35.4	37.6	33.4	30.3	36.1	38.3
	100	106	94	86	102	108
No	64.6	62.4	66.6	69.7	63.9	61.7
	100	97	103	108	99	95
Don't Know/Unsure/Refused	0	0	0	0	0	0
	0	0	0	0	0	0

Have you worked out in a gym or health club in the past month?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	24.5	25.4	27.8	17.5-	21.9	25.0
	100	104	113	71	89	102
No	75.4	74.6	72.2	82.5+	77.5	75.0
	100	99	96	109	103	99
Don't Know/Unsure/Refused	0.1	0	0	0	0.6+	0
	100	0	0	0	1152	0

Have you played sports on a team (Softball, Baseball, Football,Soccer etc) in the past month?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	24.9	29.2+	20.5	19.6	22.7	28.6
	100	117	82	79	91	115
No	75.1	70.8-	79.5	80.4	77.3	70.9
	100	94	106	107	103	94
Don't Know/Unsure/Refused	0	0	0	0	0	0.6+
	100	0	0	0	0	1298

Importance Of Getting A Good Education To Get Ahead In Life

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Top 2 Box (NET)	99.2	100.0+	97.4-	100.0	99.3	99.0
	100	101	98	101	100	100
Very Important	95.7	96.1	95.4	95.9	94.4	95.7
	100	100	100	100	99	100
Somewhat Important	3.5	3.9	2.0	4.1	4.9	3.3
	100	112	58	120	143	95
Not Very Important	0.6	0	2.2+	0	0.4	0.6
	100	0	332	0	61	94
Not Important At All	0	0	0	0	0	0
	0	0	0	0	0	0
Don't Know/Refused	0.2	0	0.4	0	0.3	0.4
	100	0	252	0	174	239

Importance Of Working Hard To Get Ahead In Life

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Top 2 Box (NET)	97.4	97.4	97.8	98.1	96.3	95.5
	100	100	100	101	99	98
Very Important	82.2	80.9	83.6	87.2	78.4	78.7
	100	99	102	106	95	96
Somewhat Important	15.2	16.5	14.2	10.9	17.9	16.9
	100	108	93	72	118	111
Not Very Important	2.2	2.6	0.9	1.9	3.4	4.5
	100	114	41	84	151	198
Not Important At All	0.1	0	0.3	0	0	0
	100	0	379	0	0	0
Don't Know/Refused	0.3	0	0.9+	0	0.3	0
	100	0	344	0	108	0

Importance Of Knowing The Right People To Get Ahead In Life

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Top 2 Box (NET)	93.3	89.9-	95.5	96.2	93.9	97.5
	100	96	102	103	101	105
Very Important	73.1	72.7	73.2	78.2	70.8	67.5
	100	100	100	107	97	92
Somewhat Important	20.2	17.2	22.3	18.0	23.1	30.0+
	100	85	111	89	115	149
Not Very Important	5.0	8.2+	2.8	2.7	3.1	1.5
	100	163	56	54	61.	31
Not Important At All	1.1	1.6	0.8	0	1.3	1.0
	100	145	77	0	121	93
Don't Know/Refused	0.7	0.4	0.8	1.1	1.7	0
	100	52	122	163	252	0

Importance Of Being Talented To Get Ahead In Life

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Top 2 Box (NET)	92.3	89.7-	93.8	95.1	93.2	95.2
	100	97	102	103	101	103
Very Important	69.5	67.7	70.8	73.5	65.7	71.2
	100	97	102	106	95	103
Somewhat Important	22.8	22.0	23.0	21.6	27.5	24.0
	100	96	101	95	120	105
Not Very Important	6.2	8.8+	4.5	3.3	4.6	4.8
	100	142	73	53	75	77
Not Important At All	0.1	0	0	0	1.4+	0
	100	0	0	0	1152	0
Don't Know/Refused	1.4	1.5	1.7	1.6	0.7	0
	100	108	121	120	54	0

Importance Of Having Successful Parents And Family To Get Ahead In Life

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Top 2 Box (NET)	86.2	83.9	86.4	91.2	86.3	88.7
	100	97	100	106	100	103
Very Important	63.6	60.5	65.6	68.9	61.3	66.1
	100	95	103	108	96	104
Somewhat Important	22.7	23.4	20.9	22.3	25.0	22.7
	100	103	92	98	110	100

Not Very Important	10.2	12.7	8.3	7.0	11.2	8.1
	100	124	81	68	110	79
Not Important At All	2.7	2.5	4.5	0.9	1.3	3.2
	100	91	163	34	48	118
Don't Know/Refused	0.8	0.9	0.8	0.9	1.1	0
	100	109	98	111	134	0

Overall would you say that you would like to see the number of immigrants allowed to enter the United States increase, decrease or do you think it's about the right number now?

		NON-HISPANIC				Index	Index
			White/	African/		Hisp -	Hisp -
	TOTAL	Total	Other	American	HISPANIC	Wh/Ot	Af/Am
Increase	13.5	11.7-	11.2-	13.8	25.3+	225	183
Decrease	31.4	33.9+	34.3+	31.9	15.6-	45	49
Same As Now	41.5	40.6	40.3-	42.1	47.4+	118	112
Don't Know/Refused	13.5	13.8	14.1	12.1	11.8	83	97

Over the next 5 years do you believe that it will become easier or more difficult to enter the United States LEGALLY?

		NON-HISPANIC				Index	Index
			White/	African/		Hisp -	Hisp -
	TOTAL	Total	Other	American	HISPANIC	Wh/Ot	Af/Am
Top 2 Box (NET)	69.2	67.5-	68.4	63.8-	80.2+	117	126
Much More Difficult	30.2	27.0-	26.4-	29.4	51.1+	193	174
Somewhat More Difficult	39.0	40.5+	41.9+	34.4-	29.1-	69	84
Somewhat Easier	12.3	13.1+	11.5	19.7+	7.3-	63	37
Much Easier	6.7	7.0	6.7	8.3+	4.8-	72	58
Don't Know/Refused	11.8	12.4	13.4+	8.2-	7.7-	58	95

Over the next 5 years do you believe that it will become easier or more difficult to enter the United States ILLEGALLY?

		NON-HISPANIC				Index	Index
			White/	African/		Hisp -	Hisp -
	TOTAL	Total	Other	American	HISPANIC	Wh/Ot	Af/Am
Top 2 Box (NET)	69.7	66.9-	68.0-	62.3-	87.4+	128	140
Much More Difficult	32.6	28.2-	27.2-	32.7	61.0+	225	186
Somewhat More Difficult	37.1	38.7+	40.8+	29.5-	26.3-	64	89
Somewhat Easier	11.2	12.3+	10.9	18.5+	3.5-	32	19
Much Easier	7.8	8.6+	8.0	11.6+	2.7-	34	24
Don't Know/Refused	11.3	12.1+	13.1+	7.7-	6.4-	49	83

Over the next 5 years do you believe that deportations of illegal immigrants will increase or decrease?

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Top 2 Box (NET)	61.8	60.1-	58.8-	65.6+	72.6+	123	111
Increase Greatly	24.6	22.4-	21.0-	28.5+	38.8+	185	136
Increase Somewhat	37.2	37.7	37.8	37.1	33.8-	89	91
Decrease Somewhat	16.3	17.0	16.3	20.0+	11.7-	72	59
Decrease Greatly	5.5	5.4	5.0	7.4+	5.7	114	77
Don't Know/Refused	16.5	17.5+	19.9+	7.0-	10.0-	50	143

Over the next 5 years do you believe that illegal immigration will increase or decrease?

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Top 2 Box (NET)	58.9	59.1	57.6-	65.5+	57.8	100	88
Increase Greatly	28.3	28.8	27.8	33.4+	24.7-	89	74
Increase Somewhat	30.6	30.2	29.8	32.1	33.1	111	103
Decrease Somewhat	20.8	20.9	21.2	19.7	20.0	94	101
Decrease Greatly	7.6	6.8-	6.7-	7.4	12.4+	187	167
Don't Know/Refused	12.7	13.2	14.5+	7.4-	9.8-	67	133

Today, it is fair to say that the United States cannot control its international borders.

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Top 2 Box (NET)	70.3	71.3+	73.1+	63.6-	63.4-	87	100
Totally Agree	43.5	44.0	44.9+	39.8-	40.8	91	103
Somewhat Agree	26.7	27.4	28.2+	23.8-	22.6-	80	95
Somewhat Disagree	12.9	12.7	12.0-	15.7+	14.6	122	93
Totally Disagree	8.5	7.7-	6.4-	13.0+	14.0+	218	108
Don't Know/Refused	8.3	8.3	8.5	7.7	7.9	94	103

In general, do you believe that immigration from Latin America over the past 10 years has had a positive or negative effect on the U.S. economy?

		NON-HISPANIC				Index	Index
	TOTAL	Total	White/ Other	African/ American	HISPANIC	Hisp - Wh/Ot	Hisp - Af/Am
Top 2 Box (NET)	42.4	40.2-	40.2-	40.1	56.5+	141	141
Very Positive	15.9	13.6-	13.0-	16.2	31.2+	240	193
Somewhat Positive	26.4	26.6	27.2	23.9-	25.3	93	106
Somewhat Negative	17.6	17.8	17.3	20.2+	15.8	91	78
Very Negative	15.6	16.0	16.7+	12.9-	13.1-	78	101
Don't Know/Refused	24.5	26.0+	25.8+	26.8+	14.7-	57	55

A recent change in U.S. immigration policy has endedthe political asylum status formerly granted to Cubans. As of now Cubans must apply for an immigration visa as other immigrants do. Do you Agree or Disagree?

		NON-HISPANIC				Index	Index
	TOTAL	Total	White/ Other	African/ American	HISPANIC	Hisp - Wh/Ot	Hisp - Af/Am
Top 2 Box (NET)	72.6	74.4+	73.7+	77.5+	60.7-	82	78
Totally Agree	54.7	56.3+	55.4	60.3+	44.0-	79	73
Somewhat Agree	17.9	18.1	18.3	17.2	16.7	91	97
Somewhat Disagree	5.5	5.1	5.1	4.9	8.5+	165	174
Totally Disagree	9.9	8.5-	9.3	4.6-	19.5+	208	422
Don't Know/Refused	12.0	12.0	11.8	13.1	11.4	97	87

Illegal Aliens residing in the United States should be immediately deported to their country of origin if convicted of a felony crime in the United States?

		NON-HISPANIC				Index	Index
	TOTAL	Total	White/ Other	African/ American	HISPANIC	Hisp - Wh/Ot	Hisp - Af/Am
Favor	81.7	82.5+	84.7+	73.1-	75.9-	90	104
Opposed	12.1	11.3-	9.6-	18.8+	16.9+	176	90
Don't Know/Unsure	6.3	6.2	5.7	8.1+	7.2	126	89

People caught producing, selling, or distributing forged or counterfeit immigration or residency documents should receive mandatory jail sentences.

		NON-HISPANIC				Index	Index
	TOTAL	Total	White/ Other	African/ American	HISPANIC	Hisp - Wh/Ot	Hisp - Af/Am
Top 2 Box (NET)	76.0	76.5	76.6	75.9	72.7-	95	96
Totally Agree	61.0	61.5	62.4+	57.6-	57.4-	92	100
Somewhat Agree	15.0	15.0	14.2	18.3+	15.3	108	84
Somewhat Disagree	9.7	9.6	9.7	9.2	10.2	105	111
Totally Disagree	6.7	6.6	6.5	7.2	7.5	115	103
Don't Know/Refused	7.6	7.3	7.2	7.7	9.6+	134	126

Do you Favor or Oppose a Hemispheric Free Trade Agreement for all of the Americas?

		NON-HISPANIC				Index	Index
	TOTAL	Total	White/ Other	African/ American	HISPANIC	Hisp - Wh/Ot	Hisp - Af/Am
Favor	62.8	61.6-	63.7	52.4-	70.4+	111	134
Opposed	12.3	12.7	10.9-	20.7+	9.7-	89	47
Don't Know/Unsure	24.9	25.7	25.4	27.0	19.9-	78	74

The United States should allow recent immigrants from Latin America to retain their citizenship in their country of origin while seeking and obtaining citizenship in the United States - in effect, to have dual citizenship.

		NON-HISPANIC				Index	Index
	TOTAL	Total	White/ Other	African/ American	HISPANIC	Hisp - Wh/Ot	Hisp - Af/Am
Top 2 Box (NET)	52.3	49.1-	48.2-	52.9	73.3+	152	139
Totally Agree	33.4	29.4-	28.9-	31.3	59.7+	207	191
Somewhat Agree	18.9	19.7	19.3	21.6+	13.6-	70	63
Somewhat Disagree	9.3	9.5	8.6	13.2+	8.2	95	62
Totally Disagree	27.9	30.3+	32.5+	20.6-	12.1-	37	59
Don't Know/Refused	10.5	11.2	10.7	13.3+	6.4-	60	48

Have you watched TV in the past month?

		NON-HISPANIC				Index	Index
	TOTAL	Total	White/ Other	African/ American	HISPANIC	Hisp - Wh/Ot	Hisp - Af/Am
Yes	97.4	97.4	97.0-	99.1+	97.8	101	99
No	2.5	2.6	2.9+	0.9-	2.2	74	254
Don't Know/Unsure/Refused	0.1	0.1	0.1	0	0	0	0

Have you shopped at a mall in the past month?

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Yes	76.2	75.0-	75.0-	75.3	83.9+	112	111
No	23.7	24.9+	24.9+	24.7	16.1-	65	65
Don't Know/Unsure/Refused	0.1	0.1	0.1	0	0	0	0

Have you got together with the whole family in the past month?

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Yes	67.2	65.6-	65.8-	64.7-	77.5+	118	120
No	32.7	34.3+	34.1+	35.3+	22.5-	66	64
Don't Know/Unsure/Refused	0.1	0.1	0.1	0	0	0	0

Have you rented a (video) movie in the past month?

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Yes	57.5	58.3	57.5	61.8+	52.3-	91	85
No	42.4	41.6	42.4	38.2-	47.7+	113	125
Don't Know/Unsure/Refused	0.1	0.1	0.1	0	0	0	0

Have you attended a movie at a theater in the past month?

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Yes	54.1	56.0+	55.6+	57.6+	41.9-	75	73
No	45.8	43.9-	44.3-	42.3-	58.1+	131	137
Don't Know/Unsure/Refused	0.1	0.1	0.1	0.1	0	0	0

Have you gone out dancing in the past month?

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Yes	30.7	30.0	26.3-	46.3+	35.4+	134	76
No	69.2	69.9	73.6+	53.6-	64.6-	88	121
Don't Know/Unsure/Refused	0.1	0.1	0.1	0.1	0	0	0

Have you worked out in a gym or health club in the past month?

	TOTAL	NON-HISPANIC Total	White/ Other	African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Yes	25.4	25.5	24.7	28.8+	24.5	99	85
No	74.6	74.4	75.2	71.2-	75.4	100	106
Don't Know/Unsure/Refused	0.1	0.1	0.1	0	0.1	48	

Have you played sports on a team (Softball, Baseball, Football, Soccer, etc) in the past month?

	TOTAL	NON-HISPANIC Total	White/ Other	African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Yes	18.4	17.4-	16.3-	22.5+	24.9+	153	110
No	81.2	82.2+	83.3+	77.5-	75.1-	90	97
Don't Know/Unsure/Refused	0.3	0.4	0.5	0-	0	10	

Importance Of Getting A Good Education To Get Ahead In Life

	TOTAL	NON-HISPANIC Total	White/ Other	African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Top 2 Box (NET)	98.7	98.6	98.7	98.0-	99.2	100	101
Very Important	90.2	89.4-	88.4-	93.6+	95.7+	108	102
Somewhat Important	8.4	9.2+	10.3+	4.4-	3.5-	34	79
Not Very Important	0.6	0.6	0.7	0.4	0.6	94	152
Not Important At All	0.1	0.1	0-	0.8+	0	0	0
Don't Know/Refused	0.6	0.6	0.6	0.8	0.2	28	20

Importance Of Working Hard To Get Ahead In Life

	TOTAL	NON-HISPANIC Total	White/ Other	African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Top 2 Box (NET)	98.5	98.7	98.6	98.8	97.4-	99	99
Very Important	88.0	88.9+	88.9+	88.6	82.2-	92	93
Somewhat Important	10.5	9.8-	9.7-	10.2	15.2+	157	149
Not Very Important	0.9	0.7	0.7-	1.0	2.2+	330	229
Not Important At All	0.1	0.1	0.1	0	0.1	99	
Don't Know/Refused	0.5	0.5	0.6	0.2	0.3	44	134

Importance Of Knowing The Right People To Get Ahead In Life

	TOTAL	NON-HISPANIC Total	White/ Other	African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Top 2 Box (NET)	89.7	89.2	88.8-	90.7	93.3+	105	103
Very Important	49.6	46.0-	44.3-	53.7+	73.1+	165	136
Somewhat Important	40.1	43.1+	44.5+	37.0-	20.2-	45	55
Not Very Important	7.7	8.1	8.5+	6.2-	5.0-	59	80
Not Important At All	2.0	2.1	2.2	1.8	1.1-	48	59
Don't Know/Refused	0.6	0.6	0.5	1.2+	0.7	142	55

Importance Of Being Talented To Get Ahead In Life

	TOTAL	NON-HISPANIC Total	White/ Other	African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Top 2 Box (NET)	91.7	91.6	92.4	88.2-	92.3	100	105
Very Important	48.8	45.6-	44.9-	48.8	69.5+	155	142
Somewhat Important	42.9	46.0+	47.5+	39.5-	22.8-	48	58
Not Very Important	5.6	5.5	4.7-	9.2+	6.2	132	67
Not Important At All	1.5	1.8	1.7	1.8	0.1-	7	7
Don't Know/Refused	1.1	1.1	1.2	0.7	1.4	116	201

Importance Of Having Successful Parents And Family To Get Ahead In Life

	TOTAL	NON-HISPANIC Total	White/ Other	African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Top 2 Box (NET)	80.4	79.6	79.1-	81.8	86.2+	109	105
Very Important	41.1	37.6-	37.5-	38.0-	63.6+	169	167
Somewhat Important	39.4	41.9+	41.5+	43.8+	22.7-	55	52
Not Very Important	12.4	12.8	13.3+	10.2-	10.2-	77	100
Not Important At All	6.3	6.9+	6.6	7.8+	2.7-	41	35
Don't Know/Refused	0.8	0.8	1.0	0.2-	0.8	88	426

Overall, would you say that you would like to see the number of immigrants allowed to enter the United States increase, decrease or do you think it's about the right number now?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Increase	25.3	15.6-	26.6	27.5	30.3+	22.8	24.4+	25.5+	217	105
Decrease	15.6	21.9+	16.3	10.1-	15.3	15.7	27.9	11.9-	81	43
Same As Now	47.4	50.2	45.8	49.7	43.2	49.4	42.8	48.7+	106	114
Don't Know/Refused	11.8	12.3	11.3	12.7	11.2	12.1	4.9-	13.8	35	282

Over the next 5 years do you believe that it will become easier or more difficult to enter the United States LEGALLY?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Top 2 Box (NET)	80.2	75.9	77.9	88.2+	83.8	78.5	69.5	83.4+	102	120
Much More Difficult	51.1	43.7	51.8	53.7	52.4	50.5	43.9+	53.3+	166	121
Smwht More Dif	29.1	32.2	26.2	34.4+	31.3	28.0	25.6-	30.1-	61	118
Somewhat Easier	7.3	8.6	7.7	5.3	5.9	7.9	14.5	5.1-	125	35
Much Easier	4.8	4.1	6.2	1.8-	3.7	5.4	7.1	4.1-	106	58
Don't Know/Refused	7.7	11.4	8.1	4.7	6.7	8.2	9.0	7.4-	67	82

Over the next 5 years do you believe that it will become easier or more difficult to enter the United States ILLEGALLY?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Top 2 Box (NET)	87.4	80.0-	86.7	93.1+	91.4+	85.4	78.6+	90.0+	116	114
Much More Difficult	61.0	52.0-	58.7	71.8+	68.2+	57.5-	47.2+	65.2+	174	138
Somewhat More Dif	26.3	27.9	28.0	21.3	23.2	27.8	31.4	24.8-	77	79
Somewhat Easier	3.5	7.0+	3.7	0.9-	2.2	4.1	8.2	2.1-	75	25
Much Easier	2.7	4.3	3.0	1.1	2.1	3.0	6.4	1.6-	80	26
Don't Know/Refused	6.4	8.7	6.5	4.8	4.3	7.5	6.8-	6.3-	52	93

Over the next 5 years do you believe that deportations of illegal immigrants will increase or decrease?

		ACCULTURATION LEVEL							Index	Index
	TOTAL	Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	US Born - Wh/Ot	Non-US Born - US Brn
Top 2 Box (NET)	72.6	59.9-	75.2	73.2	71.6	73.0	72.4+	72.6+	123	100
Increase Greatly	38.8	31.3-	38.1	44.7+	42.8	36.8	31.8+	40.9+	151	129
Increase Somewhat	33.8	28.6	37.1	28.5	28.8-	36.2	40.6	31.7-	107	78
Decrease Somewhat	11.7	14.5	11.1	11.8	13.3	11.0	13.1	11.3-	80	86
Decrease Greatly	5.7	7.5	5.3	5.6	7.0	5.0	3.8	6.2	77	161
Don't Know/Refused	10.0	18.0+	8.4	9.4	8.0	11.0	10.6-	9.8-	53	93

Over the next 5 years do you believe that illegal immigration will increase or decrease?

		ACCULTURATION LEVEL							Index	Index
	TOTAL	Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	US Born - Wh/Ot	Non-US Born - US Brn
Top 2 Box (NET)	57.8	58.1	58.0	57.2	54.0	59.7	67.2+	55.0-	117	82
Increase Greatly	24.7	18.5	26.1	24.8	23.8	25.2	22.4-	25.4	81	113
Increase Somewhat	33.1	39.6	31.9	32.4	30.2	34.5	44.7+	29.6	150	66
Decrease Somewhat	20.0	15.3	21.5	18.8	22.6	18.7	14.9-	21.5	70	144
Decrease Greatly	12.4	9.9	11.0	17.2+	15.4	11.0	5.6	14.5+	83	260
Don't Know/Refused	9.8	16.7+	9.4	6.8	8.0	10.6	12.4	9.0-	86	73

Today, it is fair to say that the United States cannot control its international borders.

		ACCULTURATION LEVEL							Index	Index
	TOTAL	Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	US Born - Wh/Ot	Non-US Born - US Brn
Top 2 Box (NET)	63.4	63.8	61.9	66.9	63.4	63.4	66.9	62.4-	92	93
Totally Agree	40.8	41.3	39.6	43.5	39.3	41.5	44.3	39.7-	99	90
Somewhat Agree	22.6	22.5	22.3	23.4	24.1	21.9	22.6	22.6-	80	100
Somewhat Disagree	14.6	10.8	17.3+	10.1-	13.4	15.2	14.7	14.6	123	99
Totally Disagree	14.0	12.9	14.1	14.6	14.4	13.9	13.6+	14.2+	211	105
Don't Know/Refused	7.9	12.5+	6.7	8.4	8.8	7.5	4.8-	8.9	57	184

In general, do you believe that immigration from Latin America over the past 10 years has had a positive or negative effect on the U.S. economy?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Top 2 Box (NET)	56.5	43.7-	54.9	67.8+	55.5	57.0	42.3	60.7+	105	143
Very Positive	31.2	17.7-	31.1	39.3+	35.3	29.3	23.7+	33.5+	182	142
Somewhat Positive	25.3	26.0	23.8	28.5	20.2-	27.8	18.7-	27.2	69	146
Somewhat Negative	15.8	21.5+	17.0	9.6-	17.2	15.1	20.9	14.2-	121	68
Very Negative	13.1	12.9	15.2	7.9-	11.6	13.8	18.8	11.3-	113	60
Don't Know/Refused	14.7	21.9+	13.0	14.7	15.8	14.1	17.9-	13.7-	70	76

A recent change in U.S. immigration policy has ended the political asylum status formerly granted to Cubans. As of now, Cubans must apply for an immigration visa as other immigrants do. Do you Agree or Disagree?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Top 2 Box (NET)	60.7	65.7	63.2	51.6-	58.2	61.9	74.7	56.5-	101	76
Totally Agree	44.0	50.5	45.1	37.6-	43.2	44.4	55.4	40.5-	100	73
Somewhat Agree	16.7	15.2	18.1	14.0	15.0	17.5	19.2	15.9	105	83
Somewhat Disagree	8.5	8.8	8.1	9.2	7.4	9.0	7.9	8.6+	155	108
Totally Disagree	19.5	7.3-	18.4	29.0+	26.5+	16.1-	9.4	22.5+	101	238
Don't Know/Refused	11.4	18.3+	10.3	10.2	8.0-	13.1	8.0-	12.4	67	156

Illegal Aliens residing in the United States should be immediately deported to their country of origin if convicted of a felony crime in the United States?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Favor	75.9	82.7+	72.9	79.4	73.7	76.9	78.0	75.3-	92	97
Opposed	16.9	11.1-	19.5	13.8	20.5	15.2	18.9+	16.3+	197	86
Don't Know/Unsure	7.2	6.2	7.6	6.8	5.7	7.9	3.1-	8.4+	54	270

People caught producing, selling, or distributing forged or counterfeit immigration or residency documents should receive mandatory jail sentences.

		ACCULTURATION LEVEL							Index	Index
	TOTAL	Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	US Born - Wh/Ot	Non-US Born - US Brn
Top 2 Box (NET)	72.7	76.9	71.8	72.6	72.9	72.6	75.7	71.8-	99	95
Totally Agree	57.4	58.4	57.1	57.6	57.4	57.4	58.1	57.2-	93	98
Somewhat Agree	15.3	18.5	14.8	14.9	15.5	15.3	17.6	14.6	124	83
Somewhat Disagree	10.2	8.3	11.6	7.9	9.7	10.4	13.3+	9.3	137	70
Totally Disagree	7.5	7.5	6.4	10.1	9.7	6.4	6.1	7.9	94	129
Don't Know/Refused	9.6	7.3	10.2	9.5	7.7	10.5	4.9	11.0+	69	223

Do you Favor or Oppose a Hemispheric Free Trade Agreement for all of the Americas?

		ACCULTURATION LEVEL							Index	Index
	TOTAL	Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	US Born - Wh/Ot	Non-US Born - US Brn
Favor	70.4	60.5-	72.1	71.7	72.4	69.4	56.5-	74.5+	89	132
Opposed	9.7	14.4+	8.9	9.0	10.5	9.3	18.5+	7.0-	170	38
Don't Know/Unsure	19.9	25.1	19.0	19.3	17.1	21.3	25.0	18.4-	98	74

The United States should allow recent immigrants from Latin America to retain their citizenship in their country of origin while seeking and obtaining citizenship in the United States - in effect, to have dual citizenship.

		ACCULTURATION LEVEL							Index	Index
	TOTAL	Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	US Born - Wh/Ot	Non-US Born - US Brn
Top 2 Box (NET)	73.3	63.5-	69.8-	87.5+	79.4+	70.3	63.5+	76.3+	132	120
Totally Agree	59.7	49.4-	55.7-	75.6+	65.5+	56.9	46.1+	63.8+	159	139
Somewhat Agree	13.6	14.1	14.1	11.9	13.9	13.4	17.4	12.4-	90	71
Somewhat Disagree	8.2	6.9	10.8+	2.6-	7.9	8.3	11.7	7.1-	135	61
Totally Disagree	12.1	22.3+	13.1	4.0-	7.1-	14.6+	22.9	8.9-	70	39
Don't Know/Refused	6.4	7.4	6.3	5.9	5.5	6.8	2.0-	7.7-	19	381

Have you watched TV in the past month?

	ACCULTURATION LEVEL								Index	Index
		Hghly	Prtly			Non-	Born	Born	US	Non-US
		Acc	Acc	Unacc	Span	Span	In The	Outside	Born -	Born -
	TOTAL	0-49	50-84	85-100	Dmnt	Dmnt	U.S.	U.S.	Wh/Ot	US Brn
Yes	97.8	98.5	97.4	98.5	98.7	97.4	99.2	97.4	102	98
No	2.2	1.5	2.6	1.5	1.3	2.6	0.8	2.6	28	313
Don't Know/Unsure/Ref	0	0	0	0	0	0	0	0	0	0

Have you shopped at a mall in the past month?

	ACCULTURATION LEVEL								Index	Index
		Hghly	Prtly			Non-	Born	Born	US	Non-US
		Acc	Acc	Unacc	Span	Span	In The	Outside	Born -	Born -
	TOTAL	0-49	50-84	85-100	Dmnt	Dmnt	U.S.	U.S.	Wh/Ot	US Brn
Yes	83.9	74.7-	85.8	84.4	84.2	83.7	87.4+	82.8+	117	95
No	16.1	25.3+	14.2	15.6	15.8	16.3	12.6-	17.2-	51	136
Don't Know/Unsure/Ref	0	0	0	0	0	0	0	0	0	0

Have you got together with the whole family in the past month?

	ACCULTURATION LEVEL								Index	Index
		Hghly	Prtly			Non-	Born	Born	US	Non-US
		Acc	Acc	Unacc	Span	Span	In The	Outside	Born -	Born -
	TOTAL	0-49	50-84	85-100	Dmnt	Dmnt	U.S.	U.S.	Wh/Ot	US Brn
Yes	77.5	76.8	79.7	72.5-	78.6	77.0	82.9+	75.9+	126	92
No	22.5	23.2	20.3	27.5+	21.4	23.0	17.1-	24.1-	50	141
Don't Know/Unsure/Ref	0	0	0	0	0	0	0	0	0	0

Have you rented a (video) movie in the past month?

	ACCULTURATION LEVEL								Index	Index
		Hghly	Prtly			Non-	Born	Born	US	Non-US
		Acc	Acc	Unacc	Span	Span	In The	Outside	Born -	Born -
	TOTAL	0-49	50-84	85-100	Dmnt	Dmnt	U.S.	U.S.	Wh/Ot	US Brn
Yes	52.3	59.7	53.5	45.0-	46.1-	55.3	68.3+	47.5-	119	70
No	47.7	40.3	46.5	55.0+	53.9+	44.7	31.7-	52.5+	75	166
Don't Know/Unsure/Ref	0	0	0	0	0	0	0	0	0	0

Have you attended a movie at a theater in the past month?

	ACCULTURATION LEVEL								Index	Index
		Hghly	Prtly			Non-	Born	Born	US	Non-US
		Acc	Acc	Unacc	Span	Span	In The	Outside	Born -	Born -
	TOTAL	0-49	50-84	85-100	Dmnt	Dmnt	U.S.	U.S.	Wh/Ot	US Brn
Yes	41.9	55.2+	45.5	25.6-	33.6-	46.0+	63.4+	35.5-	114	56
No	58.1	44.8-	54.5	74.4+	66.4+	54.0-	36.6-	64.5+	83	176
Don't Know/Unsure/Ref	0	0	0	0	0	0	0	0	0	0

Have you gone out dancing in the past month?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Yes	35.4	36.9	38.1	27.8-	34.3	35.9	45.9+	32.2	174	70
No	64.6	63.1	61.9	72.2+	65.7	64.1	54.1-	67.8	74	125
Don't Know/Unsure/Ref	0	0	0	0	0	0	0	0	0	0

Have you worked out in a gym or health club in the past month?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Yes	24.5	30.7	26.8	15.4-	17.1-	28.2+	34.0+	21.7-	137	64
No	75.4	69.3	73.1	84.6+	82.9+	71.8-	66.0-	78.2+	88	119
Don't Know/Unsure/Ref	0.1	0	0.1	0	0	0.1	0	0.1	0	0

Have you played sports on a team (Softball, Baseball, Football, Soccer, etc) in the past month?

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Yes	24.9	25.1	27.6	17.9-	20.8	26.9	32.9+	22.5+	202	68
No	75.1	74.9	72.4	81.9+	79.1	73.1	67.1-	77.5-	81	116
Don't Know/Unsure/Ref	0	0	0	0.2	0.1	0	0	0.1	0	0

Importance Of Getting A Good Education To Get Ahead In Life

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Top 2 Box (NET)	99.2	98.7	99.5	98.8	98.8	99.4	98.9	99.3	100	100
Very Important	95.7	95.9	95.5	96.2	96.4	95.4	95.5+	95.8+	108	100
Somewhat Important	3.5	2.8	4.0	2.6	2.4	4.0	3.4-	3.5-	33	103
Not Very Important	0.6	0.3	0.5	1.1	0.9	0.5	1.0	0.5	151	51
Not Important At All	0	0	0	0	0	0	0	0	0	0
Don't Know/Refused	0.2	1.0+	0	0.1	0.3	0.1	0.1	0.2	18	168

Importance Of Working Hard To Get Ahead In Life

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Top 2 Box (NET)	97.4	96.2	97.6	97.5	97.2	97.5	99.1	96.9-	100	98
Very Important	82.2	84.2	81.3	83.2	80.8	82.8	85.7	81.1-	96	95
Somewhat Important	15.2	12.1	16.3	14.3	16.4	14.7	13.4	15.8+	138	118
Not Very Important	2.2	2.2	2.2	2.5	2.2	2.3	0.8	2.7+	115	343
Not Important At All	0.1	0.6+	0	0	0.3	0	0	0.1	0	0
Don't Know/Refused	0.3	1.0	0.2	0	0.3	0.2	0.1	0.3	18	290

Importance Of Knowing The Right People To Get Ahead In Life

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Top 2 Box (NET)	93.3	85.2-	93.6	97.0+	94.4	92.7	82.8-	96.4+	93	116
Very Important	73.1	62.3-	71.1	84.2+	79.7+	69.9-	50.6	79.8+	114	158
Somewhat Important	20.2	23.0	22.5	12.8-	14.7-	22.8	32.2-	16.6-	72	51
Not Very Important	5.0	9.6+	4.9	2.5	4.4	5.3	12.6+	2.7-	148	22
Not Important At All	1.1	4.2+	0.8	0	0.3	1.5	3.7+	0.3-	166	8
Don't Know/Refused	0.7	1.0	0.7	0.5	0.9	0.6	0.9	0.6	190	67

Importance Of Being Talented To Get Ahead In Life

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Top 2 Box (NET)	92.3	87.0-	92.6	94.6	94.2	91.4	85.6-	94.3+	93	110
Very Important	69.5	55.8-	68.8	78.9+	77.1+	65.8-	47.7	76.0+	106	159
Somewhat Important	22.8	31.2+	23.8	15.8-	17.1-	25.6	37.9	18.3-	80	48
Not Very Important	6.2	10.1+	5.8	4.9	3.8	7.4	11.2+	4.7	240	42
Not Important At All	0.1	0.4	0	0.2	0.1	0.1	0.4	0.1-	21	14
Don't Know/Refused	1.4	2.5	1.5	0.3	1.9	1.1	2.8+	0.9	240	33

Importance Of Having Successful Parents And Family To Get Ahead In Life

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Top 2 Box (NET)	86.2	81.3	85.7	90.3+	89.7+	84.5	77.5	88.8+	98	115
Very Important	63.6	58.8	60.9	72.8+	70.5+	60.2-	46.6	68.7+	124	147
Somewhat Important	22.7	22.4	24.8	17.5-	19.1	24.4	30.9-	20.2-	74	65
Not Very Important	10.2	11.9	11.8	5.3-	7.4	11.6	16.5+	8.3-	124	51
Not Important At All	2.7	4.2	2.1	3.4	2.4	2.9	4.7	2.1-	71	46
Don't Know/Refused	0.8	2.7+	0.4	1.0	0.5	1.0	1.4	0.7	140	51

VIII.

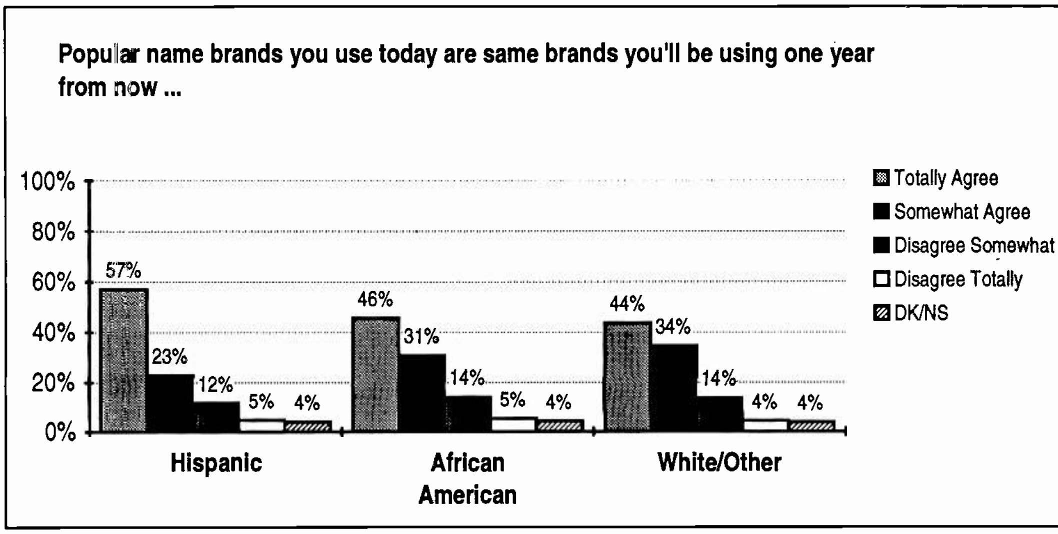
Brand Building & Advertising

VIII. BRAND BUILDING

A. Brand Loyalty Among U.S. Hispanics

For many, "brand loyalty" conjures up images of consumers with absolute loyalty to a brand; take for example, the Budweiser drinker who will not (except under the most extreme circumstances) drink any other brand of beer. Yet by a strict definition, brand loyalty means the repeat purchase of a brand or "brand continuity." So defined, repeat purchasing of a brand or product does not necessarily indicate absolute ". . . preference for the product, but may also reflect *habit, indifference, a lower price, or the non availability of substitutes.*[1]" Thus, "brand loyalty" is measured by repeat purchasing patterns, as well as brand preferences.

Hispanics are often said to be "more brand loyal" than non-Hispanic Whites and other ethnic segments. In our survey, we asked respondents two brand loyalty questions. In the first, respondents were asked how much they agreed with the following statement; "The popular name brands I use most often today are the same ones I will be using a year from now."



In the five markets surveyed, Hispanics were significantly more likely to answer "totally agree" (57%), as compared to African Americans (46%) and Whites/Others (44%). African Americans and Whites Others, on the other hand, were significantly more likely to answer "somewhat agree," implying a more circumspect approach to the brands they are currently buying and see themselves buying and using one year from now.

We may imply from these results that Hispanics have a *stronger intention* to stick with the popular name brands they are using today into the near future. From this perspective, they can be considered more "brand loyal."

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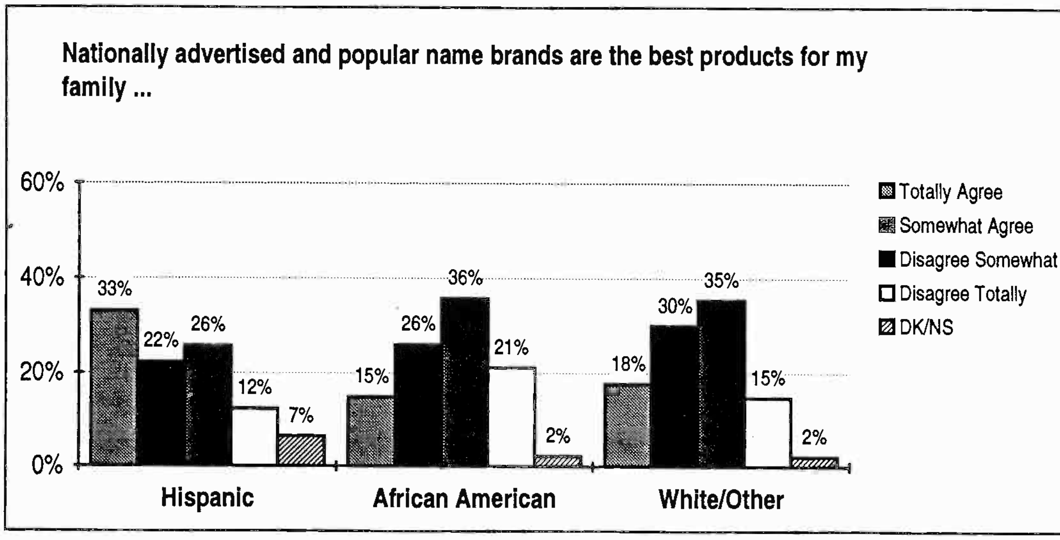
1 Kotler, Philip. **Marketing Management: Analysis, Planning and Control.** Fourth Edition. 1980. Prentice-Hall, Inc., Englewood Cliffs, New Jersey.

Best for My Family

Consumers who purchase products for their families undertake a heavy responsibility for the health, comfort, and pleasure of their families. Such responsibilities are not taken lightly. When consumers were asked their opinions as to the quality of national brands in terms of being "best for my family" Hispanics exhibited much stronger preference for nationally advertised brands.

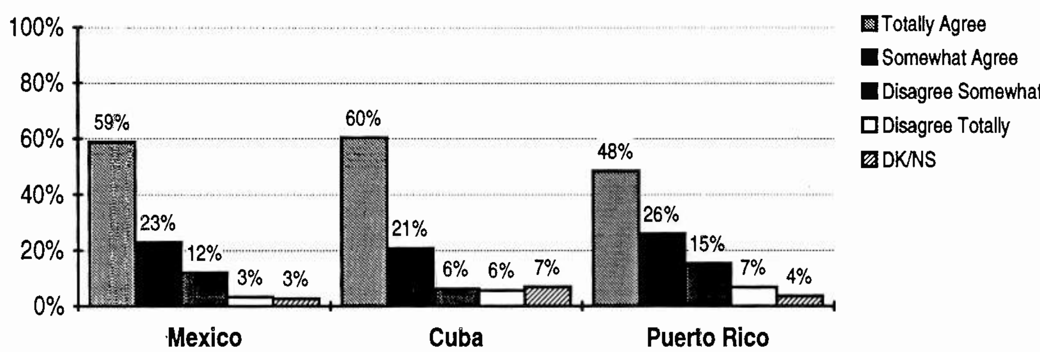


Thus, Hispanics exhibit both stronger repeat purchase intention and national brand preference.

Country of Origin Effects on Brand Loyalty

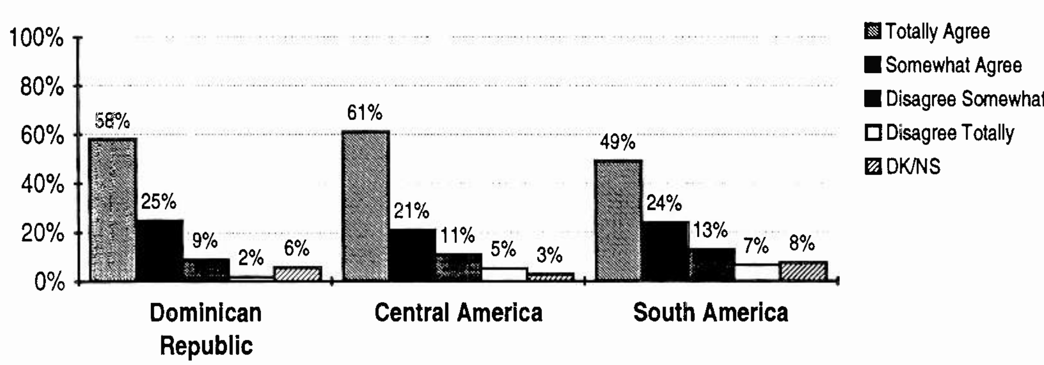
Some major differences in brand loyalty are evident in Hispanics' countries of origin. Of the three largest Hispanic ethnic groups, a significantly *larger* percentage of Cubans and Mexicans agreed "totally" that the popular name brands they are using most often today are the same ones they'll be using one year from now, compared to 49% of Puerto Ricans.

Popular name brands you use today are same brands you'll be using one year from now ...



Dominicans and Central Americans also appear as brand loyal as Cubans or Mexicans. A total of 84% of Dominicans and 81% of Central Americans agreed "totally" or "somewhat" with our statement. South Americans, on the other hand, mirrored the response of the Puerto Ricans, who both closely mirror the response of Whites/Others; slightly less than half of the South Americans were inclined to "totally" agree with our brand loyalty statement.

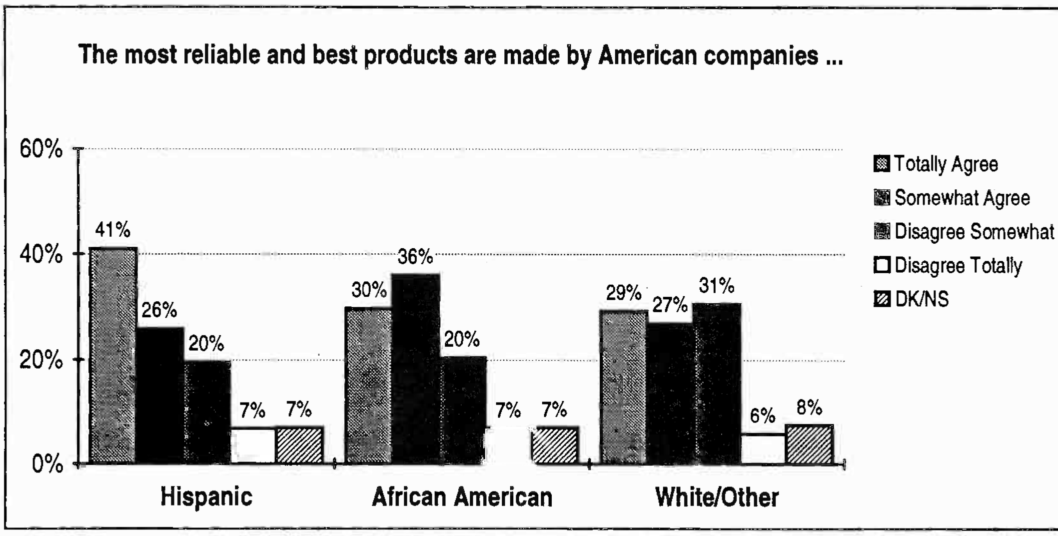
Popular name brands you use today are same brands you'll be using one year from now ...



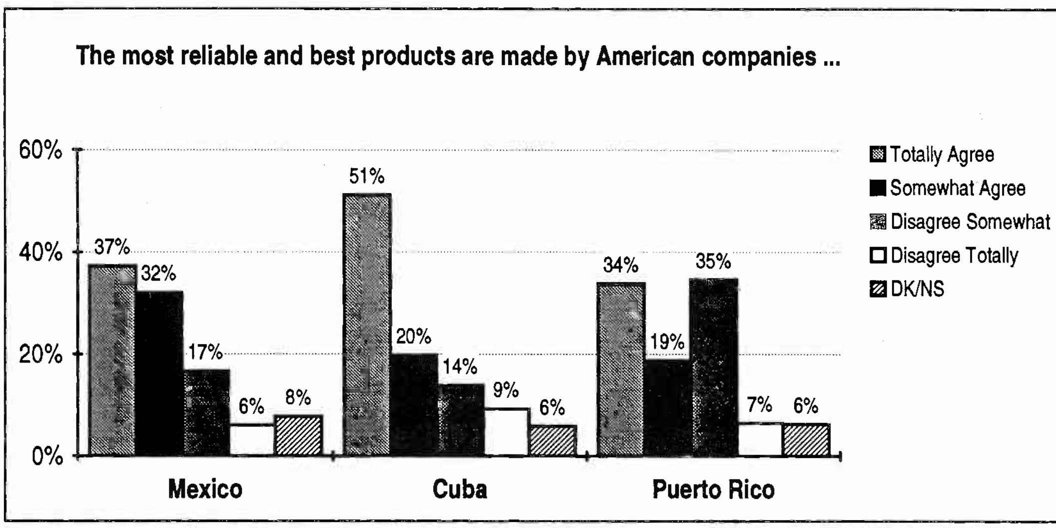
Whose brands and products are they most loyal to? Well, we know that they are not necessarily nationally advertised or popular national brands. They also may not necessarily be American-made.

We also asked respondents to tell us how much they agreed with the following statement: "The most reliable and best products are made by American companies."

Hispanics are most likely to agree that American companies turn out the most reliable and best products of the three ethnic segments. A significantly higher percentage of Hispanics (41%), "totally" agreed, and another 26% "somewhat" agreed.

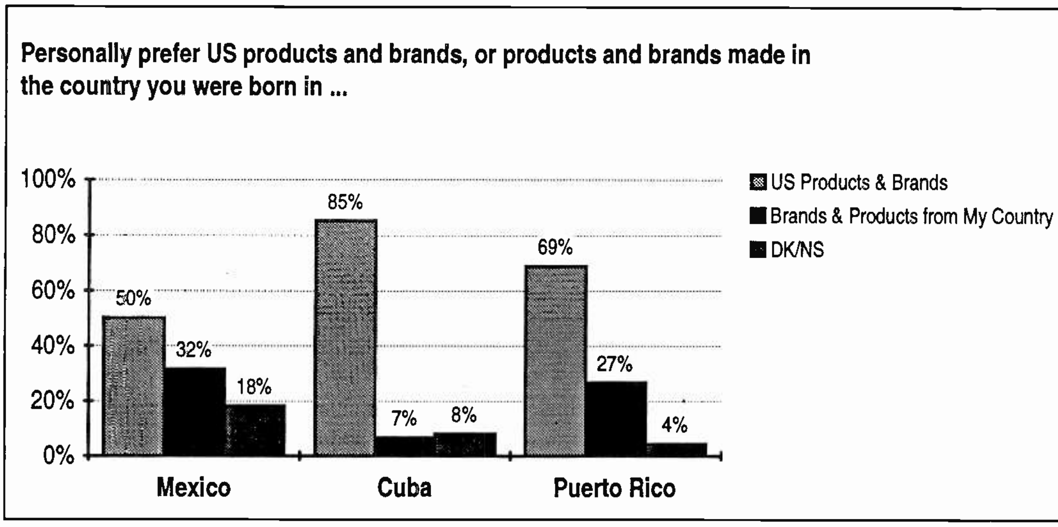


Among Hispanics, significantly more Cubans "totally" agreed, and overall, Puerto Ricans are significantly less likely to agree either "totally" or "somewhat."

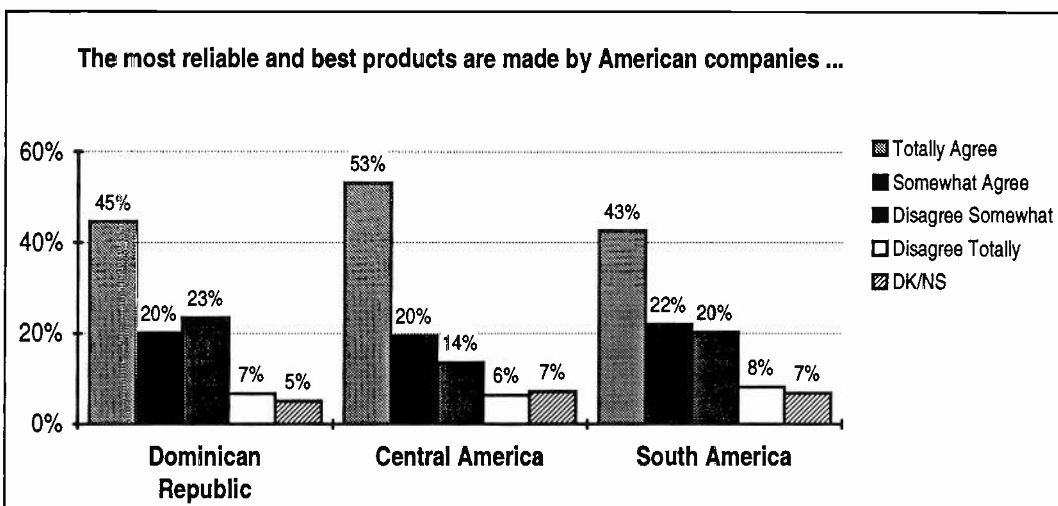


Mexicans are no more likely than other Hispanic ethnic groups to agree that American companies make the most reliable and best products.

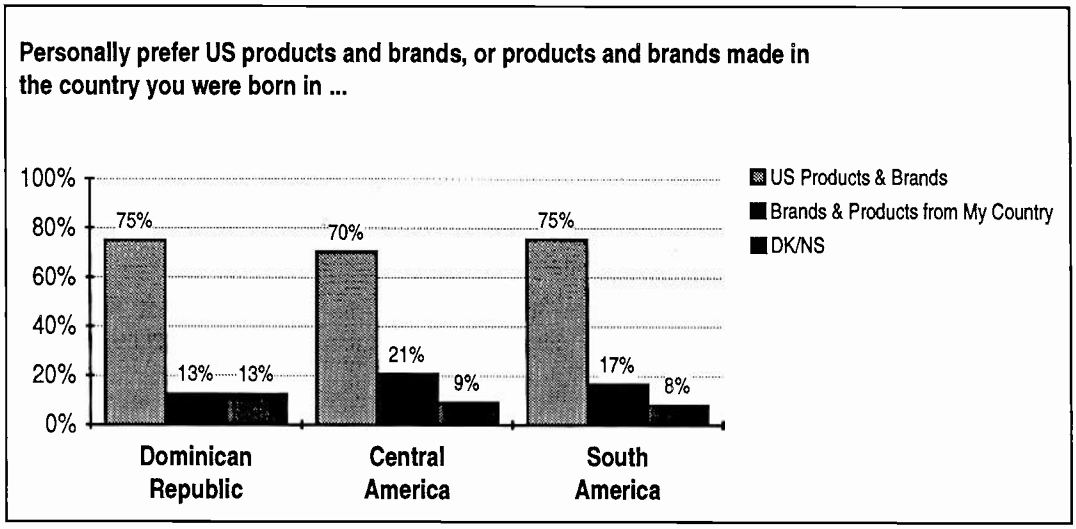
Mexicans' feelings toward U.S. brands and products translate into their stated preference; almost one-third state that they personally prefer brands and products from Mexico. Cubans on the other hand, have little choice under the current embargo.



Central Americans exhibit a significantly higher tendency to "totally" agree that American products are tops; 53% plus another 20% who agree "somewhat." Close to 30% of both Dominicans and South Americans said they either disagreed "somewhat" or "totally".



Additionally, all three of these groups expressed a very high preference for U.S. products and brands over those made in their countries of origin.



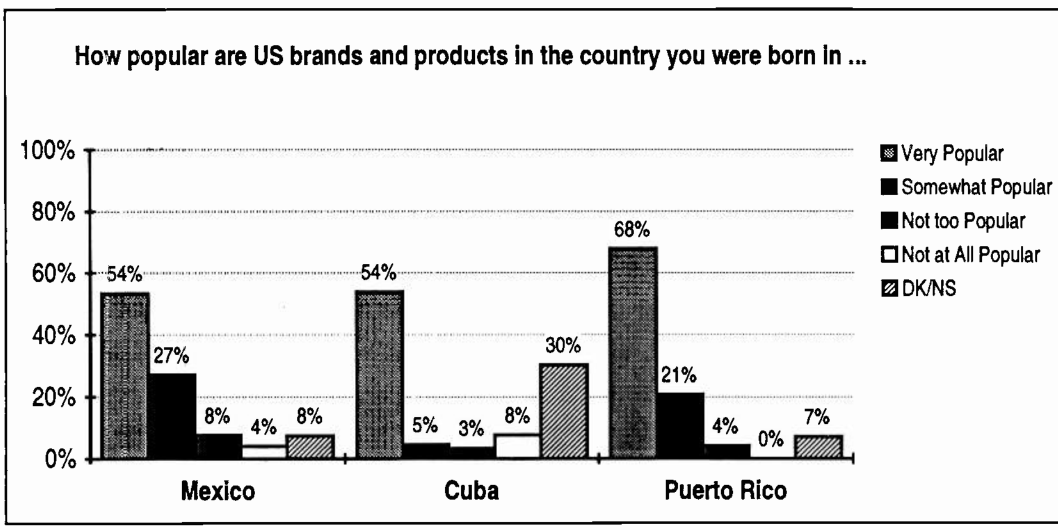
It is interesting to ponder the implications of free trade while considering the responses to the questions on brand loyalty, and country of origin preference for products and brands. Many U.S. "brands" have manufacturing facilities in other countries of the world, and very often a brand that is closely associated with being "American" is made or assembled in Mexico, China, Taiwan, etc. The free flow of products, and increasingly of information, between countries obviously impacts the equation as well. Were the U.S. to have free trade agreements with countries in Central America, for example, would even more Central Americans living in the U.S. prefer products and brands from their country of origin?

As economies of the Western Hemisphere become more integrated and brand choices increase exponentially for consumers, the importance of international or ***global brand building*** -- the goal of creating brand image, relevancy and loyalty consistently across many countries -- will grow to be of utmost importance.

B. Global Brand Building And Hispanics

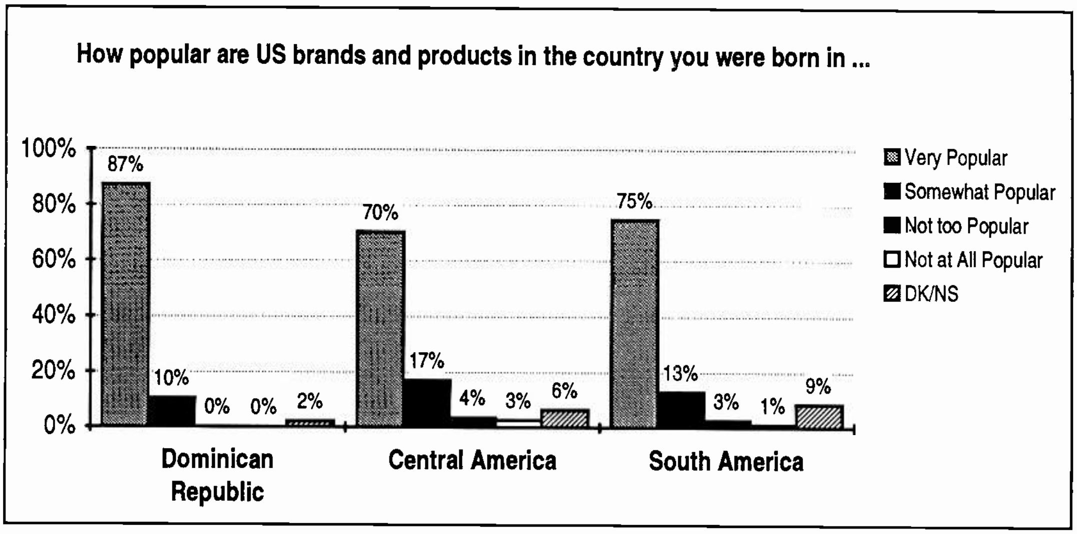
You may have already begun to wonder, given the fact that 3 out of 4 adult Hispanics living in the United States were born in another country, where their mind-sets or attitudes toward brands were created. Thinking about U.S. brands and products, we decided to test the waters for opportunities in global brand building -- both through the U.S. Hispanic market *and* Latin American markets.

The results are based upon the responses to a series of questions asked only of those Hispanics residing in the U.S. who had lived in their countries of origin at least until they were 16 years old. In this way, we can be assured that their perceptions of media and the brands available in their countries were beginning to take hold *before* they arrived in the consumer-choice Mecca that is the United States.

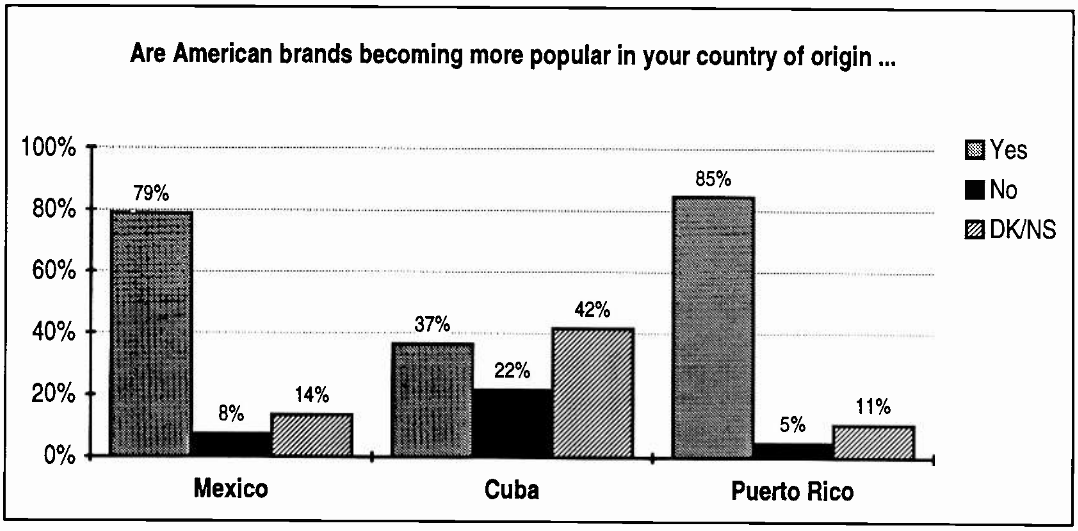


We wanted to know how popular Hispanics perceived U.S. brands to be in Latin American countries. For Mexico and Puerto Rico, over half of the respondents state that U.S. brands are "very popular," and another 20% or so say they are at least "somewhat popular." Interestingly enough, 54% of Cubans surveyed say that U.S. brands are "very popular" in Cuba, although 30% grant that they either did not know or were not sure ("DK/NS").

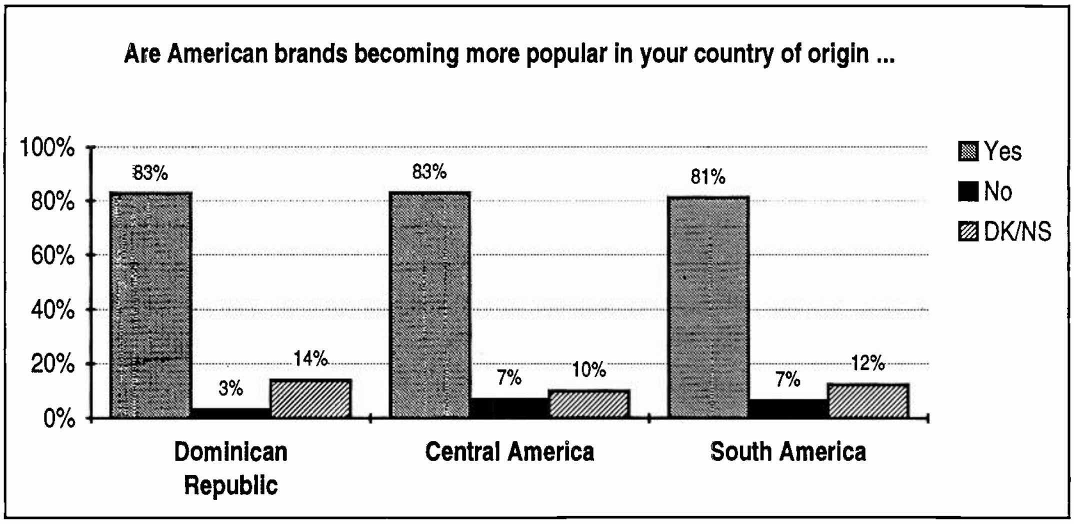
From the Dominican Republic in the Caribbean, across Central America and south to Colombia, Argentina, Venezuela and Chile, American brands are perceived to be "very popular" by the vast majority of Hispanics from these regions.



Better yet, with the understandable exception of Cuba (the embargo), Hispanics perceive American brands to be increasingly popular. In Mexico, where a low of 54% of Mexicans residing in the U.S. say American brands are "very popular", almost 80% say they are becoming more popular. (There's hope for the NAFTA yet.)



The same is true for the Dominican Republic, and Central and South America in general. It is interesting to note the low proportions of Hispanics who say they "don't know" or are "not sure" whether American brands are becoming more popular in their countries of origin. While understandable in the case of Cuba -- 42% say they don't know -- only about 10-15% of the foreign-born population of all other Hispanics appear to be cut-off from communications with their countries of origin.



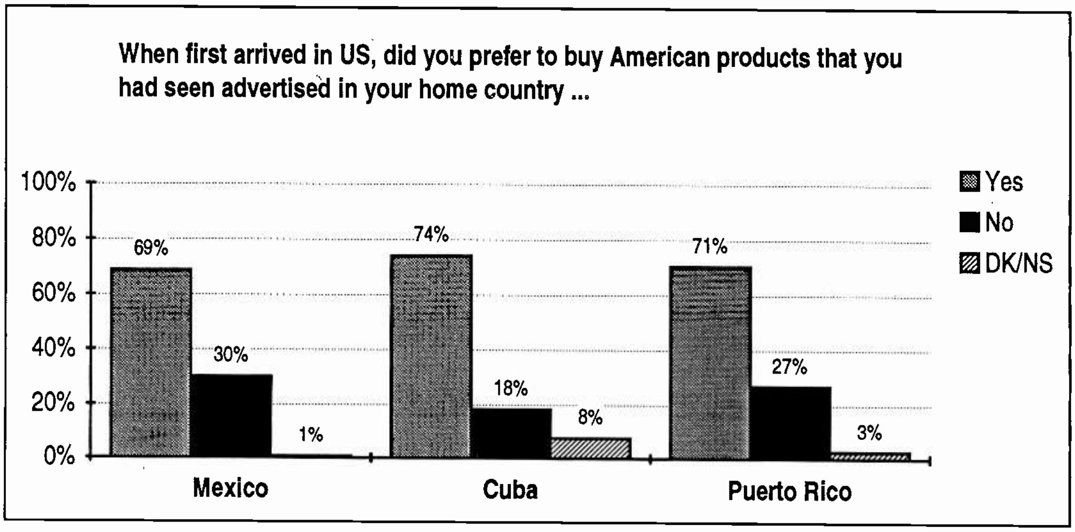
Word-of-mouth advertising can be an effective vehicle for global brand building. We can assume that virtually 100% of all Hispanics living in the United States have relatives in their countries of origin. Add to that the number of Hispanic-owned businesses which rely on international trade with the Americas, and you've got a powerful phenomenon, through modern electronic communications, working in your favor.

Word-of-mouth from the United States is obviously not the only channel through which information and opinions about U.S. brands and products is transmitted. Product distribution, with or without advertising, creates awareness of brands, and advertising -- with or without distribution -- is a fact of life in many Latin American countries. Through cable and satellite TV, radio signals which cross borders, and the international press, advertisements for U.S. products are seen, heard and read all over Latin America regardless of whether or not the product is available in a certain region or country.

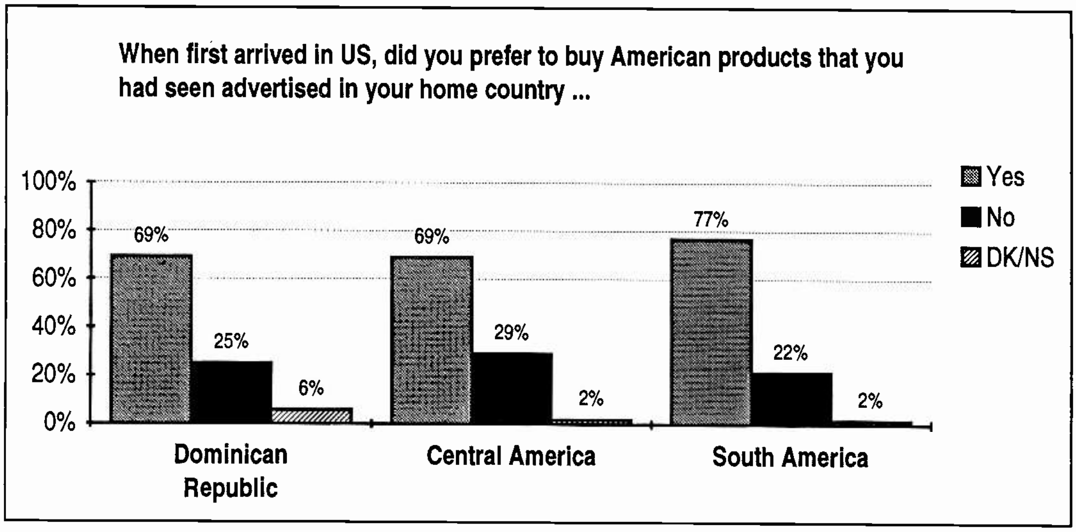
In fact, even without advertising or distribution of brands or products made in the U.S., all countries have images of products made in another country based upon travels and the image they have of the country itself. Known as "Product-Country Image," or PCI, American products are often globally associated with innovation, quality and durability, among other factors. Other product-countries which receive high marks around the globe are Japan (know for its "high-tech" products) and Germany (known for its engineering).

C. Northbound Brand Building

However the message gets to Latin America about U.S. brands and products, it is clearly hitting home; upon first arriving in the States, the effects of ***northbound brand building*** can be seen in the new arrivals' stated preference for U.S. products for which they had seen advertising in their countries of origin.



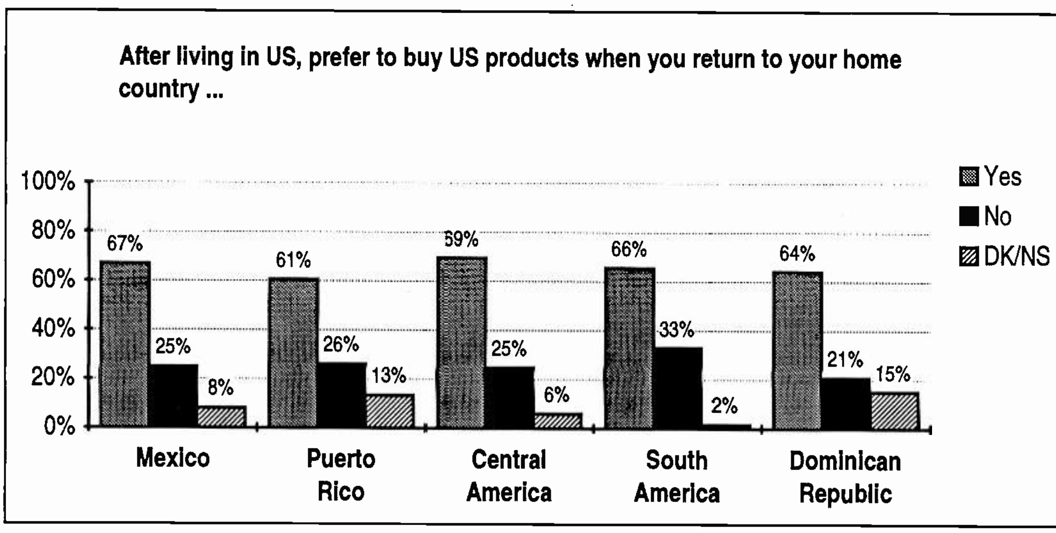
Over two-thirds of foreign-born Hispanics from the three countries which contribute the largest Hispanic populations to the U.S., Mexico, Cuba and Puerto Rico, report, upon arriving in the U.S., that they preferred to buy American products *they had seen advertised in their home countries.*



This phenomenon is not restricted to the Mexican border, or nearby Caribbean countries either. Over two-thirds of Hispanics born in the Dominican Republic, Central American countries, and South American countries also report preferring to buy American brands they had seen advertised in their home countries.

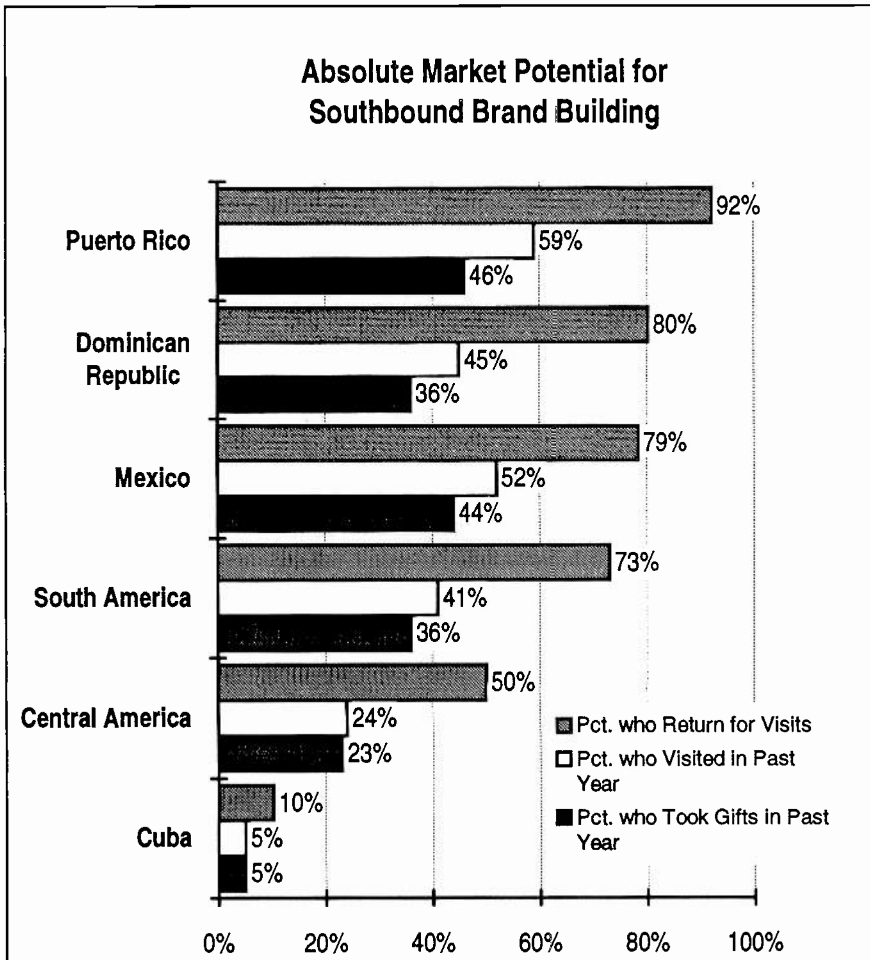
D. Southbound Brand Building

As it pays to advertise in Latin America, it also pays to target Hispanics in the United States. Of those who returned for a visit over the past year, for whatever reason, over 60% in all ethnic groups say they prefer to buy U.S. products while there. The effects of ***southbound brand building*** is stronger among Central and South Americans, 66% or more of whom prefer to buy U.S. products when they return home. Even two-thirds of the Mexicans say they preferred to buy U.S. products when they returned over the past year.



The obvious question now is how many Hispanics return to visit their country of origin, and how often.

Seventy-seven percent of all adult Hispanics residing in the five U.S. markets included in our survey report being born outside of the U.S. The graph below depicts the flow of absolute southbound travel for Hispanics for each country of origin. For example, 92% of Puerto Ricans in the five market study say they travel to their home country to visit, and 59% traveled in the past year. Forty-six percent of all Puerto Ricans in the five markets brought gifts for family, friends or business associates when they traveled in the past year. That means that 78% of those adults who went to Puerto Rico for a visit over the past year brought some type of gift with them.



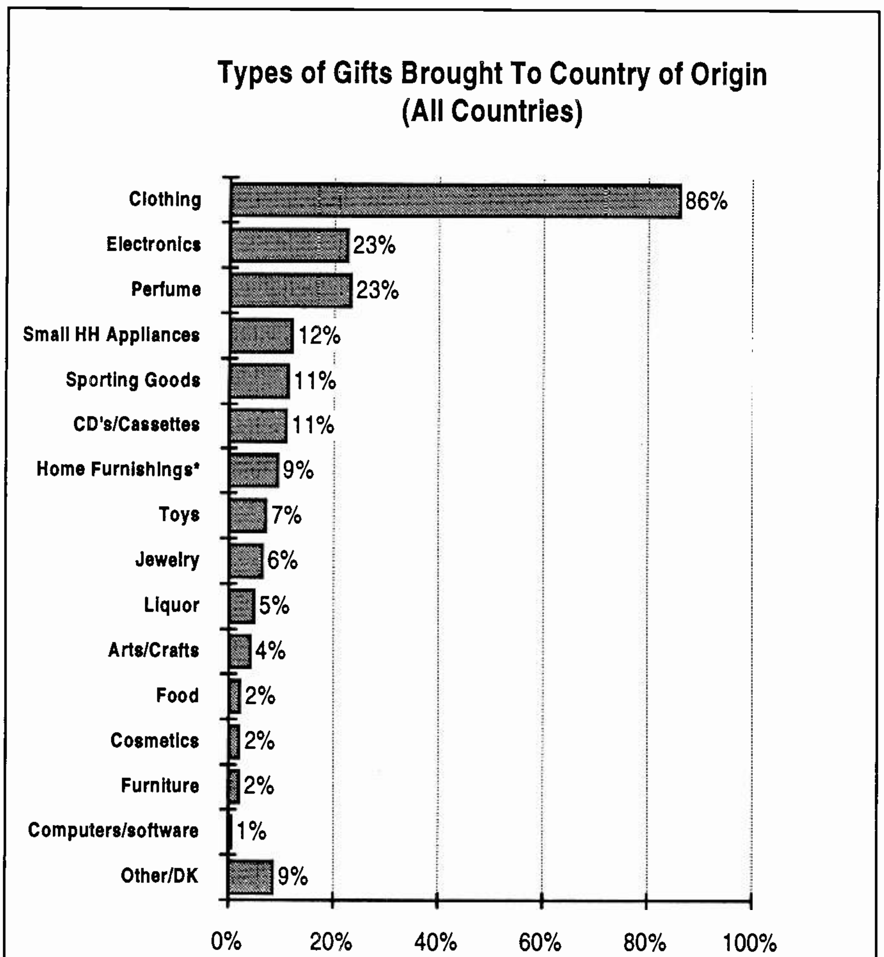
Because we know that 70% of Puerto Ricans in our survey said they prefer to buy U.S. brands over brands made on the island, we can assume that a good proportion of those gifts were U.S. brands. Some groups are even more likely to be carrying gifts for family, friends or business associates upon their arrival home.

Additionally, some Latinos travel home a great deal more often than others. Just over the past year, the average number of trips to their country of origin made was:

Mexicans:	2.7
Puerto Ricans:	1.7
Central Americans:	1.3
South Americans:	1.3
Dominicans:	1.3

Although a relatively smaller potential market for southbound brand building, 97% of Central Americans in our survey who returned home to visit over the past year brought gifts. Eighty-three percent of the Mexicans who traveled home brought gifts over the past year, and 88% of the South Americans did as well.

The question is then; what type of gifts do they bring? Overwhelmingly, three categories top the list--Clothing, Electronics, and Perfume.



Other popular categories include small household appliances and furnishings, sporting goods, and CDs and cassettes. Lest manufacturers of larger items that don't fit in a suitcase despair, 2% report taking large furniture with them.

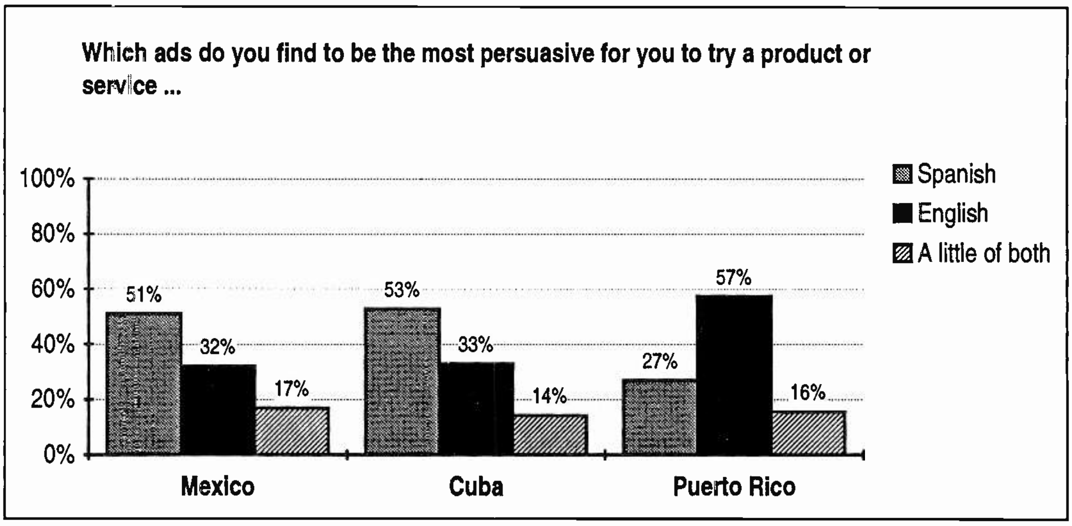
Although the types of gifts brought home are similar for Hispanics from all countries, a few interesting significant differences do exist. For example, Central Americans are significantly more likely to bring electronics home (43%) indicating a lack of availability or high prices for electronics in Central America. South Americans, on the other hand, are significantly more likely to bring perfume home (39%).

The time is ripe for marketing practitioners to study and explore the potential for global brand building in the U.S. Hispanic market and Latin America. If we assume for the moment that the effects of word-of-mouth and media advertising, product distribution, and travel back-and-forth from the United States to Latin America and the Caribbean have had the unintentional result of northbound and southbound brand building for American products, imagine the results of a targeted advertising campaign against this phenomenon. The U.S. Hispanic market represents a fantastic, if untapped, potential market for global brand building in the Western Hemisphere.

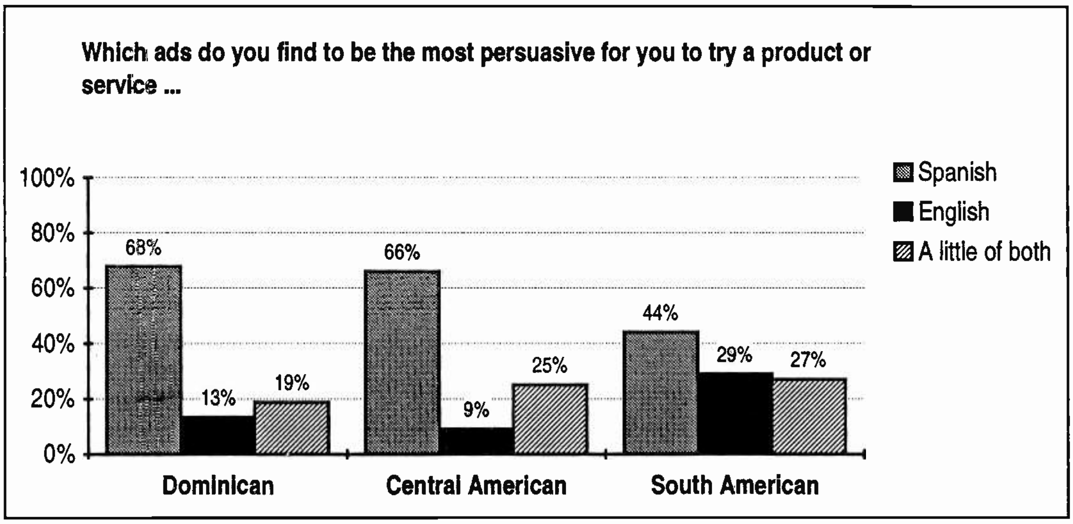
On the next page we take a look at advertising and language.

E. Advertising to Hispanics: Spanish or English?

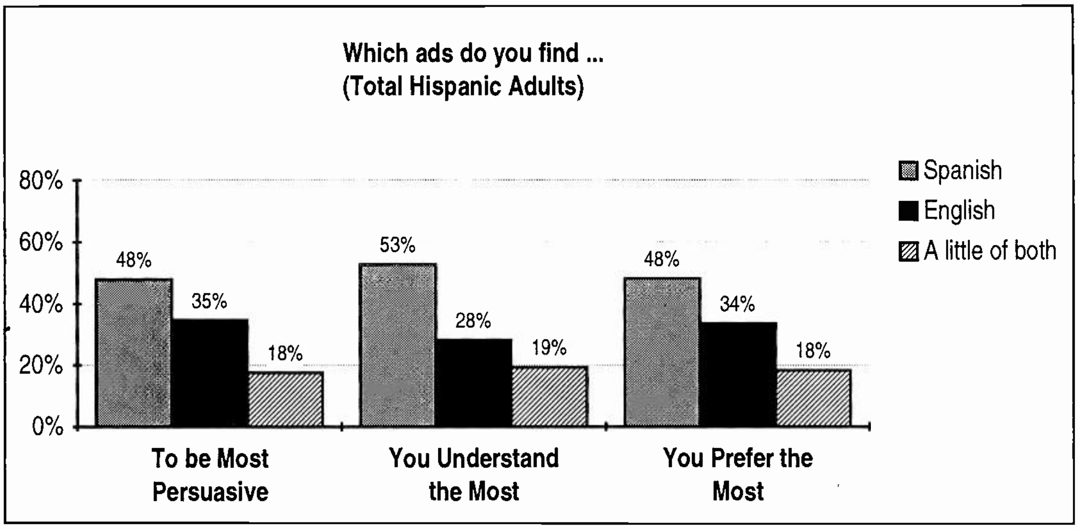
When it comes to advertising to Hispanics, 48% in the five markets we surveyed said they felt Spanish advertisements were the "most persuasive". However, certain Latino ethnic groups exhibit different preferences. Take, for example, Puerto Ricans and Dominicans. While 57% of Puerto Ricans said they found English advertisements to be most persuasive, 68% of Dominicans said Spanish ads were most persuasive. So if you were thinking of advertising only in English in New York City, think again.



Central Americans are as predisposed to Spanish advertisements as are Dominicans. South Americans, on the other hand, appear to find English ads most persuasive. Twenty-nine percent say English ads alone, and another 27% say "a little of both languages". Still 44% say Spanish ads are most persuasive.



Spanish ads are understood the most by 53% of the Hispanic adults in our five market survey, and preferred by 48%. Simply put, Spanish language ads are the most persuasive, most preferred and most understood by the Hispanic market in the five markets surveyed.



F. Survey Tabulations

The following tables show the tabulations used in the analysis of this section. Included in the tabulations are the data used in this section. The cross-tabulations shown are: Ethnic Segment, Market and Country of Origin. All data shown this section are Hispanic Adults 18 years of age or older.

On any given line, the first number is a percentage based on the total of all respondents in that column. Where a second figure appears, figure is an index on the total column.

All tables shown have Chi-square significance testing at 95% confidence. The +/- indicate significance and direction against the expected value.

The Popular Name Brands I use most often today are the same ones I will be using a year from now

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Top 2 Box (NET)	77.9	77.6	77.9	76.3	80.0	103	105
Totally Agree	45.6	43.8-	43.5-	45.5	57.1+	131	125
Somewhat Agree	32.3	33.8+	34.4+	30.7	22.8-	66	74
Somewhat Disagree	13.6	13.9	13.8	14.2	11.6-	84	81
Totally Disagree	4.5	4.5	4.4	5.3	4.6	105	86
Don't Know/Refused	4.0	4.0	3.9	4.2	3.9	100	94

Nationally advertised and popular name brands are the best products for my family

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Top 2 Box (NET)	47.6	46.5-	47.7	41.0-	55.4+	116	135
Totally Agree	19.3	17.2-	17.7-	14.9-	33.1+	186	221
Somewhat Agree	28.3	29.2	30.0+	26.0	22.3-	75	86
Somewhat Disagree	34.2	35.5+	35.4+	35.7	25.7-	72	72
Totally Disagree	15.5	15.9	14.8	21.1+	12.4-	84	59
Don't Know/Refused	2.7	2.1-	2.1-	2.2	6.5+	311	299

The most reliable and best products are made by American companies

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Top 2 Box (NET)	59.1	57.9-	56.1-	65.7+	66.8+	119	102
Totally Agree	30.9	29.3-	29.2-	29.7	41.0+	140	138
Somewhat Agree	28.2	28.6	26.9-	36.0+	25.8	96	72
Somewhat Disagree	27.5	28.7+	30.6+	20.4-	19.5-	64	95
Totally Disagree	6.1	6.0	5.8	6.9	6.8	117	99
Don't Know/Refused	7.4	7.4	7.5	7.0	7.0	93	99

The Popular Name Brands I Use most often today are the same Ones I Will Be Using A Year From Now

	Total	COUNTRY OF ORIGIN Mexico	Puerto Rico	Cuba	Central America	South America	Dominican Republic
Totally/Somewhat Agree (NET)	80	81.8	74.3	81.1	81	72.8	83.5
Totally Agree	57.1	58.9	48.4	60.4	60.5	49.2	58.4
Somewhat Agree	22.8	22.9	25.9	20.7	20.6	23.6	25.2
Somewhat Disagree	11.6	12	15.3	6.3	10.9	13	8.9
Totally Disagree	4.6	3.3	6.8	5.7	5.2	6.6	1.8
Don't Know/Refused	3.9	2.8	3.6	6.9	2.8	7.6+	5.7

Nationally advertised and popular name brands are the best products for my family

	Total	COUNTRY OF ORIGIN Mexico	Puerto Rico	Cuba	Central America	South America	Dominican Republic
Totally/Somewhat Agree (NET)	55.4	54.9	52.4	48.6	64.5+	59.5	59.4
Totally Agree	33.1	32.3	27.9	30.8	42.4+	35.5	37.6
Somewhat Agree	22.3	22.6	24.6	17.8	22	24	21.8
Somewhat Disagree	25.7	27	32.2	27	17.0-	17.6	25.4
Totally Disagree	12.4	12.2	11.4	16	9.3	13.4	10.5
Don't Know/Refused	6.5	5.9	3.9	8.4	9.3	9.5	4.7

The most reliable and best products are made by American companies

	Total	COUNTRY OF ORIGIN Mexico	Puerto Rico	Cuba	Central America	South America	Dominican Republic
Totally/Somewhat Agree (NET)	66.8	69.4	52.6-	70.9	72.8	64.7	64.8
Totally Agree	41	37.3	33.8	51.2+	53.3+	42.6	44.7
Somewhat Agree	25.8	32.1+	18.8	19.8	19.5	22	20.1
Somewhat Disagree	19.5	16.7	34.6+	13.9	13.6	20.3	23.4
Totally Disagree	6.8	6.1	6.5	9.3	6.4	8.2	6.7
Don't Know/Refused	7	7.8	6.3	5.9	7.2	6.9	5.1

Would you say that you personally prefer to purchase U.S. products and brands or do you prefer products and brands made in the country you were born?

	Total	COUNTRY OF ORIGIN Mexico	Puerto Rico	Cuba	Central America	South America	Dominican Republic
Yes - U.S. Products	63.4	50.2-	68.9	85.2+	70.3	75.4+	74.9
No - Other Products	23.3	31.6+	26.7	6.7-	20.6	16.5	12.6
Don't Know/Refused	13.2	18.2+	4.4	8.1	9.1	8.1	12.5

How popular are brands or products made in the United States in the country that you were born in?

		COUNTRY OF ORIGIN					
	Total	Mexico	Puerto Rico	Cuba	Central America	South America	Dominican Republic
Very/Somewhat Popular (NET)	80.8	80.8	88.6	58.5-	87.5	87.8	97.8+
Very Popular	61.2	53.5-	67.9	53.9	70.4	75.0+	87.4+
Somewhat Popular	19.6	27.2+	20.7	4.6-	17.0	12.9	10.4
Not Too Popular	5.2	7.6+	4.2	3.4	3.5	2.6	0
Not At All Popular	3.6	4.1	0	7.6+	2.6	1.1	0
Don't Know/Refused	10.4	7.5	7.2	30.4+	6.4	8.5	2.2

Are American brands advertised in the U.S. becoming more popular in your country of origin?

		COUNTRY OF ORIGIN					
	Total	Mexico	Puerto Rico	Cuba	Central America	South America	Dominican Republic
Yes	74.3	78.9	84.5	36.6-	83.1+	81.2	82.8
No	8.9	7.5	4.8	21.7+	7.0	6.5	3.2
Don't Know/Unsure/Refused	16.8	13.6	10.7	41.6+	9.9	12.3	14.0

When you first came to the U.S., did you prefer to buy American products that you had seen advertised in your HOME country?

		COUNTRY OF ORIGIN					
	Total	Mexico	Puerto Rico	Cuba	Central America	South America	Dominican Republic
Yes	70.6	68.7	70.5	74.1	68.9	76.8	69.1
No	27.1	30.7	26.8	18.2-	29.2	21.5	25.2
Don't Know/Unsure/Refused	2.4	0.6-	2.7	7.7+	1.9	1.7	5.7

During the past year, how many visits did you make?

		COUNTRY OF ORIGIN					
	Total	Mexico	Puerto Rico	Cuba	Central America	South America	Dominican Republic
0	38.1	33.2	35.4	48.2	51.4+	43.0	44.6
1	42.3	43.1	31.8	45.4	41.8	46.6	41.9
2	11.7	12.9	25.1+	3.2	2.7-	6.8	11.9
3	3.1	4.2	5.1	0	1.3	0	1.6
4	2.3	2.4	2.5	0	2.7	3.6	0
5	0.5	0.8	0	3.2	0	0	0
6	0.7	1.3	0	0	0	0	0
7	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0
10+	1.3	2.2	0	0	0	0	0
Don't Know/Refused	0	0	0	0	0	0	0
Mean (Excluding 0)	2.19	2.70	1.66	1.31	1.28	1.31	1.27

Have you taken gifts for family, friends, or business associates when you travel to your country of origin?

		COUNTRY OF ORIGIN					
	Total	Mexico	Puerto Rico	Cuba	Central America	South America	Dominican Republic
Yes	84.6	83.1	78.4	100.0	97.3+	87.8	80.9
No	15.4	16.9	21.6	0	2.7-	12.2	19.1
Don't Know/Unsure/Refused	0	0	0	0	0	0	0

What type of gifts do you take or send?

		COUNTRY OF ORIGIN					
	Total	Mexico	Puerto Rico	Cuba	Central America	South America	Dominican Republic
Art work	4.1	3.2	11.8+	12.1	10.2	0	0
Clothing	86.0	85.6	70.6-	87.9	90.3	87.5	97.8
Compact Discs or Cassette Tapes	10.9	12.7	18.1	0	9.3	7.0	0
Computers/Software	0.5	0	0	0	0	4.3+	0
Cosmetics	1.7	0.3	4.9	0	7.2+	3.5	0
Electronic Equipment	22.5	20.1	25.0	0	43.4+	22.8	19.1
Food	2.1	2.9	0	0	0	3.5	0
Furniture	1.9	2.2	0	0	0	5.3	0
Home Furnishings (not furniture)	9.3	10.4	5.9	0	16.8	3.5	0
Jewelry	6.4	4.6	9.7	9.7	6.3	7.6	7.5
Liquor	4.8	2.7	12.5	0	6.5	3.5	6.4
Perfume	23.1	17.6	33.8	19.4	27.4	38.8+	20.3
Small Household Appliances	12.0	10.5	5.9	6.2	20.8	8.4	20.1
Sporting Goods	11.2	15.3	0	0	5.8	8.3	6.7
Toys	7.1	8.8	0	0	0	6.7	13.0
Other	6.4	5.4	16.1+	47.3+	0	7.2	0
Don't Know/Refused	2.1	1.9	11.2+	0	0	0	0

Do people, like yourself, who have lived in the United States prefer to purchase U.S. products when they return to their HOME countries?

		COUNTRY OF ORIGIN					
	Total	Mexico	Puerto Rico	Cuba	Central America	South America	Dominican Republic
Yes	66.1	66.9	60.5	72.3	69.4	65.5	64.1
No	25.5	24.9	26.1	16.1	24.7	32.9	20.8
Don't Know/Unsure/Refused	8.4	8.1	13.4	11.6	5.9	1.6-	15.0

The Popular Name Brands I use most often today are the same ones I will be using a year from now

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Top 2 Box (NET)	80.0	82.6	77.7	80.7	76.5	75.3
	100	103	97	101	96	94
Totally Agree	57.1	61.0	52.2	59.3	52.5	53.6
	100	107	91	104	92	94
Somewhat Agree	22.8	21.6	25.5	21.4	24.0	21.7
	100	95	112	94	105	95
Somewhat Disagree	11.6	12.5	9.6	9.3	14.4	13.9
	100	108	83	80	125	120
Totally Disagree	4.6	2.9	7.2+	3.5	5.1	6.0
	100	63	159	78	111	133
Don't Know/Refused	3.9	2.0-	5.4	6.5	4.0	4.8
	100	52	138	164	102	121

Nationally advertised and popular name brands are the best products for my family

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Top 2 Box (NET)	55.4	56.4	55.0	58.1	49.7	52.7
	100	102	99	105	90	95
Totally Agree	33.1	33.2	32.7	38.8	27.3	29.3
	100	101	99	117	83	89
Somewhat Agree	22.3	23.2	22.3	19.3	22.3	23.4
	100	104	100	87	100	105
Somewhat Disagree	25.7	26.7	25.7	21.4	28.2	24.6
	100	104	100	83	110	96
Totally Disagree	12.4	11.4	11.3	14.0	15.0	15.9
	100	92	91	113	121	128
Don't Know/Refused	6.5	5.5	8.0	6.4	7.1	6.7
	100	84	122	99	109	103

The most reliable and best products are made by American companies

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Top 2 Box (NET)	66.8	71.7+	59.6-	70.1	61.9	62.6
	100	107	89	105	93	94
Totally Agree	41.0	40.2	37.8	55.5+	37.3	33.6
	100	98	92	135	91	82
Somewhat Agree	25.8	31.5+	21.8	14.6-	24.7	29.0
	100	122	85	57	96	112
Somewhat Disagree	19.5	16.0	25.0+	16.5	23.0	21.2
	100	82	129	85	118	109
Totally Disagree	6.8	6.3	6.6	8.0	7.2	8.0
	100	92	97	118	106	118
Don't Know/Refused	7.0	6.0	8.7	5.4	7.8	8.2
	100	87	125	77	112	117

Would you say that you personally prefer to purchase U.S. products and brands or do you prefer products and brands made in the country you were born?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes - U.S. Products	63.4	56.4-	70.2	79.6+	58.2	44.4-
	100	89	111	126	92	70
No - Other Products	23.3	27.2	22.9	12.9-	25.4	26.4
	100	117	98	55	109	113
Don't Know/Refused	13.2	16.4	6.9-	7.5	16.4	29.2+
	100	123	52	56	124	220

How popular are brands or products made in the United States in the country that you were born in?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Top 2 Box (NET)	80.8	79.7	82.9	75.8	86.8	84.3
	100	99	103	94	108	104
Very Popular	61.2	57.3	66.4	67.3	54.4	56.2
	100	94	109	110	89	92
Somewhat Popular	19.6	22.4	16.5	8.5-	32.4+	28.0
	100	115	84	43	166	143
Not Too Popular	5.2	7.0	3.4	3.7	6.1	4.7
	100	135	65	71	118	90
Not At All Popular	3.6	4.3	2.7	4.9	2.0	2.0
	100	119	74	136	55	55
Don't Know/Refused	10.4	9.0	11.1	15.6	5.1	9.1
	100	86	106	150	49	87

Are American brands advertised in the U.S. becoming more popular in your country of origin?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	74.3	81.1+	78.0	55.5-	72.6	71.3
	100	109	105	75	98	96
No	8.9	4.9-	10.5	12.6	9.2	15.4
	100	55	118	142	103	172
Don't Know/Unsure/Refused	16.8	14.0	11.5	31.8+	18.1	13.3
	100	83	69	190	108	79

When you first came to the U.S, did you prefer to buy American products that you had seen advertised in your HOME country?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	70.6	71.2	72.0	73.5	60.4	65.9
	100	101	102	104	86	93
No	27.1	28.4	25.2	20.1	36.6	33.1
	100	105	93	74	135	122
Don't Know/Unsure/Refused	2.4	0.4-	2.8	6.3+	3.0	1.0
	100	18	121	268	128	41

Do you ever return for visits to your country of origin?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	65.9	72.7+	75.9+	27.7-	65.3	80.2+
	100	110	115	42	99	122
No	34.1	27.3-	24.1-	72.3+	33.9	19.8-
	100	80	71	212	99	58
Don't Know/Unsure/Refused	0.1	0	0	0	0.8+	0
	100	0	0	0	1302	0

During the past year, how many visits did you make?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
0	38.1	35.0	43.3	42.0	28.3	40.0
	100	92	114	110	74	105
1	42.3	38.4	45.5	31.8	57.8+	46.4
	100	91	108	75	137	110
2	11.7	12.3	9.1	21.3	10.3	11.5
	100	105	77	182	88	98
3	3.1	4.5	1.4	3.9	2.5	2.1
	100	143	46	126	81	69
4	2.3	4.6+	0.7	0	0	0
	100	201	30	0	0	0
5	0.5	1.0	0	0.9	0	0
	100	194	0	177	0	0
6	0.7	1.4	0	0	1.0	0
	100	198	0	0	143	0
7	0	0	0	0	0	0
	0	0	0	0	0	0
8	0	0	0	0	0	0
	0	0	0	0	0	0
9	0	0	0	0	0	0
	0	0	0	0	0	0
10+	1.3	2.8+	0	0	0	0
	100	222	0	0	0	0
Don't know/refused	0	0	0	0	0	0
	0	0	0	0	0	0
Mean	1.35	2.07	0.71	0.91	0.92	0.76

Have you taken gifts for family, friends, or business associates when you travel to your country of origin?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	84.6	84.5	86.9	87.6	77.8	81.8
	100	100	103	104	92	97
No	15.4	15.5	13.1	12.4	22.2	18.2
	100	100	85	80	144	118
Don't Know/Unsure/Refused	0	0	0	0	0	0
	0	0	0	0	0	0

What type of gifts do you take or send?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Art work	4.1	1.2	6.5	8.5	8.7	4.3
	100	29	157	205	210	105
Clothing	86.0	84.0	86.2	84.2	86.8	98.0
	100	98	100	98	101	114
Compact Discs or Cassette Tapes	10.9	10.4	13.0	7.8	10.6	8.8
	100	96	120	71	97	81
Computers/Software	0.5	0	1.7	0	0	0
	100	0	339	0	0	0
Cosmetics	1.7	0	4.7+	0	1.8	2.0
	100	0	277	0	108	116
Electronic Equipment	22.5	18.2	29.4	12.7	25.7	28.5
	100	81	130	56	114	126
Food	2.1	2.9	1.4	0	4.2	0
	100	137	66	0	197	0
Furniture	1.9	2.2	2.1	0	3.4	0
	100	112	110	0	178	0
Home Furnishings (not furniture)	9.3	10.0	8.3	12.5	10.7	5.2
	100	107	89	134	115	56
Jewelry	6.4	1.7-	11.0	11.6	13.2	5.5
	100	27	172	182	206	86
Liquor	4.8	0-	9.7+	16.0+	9.9	0
	100	0	203	334	208	0
Perfume	23.1	18.0	31.8+	34.8	21.9	12.7
	100	78	138	150	95	55
Small Household Appliances	12.0	9.2	15.6	9.1	17.9	12.2
	100	76	130	75	148	101
Sporting Goods	11.2	14.4	9.5	0	11.8	8.5
	100	128	84	0	105	76
Toys	7.1	8.1	4.9	9.6	7.7	5.7
	100	115	70	136	109	81
Other	6.4	7.5	5.8	8.8	5.2	1.4
	100	117	90	138	82	21
Don't Know/Refused	2.1	2.2	3.2	0	1.8	0
	100	102	153	0	85	0

Do people like yourself, who have lived in the United States prefer to purchase U.S. products when they return to their HOME countries?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Yes	66.1	70.7	59.6	84.1+	56.9	58.7
	100	107	90	127	86	89
No	25.5	23.0	29.2	11.9-	34.4	29.0
	100	90	114	47	135	113
Don't Know/Unsure/Refused	8.4	6.3	11.2	4.0	8.7	12.3
	100	75	134	48	103	147

Thinking about all the advertising you see or hear which ads do you find to be the most persuasive for you to try a product or service

	Total	Los Angeles	New York	Miami	San Fran	Chicago
English	34.6	35.4	34.2	27.2-	39.8	39.2
Spanish	47.9	48.5	44.2	55	47.2	45.4
A Little Of Both Languages	17.5	16.1	21.6	17.8	13	15.4

Thinking about all the advertising you see or hear which ads do you find that you understand the most?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
English	28.1	27.9	31.5	19.3-	31.8	29.1
Spanish	52.7	53.6	46.7-	62.5+	49.9	53.5
A Little Of Both Languages	19.3	18.5	21.9	18.2	18.3	17.5

Thinking about all the advertising you see or hear which ads do you find that you prefer the most?

	Total	Los Angeles	New York	Miami	San Fran	Chicago
English	33.5	31.6	36.4	29.6	37.4	37.1
Spanish	48.1	48.4	44.6	54.2	46.7	49
A Little Of Both Languages	18.3	19.9	19	16.1	16	13.8

Thinking about all the advertising you see or hear which ads do you find to be the most persuasive for you to try a product or service?

		COUNTRY OF ORIGIN					
	Total	Mexico	Puerto Rico	Cuba	Central America	South America	Dominican Republic
English	34.6	32	57.4+	32.9	22.4-	31.9	27
Spanish	47.9	51.1	26.9-	52.8	59.6+	43.8	53.1
A Little Of Both Languages	17.5	16.9	15.7	14.3	17.9	24.2	19.9

Thinking about all the advertising you see or hear which ads do you find that you understand the most?

		COUNTRY OF ORIGIN					
	Total	Mexico	Puerto Rico	Cuba	Central America	South America	Dominican Republic
English	28.1	26.1	64.0+	24.9	9.1-	28.9	13.4-
Spanish	52.7	57.6+	20.3-	58.1	66.0+	44.1	67.8+
A Little Of Both Languages	19.3	16.3	15.7	17	25	27.0+	18.8

Thinking about all the advertising you see or hear which ads do you find that you prefer the most?

		COUNTRY OF ORIGIN					
	Total	Mexico	Puerto Rico	Cuba	Central America	South America	Dominican Republic
English	33.5	30.3	61.7+	31.8	15.8-	32.9	29.9
Spanish	48.1	52.4+	22.0-	56.1	57.6+	42.8	54.3
A Little Of Both Languages	18.3	17.3	16.3	12.2	26.7+	24.3	15.8

IX.

S*T*A*R PERSONALITY RATINGS

IX. S*T*A*R Personality Ratings

A. Introduction

This section provides highlights from the most recent STAR PR™ Reports for both Hispanic Adults and Teens. This data presented was not collected in the survey for the ***1996 U.S. Hispanic Market Study***. The STAR Personality Ratings, STAR PR™, are national syndicated reports measuring the Awareness and Favorability of key Personalities and Celebrities. This report is conducted among Hispanic Adults 18-54 and Hispanic Teenagers 12-17 years of age, and covers the following personality and celebrity categories:

Actors/Actresses
Music Entertainers
TV Announcers/Show Hosts

Each STAR PR™ report has the following five key measures:

1) Total Awareness (percent of respondents who are aware of the Personality)
2) STAR PR™ Score (percent who named Personality as one of their favorites)
3) Favorability Rating (average Personality's rating)
4) Index of each Personality's STAR PR™ Score and Awareness Score against average for the Category
5) Ranking of Indices by Category

Each Personality is measured as follows:

1) Awareness ("Have you heard of ...?")
2) Favorability ("Is he/she one of your favorites?" and
3) "... rate Personality on a five-point scale.")

Demographic cross tabulations for all key measures are included in the report.

Age
Sex
Reported Markets: Total U.S., Los Angeles, New York, Miami, Texas
Employment Status
Country of Origin
Born In/Out of U.S.A.

The surveys are conducted twice a year. A random sample is drawn in the eight top Hispanic markets which represent 58% of total U.S. Hispanics. The selected markets and sample sizes are:

Los Angeles -	200	Dallas/Ft. Worth -	100
New York -	200	Houston -	100
Miami -	200	San Antonio -	100
San Francisco -	100	Chicago -	100

The surveys are conducted by telephone using Strategy Research Corporation's CATI (Computer Assisted Telephone Interviewing) Center in Miami. Sample size for Performers Report I is 1,100 Hispanic Adults 18-54 years of age, and for Performers II, the sample size is 550 Hispanic Teens 12-17 years of age. There are 75 mainly Hispanic Personalities included on the questionnaire for each survey.

The STAR PR™ have been designed to be flexible. Should you require something other than the regular report, the report can be customized to fit your needs. Here are some of the customized reports that can be produced:

Adding Personalities on a Proprietary Basis
Data Tracking Wave-to-Wave
Special Report on one or more Personalities
Special Report on Local Market Personalities

For more information about the STAR Personality Ratings report please call our Miami offices at (305) 649-5400.

B. Hispanic Celebrity Ratings: Hispanic Adults 18-54

The STAR PR™ Score indicates that 26% of the Respondents who were Aware of Thalia gave her a top rating as 'uno de mis favoritos/one of my favorites', and 19% of the respondents who were Aware of Cristina rated her highest for favorability. The Awareness Score simply indicates that 86% of the respondents were Aware of Lucia Mendez and 85% were Aware of Don Francisco.

PERFORMERS REPORT I
Adults 18-54
Spring Report-April 1995

Type of Performer	Type of Rating	Personality	Ratings (Pct. Response)
Actor/Actress	STAR PR™	Thalia	26
Actor/Actress	Awareness	Lucia Mendez	86
TV Announcer/Host	STAR PR™	Cristina	19
TV Announcer/Host	Awareness	Don Francisco	85
Music Entertainer	STAR PR™	Juan Gabriel	27
Hispanic Music Group	STAR PR™	Los Bukis	22

Source: Strategy Research Corporation

Some performers have significant differences in their scores when cross tabulations are analyzed. For example:

Angelica Maria had a higher STAR PR™ Score among respondents born outside the U.S. (19) as opposed to respondents born in the U.S. (15). This was also true of Maribel Guardia - (15) vs. (5). This relationship was reversed for Andy Garcia, Paul Rodriguez, and John Leguizamo. Thalia's STAR PR™ Score, however, was relatively even among those born in and those born outside of the U.S.

Eduardo Yañes was significantly more popular among women (21) than among men (9), as was Eduardo Capetillo and Eduardo Palomo. Antonio Banderas, Alberto Vazquez, and Adela Noriega were equally well regarded by both sexes. Men gave higher STAR PR™ Scores to Thalia, Edward James Olmos, and Andy Garcia, than did women.

Among TV Hosts/Announcers, Daisy Fuentes had a much higher STAR PR™ score among males (20) than among females (11). This relationship was reversed for Pedro Sevcec - (15) among females vs. (10) among males - and for Cristina - (21) among females vs. (17) among males. Cristina, Daisy Fuentes, Enrique Gratas, Don Francisco, and Raul Velazco all indexed above average among respondents born inside and born outside of the U.S. Maria Celeste indexed higher among those born inside the US but below average among U.S. born respondents. Lily Estefan indexed higher with U.S.-born respondents than among those born outside the U.S.

The STAR PR™ Scores and Awareness percentages among Music Stars reflect the diverse tastes of Hispanics when analyzed by age, sex, country of origin, and language spoken at home. As expected, some stars had regional appeal while others crossed over national and demographic boundaries. For example, Los Bukis and Los Tigres del Norte had higher STAR PR™ Scores among Mexican respondents than among all other respondents. On the other hand, Ana Gabriel scored equally well among respondents from all nationalities. Among Puerto Rican respondents, Tito Puente had the highest STAR PR™ score (37). Cuban respondents scored Gloria Estefan highest (38), and among Mexican respondents, Vicente Fernandez scored highest (33). Female respondents gave Juan Gabriel (31), Vicente Fernandez (27), and Ana Gabriel (25) the highest STAR PR™ scores, while males preferred Vicente Fernandez (26) and Gloria Estefan (25).

The STAR PR™ Score indicates that 38% of **Hispanic Teens** who were Aware of John Leguizamo gave him a top rating as "uno de mis favoritos," and 20% of Hispanic Teens who were Aware of Daisy Fuentes rated her highest for favorability. The Awareness Score simply indicates that 75% of Hispanic Teens were Aware of Paul Rodriguez, 83% were Aware of Beavis & Butt-Head, and 93% were aware of Gloria Estefan. Some performers have significant differences in their scores when cross tabulations are analyzed. For example: Eduardo Capetillo's STAR PR™ Score was twice as high for females (32) as it was for males (16). These results were reversed for Paul Rodriguez who scored (27) among males and (13) among females.

PERFORMERS REPORT II
Teens 12-17
Spring Report-April 1995

Type of Performer	Type of Rating	Personality	Ratings (Pct. Response)
Actor/Actress	STAR PR™	John Leguizamo	38
Actor/Actress	Awareness	Paul Rodriguez	75
TV Announcer/Host	Awareness	Beavis & Butt-Head	83
Non-Animated TV Announcer/Host	STAR PR™	Daisy Fuentes	20
Male TV Announcer/ Host	STAR PR™	Emilio Aragon	15
Music Entertainer	Awareness	Gloria Estefan	93

Source: Strategy Research Corporation

The STAR PR™ Scores and Awareness percentages among Music Stars reflect the diverse tastes of Hispanics when analyzed by age, sex, country of origin and language spoken at home. As expected, some stars had regional appeal while others crossed over national and demographic boundaries. For example, Barrio Boyzz had a higher STAR PR™ Score among Females (26) than among Males (19). Further, Mark Anthony scored higher among respondents born in the U.S. (21) compared to respondents born outside of the U.S. (14).

The highest STAR PR™ Scores among Hispanic Music Stars for various cross tabulations were as follows:

HISPANIC MUSIC STARS
STAR PR™
Spring Report - April 1995

Type of Respondent	Music Star	STAR PR™
Total	Lucero	32
Mexicans	Lucero	34
Cubans	Jerry Rivera	45
Los Angeles	Cristian Castro	32
Dallas	Selena	40
Males	Jerry Rivera	32
Females	Lucero	36

Source: Strategy Research Corporation

The death of tejano singer Selena has left a void in the heart of the Hispanic music industry. Selena was a favorite among U.S. Hispanics. Her STAR PR™ Index was 155 among teens. She had a STAR PR™ Score of 31 for both males and females. Further, Selena's score among Mexican respondents was 32.

X.

SELECTED PRODUCT USAGE

The Bravo Group
Integrated Hispanic Communications

MetLife®

X. SELECTED PRODUCT USAGE

A. Personal Product Usage

The 1996 U.S. Hispanic Market survey includes a series of questions regarding the personal incidence of use of 111 consumer products. These specific products are grouped into 11 product categories ranging from health and medicinal aids through various food groups to health and beauty aids. Each product category is cross-tabulated in the following tables by first a General market to Hispanic market comparison including; Total, Total non-Hispanics, non-Hispanic Whites/Other, and African Americans as well as all Hispanics. Secondly, tables are broken out by the top five U.S. Hispanic markets, including in rank order; Los Angeles, New York, Miami, San Francisco and Chicago;

- The U.S. General Market & The U.S. Hispanic Market Comparison
- The Top 5 U.S. Hispanic Market Comparison
- Personal Product Usage Highlights

While the analysis points out the major differences between the General Market and Hispanic markets, it is beneficial to focus on the similarities in product category consumption and past 30 day purchase patterns, which illustrate the need to reach the Hispanic consumer as a vital component of the overall marketing plan. The summary section illustrates the highlights of incidence of use for selected personal product consumption patterns.

If your company is producing or marketing personal consumer goods, you will be able to see how each product fares in the U.S. Hispanic market compared to the same product in the U.S. General market. Further, comparisons of incidence of product usage by market segmentation including an index of Hispanics to non-Hispanic Whites/Other and another index of Hispanics to African Americans easily illustrate similarities and differences in specific product usage patterns. In addition, among the top five Hispanic markets, you will be able to see the highest incidence of product usage among all Hispanics as well as similarities and differences in consumption across markets.

Product Categories

The 11 product categories included, in order, are:

- Health and Medicinal Aids
- Women's Products
- Condiments/Staples
- Alcoholic Beverages
- Meats
- Snack Items
- Dairy Products
- Desserts and Sweets
- Beverages
- Health and Beauty Aids
- Breakfast Foods

Plus Personal Credit Card Ownership for:

- American Express
- Visa
- MasterCard
- Diners Club card
- Discover card
- American Express OPTIMA card

The U.S. General Market & The U.S. Hispanic Market Comparison

For each product category, the first tabulation shown is the *General Market vs. Hispanic Market*, as in the table below. Shown here for the product category "Women's Products Used In The Past 30 Days" are: home permanents, hand cream/lotion, lipstick/lip gloss, mascara, eye shadow, eye liner, nail polish, tampons, sanitary napkins, panty shields/liners, in-home pregnancy test, perfume/cologne, a hair coloring product, hair spray, styling gels/lotions and hair mousse.

For each product the incidence of use in the past 30 days among women in the general market, classified as either White/Other (non-Hispanic) or African American, and the Hispanic market are shown. To the right of these percentages, are an indices of the Hispanic market segment to two general market classifications; White/Other and to African American. In this table, the Total Non-Hispanic market is considered the base for indexing; that is, "100."

For example, for the first product, "home permanents," 7.3% of White/Other women report having used "home permanents" in the past 30 days, as compared to 12.6% of Hispanic women. Because the incidence of use is higher among the Hispanic women, the index shows a difference of higher usage at 171. Conversely, the incidence of using "home permanents" in the past 30 days among African American non-Hispanic women is 24.7% compared to 12.6% for Hispanic women. Because the incidence of use of home permanents among Hispanic women is half that of African American women, the index shows the lower usage at 51.

WOMEN'S PRODUCTS PURCHASED IN PAST 30 DAYS

		Non-Hispanic General Market					
	TOTAL	Total	White/ Other	Afr/ Amer	Hlispanic	Index of Hisp to Wh/Oth	Index of Hisp to Af/Am
Home Permanents	**10.9**	**10.7**	**7.3**	**24.7**	**12.6**	**171**	**51**
HandCream/Lotion	78.2	77.2	75.2	85.7	85.0	113	99
Lipstick/Lip Gloss	75.0	75.4	76.7	69.7	72.7	95	104
Mascara	50.1	50.9	54.0	38.0	44.2	82	116
Eye Shadow	40.7	39.9	43.2	26.3	46.4	108	176
Eye Liner	44.1	42.5	43.0	40.3	55.1	128	137
Nail Polish	54.5	53.4	50.0	67.8	61.3	123	90
Tampons	**32.8**	**35.6**	**36.1**	**33.5**	**14.4**	**40**	**43**

Source: Strategy Research Corporation

WOMEN'S PRODUCTS PURCHASED IN PAST 30 DAYS
(Continued)

	TOTAL	Non-Hispanic General Market Total	White/ Other	Afr/ Amer	Hlispanic	Index of Hisp to Wh/Oth	Index of Hisp to Af/Am
Sanitary Napkins	46.9	42.9	39.3	57.8	73.9	188	128
Panty Shields/Liners	41.3	41.6	39.3	51.4	39.4	100	77
In-Home Preg Test	3.5	3.2	3.3	2.7	5.7	170	214
Perfume/Cologne	74.0	73.5	72.1	79.4	77.4	107	98
Hair Coloring Prod	28.0	26.8	26.2	29.4	36.0	138	122
Hair Spray	61.6	61.2	63.5	51.8	64.1	101	124
Styling Gels/Lotions	47.9	47.7	43.4	64.0	51.5	119	80
Hair Mousse	28.2	25.1	28.1	12.8	49.5	176	388

Source: Strategy Research Corporation
First five columns represent Percentages
Last two columns represent Index

"Tampons," have a lower incidence of use by Hispanic females (14.4%) than by either African American females (33.5%) or White/Other females (36.1%). The resulting indices of 43 Hispanics to African Americans and 40 for Hispanics to Whites/Other highlights that lower incidence.

The Top 5 U.S. Hispanic Market Comparison

For each product category, the second tabulation shown illustrates the Top 5 Hispanic markets, such as in the table below. For our purposes, the table below for "Women's Products Used In The Past 30 Days" details product usage percentages for Los Angeles, New York, Miami, San Francisco and Chicago.

Among the products listed for this category, "hand cream/lotion" has the highest use among Hispanic females, 85.0%. Among the top five markets listed, Hispanic women in the Miami market have the highest reported incidence of use of "hand cream/lotion" (88.6%).

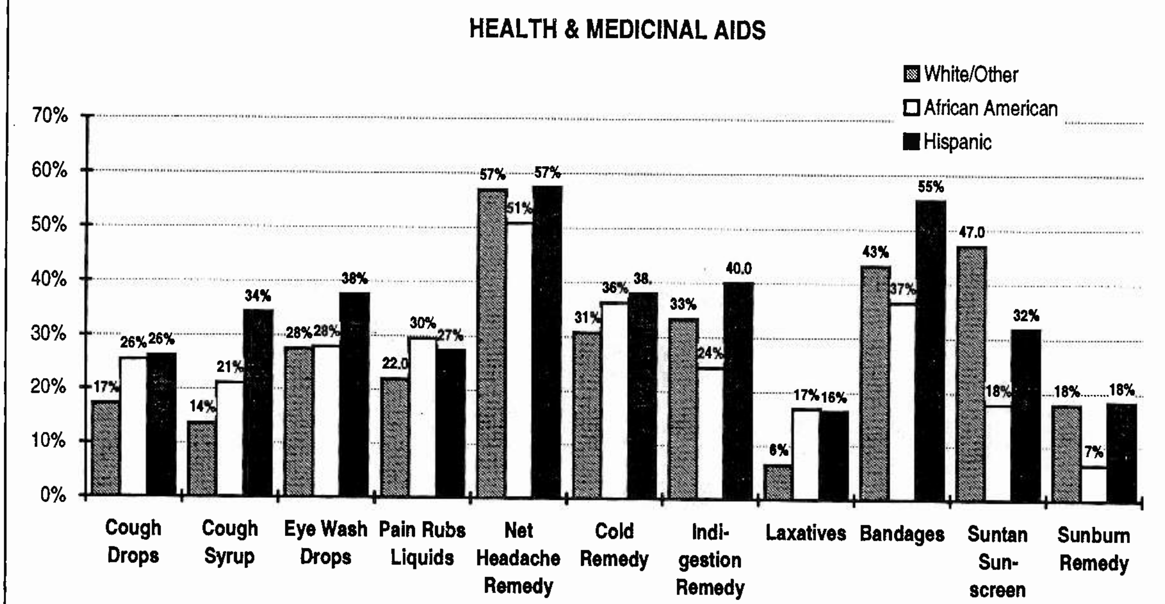
WOMEN'S PRODUCTS PURCHASED IN PAST 30 DAYS

		TOP 5 HISPANIC MARKETS				
	TOTAL	Los Angeles	New York	Miami	San Francisco	Chicago
Home Permanents	12.6	10.4	17.2	13.0	7.5	11.7
HandCream/Lotion	**85.0**	**82.0**	**87.0**	**88.6**	**87.5**	**82.8**
Lipstick/Lip Gloss	72.7	68.1	76.3	73.2	74.2	80.8
Mascara	44.2	47.6	45.7	35.9	41.7	40.8
Eye Shadow	46.4	47.7	44.7	43.2	52.2	45.9
Eye Liner	55.1	55.4	58.5	47.7	58.2	52.6
Nail Polish	61.3	56.0	70.4	66.5	49.8	58.9
Tampons	14.4	14.8	15.1	12.6	13.5	14.3
Sanitary Napkins	73.9	81.2	74.8	58.1	66.3	73.6
Panty Shields/Liners	39.4	42.9	40.2	32.7	35.4	35.4
In-Home Preg Test	5.7	7.2	4.9	5.0	3.4	4.8
Perfume/Cologne	77.4	71.8	84.1	85.0	72.9	72.6
Hair Coloring Prod	36.0	31.6	37.7	51.2	27.8	31.7
Hair Spray	64.1	61.3	71.1	64.3	61.7	54.9
Styling Gels/Lotions	51.5	49.5	58.3	49.2	49.9	43.1
Hair Mousse	49.5	52.3	49.3	45.2	47.5	46.9

Source: Strategy Research Corporation
Figures in each row represent a Percentage

Personal Product Usage Highlights

A few graphs highlighting the differences and similarities of incidence of use among Hispanics compared to Whites/Other and African Americans for various personal product categories are illustrated. Interestingly, many more similarities than differences appear in consumption patterns.



Source: Strategy Research Corporation

The Hispanic market segment has a significantly higher incidence of use for several products within the personal product category, Health & Medicinal Aids, than the White/Other or African American segments.

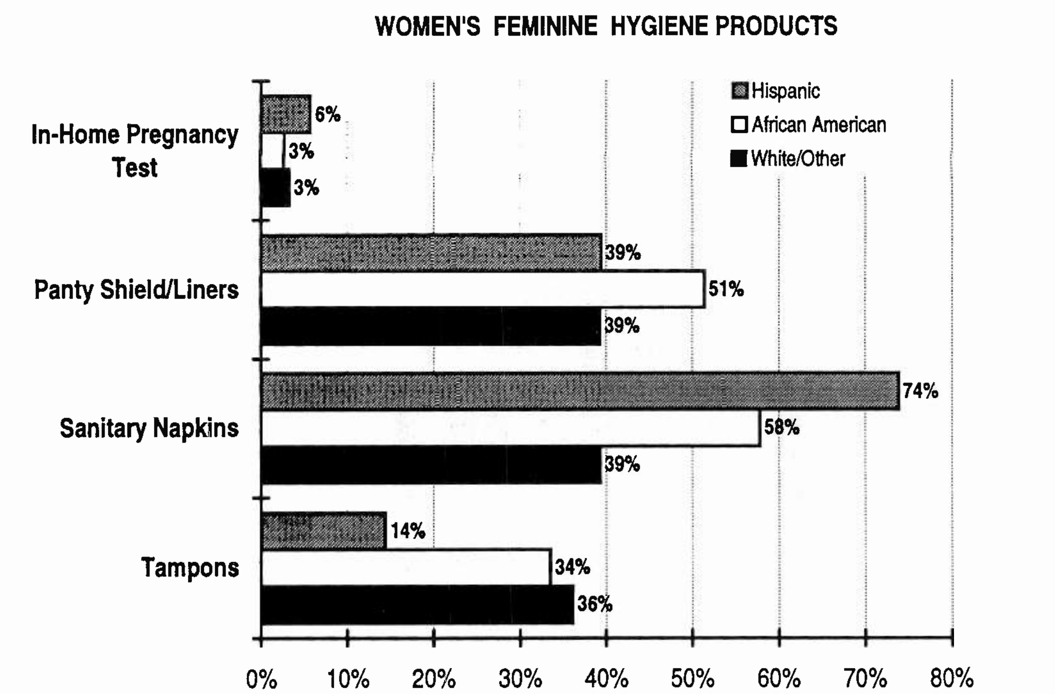
"Cough syrup" has a high incidence of use 34.3% - Hispanics, compared to 13.6% Whites/Other and 21.2% African Americans; **"cough drops,"** 26.2% usage among Hispanics, is the same as African Americans, 25.5% but high compared to 17.2% among Whites/Other.

Though incidence of **"eye wash/drops"** is similar between the White/Other and African American segments (about one in four), it is slightly higher, 37.6% among Hispanics.

"Laxatives," with an incidence of 16.3% among Hispanics is more than double that of Whites/Other, 6.4%.

"Indigestion remedies" have a slightly higher incidence among Hispanics (used by 4 out of 10 Hispanics), compared to about one-third of Whites/Other and fewer (1 out of 4) African Americans.

In the feminine hygiene group of products taken from the Women's Product category, Hispanic females have a significantly higher incidence of use of **"sanitary napkins"** (73.9%) compared to 39.3% among White/Other females and 57.8% among African American females.



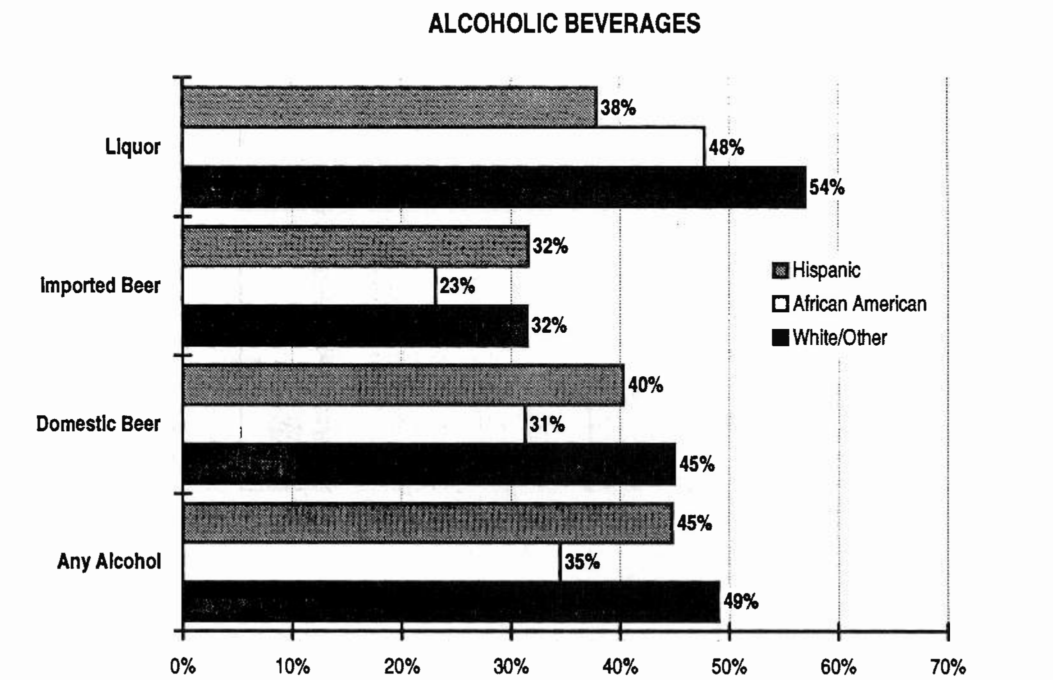
Source: Strategy Research Corporation

Conversely, **"tampons"** have a significantly lower incidence of use among Hispanic females, 14.4%, compared to 36.1% among White/Other females and 33.5% among African American females.

Meanwhile, incidence of purchase of **"panty shields/liners,"** is the same among both the White/Other and Hispanic female segments (39.3% and 39.4%, respectively) yet, higher among the Black females, 51.4%.

"In-home pregnancy tests" have a higher incidence of usage among the Hispanic females than either the White/Other or African American female segments. Of all products within this category, **"in-home pregnancy tests"** have the lowest incidence of past thirty day purchase for all women; White/Other, African American and Hispanic.

Hispanics' consumption of **"any alcoholic beverage,"** 44.8%, is lower than that of their White/Other counterparts (49.0%) but higher than the African American segment, 34.5%.

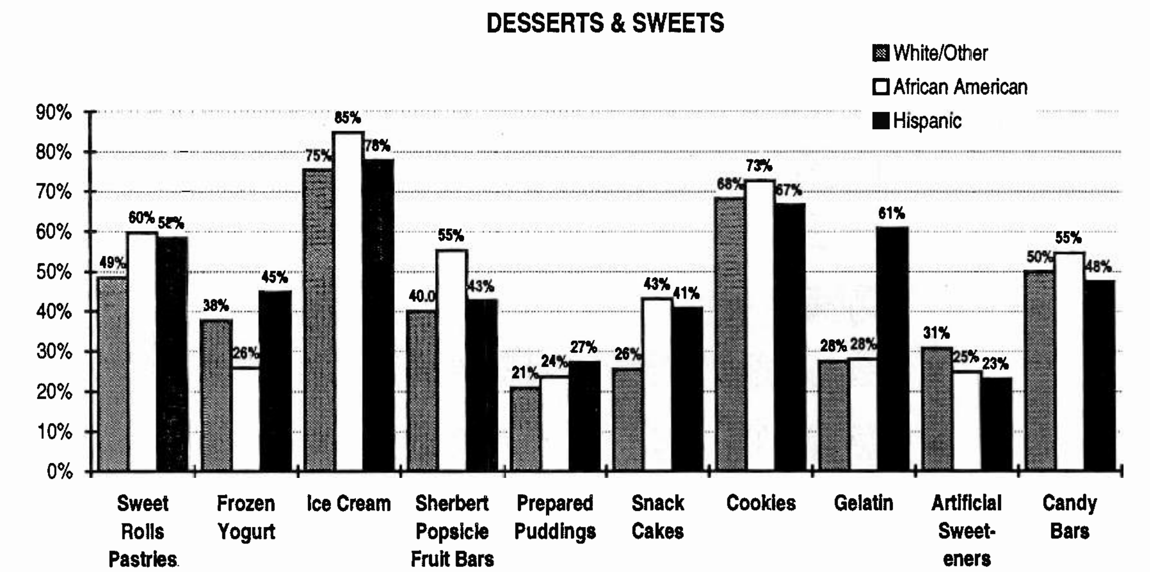


Source: Strategy Research Corporation

In terms of liquor products (including; brandy/cognac, rum, scotch/bourbon, vodka, gin, tequila, cordials/liqueurs and dinner/table wines), Hispanic consumption is lower than both other market segments. Hispanics **"liquor"** consumption at 37.9% is much lower than Whites/Other at 54.0% and somewhat lower than African Americans at 47.8%.

"Beer" consumption, either imported or domestic, is relatively the same among Hispanics and Whites/Other, yet somewhat lower among African Americans.

The Hispanic market segment usage of Desserts and Sweets is higher in most cases (7 out of 10 of the products) than among the White/Other market segment. The African American market segment has a higher incidence of usage than Hispanics for 6 of the 10 products listed.



Source: Strategy Research Corporation

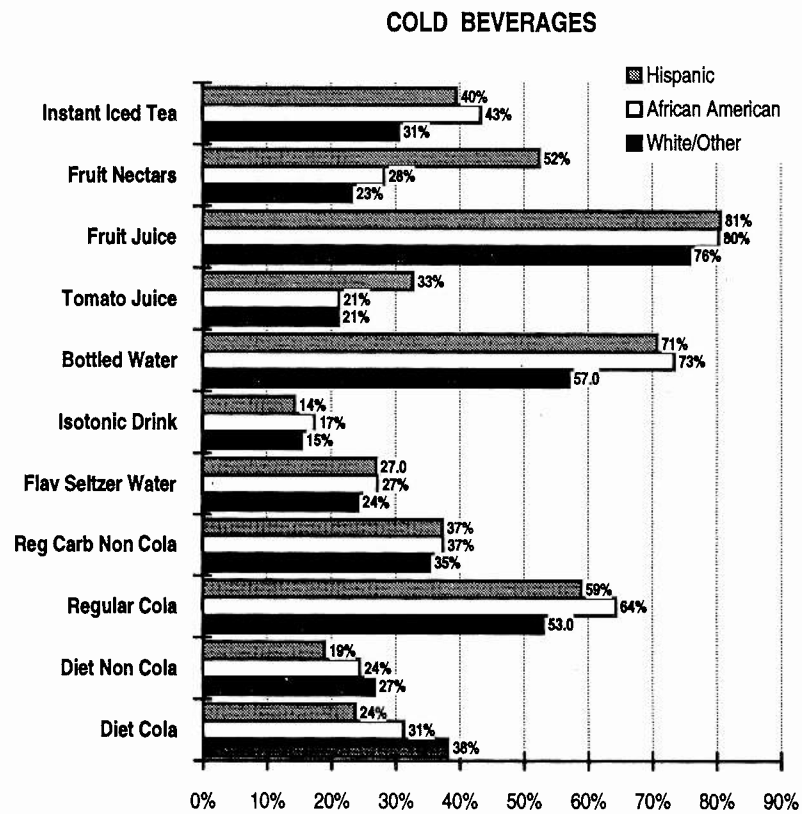
Hispanics have the highest personal consumption for "gelatin" (60.7%), significantly higher than either Whites/Other at 27.5% and African Americans at 28.0%.

Hispanics also have a higher consumption of "snack cakes" (40.8%) compared to Whites/Other (25.5%), but lower than African Americans (43.1%).

African Americans have the highest incidence of usage for "ice cream" at 84.8%, compared to 77.8% usage among Hispanics and 75.3% among Whites/Other.

Meanwhile, Hispanics have not developed a taste for "artificial sweeteners," based on an incidence of use of 23.1% for Hispanics, compared to a higher incidence of use for Whites/Other at 30.7%, yet similar to African Americans at 24.9%.

In the Cold Beverage product category, Hispanics stand out as consumers of **"Fruit Nectars,"** 52.4%, about twice the amount for either Whites/Other, 23.2% and African Americans, 28.2%.

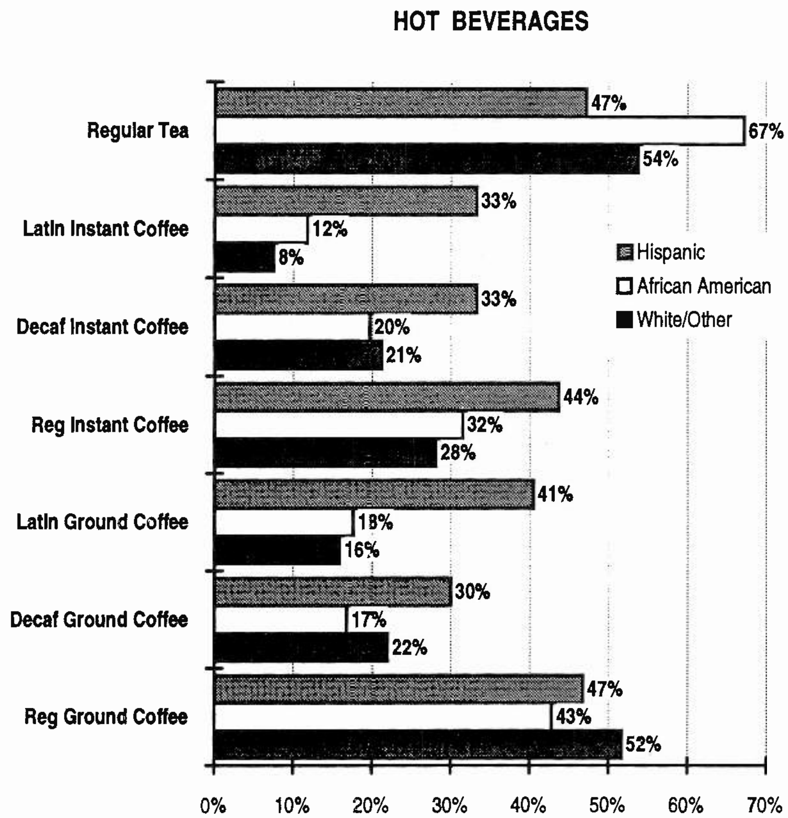


Source: Strategy Research Corporation

Hispanics also consume **"tomato juice"** substantially more frequently, 32.7% in the past 30 days, than either Whites/Other, 21.1% and African Americans, 21.2%.

Diet soft drinks do not do well among Hispanics. Hispanics consume less **"diet cola"** and **"diet non-cola"** (23.7% and 18.9% respectively), than the Whites/Other segment (38.1% and 26.7% respectively) or the African American segment, (31.2% and 24.4% respectively). As we saw earlier with the low usage of artificial sweeteners, the Hispanic taste preference appears to be consistent in its consumption of the real sugar/sweet taste.

Compared to the other market segments, Hispanics have higher consumption of coffee products and a lower consumption of tea in the Hot Beverage product category.



Source: Strategy Research Corporation

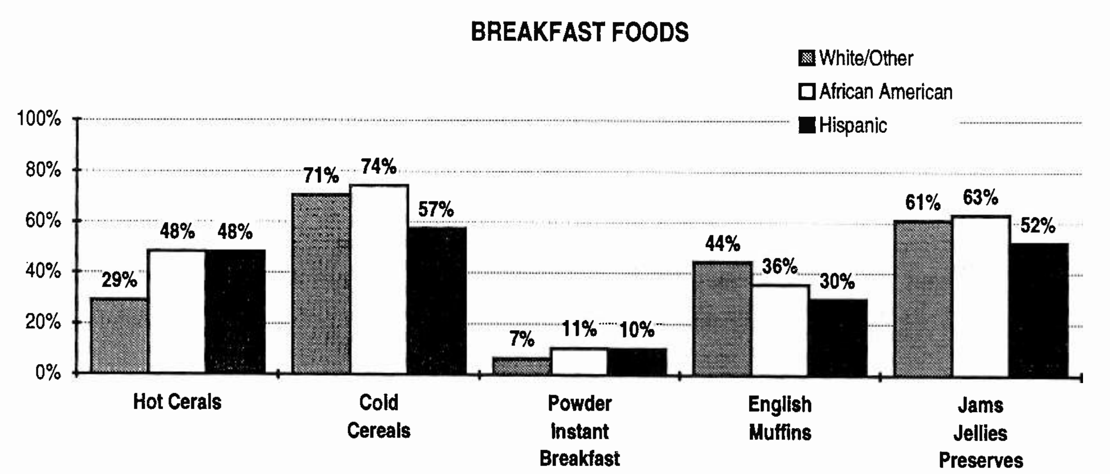
Hispanics have a significantly higher incidence of use of **"Latin Instant Coffee"** (33.3%), **"Decaf Instant Coffee"** (33.3%), **"Regular Instant Coffee"** (43.7%), **"Latin Ground Coffee"** (40.5%), and **"Decaf Ground Coffee"** (30.0%) than the other market segments.

The only time Whites/Other have a higher incidence of use in this category is for, **"Regular Ground Coffee,"** 51.7% compared to 46.8% for Hispanics and 42.8% for African Americans.

African Americans have the highest incidence of use for **"Regular Tea"** used by about two-thirds, compared to about one-half in both the Whites/Other and Hispanic market segments.

Considering the product category, Breakfast Foods, Hispanics overall have a lower incidence of use on a product by product comparison in relation to the other market segments.

The one outstanding instance of higher incidence of use among Hispanics is for "hot cereals" where Hispanics have an incidence of use of 48.3% compared to 29.1% among Whites/Other, and no real difference from African Americans with an incidence of use of 48.4%.



Source: Strategy Research Corporation

Incidence of use of "Cold cereals" is slightly lower in the Hispanic segment as compared to the African American or White/Other segments; 57.4% incidence of personal consumption within the past thirty days compared to 74.2% and 70.5%, respectively.

"Powder instant breakfast" has the lowest incidence of use, about 1 out of every 10 respondents, among all market segments.

B. Household Product Usage

The 1996 U.S. Hispanic Market survey includes a series of questions regarding Hispanic household incidence of use of 80 consumer products and intent to purchase on 14 other household products, plus past 30 day habits for 5 different types of fast food/take-away restaurants. The initial 80 different consumer products are grouped into 11 product categories ranging from Frozen Foods through Fresh Food groups onto Bottled/Canned, and Packaged Food groups to Paper Products and Cleaning Products. Intent to purchase products consists of another 3 product groupings. Each specific product fits into this household definition due to its' household product nature. These product categories are shown in the following tables by a General market to Hispanic market comparison as used previously and broken out by the top five U.S. Hispanic markets, Los Angeles, New York, Miami, San Francisco and Chicago.

- The U.S. General Market &. The U.S. Hispanic Market Comparison
- The Top 5 U.S. Hispanic Market Comparison
- Household Product Usage Highlights

The 11 product categories included, in order, are:

Household Products

- Frozen Foods
- Household Cleaning Products
- Laundry Products
- Paper/Plastic Wraps/Bags

- Packaged Foods
- Fresh Vegetables
- Fresh Dairy/Meat
- Bottled/Canned Goods

- Pet Products
- Baby Products

Intent to Buy in Next 60 Days:

- Large Ticket Items
- Auto Supplies/Parts
- Electronic Items

And Shopping Habits, Fast Food Restaurant Types Eaten From in the Past 30 Days:

- Hamburger
- Pizza
- Chicken
- Mexican/Taco
- Chinese

The U.S. General Market & The U.S. Hispanic Market Comparison

For each household product category, the first cross-tabulation shown is the *General Market vs. Hispanic Market*, such as in the table below. Shown here for the household product category "Staples Purchased In The Past 30 Days," cornmeal, flour, shortening, olive oil and salad/cooking oil are listed.

STAPLES PURCHASED IN PAST 30 DAYS

	TOTAL	Non-Hispanic General Market Total	Non-Hispanic General Market White/ Other	Non-Hispanic General Market Afr/ Amer	Hlispanic	Index of Hisp to Wh/Oth	Index of Hisp to Af/Am
Cornmeal	**27.2**	**24.3**	**17.8**	**52.7**	**46.4**	**260**	**88**
Flour	**51.3**	**49.5**	**42.1**	**82.2**	**62.9**	**149**	**77**
Shortening	30.6	25.3	19.4	51.7	65.3	337	126
Olive Oil	49.6	48.6	49.0	47.1	55.9	114	119
Salad/Cooking Oil	71.3	68.5	64.7	85.4	89.9	139	105

First five columns represent Percentages
Last two columns represent Index

Source: Strategy Research Corporation

Consider the first product, "cornmeal:" 17.8% of non-Hispanic Whites/Other respondents report having purchased "cornmeal" in the past 30 days, as compared to 46.4% of Hispanic respondents. Because the incidence of purchase is higher among the Hispanic market segment, the index shows a difference with higher usage at 260. Conversely, the incidence of purchasing "cornmeal" in the past 30 days among African American non-Hispanic respondents is 52.7% compared to 46.4% for Hispanic respondents. Because the incidence of purchase among the Hispanic market segment is lower, the index shows the lower usage at 88.

All staples listed show a higher incidence of purchase among the Hispanic market segment than among their non-Hispanic Whites/Other counterparts, however, incidence of purchase for both "cornmeal" and "flour," is higher among the non-Hispanic African American market segment. The resulting indices of 88 Hispanics to non-Hispanic African Americans for "cornmeal" and 77 for Hispanics to non-Hispanic African Americans for "flour" highlights these lower levels. For the product category, Staples, the Whites/Other non-Hispanic market segment has the overall lowest incidences for past 30 day purchase patterns. Does this mean they use less, or perhaps they may be purchasing greater volumes less frequently than either their African American or Hispanic market segment counterparts?

The Top 5 U.S. Hispanic Market Comparison

For each household product category, the second cross-tabulation shown illustrates the Top 5 Hispanic markets, such as in the table below. For our purposes, the table below for "Staples Purchased In The Past 30 Days" details Hispanic product purchase percentages for Los Angeles, New York, Miami, San Francisco and Chicago.

Among the products listed for this category, "salad/cooking oil" has the highest past thirty day purchase among Hispanics, 89.9%. Among the top five markets listed, Hispanics in the Los Angeles market have the highest reported incidence of purchase of "salad/cooking oil" (92.1%).

STAPLES PRODUCTS PURCHASED IN PAST 30 DAYS

		TOP 5 HISPANIC MARKETS				
	TOTAL	Los Angeles	New York	Miami	San Francisco	Chicago
Cornmeal	**46.4**	**45.7**	**47.7**	**50.2**	**42.4**	**43.0**
Flour	62.9	65.0	65.4	53.3	67.0	55.8
Shortening	65.3	71.4	53.4	74.0	58.2	64.0
Olive Oil	55.9	45.4	69.9	73.6	47.6	44.7
Salad/Cooking Oil	**89.9**	**92.1**	**88.3**	**89.0**	**85.9**	**89.5**

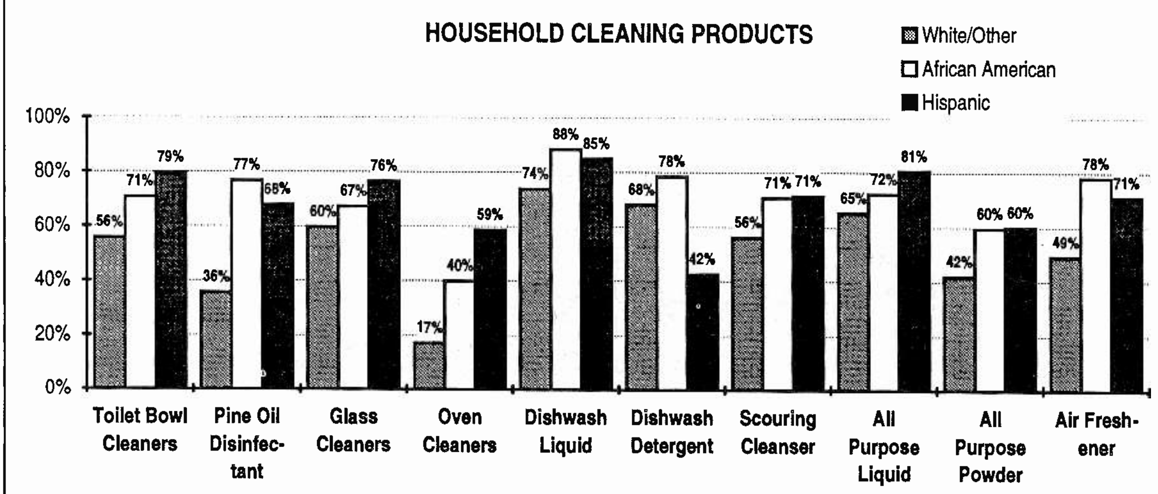
Figures in each row represent a Percentage

Source: Strategy Research Corporation

The product least used in this table, by Hispanics, is "cornmeal," at 46.4%, and cornmeal was used least of all by Hispanics in the San Francisco market (42.4%).

Household Product Usage Highlights

A few graphs highlighting the differences and similarities of incidence of use among Hispanics compared to Whites/Other and African Americans for various household product categories are illustrated. Interestingly, many more similarities appear than differences in household consumption patterns.



Source: Strategy Research Corporation

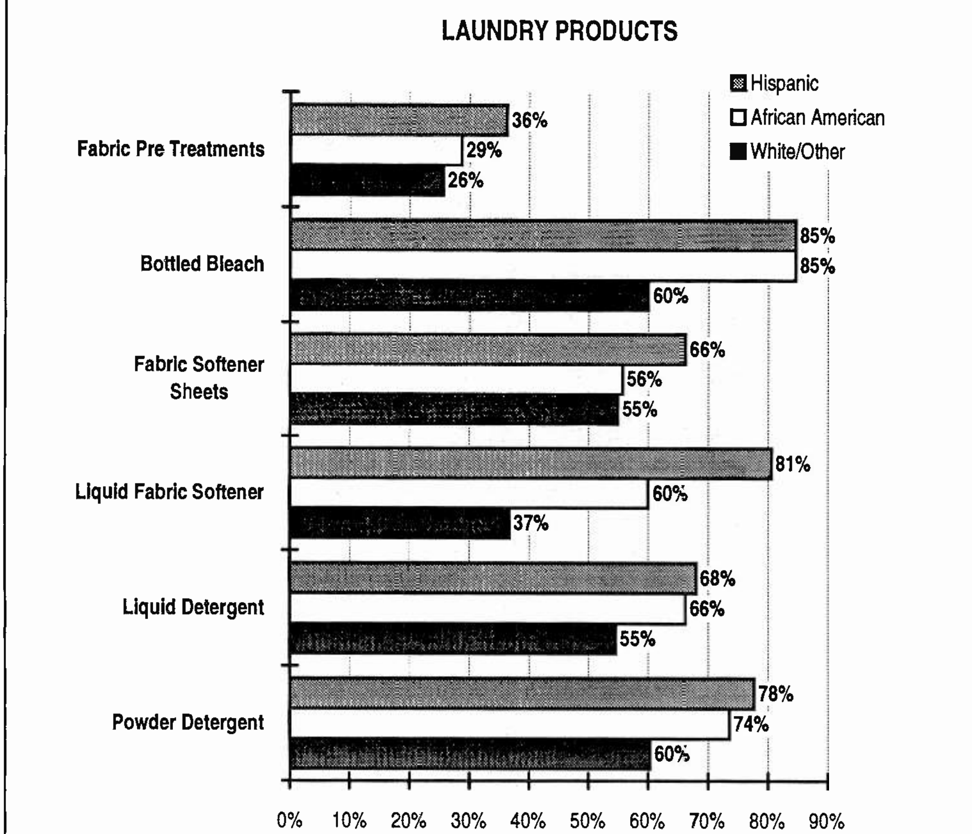
The Hispanic market segment has a significantly higher incidence of purchase for most products within the product category, Household Cleaning Products, than the Whites/Other or African American classifications. Hispanics have a higher incidence of purchase than Whites/Other for: toilet bowl cleaners, pine oil disinfectant, glass cleaners, oven cleaners, dishwashing liquid, scouring cleansers, all purpose liquid cleaners, all purpose powder cleaners and air fresheners.

The only product with a lower incidence of use among Hispanics (42.4%) is "**dishwashing detergent**" compared to 67.9% among Whites/Other and an even higher incidence of use 78.3% among African Americans.

Therefore, not surprisingly, among the Hispanic market segment **"dishwashing liquid"** has the highest incidence of use at 84.8%, compared to 73.6% among White /Others and a slightly higher incidence of use among African Americans, 88.2%.

"Oven cleaners" have the highest incidence of use among Hispanics (58.5%), compared to 17.0% of Whites/Other and 39.8% of African Americans.

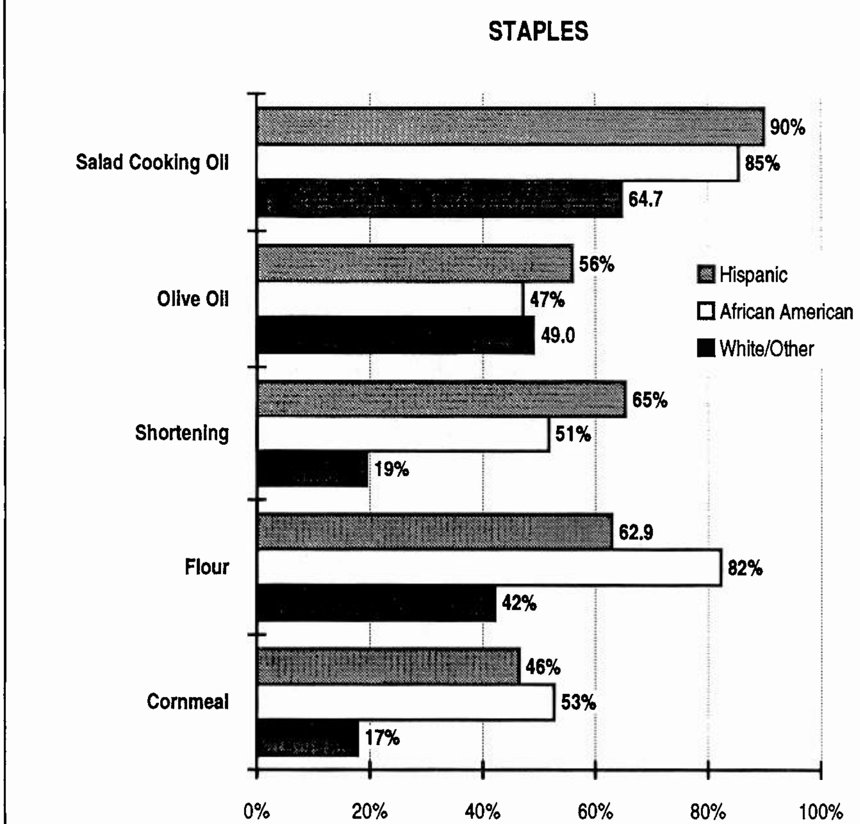
In the Laundry group of products, Hispanic respondents have a significantly higher incidence of purchase of **"liquid fabric softener"** (80.6%) compared to 36.7% among Whites/Other and 60.0% among African Americans.



Source: Strategy Research Corporation

All household products within this category have a somewhat higher incidence of use among Hispanics compared to Whites/Other. African Americans incidence of use seems to be more comparable to Hispanics than to Whites/Other for most products within this group.

Both **"shortening"** (65.3%) and **"cornmeal"** (46.4%) have a significantly higher incidence of use among Hispanics compared to Whites/Other (19.4% and 17.8% respectively). However, though Hispanics have a higher incidence of purchase than African Americans for "shortening" at 51.7%, African Americans at 52.7% have a higher incidence of purchase than Hispanics for **"cornmeal"**.

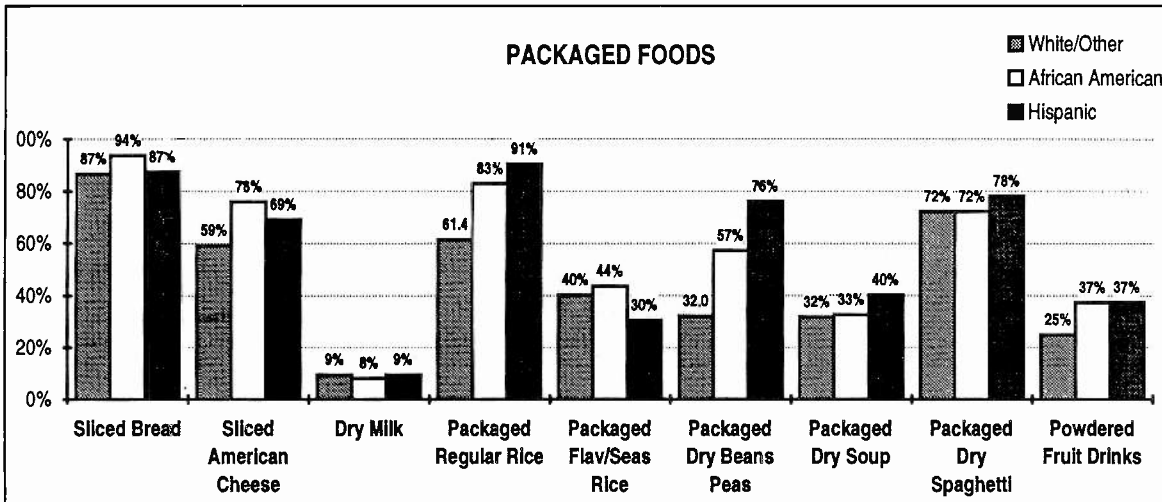


Source: Strategy Research Corporation

The product with the highest incidence of purchase among Hispanics is **"salad/cooking oil"**, purchased by about 9 out of 10 of all Hispanics in the past thirty days. A similar incidence of purchase is reported among the African American segment, 85.4%, while the Whites/Other segment of the non-Hispanic classification report that about two-thirds have made such a purchase in the past thirty days.

Meanwhile, about one-half of all respondents indicate having purchased **"flour"** in the past thirty days. Yet, when analyzing by market segmentation, approximately 8 out of 10 African Americans have purchased flour, about two-thirds of Hispanics and only about 4 out of 10 Whites/Other claim to have purchased flour in the past thirty days.

Packaged Foods most traditionally associated with the Hispanic market segment include rice and beans. Considering the product, rice, we see an interesting trend among Hispanics past thirty day purchase patterns. **"Packaged regular rice"** at 90.5% among the Hispanics surveyed has the highest incidence of all products within this category. In contrast, **"packaged flavored/seasoned rice"** has a much lower incidence of use, 30.4%. **"Packaged dry beans/peas"** have a much higher incidence of use among Hispanics (76.2%) compared to Whites/Other (32.0%) and African Americans (57.2%).

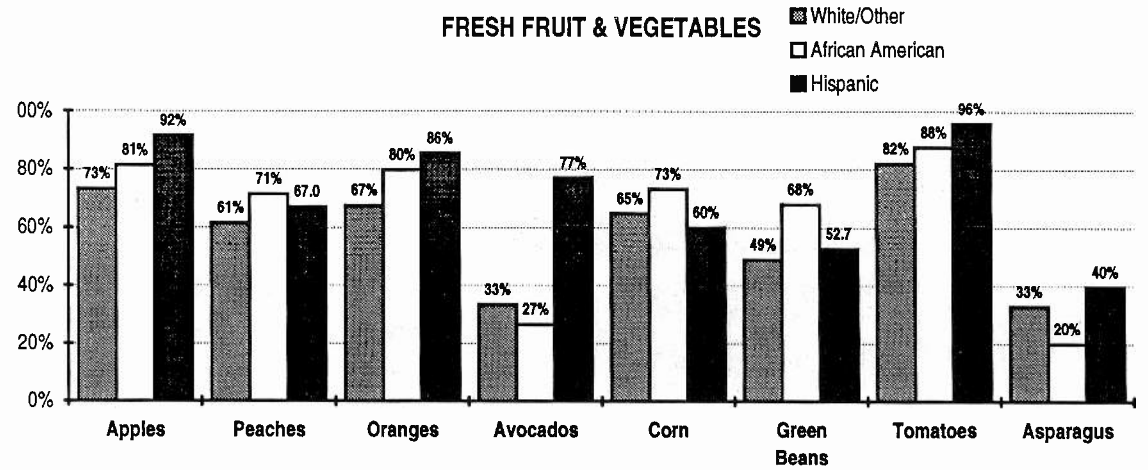


Source: Strategy Research Corporation

While a slightly higher incidence of purchase of **"powdered fruit drinks"** is apparent among Hispanics (37.3%) compared to Whites/Other (24.8%), African Americans incidence of purchase for this item is basically the same (37.2%) as Hispanics.

The product within this category with the lowest overall incidence among all market segments is **"dry milk"** purchased by less than 1 out of 10 respondents, regardless of classification segmentation.

While apples, oranges, avocados, tomatoes and asparagus all have a higher incidence of purchase among Hispanics than Whites/Other and African Americans, **"avocado"** purchases by Hispanics are significantly higher (77.1%) than both other market segments, Whites/Other at 33.3% and African Americans at 26.5%.



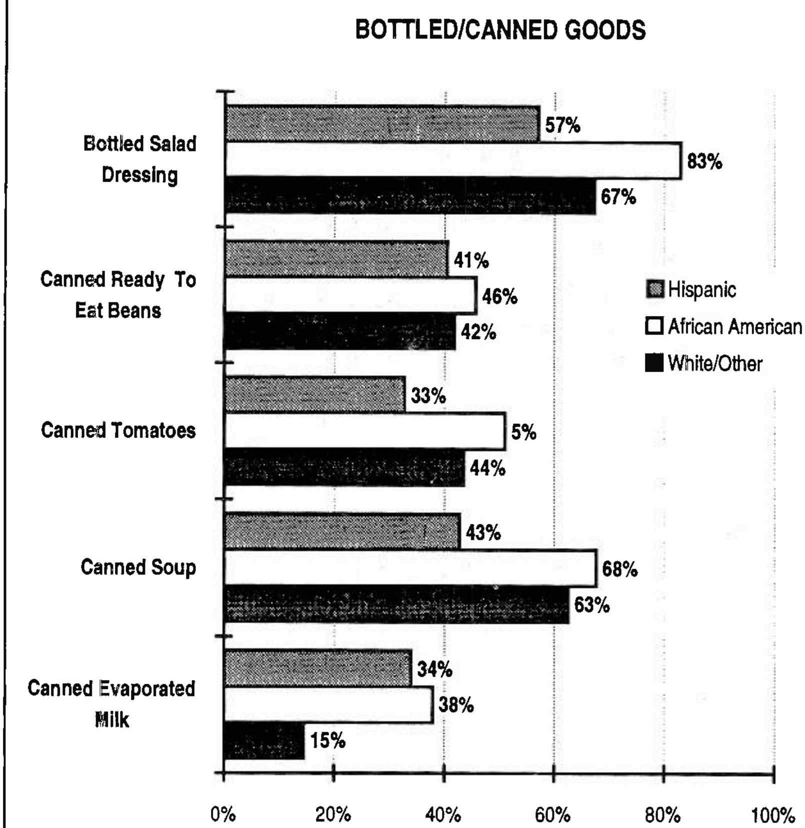
Source: Strategy Research Corporation

"Fresh corn" however, has a lower incidence of purchase among Hispanics, 59.9% than it does among both the African American group, 73.2% or the Whites/Other segment, 64.7%.

The product with the highest incidence of purchase among Hispanics, within the fresh fruit and vegetable product category is **"tomatoes,"** 95.9% which is higher than both African Americans, 87.7% and Whites/Other, 82.1%.

Taken from the household product group, Bottled/Canned Goods, are several products of interest, considering the lower incidence of purchase among Hispanics.

"Bottled salad dressing" showed the highest incidence of purchase among African Americans, 82.9%, among the Whites/Other, 67.3%, and lower among Hispanics, 57.1%.



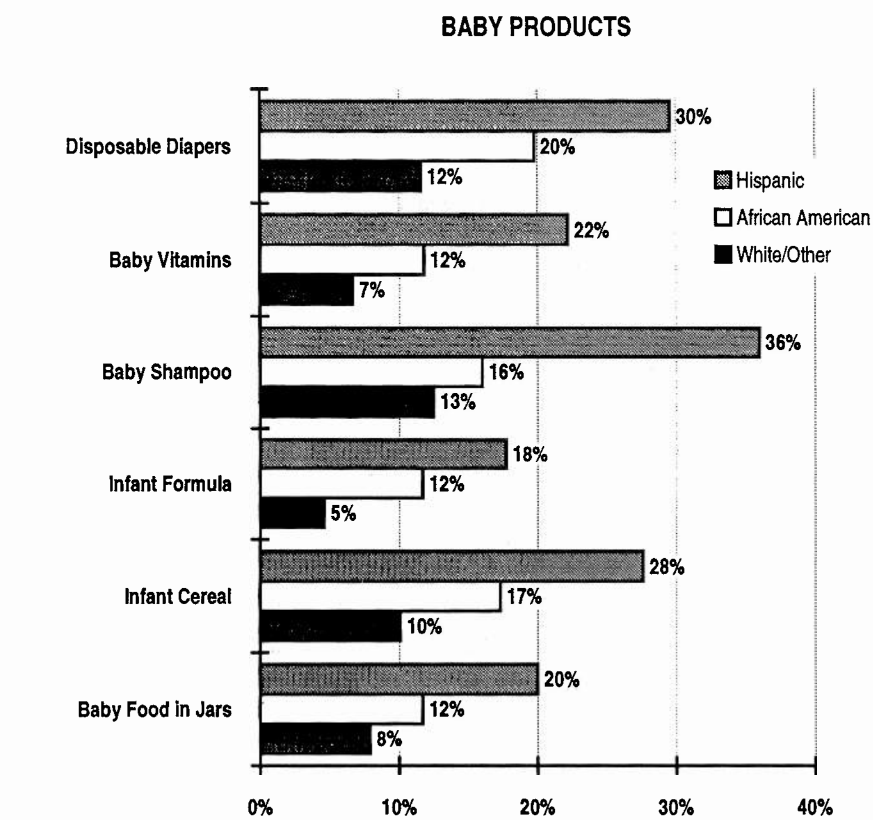
Source: Strategy Research Corporation

Where we previously saw 3 out of 4 Hispanics with a past thirty day purchase pattern for **"packaged dry beans/peas,"** here we see only 4 out of 10 who indicate having purchased **"canned ready to eat beans."** Also, whereas fresh tomatoes had the highest incidence of purchase among Hispanics in the fresh fruit & vegetable category (95.9%), **"canned tomatoes"** have an incidence of use of 32.8%, compared to 43.6% for Whites/Other and 51.1% for African Americans.

"Canned soup" with the highest incidence of use among the African Americans, 67.7% and 62.6% among White Others, is considerably lower among Hispanics, 42.8%.

"Canned Evaporated Milk" showed Hispanic incidence of use second to African Americans (34.0% to 37.9%), with Whites/Other scoring a low 14.5% usage.

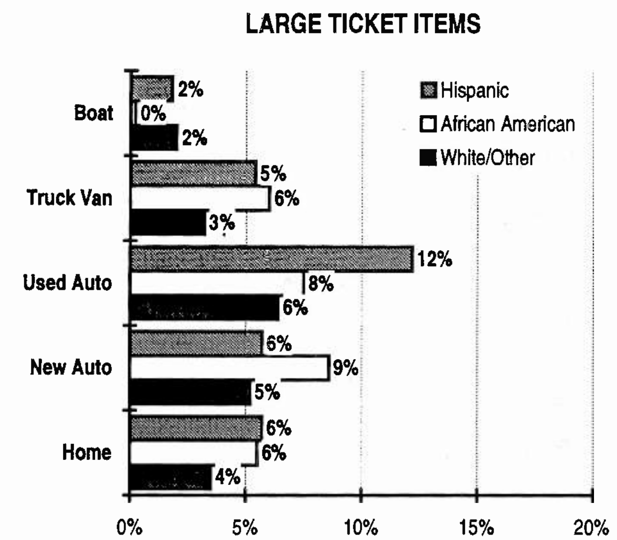
Overwhelmingly, Hispanics have much higher purchase patterns for each and every product within the Baby Products category. More than one-third of the Hispanic households (36.0%) reported purchasing **"baby shampoo"** and 30 percent of the households purchasing disposable diapers.



Source: Strategy Research Corporation

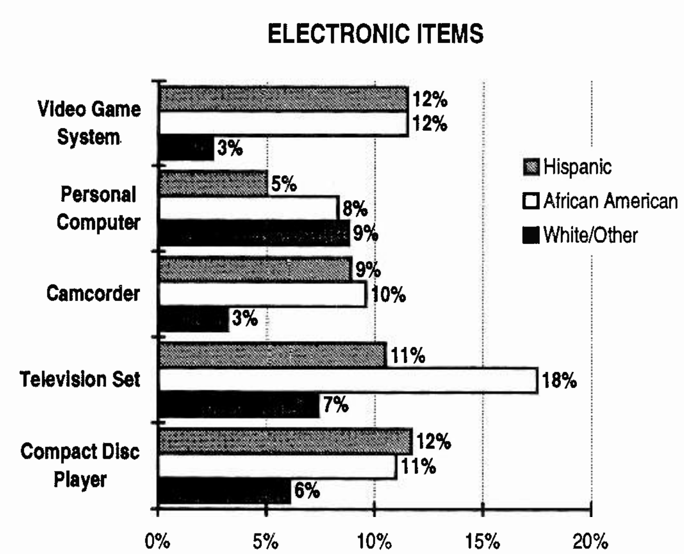
Considering the incidence of purchase of Hispanics to the Whites/Other we see significantly higher usage, and even compared to the African American segment, a higher purchase pattern appears. Hispanic households tend to be larger than the traditional non-Hispanic American family unit. The data suppports the larger family unit among Hispanics with the higher incidences of purchase among all products within this group, from **"disposable diapers"** to **"baby food in jars"**.

Among the Large Ticket Items for which all respondents were asked the intent to purchase in the next 60 days, Hispanics have the highest incidence for **"used auto"** at 12.2%, double the incidence of Whites/Other, 6.4% and higher than African Americans at 7.5%.



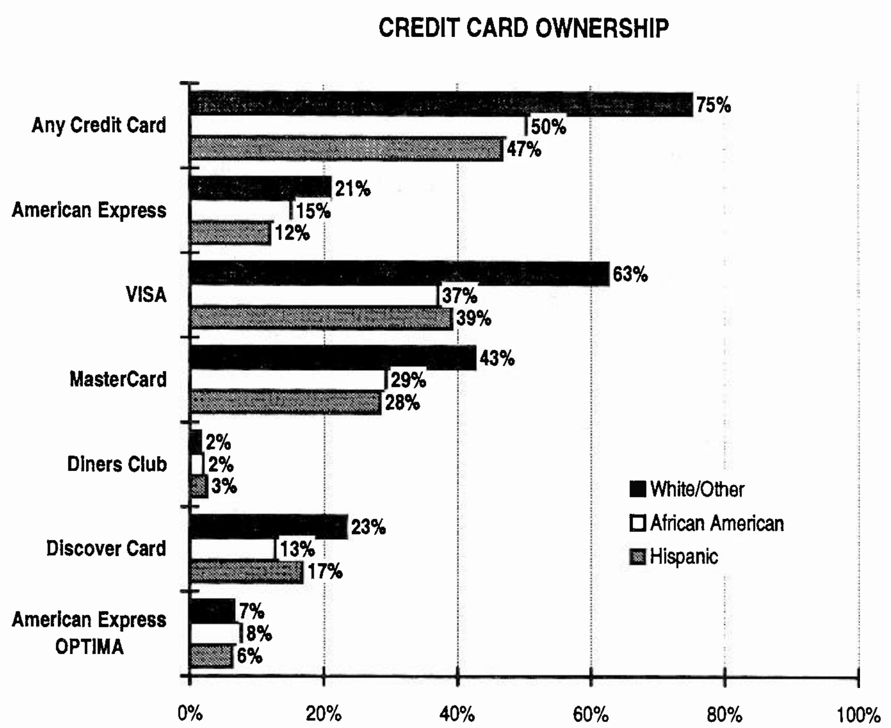
Source: Strategy Research Corporation

All respondents were also asked a similar series of questions regarding Electronic Items, about 1 out of 10 Hispanics surveyed indicated the intent to purchase a **"compact disc player," "television set,"** or **"video game system"** in the next 60 days. The intention to purchase a **"video game system"** is much higher among Hispanics (11.1%) than among the Whites/Other (2.5%), but about the same as African Americans, 11.5%. African Americans have the highest incidence for intention to purchase a **"television set"**, 17.5% compared to 10.5% among the Hispanics and 7.4% among White /Others.



Source: Strategy Research Corporation

Credit card ownership is highest in the White/Other segment, 75.2%, as compared to 50.4% of the African American segment and 46.7% of the Hispanic segment. The charge card with the highest incidence of ownership, regardless of market segment, is **"VISA."**

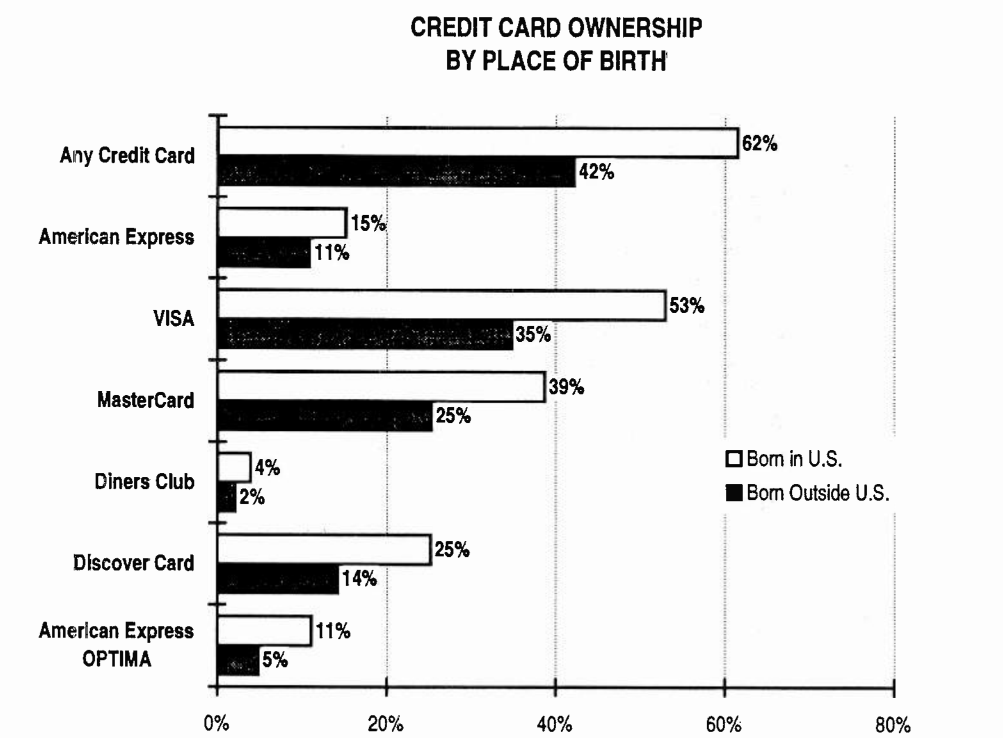


Source: Strategy Research Corporation

In a comparative analysis, Hispanics have a higher incidence of ownership of the **"Diners Club"** 2.5% than Whites/Other at 1.6% and African Americans at 2.0%. Meanwhile, the Whites/Other segment has an incidence about twice that of Hispanics for the **"American Express Card"** and one and a half times for both the **"VISA"** and **"MasterCard."**

This data would tend support the theory that the Hispanic segment is more cash-oriented than other market segments. This may also indicate why direct marketing efforts toward Hispanics tend to be less successful.

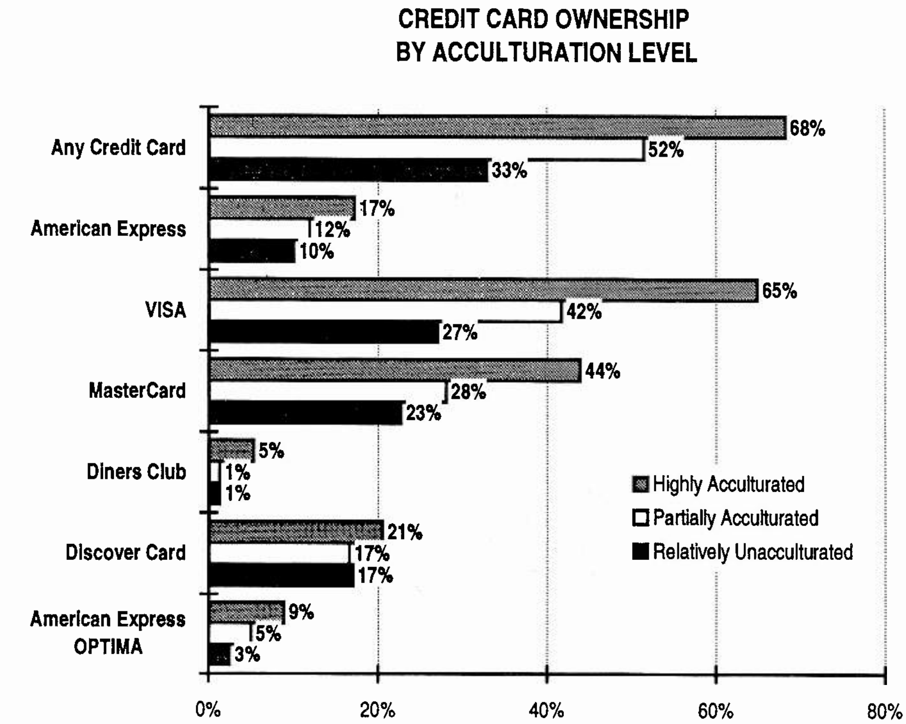
Retailers could offer an acceptable alternative to Hispanics who do not have credit cards. In stores with high Hispanic patronage, savvy retailers should consider offering lay-away plans. This would help to meet the credit needs of the large percentage of Hispanic consumers without major credit cards.



Source: Strategy Research Corporation

Another illustration of credit card ownership among Hispanics based on place of birth indicates a significantly higher incidence of credit card ownership among those Hispanics born in the U.S.; 61.5% compared to 42.2% of Hispanics born ouside of the U.S.

Hispanics born in the U.S. have a significantly higher incidence of use for *all* major credit cards. This may imply that less acculturated Hispanics need an alternative method for major purchases, such as lay-away plans, or that this segment represents a good opportunity for an educational marketing campaign on the part of the major credit card companies.



Source: Strategy Research Corporation

A pattern is seen regarding incidence of credit card ownership and level of acculturation. The higher the level of acculturation, the higher the incidence of credit card ownership among Hispanics. This is true for each credit card measured within our survey findings.

C. Survey Tabulations

The following tables show the tabulations used in the analysis of this section. Included in the tabulations are the data used in this section. The cross tabulations shown are: Market and Acculturation. All data shown this section are Hispanic Adults 18 years of age or older.

On any given line, the first number is a percentage based on the total of all respondents in that column. Where a second figure appears, figure is an index on the total column.

All tables shown have Chi-square significance testing at 95% confidence. The +/- indicate significance and direction against the expected value.

Frozen Foods Purchased For Use In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Frozen Dinners	32.5	33.4	27.5	34.7	33.2	39.0
	100	103	85	107	102	120
Frozen Prepared Vegetables	39.9	41.7	38.4	40.3	37.1	37.4
	100	105	96	101	93	94
Plain Frozen Vegetables	54.0	53.5	55.0	58.5	48.9	50.7
	100	99	102	108	91	94
Frozen Orange Juice	41.0	44.3	36.9	29.9-	52.7+	43.6
	100	108	90	73	129	106

Household Cleaning Products Purchased For Use In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Toilet Bowl Cleaners	79.4	75.5-	85.1+	92.7+	66.4-	72.7
	100	95	107	117	84	91
Pine Oil Disinfectant	67.7	66.5	67.7	69.3	67.5	72.2
	100	98	100	102	100	107
Glass Cleaners	76.4	77.0	76.4	81.9	69.9	70.1
	100	101	100	107	92	92
Oven Cleaners	58.5	58.0	66.9+	57.4	46.4-	48.5
	100	99	114	98	79	83
Dishwashing Liquid	84.8	82.4	88.0	83.6	85.9	88.7
	100	97	104	99	101	105
Dishwashing Detergent	42.4	45.5	42.8	32.6-	44.2	40.1
	100	107	101	77	104	94
Scouring Cleansers	71.3	69.5	76.4+	72.8	66.7	66.0
	100	97	107	102	94	93
All Purpose Liquid Cleaners	80.6	80.4	83.2	85.1	68.8-	78.6
	100	100	103	106	85	98
All Purpose Powder Cleaners	59.9	61.0	62.8	58.3	54.8	52.6
	100	102	105	97	91	88
Air Fresheners	71.0	69.6	73.9	80.3+	59.1-	65.3
	100	98	104	113	83	92
Insecticides	51.5	57.2+	47.1	61.3+	31.7-	39.1-
	100	111	91	119	62	76
Insect Repellents	43.4	46.1	41.6	45.4	33.5-	42.1
	100	106	96	105	77	97

Laundry Products Purchased For Use In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Powder Laundry Detergent	77.7	87.8+	62.0-	77.2	90.9+	60.5-
	100	113	80	99	117	78
Liquid Laundry Detergent	68.0	55.9-	87.7+	70.9	50.9-	83.5+
	100	82	129	104	75	123
Liquid Fabric Softener	80.6	83.2	82.2	71.8-	70.2-	88.9+
	100	103	102	89	87	110
Fabric Softener Sheets	66.2	73.1+	59.1-	61.9	67.4	58.8
	100	110	89	93	102	89
Bottled Bleach	84.6	91.0+	77.6-	79.9	81.6	84.4
	100	108	92	94	97	100
Fabric Pre-treatments	36.3	36.5	35.8	39.4	29.0	40.1
	100	100	99	108	80	110

Paper/Plastic Wraps/Bags Purchased For Use In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Facial Tissue	76.9	77.9	75.6	76.7	74.4	78.6
	100	101	98	100	97	102
Paper Towels	95.0	94.0	96.3	97.6	90.2-	96.7
	100	99	101	103	95	102
Plastic Garbage Bags	85.9	82.3-	90.6+	87.9	81.9	90.1
	100	96	106	102	95	105
Plastic Sandwich Bags	64.9	72.4+	54.8-	55.6-	67.2	71.8
	100	112	85	86	103	111
Plastic Wrap	64.8	69.0+	59.0-	64.3	62.9	63.8
	100	107	91	99	97	99
Aluminum Foil Wrap	91.5	93.2	90.8	91.2	90.6	85.7
	100	102	99	100	99	94

Staples Purchased For Use In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Cornmeal	46.4	45.7	47.7	50.2	42.4	43.0
	100	99	103	108	91	93
Flour	62.9	65.0	65.4	53.3-	67.0	55.8
	100	103	104	85	107	89
Shortening	65.3	71.4+	53.4-	74.0+	58.2	64.0
	100	109	82	113	89	98
Olive Oil	55.9	45.4-	69.9+	73.6+	47.6	44.7-
	100	81	125	132	85	80
Salad/Cooking Oil	89.9	92.1	88.3	89.0	85.9	89.5
	100	102	98	99	96	100

Packaged Foods Purchased For Use In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Sliced Bread	87.4	91.6+	83.9	82.0-	85.2	87.7
	100	105	96	94	98	100
Sliced American Cheese	69.1	70.5	72.1	67.9	59.9-	64.3
	100	102	104	98	87	93
Dry Milk	9.4	9.5	6.7	13.1	7.2	13.4
	100	102	72	140	76	143
Packaged Regular Rice	90.5	91.5	91.4	92.4	82.5-	87.5
	100	101	101	102	91	97
Packaged Flavored/Seasoned Rice	30.4	38.5+	20.8-	22.8-	30.9	31.2
	100	127	68	75	102	103
Packaged Dry Beans/Peas	76.2	78.8	73.6	72.3	76.1	77.9
	100	103	97	95	100	102
Packaged Dry Soup	40.2	39.9	42.1	45.6	32.2	35.2
	100	99	105	113	80	88
Packaged Dry Spaghetti	78.1	77.4	81.6	81.8	70.5	71.5
	100	99	105	105	90	92
Powdered Fruit Drinks	37.3	36.7	44.1+	29.2-	31.7	39.4
	100	98	118	78	85	106

Fresh Fruit/Vegetables Purchased For Use In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Fresh Apples	91.5	94.1+	89.3	85.5-	93.1	92.9
	100	103	98	94	102	102
Fresh Peaches	67.0	67.8	69.8	58.2-	70.0	64.8
	100	101	104	87	105	97
Fresh Oranges	85.8	88.3	86.1	77.2-	86.3	86.0
	100	103	100	90	101	100
Fresh Avocados	77.1	82.9+	72.7	58.1-	85.0	86.2+
	100	107	94	75	110	112
Fresh Corn	59.9	53.4-	64.1	65.4	64.8	66.3
	100	89	107	109	108	111
Fresh Green Beans	52.7	51.8	59.9+	48.3	45.9	48.8
	100	98	114	92	87	93
Fresh Tomatoes	95.9	97.7+	94.0	93.0	97.5	96.1
	100	102	98	97	102	100
Fresh Asparagus	39.7	42.1	39.4	32.0-	43.1	37.9
	100	106	99	81	108	95

Fresh Dairy/Meat Purchased For Use In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Fresh Beef	91.9	93.0	90.2	91.5	91.9	92.1
	100	101	98	100	100	100
Fresh Eggs	96.3	97.9	94.0-	94.7	96.6	98.1
	100	102	98	98	100	102
Fresh Chicken	93.3	94.2	92.7	91.7	92.6	94.5
	100	101	99	98	99	101
Fresh Fish	64.6	62.1	69.9	64.7	65.1	59.5
	100	96	108	100	101	92

Bottled/Canned Goods Purchased For Use In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Bottled Fruit Drinks	66.6	66.2	66.4	63.0	74.2	67.6
	100	99	100	95	111	101
BBQ/Season Sauces	60.1	63.4	55.2	59.5	60.7	58.4
	100	105	92	99	101	97
Bottled Salad Dressing	57.1	60.5	55.9	54.9	54.8	49.0
	100	106	98	96	96	86
Canned Evaporated Milk	34.0	32.0	36.3	43.8+	22.7-	33.0
	100	94	107	129	67	97
Canned Soup	42.8	40.9	45.0	44.6	43.3	41.8
	100	96	105	104	101	98
Canned Tomato Paste	54.5	49.6-	63.2+	62.2+	45.5	48.0
	100	91	116	114	84	88
Canned Tomato Sauce	73.2	70.6	78.2+	76.2	66.7	72.4
	100	96	107	104	91	99
Canned Tomatoes	32.8	33.6	26.4-	34.1	38.8	40.5
	100	102	81	104	118	124
Canned Chili	45.4	67.6+	17.5-	21.3-	54.3	49.8
	100	149	39	47	120	110
Canned Tuna	71.7	76.1+	69.4	66.6	69.0	67.4
	100	106	97	93	96	94
Canned Beans in Water/Salt	36.2	22.5-	55.4+	52.3+	19.6-	36.2
	100	62	153	145	54	100
Canned Ready to Eat Beans	40.5	34.1-	43.9	57.4+	30.5-	45.5
	100	84	108	142	75	112
Canned Vegetables	55.7	59.7	52.8	58.8	40.4-	55.1
	100	107	95	106	73	99
Canned Spaghetti	17.7	13.8-	22.4+	22.4	9.5-	24.7
	100	78	126	126	54	139
Canned Spaghetti Sauce	61.2	64.7	62.7	59.2	46.7-	56.8
	100	106	102	97	76	93

Pet Products Purchased For Use In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Net Purch Cat Food:	12.9	10.5	15.9	17.2	13.0	9.1
	100	81	123	133	100	70
Canned Cat Food	9.4	7.7	11.1	13.9	7.7	7.7
	100	81	118	147	81	81
Dry Cat Food	11.5	9.1	14.9	13.5	12.0	8.5
	100	80	130	118	105	74
Net Purch Dog Food:	22.7	25.6	17.4	30.4	19.1	14.9
	100	112	77	134	84	66
Canned Dog Food	13.6	13.1	12.3	24.1+	7.1	8.9
	100	97	90	177	52	65
Dry Dog Food	20.7	23.9	14.7-	27.1+	18.6	14.5
	100	115	71	131	90	70
Flea/Tick Care Products	17.5	22.7+	10.5-	21.0	14.7	8.4-
	100	130	60	120	84	48

Baby Products Purchased For Use In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Baby Food in Jars	20.0	23.4	18.5	15.3	15.5	19.8
	100	117	92	77	77	99
Infant Cereal	27.6	33.3+	25.5	17.2-	24.6	25.8
	100	120	92	62	89	93
Infant Formula	17.7	21.8+	15.0	11.5-	13.3	21.2
	100	123	84	65	75	119
Baby Shampoo	36.0	43.8+	29.1-	26.6-	32.4	37.1
	100	122	81	74	90	103
Baby Vitamins	22.2	26.0+	20.7	16.3	18.5	20.6
	100	117	94	73	83	93
Disposable Diapers	29.6	35.8+	23.5-	21.1-	26.9	34.4
	100	121	79	71	91	116

Large Ticket Items Household Plans To Buy In Next 60 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Home	5.7	3.1-	9.8+	5.7	6.1	5.9
	100	55	171	100	107	103
New Automobile	5.7	4.6	7.6	6.9	4.5	5.0
	100	80	133	120	79	88
Used Automobile	12.2	13.2	12.7	9.0	11.5	11.6
	100	108	104	74	94	95
Truck/Van	5.4	6.0	5.3	3.7	6.3	4.3
	100	111	99	69	117	80
Boat	1.8	1.8	1.5	1.4	3.0	3.0
	100	95	83	74	164	161

Auto Supplies/Parts Household Plans To Buy In Next 60 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Car Batteries	13.8	15.3	15.7	10.3	11.2	9.1
	100	110	113	74	81	66
Spark Plugs	30.0	40.2+	19.5-	22.5-	30.0	22.4
	100	134	65	75	100	75
Motor Oil	54.1	62.8+	43.0-	49.8	55.4	50.2
	100	116	79	92	102	93
Tires	23.2	26.7	20.7	22.6	16.6	20.2
	100	115	89	98	72	87

Electronics Household Plans To Buy In Next 60 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Compact Disc Player	11.7	10.1	14.5	8.8	11.0	17.4
	100	86	124	75	94	148
Television Set	10.5	9.7	10.3	12.7	6.3	16.9
	100	92	98	120	60	160
Camcorder	8.9	6.8	12.8+	10.5	3.4	10.7
	100	77	143	118	38	120
Personal Computer	5.0	4.3	7.3	4.5	3.0	4.8
	100	84	146	90	60	95
Video Game System	11.1	10.3	14.8+	7.8	7.5	12.8
	100	93	133	71	67	116

Health and Medicinal Aids Used In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Cough drops	26.2	27.7	25.3	23.8	27.0	23.9
	100	106	97	91	103	91
Cough Syrup	34.3	35.4	32.9	35.4	32.5	33.5
	100	103	96	103	95	98
Eye Wash/Drops	37.6	38.5	36.7	41.5	31.8	34.8
	100	103	98	110	85	93
Pain Relieving Rubs/Liquids	27.3	24.1	30.9	31.5	26.3	26.5
	100	88	113	115	96	97
Net Headache/Pain Remedy:	57.4	55.0	57.2	70.3	53.6	52.0
	100	96	100	123	93	91
Aspirin Formula	38.6	36.2	38.4	47.8+	37.6	37.2
	100	94	99	124	97	96
Non-Aspirin Formula	37.0	34.5	35.6	48.5+	37.0	34.6
	100	93	96	131	100	94
Cold/Sinus/Allergy Remedy	38.0	37.6	40.7	39.8	35.6	30.3
	100	99	107	105	94	80

Health and Medicinal Aids Used In Past 30 Days (Con't)

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Indigestion Aids/Stomach Remedy	40.0	37.4	41.3	50.4+	33.6	39.1
	100	93	103	126	84	98
Laxatives	16.3	16.0	17.7	20.3	10.2	12.6
	100	98	109	125	63	77
Adhesive Bandages	55.3	53.8	58.3	60.1	45.6-	55.9
	100	97	105	109	82	101
Suntan/Sunscreen Products	31.8	30.3	34.2	32.6	30.7	31.7
	100	95	108	102	97	100
Sunburn Remedy	18.3	18.0	17.1	23.3	15.7	18.5
	100	98	93	127	86	101

Women's Products Used In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Home Permanents	12.6	10.4	17.2	13.0	7.5	11.7
	100	83	137	104	60	93
Hand Cream/Lotion	85.0	82.0	87.0	88.6	87.5	82.8
	100	97	102	104	103	97
Lipstick/Lip Gloss	72.7	68.1	76.3	73.2	74.2	80.8
	100	94	105	101	102	111
Mascara	44.2	47.6	45.7	35.9	41.7	40.8
	100	108	103	81	94	92
Eye Shadow	46.4	47.7	44.7	43.2	52.2	45.9
	100	103	96	93	112	99
Eye Liner	55.1	55.4	58.5	47.7	58.2	52.6
	100	101	106	86	105	95
Nail Polish	61.3	56.0	70.4+	66.5	49.8	58.9
	100	91	115	108	81	96
Tampons	14.4	14.8	15.1	12.6	13.5	14.3
	100	103	105	87	94	99
Sanitary Napkins	73.9	81.2+	74.8	58.1-	66.3	73.6
	100	110	101	79	90	100
Panty Shields/Liners	39.4	42.9	40.2	32.7	35.4	35.4
	100	109	102	83	90	90
In-Home Pregnancy Test	5.7	7.2	4.9	5.0	3.4	4.8
	100	127	86	88	59	83
Perfume/Cologne	77.4	71.8-	84.1+	85.0	72.9	72.6
	100	93	109	110	94	94
A Hair Coloring Product	36.0	31.6	37.7	51.2+	27.8	31.7
	100	88	105	142	77	88
Hair Spray	64.1	61.3	71.1	64.3	61.7	54.9
	100	96	111	100	96	86
Styling Gels/Lotions	51.5	49.5	58.3	49.2	49.9	43.1
	100	96	113	96	97	84
Hair Mousse	49.5	52.3	49.3	45.2	47.5	46.9
	100	106	100	91	96	95

Condiments/Staples Personally Consumed In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Corn Tortillas	68.7	91.7+	37.7-	35.0-	88.2+	84.9+
	100	134	55	51	128	124
Flour Tortillas	55.8	74.9+	32.1-	29.2-	75.4+	56.4
	100	134	57	52	135	101
Mustard	51.4	54.2	44.1-	53.5	53.4	54.7
	100	105	86	104	104	106
Ketchup	79.0	84.1+	71.5-	78.3	76.8	79.4
	100	106	91	99	97	101
Salsa	52.9	70.8+	29.3-	18.9-	78.5+	66.3+
	100	134	55	36	148	125
Mayonnaise/Dressing	81.1	87.3+	78.6	65.9-	84.1	78.9
	100	108	97	81	104	97

Alcoholic Beverages Personally Consumed In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Any Alcoholic Beverage (Net)	44.8	45.8	44.1	42.6	46.0	44.5
	100	102	98	95	103	99
Domestic Beer (Subnet)	40.3	41.5	38.9	39.4	40.2	39.6
	100	103	97	98	100	98
Low Calorie Beer	21.9	23.3	20.3	19.3	20.7	26.1
	100	106	93	88	94	119
Regular Beer	36.9	38.2	35.2	37.1	38.3	33.5
	100	103	95	101	104	91
Imported Beer (Subnet)	31.6	33.1	32.9	25.9	31.6	28.9
	100	105	104	82	100	91
Low Calorie Beer	15.9	18.3	15.5	14.2	9.2	14.3
	100	115	97	89	58	90
Regular Beer	28.7	29.8	30.7	22.9	29.2	25.9
	100	104	107	80	102	90
Liquor Products	37.9	35.2	41.1	43.3	34.2	35.9
	100	93	109	114	90	95
Brandy/Cognac	10.5	11.3	9.7	10.5	9.3	9.9
	100	108	93	100	89	94
Rum	11.5	8.1-	15.6+	19.2+	4.8-	10.5
	100	70	136	167	41	91
Scotch/Bourbon	9.9	9.6	8.9	17.7+	6.5	4.8
	100	97	90	179	66	49
Vodka	10.2	9.7	12.9	9.8	8.7	6.1
	100	95	126	96	86	60
Gin	6.0	6.8	7.5	4.5	2.8	3.4
	100	113	124	75	46	56
Tequila	11.5	13.8	6.6-	9.5	17.9+	11.2
	100	120	58	83	156	98
Cordials/Liqueurs	13.0	13.6	13.7	12.4	11.5	11.0
	100	104	105	95	88	84
Dinner/Table Wines	22.2	16.1-	28.5+	32.5+	20.3	18.0
	100	72	129	146	92	81

Meats Personally Consumed In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Franks/Wieners/Hot Dogs	65.0	67.6	61.6	59.0	68.1	69.3
	100	104	95	91	105	107
Cold Cuts	67.8	69.2	66.2	66.1	67.4	68.7
	100	102	98	97	99	101

Snack Items Personally Consumed In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Potato Chips	70.6	76.2+	63.7-	63.6	75.1	69.8
	100	108	90	90	106	99
Packaged Pop Corn	42.4	43.3	39.3	34.6-	51.1	52.6
	100	102	93	82	120	124
Pretzels	30.2	28.6	34.0	21.8-	34.0	36.9
	100	95	113	72	113	122
Corn Tortilla Chips	58.6	69.0+	41.3-	39.9-	79.8+	69.5+
	100	118	70	68	136	119
Crackers	69.1	71.3	65.0	64.6	70.9	76.0
	100	103	94	94	103	110
Peanut Butter	44.9	53.5+	39.4	27.7-	48.3	43.5
	100	119	88	62	107	97

Dairy Products Personally Consumed In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Margarine	67.4	72.4+	69.0	60.4	59.0	56.3-
	100	107	102	90	88	84
Butter	75.5	76.0	79.8	69.4	69.5	75.4
	100	101	106	92	92	100
Sour Cream	37.9	50.3+	16.5-	30.5-	50.2+	41.5
	100	133	44	80	132	109
Grated Cheese	53.7	55.9	52.6	55.9	46.1	50.0
	100	104	98	104	86	93
Cottage Cheese	31.8	40.8+	19.1-	24.8	31.2	38.4
	100	128	60	78	98	121
Spread Cheese	41.3	40.9	41.5	44.9	35.9	42.3
	100	99	100	109	87	102
Non-Dairy Substitute	12.9	14.3	8.6-	21.4+	8.7	9.4
	100	111	66	165	67	73
Yogurt	58.2	60.5	52.2-	65.6	53.8	57.1
	100	104	90	113	92	98

Desserts and Sweets Personally Consumed In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Sweet Rolls/Pastries	58.3	69.6+	42.9-	42.1-	64.8	70.0+
	100	119	74	72	111	120
Frozen Yogurt	44.8	45.7	44.7	46.3	40.5	42.1
	100	102	100	103	91	94
Ice Cream	77.8	78.1	78.9	76.4	74.7	79.2
	100	100	101	98	96	102
Sherbet/Popsicles/Fruit Bars	42.7	46.8	37.7	37.2	51.2	37.5
	100	109	88	87	120	88
Prepared Puddings	27.2	24.3	30.4	32.4	23.1	27.3
	100	89	112	119	85	101
Snack Cakes	40.8	35.7-	51.4+	39.3	34.2	43.7
	100	88	126	96	84	107
Cookies	66.6	69.1	64.0	66.9	67.1	61.0
	100	104	96	100	101	92
Gelatin	60.7	65.2+	51.9-	65.4	52.6	66.6
	100	107	86	108	87	110
Artificial Sweeteners	23.1	21.9	22.9	28.0	22.2	22.1
	100	95	99	121	96	96
Candy Bars	47.5	46.1	48.0	48.2	46.1	53.9
	100	97	101	102	97	114

Beverages Personally Consumed In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Diet Cola	23.7	22.9	22.9	26.2	24.9	24.2
	100	97	97	111	105	102
Diet Non-Cola	18.9	19.9	17.9	19.1	17.4	18.0
	100	105	95	101	92	95
Regular Cola	58.9	61.6	56.3	53.8	59.8	61.4
	100	104	96	91	101	104
Regular-Carbonated Non-Cola	37.3	37.5	36.4	36.5	36.8	42.0
	100	100	97	98	99	113
Flavored Seltzer Water	27.0	29.3	28.6	15.0-	25.6	31.8
	100	109	106	55	95	118
Energy/Isotonic Beverage Drinks	14.3	15.0	11.9	17.0	10.7	17.8
	100	105	83	119	75	125
Bottled Drinking Water	70.7	76.6+	68.6	59.7-	75.8	59.2-
	100	108	97	84	107	84
Tomato Juice	32.7	41.4+	20.1-	32.9	31.9	27.9
	100	127	61	100	97	85

Beverages Personally Consumed In Past 30 Days (Con't)

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Fruit Juices	80.7	80.9	79.8	80.0	83.0	82.2
	100	100	99	99	103	102
Fruit Nectars	52.4	53.9	48.4	52.3	54.8	55.5
	100	103	92	100	105	106
Instant Iced Tea	39.5	37.8	46.7+	38.5	27.3-	39.8
	100	96	118	98	69	101
Regular Tea	47.2	44.6	54.1+	43.8	43.6	47.8
	100	95	115	93	93	101
Regular Ground Coffee	46.8	36.1-	53.3+	65.7+	47.1	49.6
	100	77	114	140	101	106
Decaffeinated Ground Coffee	30.0	25.3-	34.8	30.7	37.9	30.2
	100	84	116	102	126	101
Latin Style Ground Coffee	40.5	31.1-	49.2+	65.2+	29.3-	31.5
	100	77	121	161	72	78
Regular Instant Coffee	43.7	48.8+	37.9-	39.7	46.4	39.4
	100	112	87	91	106	90
Decaffeinated Instant Coffee	33.3	33.5	32.4	33.0	35.4	33.7
	100	101	97	99	106	101
Latin Style Instant Coffee	33.3	33.2	32.6	37.9	31.6	30.0
	100	100	98	114	95	90

Health & Beauty Aids Personally Used In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Breath Mints	52.4	54.7	52.2	46.9	48.2	55.0
	100	104	100	90	92	105
Vitamins/Minerals	49.0	47.5	54.0	52.3	39.4	44.7
	100	97	110	107	80	91
Mouthwash	79.4	83.6+	76.7	75.7	73.8	78.1
	100	105	97	95	93	98
Baby Powder	35.7	36.2	40.0	28.3	30.5	37.1
	100	102	112	79	86	104
Spray Deodorants/Anti-perspirants	47.2	53.1+	40.6-	41.3	45.2	50.1
	100	112	86	88	96	106
Solid Deodorants/Anti-perspirants	70.3	74.4+	73.2	57.5-	64.3	68.2
	100	106	104	82	91	97
Roll-on Deodorants/Anti-perspirants	56.8	59.1	56.7	52.0	55.4	54.8
	100	104	100	92	98	97

Health & Beauty Aids Personally Used In Past 30 Days Con't)

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Toothpaste from Pump	31.4	32.8	31.4	30.4	27.0	30.0
	100	105	100	97	86	96
Toothpaste from Tube	87.0	86.8	86.7	91.5	84.9	83.8
	100	100	100	105	97	96
Tartar Control Toothpaste	72.5	74.0	70.1	76.0	69.4	69.7
	100	102	97	105	96	96
Regular Toothpaste	84.3	85.7	84.0	80.9	82.5	85.8
	100	102	100	96	98	102
Personal Bar Soap	89.6	89.0	94.0+	86.1	88.3	86.2
	100	99	105	96	98	96
Liquid Hand Soap	64.6	66.5	65.8	64.6	51.8-	64.5
	100	103	102	100	80	100
Shampoo	95.4	95.9	96.2	93.8	93.4	94.4
	100	101	101	98	98	99
Hair Conditioners	75.6	79.8+	73.7	76.9	66.2-	66.9
	100	106	98	102	88	89

Breakfast Foods Personally Used In Past 30 Days

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Hot Cereals	48.3	47.7	51.8	44.0	49.0	46.8
	100	99	107	91	101	97
Cold Cereals	57.4	59.0	60.3	50.2	53.6	55.3
	100	103	105	87	93	96
Powder Instant Breakfast	10.3	11.2	9.0	11.6	8.7	9.1
	100	109	87	113	85	89
English Muffins	29.8	27.7	35.9+	26.1	27.9	29.8
	100	93	120	88	93	100
Jams/Jellies/Preserves	52.9	63.2+	37.2-	46.0	56.9	57.5
	100	119	70	87	107	109

Shopped In The Past 30 Days At Fast Foods/Drive Thru Restaurants

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Hamburger	63.5	71.3+	50.2-	61.1	64.9	68.0
	100	112	79	96	102	107
Pizza	58.8	59.4	63.2	53.0	49.8	61.6
	100	101	108	90	85	105
Chicken	58.8	64.6+	54.4	53.3	50.8	60.5
	100	110	93	91	86	103
Mexican/Taco	47.2	62.8+	22.6-	24.6-	67.1+	63.1+
	100	133	48	52	142	134
Chinese	50.7	51.4	55.9	44.6	50.4	39.8-
	100	101	110	88	100	79

Credit Cards Personally Have

	Total	Los Angeles	New York	Miami	San Fran	Chicago
Any Credit Card (Net)	46.7	44.9	43.4	61.0	48.0	40.1
	100	96	93	131	103	86
American Express card	11.9	11.1	11.7	20.0+	6.9	7.7
	100	93	99	168	58	65
Visa card	39.1	36.4	35.4	53.0+	44.0	35.4
	100	93	91	136	113	91
MasterCard	28.4	27.7	26.9	39.7+	27.2	18.2-
	100	98	95	140	96	64
Diners Club card	2.5	2.6	2.5	3.0	1.5	1.9
	100	104	102	121	61	76
Discover card	16.8	16.0	17.7	21.9	10.3	16.3
	100	95	105	130	61	97
American Express OPTIMA card	6.3	4.9	7.9	10.6+	3.7	4.2
	100	78	124	167	59	67

Frozen Foods Purchased For Use In Past 30 Days

	TOTAL	NON-HISPANIC Total	White/ Other	African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Frozen Dinners	37.2	37.9	39.0+	33.4-	32.5-	83	97
Frozen Prepared Vegetables	50.8	52.4+	50.6	60.6+	39.9-	79	66
Plain Frozen Vegetables	62.2	63.4+	61.6	71.3+	54.0-	88	76
Frozen Orange Juice	34.8	33.9	35.3	27.5-	41.0+	116	149

Household Cleaning Products Purchased For Use In Past 30 Days

	TOTAL	NON-HISPANIC Total	White/ Other	African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Toilet Bowl Cleaners	61.1	58.4-	55.6-	70.6+	79.4+	143	112
Pine Oil Disinfectant	46.4	43.1-	35.5-	76.7+	67.7+	191	88
Glass Cleaners	63.1	61.0-	59.6-	67.1+	76.4+	128	114
Oven Cleaners	26.2	21.2-	17.0-	39.8+	58.5+	343	147
Dishwashing Liquid	77.4	76.3-	73.6-	88.2+	84.8+	115	96
Dishwashing Detergent	66.2	69.8+	67.9+	78.3+	42.4-	62	54
Scouring Cleansers	60.3	58.7-	56.0-	70.6+	71.3+	127	101
All Purpose Liquid Cleaners	68.8	67.0-	65.8-	72.1+	80.6+	122	112
All Purpose Powder Cleaners	47.1	45.1-	41.9-	59.5+	59.9+	143	101
Air Fresheners	56.6	54.4-	49.1-	78.1+	71.0+	145	91
Insecticides	34.9	32.4-	31.8-	34.9	51.5+	162	147
Insect Repellents	29.9	27.8-	26.6-	33.4+	43.4+	163	130

Laundry Products Purchased For Use In Past 30 Days

	TOTAL	NON-HISPANIC Total	White/ Other	African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Powder Laundry Detergent	64.7	62.8-	60.3-	73.6+	77.7+	129	106
Liquid Laundry Detergent	58.2	56.8-	54.6-	66.2+	68.0+	125	103
Liquid Fabric Softener	46.2	41.0-	36.7-	60.0+	80.6+	220	134
Fabric Softener Sheets	56.5	55.0-	54.9-	55.7	66.2+	121	119
Bottled Bleach	67.2	64.6-	60.0-	84.6+	84.6+	141	100
Fabric Pre-treatments	27.5	26.2-	25.6-	28.7	36.3+	142	127

Paper/Plastic Wraps/Bags Purchased For Use In Past 30 Days

		NON-HISPANIC				Index	Index
	TOTAL	Total	White/ Other	African/ American	HISPANIC	Hisp - Wh/Ot	Hisp - Af/Am
Facial Tissue	69.8	68.8-	68.6-	69.5	76.9+	112	111
Paper Towels	91.1	90.5	89.9-	93.0+	95.0+	106	102
Plastic Garbage Bags	74.7	73.0-	70.1-	85.7+	85.9+	122	100
Plastic Sandwich Bags	60.8	60.2	59.8	62.1	64.9+	109	105
Plastic Wrap	59.5	58.7	56.8-	67.2+	64.8+	114	96
Aluminum Foil Wrap	76.4	74.1-	70.8-	88.6+	91.5+	129	103

Staples Purchased For Use In Past 30 Days

		NON-HISPANIC				Index	Index
	TOTAL	Total	White/ Other	African/ American	HISPANIC	Hisp - Wh/Ot	Hisp - Af/Am
Cornmeal	27.2	24.3-	17.8-	52.7+	46.4+	260	88
Flour	51.3	49.5-	42.1-	82.2+	62.9+	149	77
Shortening	30.6	25.3-	19.4-	51.7+	65.3+	337	126
Olive Oil	49.6	48.6	49.0	47.1	55.9+	114	119
Salad/Cooking Oil	71.3	68.5-	64.7-	85.4+	89.9+	139	105

Packaged Foods Purchased For Use In Past 30 Days

		NON-HISPANIC				Index	Index
	TOTAL	Total	White/ Other	African/ American	HISPANIC	Hisp - Wh/Ot	Hisp - Af/Am
Sliced Bread	87.8	87.9	86.6-	93.7+	87.4	101	93
Sliced American Cheese	63.2	62.2	59.2-	75.9+	69.1+	117	91
Dry Milk	9.2	9.2	9.4	8.1	9.4	99	116
Packaged Regular Rice	68.7	65.4-	61.4-	82.9+	90.5+	147	109
Packaged Flavored/Seasoned Rice	39.5	40.8+	40.2	43.6+	30.4-	76	70
Packaged Dry Beans/Peas	41.9	36.7-	32.0-	57.2+	76.2+	238	133
Packaged Dry Soup	32.9	31.8-	31.6-	32.5	40.2+	127	124
Packaged Dry Spaghetti	73.0	72.2	72.2	72.2	78.1+	108	108
Powdered Fruit Drinks	28.4	27.1-	24.8-	37.2+	37.3+	151	100

Fresh Fruit/Vegetables Purchased For Use In Past 30 Days

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Fresh Apples	76.9	74.7-	73.2-	81.3+	91.5+	125	113
Fresh Peaches	63.7	63.2	61.4-	71.4+	67.0+	109	94
Fresh Oranges	71.8	69.7-	67.4-	79.8+	85.8+	127	107
Fresh Avocados	38.0	32.0-	33.3-	26.5-	77.1+	232	291
Fresh Corn	65.4	66.3	64.7	73.2+	59.9-	93	82
Fresh Green Beans	52.4	52.4	48.9-	67.9+	52.7	108	78
Fresh Tomatoes	84.8	83.1-	82.1-	87.7+	95.9+	117	109
Fresh Asparagus	31.7	30.5-	32.9+	20.0-	39.7+	121	199

Fresh Dairy/Meat Purchased For Use In Past 30 Days

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Fresh Beef	77.0	74.7-	74.7-	74.8	91.9+	123	123
Fresh Eggs	88.1	86.9-	85.2-	94.2+	96.3+	113	102
Fresh Chicken	86.8	85.8-	84.1-	93.2+	93.3+	111	100
Fresh Fish	56.8	55.6-	50.2-	79.1+	64.6+	129	82

Bottled/Canned Goods Purchased For Use In Past 30 Days

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Bottled Fruit Drinks	65.0	64.8	62.4-	75.3+	66.6	107	89
BBQ/Season Sauces	60.2	60.2	55.2-	82.1+	60.1	109	73
Bottled Salad Dressing	68.5	70.2+	67.3	82.9+	57.1-	85	69
Canned Evaporated Milk	20.8	18.8-	14.5-	37.9+	34.0+	235	90
Canned Soup	60.8	63.5+	62.6+	67.7+	42.8-	68	63
Canned Tomato Paste	48.9	48.1	45.0-	61.6+	54.5+	121	88
Canned Tomato Sauce	61.4	59.6-	57.5-	68.9+	73.2+	127	106
Canned Tomatoes	43.3	45.0+	43.6	51.1+	32.8-	75	64
Canned Chili	30.8	28.5-	25.6-	41.4+	45.4+	177	109
Canned Tuna	71.8	71.8	70.0-	80.0+	71.7	102	90
Canned Beans in Water/Salt	35.4	35.3	33.4-	43.3+	36.2	108	83
Canned Ready to Eat Beans	42.3	42.6	41.9	45.7+	40.5	97	89
Canned Vegetables	55.9	55.9	52.7-	70.3+	55.7	106	79
Canned Spaghetti	17.4	17.3	14.7-	29.1+	17.7	121	61
Canned Spaghetti Sauce	44.4	41.8-	38.1-	58.3+	61.2+	161	105

Pet Products Purchased For Use In Past 30 Days

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Net Purch Cat Food:	26.2	28.2	30.2	19.1	12.9	43	68
Canned Cat Food	16.6	17.7+	18.9+	12.4-	9.4-	50	76
Dry Cat Food	23.4	25.2+	27.8+	13.4-	11.5-	41	85
Net Purch Dog Food:	26.3	26.8	28.8	18.1	22.7	79	125
Canned Dog Food	14.0	14.0	14.6	11.3-	13.6	93	120
Dry Dog Food	24.3	24.9	26.9+	16.0-	20.7-	77	130
Flea/Tick Care Products	17.0	17.0	17.4	15.2	17.5	101	115

Baby Products Purchased For Use In Past 30 Days

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Baby Food in Jars	10.1	8.6-	7.9-	11.7+	20.0+	254	170
Infant Cereal	13.6	11.4-	10.1-	17.3+	27.6+	274	160
Infant Formula	7.5	5.9-	4.6-	11.7+	17.7+	385	151
Baby Shampoo	16.1	13.1-	12.5-	16.0	36.0+	289	225
Baby Vitamins	9.6	7.6-	6.7-	11.8+	22.2+	330	189
Disposable Diapers	15.3	13.1-	11.6-	19.8+	29.6+	256	150

Large Ticket Items Household Plans To Buy In Next 60 Days

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Home	4.1	3.9	3.5-	5.5+	5.7+	163	103
New Automobile	5.8	5.8	5.2-	8.6+	5.7	111	67
Used Automobile	7.4	6.6-	6.4-	7.5	12.2+	189	162
Truck/Van	4.0	3.7	3.2-	6.0+	5.4+	167	90
Boat	1.7	1.7	2.0	0.2-	1.8	92	862

Auto Supplies/Parts Household Plans To Buy In Next 60 Days

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Car Batteries	6.0	4.8-	3.4-	10.7+	13.8+	404	129
Spark Plugs	15.5	13.3-	11.4-	21.5+	30.0+	263	140
Motor Oil	44.7	43.3-	44.0	40.4-	54.1+	123	134
Tires	15.1	13.8-	12.8-	18.2+	23.2+	181	128

Electronics Household Plans To Buy In Next 60 Days

		NON-HISPANIC				Index	Index
	TOTAL	Total	White/ Other	African/ American	HISPANIC	Hisp - Wh/Ot	Hisp - Af/Am
Compact Disc Player	7.6	7.0-	6.1-	11.0+	11.7+	193	107
Television Set	9.4	9.3	7.4-	17.5+	10.5	142	60
Camcorder	5.0	4.4-	3.2-	9.6+	8.9+	277	93
Personal Computer	8.2	8.7	8.8	8.3	5.0-	57	61
Video Game System	5.1	4.2-	2.5-	11.5+	11.1+	444	96

Health and Medicinal Aids Used In Past 30 Days

		NON-HISPANIC				Index	Index
	TOTAL	Total	White/ Other	African/ American	HISPANIC	Hisp - Wh/Ot	Hisp - Af/Am
Cough drops	19.7	18.8-	17.2-	25.5+	26.2+	152	103
Cough Syrup	17.5	15.0-	13.6-	21.2+	34.3+	253	162
Eye Wash/Drops	28.9	27.6-	27.5-	27.9	37.6+	137	135
Pain Relieving Rubs/Liquids	23.9	23.4	22.0-	29.5+	27.3+	124	93
Net Headache/Pain Remedy:	55.9	55.7	56.9	50.8	57.4	101	113
Aspirin Formula	34.1	33.4	34.0	30.7-	38.6+	113	126
Non-Aspirin Formula	39.0	39.3	40.9+	32.3-	37.0	90	114
Cold/Sinus/Allergy Remedy	32.6	31.8	30.8-	36.3+	38.0+	123	105
Indigestion Aids/Stomach Remedy	32.7	31.6-	33.3	24.4-	40.0+	120	164
Laxatives	9.4	8.3-	6.4-	16.8+	16.3+	254	97
Adhesive Bandages	43.7	42.0-	43.2	36.5-	55.3+	128	151
Suntan/Sunscreen Products	40.3	41.6+	47.0+	17.8-	31.8-	68	179
Sunburn Remedy	16.1	15.7	17.8+	6.6-	18.3+	103	278

Women's Products Used In Past 30 Days

		NON-HISPANIC				Index	Index
	TOTAL	Total	White/ Other	African/ American	HISPANIC	Hisp - Wh/Ot	Hisp - Af/Am
Home Permanents	10.9	10.7	7.3-	24.7+	12.6	171	51
Hand Cream/Lotion	78.2	77.2	75.2-	85.7+	85.0+	113	99
Lipstick/Lip Gloss	75.0	75.4	76.7+	69.7-	72.7	95	104
Mascara	50.1	50.9	54.0+	38.0-	44.2-	82	116
Eye Shadow	40.7	39.9	43.2+	26.3-	46.4+	108	176
Eye Liner	44.1	42.5-	43.0	40.3-	55.1+	128	137
Nail Polish	54.5	53.4	50.0-	67.8+	61.3+	123	90
Tampons	32.8	35.6+	36.1+	33.5	14.4-	40	43
Sanitary Napkins	46.9	42.9-	39.3-	57.8+	73.9+	188	128
Panty Shields/Liners	41.3	41.6	39.3-	51.4+	39.4	100	77
In-Home Pregnancy Test	3.5	3.2	3.3	2.7	5.7+	170	214
Perfume/Cologne	74.0	73.5	72.1-	79.4+	77.4	107	98

Women's Products Used In Past 30 Days (Con't)

	TOTAL	NON-HISPANIC Total	White/ Other	African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
A Hair Coloring Product	28.0	26.8	26.2-	29.4	36.0+	138	122
Hair Spray	61.6	61.2	63.5+	51.8-	64.1	101	124
Styling Gels/Lotions	47.9	47.4	43.4-	64.0+	51.5	119	80
Hair Mousse	28.2	25.1-	28.1	12.8-	49.5+	176	388

Condiments/Staples Personally Consumed In Past 30 Days

	TOTAL	NON-HISPANIC Total	White/ Other	African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Corn Tortillas	44.9	41.3-	43.4-	32.0-	68.7+	158	215
Flour Tortillas	47.4	46.2-	48.3	36.6-	55.8+	116	152
Mustard	71.8	74.8+	74.2+	77.7+	51.4-	69	66
Ketchup	78.9	78.9	78.1	82.5+	79.0	101	96
Salsa	53.3	53.3	55.2+	45.2-	52.9	96	117
Mayonnaise/Dressing	79.8	79.6	78.6-	83.8+	81.1	103	97

Alcoholic Beverages Personally Consumed In Past 30 Days

	TOTAL	NON-HISPANIC Total	White/ Other	African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Any Alcoholic Beverage (Net)	46.1	46.3	49.0	34.5	44.8	92	130
Domestic Beer (Subnet)	42.1	42.4	45.0	31.3	40.3	90	129
Low Calorie Beer	25.4	26.0	28.1+	16.4-	21.9-	78	133
Regular Beer	37.6	37.7	39.9+	27.9-	36.9	93	132
Imported Beer (Subnet)	30.2	29.9	31.5	23.1	31.6	100	137
Low Calorie Beer	12.2	11.6	12.7	7.0-	15.9+	125	226
Regular Beer	27.2	26.9	28.2	21.3-	28.7	102	135
Liquor Products	50.9	52.9	54.0	47.8	37.9	70	79
Brandy/Cognac	10.9	11.0	9.6-	16.9+	10.5	109	62
Rum	10.8	10.6	10.1	12.9+	11.5	114	89
Scotch/Bourbon	12.0	12.4	12.8	10.5	9.9-	77	94
Vodka	16.6	17.5+	19.4+	9.1-	10.2-	53	111
Gin	8.3	8.6	8.6	8.8	6.0-	70	69
Tequila	11.1	11.1	11.7	8.3-	11.5	98	137
Cordials/Liqueurs	13.3	13.4	13.8	11.4-	13.0	94	115
Dinner/Table Wines	36.5	38.7+	39.9+	33.3-	22.2-	56	67

Meats Personally Consumed In Past 30 Days

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Franks/Wieners/Hot Dogs	62.3	61.9	59.9-	70.9+	65.0	108	92
Cold Cuts	64.9	64.5	62.5-	72.9+	67.8+	108	93

Snack Items Personally Consumed In Past 30 Days

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Potato Chips	68.4	68.1	65.4-	80.2+	70.6	108	88
Packaged Pop Corn	40.9	40.6	36.7-	57.9+	42.4	116	73
Pretzels	42.1	43.9+	43.9+	44.0	30.2-	69	69
Corn Tortilla Chips	53.3	52.5	53.6	47.7-	58.6+	109	123
Crackers	71.1	71.4	70.2	76.5+	69.1	98	90
Peanut Butter	54.0	55.4+	55.7+	54.3	44.9-	81	83

Dairy Products Personally Consumed In Past 30 Days

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Margarine	64.6	64.1	62.1-	73.1+	67.4+	109	92
Butter	68.2	67.1-	63.6-	82.7+	75.5+	119	91
Sour Cream	43.3	44.1	45.5+	38.0-	37.9-	83	100
Grated Cheese	54.3	54.4	54.0	55.9	53.7	99	96
Cottage Cheese	31.3	31.2	33.5+	21.5-	31.8	95	148
Spread Cheese	24.2	21.6-	18.9-	33.9+	41.3+	219	122
Non-Dairy Substitute	18.2	19.0	19.6+	16.4	12.9-	66	79
Yogurt	50.5	49.3-	51.4	40.4-	58.2+	113	144

Desserts and Sweets Personally Consumed In Past 30 Days

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Sweet Rolls/Pastries	52.3	51.4	49.5-	59.7+	58.3+	118	98
Frozen Yogurt	36.7	35.5-	37.7	25.8-	44.8+	119	174
Ice Cream	77.1	77.0	75.3-	84.8+	77.8	103	92
Sherbet/Popsicles/Fruit Bars	42.8	42.8	40.0-	55.3+	42.7	107	77
Prepared Puddings	22.2	21.4	20.9-	23.7	27.2+	130	115
Snack Cakes	30.3	28.7-	25.5-	43.1+	40.8+	160	95
Cookies	68.6	68.9	68.1	72.7+	66.6	98	92
Gelatin	31.9	27.6-	27.5-	28.0-	60.7+	221	217
Artificial Sweeteners	28.7	29.6	30.7+	24.9-	23.1-	75	93
Candy Bars	50.5	50.9	50.0	54.7+	47.5-	95	87

Beverages Personally Consumed In Past 30 Days

		NON-HISPANIC				Index	Index
			White/	African/		Hisp -	Hisp -
	TOTAL	Total	Other	American	HISPANIC	Wh/Ot	Af/Am
Diet Cola	35.1	36.9+	38.1+	31.2-	23.7-	62	76
Diet Non-Cola	25.3	26.3	26.7+	24.4	18.9-	71	77
Regular Cola	55.6	55.0	53.0-	64.3+	58.9+	111	92
Regular-Carbonated Non-Cola	35.9	35.7	35.3	37.4	37.3	106	100
Flavored Seltzer Water	25.0	24.7	24.2	27.2	27.0	111	99
Energy/Isotonic Beverage Drinks	15.6	15.8	15.4	17.4	14.3	93	82
Bottled Drinking Water	61.4	60.0-	57.0-	73.4+	70.7+	124	96
Tomato Juice	22.6	21.1-	21.1-	21.2	32.7+	155	154
Fruit Juices	77.3	76.8	75.9-	80.4+	80.7+	106	100
Fruit Nectars	27.8	24.1-	23.2-	28.2	52.4+	226	186
Instant Iced Tea	33.8	32.9	30.5-	43.3+	39.5+	129	91
Regular Tea	55.1	56.3+	53.8-	67.2+	47.2-	88	70
Regular Ground Coffee	49.6	50.0	51.7+	42.8-	46.8	91	109
Decaffeinated Ground Coffee	22.2	21.0-	22.0	16.8-	30.0+	136	179
Latin Style Ground Coffee	19.4	16.2-	15.9-	17.6	40.5+	254	231
Regular Instant Coffee	30.7	28.7-	28.1-	31.5	43.7+	156	139
Decaffeinated Instant Coffee	22.5	20.9-	21.2-	19.7-	33.3+	157	169
Latin Style Instant Coffee	11.6	8.3-	7.5-	11.8	33.3+	442	282

Health & Beauty Aids Personally Used In Past 30 Days

		NON-HISPANIC				Index	Index
			White/	African/		Hisp -	Hisp -
	TOTAL	Total	Other	American	HISPANIC	Wh/Ot	Af/Am
Breath Mints	45.9	44.9	41.1-	61.9+	52.4+	127	85
Vitamins/Minerals	58.3	59.8+	60.1+	58.1	49.0-	81	84
Mouthwash	62.7	60.2-	54.8-	84.0+	79.4+	145	95
Baby Powder	31.3	30.6	26.3-	49.8+	35.7+	136	72
Spray Deodorants/Anti-perspirants	32.5	30.3-	29.1-	35.8+	47.2+	163	132
Solid Deodorants/Anti-perspirants	63.9	62.9	60.0-	75.7+	70.3+	117	93
Roll-on Deodorants/Anti-perspirants	52.6	51.9	48.8-	66.0+	56.8+	117	86
Toothpaste from Pump	28.9	28.5	27.0-	35.1+	31.4	116	89
Toothpaste from Tube	85.1	84.8	83.4-	90.8+	87.0	104	96
Tartar Control Toothpaste	66.1	65.1	64.9-	66.2	72.5+	112	110
Regular Toothpaste	74.3	72.8-	71.2-	79.7+	84.3+	118	106
Personal Bar Soap	87.9	87.6	87.2	89.4	89.6	103	100
Liquid Hand Soap	59.4	58.7	59.9	53.4-	64.6+	108	121
Shampoo	90.7	90.0-	92.0+	81.3-	95.4+	104	117
Hair Conditioners	65.9	64.4-	62.8-	71.5+	75.6+	120	106

Breakfast Foods Personally Used In Past 30 Days

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Hot Cereals	34.7	32.7-	29.1-	48.4+	48.3+	166	100
Cold Cereals	69.4	71.2+	70.5	74.2+	57.4-	81	77
Powder Instant Breakfast	7.8	7.4	6.6-	10.5+	10.3+	155	98
English Muffins	41.0	42.7+	44.4+	35.5-	29.8-	67	84
Jams/Jellies/Preserves	60.3	61.4+	61.0	63.1+	52.9-	87	84

Shopped In The Past 30 Days At Fast Foods/Drive Thru Restaurants

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Hamburger	63.4	63.4	62.7	66.5+	63.5	101	95
Pizza	61.6	62.0	63.2+	56.8-	58.8	93	104
Chicken	50.7	49.5-	45.6-	66.5+	58.8+	129	88
Mexican/Taco	47.2	47.2	48.7+	40.7-	47.2	97	116
Chinese	52.3	52.5	50.1-	63.4+	50.7	101	80

Credit Cards Personally Have

	TOTAL	NON-HISPANIC Total	NON-HISPANIC White/ Other	NON-HISPANIC African/ American	HISPANIC	Index Hisp - Wh/Ot	Index Hisp - Af/Am
Any Credit Card (Net)	67.5	70.6	75.2	50.4	46.7	62	93
American Express card	18.8	19.9+	21.0+	15.1-	11.9-	57	79
Visa card	55.4	57.9+	62.6+	37.0-	39.1-	62	106
MasterCard	38.6	40.1+	42.6+	29.3-	28.4-	67	97
Diners Club card	1.8	1.7	1.6	2.0	2.5	151	126
Discover card	20.7	21.3	23.3+	12.7-	16.8-	72	132
American Express OPTIMA card	6.7	6.8	6.6	7.7	6.3	96	83

Frozen Foods Purchased For Use In Past 30 Days

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Frozen Dinners	32.5	46.7+	27.5-	26.8	30.0	29.5	32.8	32.4-	84	99
Frozen Prepared Vegs	39.9	41.7	36.6	39.1	30.2	39.7	48.6	37.3-	96	77
Plain Frozen Vegetables	54.0	58.9	51.7	53.1	49.3	53.8	54.8-	53.7-	89	98
Frozen Orange Juice	41.0	36.0	38.2	40.0	39.0	38.4	42.2+	40.7+	119	96

Household Cleaning Products Purchased For Use In Past 30 Days

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Toilet Bowl Cleaners	79.4	80.8	79.5	81.7	84.0	79.6	75.3+	80.7+	136	107
Pine Oil Disinfectant	67.7	55.3-	72.7+	76.2+	69.7	72.1	60.6+	69.9+	171	115
Glass Cleaners	76.4	75.4	80.5	78.5	82.7	78.5	69.5+	78.4+	117	113
Oven Cleaners	58.5	37.2-	59.3	63.6	67.6+	55.9	46.6+	62.1+	274	133
Dishwashing Liquid	84.8	79.6	82.7	88.1	80.8	84.7	79.4	86.5+	108	109
Dishwashing Detergent	42.4	61.6+	45.4	29.3-	29.6-	45.0	65.9	35.3-	97	54
Scouring Cleansers	71.3	81.9+	68.5	76.1	73.2	72.4	64.5	73.3+	115	114
All Prps Liquid Cleaners	80.6	77.8	81.1	80.6	89.6+	78.5	77.5+	81.6+	118	105
All Prps Powder Cleaners	59.9	64.0	57.8	68.9+	65.2	61.4	54.2+	61.6+	129	114
Air Fresheners	71.0	67.1	72.1	78.1+	77.3	72.6	65.8+	72.6+	134	110
Insecticides	51.5	49.4	49.1	58.8+	46.9	53.4	48.0+	52.5+	151	109
Insect Repellents	43.4	43.8	39.5	50.8+	40.8	44.2	43.8+	43.3+	165	99

Laundry Products Purchased For Use In Past 30 Days

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Powder Laundry Dtrgnt	77.7	83.4	78.5	78.5	78.4	79.2	71.9+	79.5+	119	111
Liquid Laundry Detergent	68.0	70.1	67.9	67.6	74.7	66.6	66.4+	68.5+	122	103
Liquid Fabric Softener	80.6	64.1-	79.2	88.2+	86.1	79.0	65.9+	85.1+	180	129
Fabric Softener Sheets	66.2	64.2	66.9	68.5	73.7	65.6	66.4+	66.2+	121	100
Bottled Bleach	84.6	88.2	82.3	84.7	79.9	84.6	84.1+	84.7+	140	101
Fabric Pre-treatments	36.3	33.8	31.6	40.8	36.5	34.5	40.1+	35.2+	157	88

Paper/Plastic Wraps/Bags Purchased For Use In Past 30 Days

		ACCULTURATION LEVEL							Index	Index	
		Hghly	Prtly			Non-	Born	Born	US	Non-US	
		Acc	Acc	Unacc	Span	Span	In The	Outside	Born -	Born -	
	TOTAL	0-49	50-84	85-100	Dmnt	Dmnt	U.S.	U.S.	Wh/Ot	US Brn	
Facial Tissue	76.9	72.4	81.6+	80.5	84.7	79.1	71.3	78.6+	104	110	
Paper Towels	95.0	91.9	97.2	97.8		96.1	96.9	92.4	95.8+	103	104
Plastic Garbage Bags	85.9	82.7	85.8	82.8	89.8	83.3	85.2+	86.0+	121	101	
Plastic Sandwich Bags	64.9	62.5	64.5	62.0	61.1	64.0	64.6	65.0+	108	101	
Plastic Wrap	64.8	67.5	62.7	58.6	63.8	61.6	56.4	67.3+	99	119	
Aluminum Foil Wrap	91.5	87.1	92.1	92.0	92.4	91.3	89.5+	92.1+	126	103	

Staples Purchased For Use In Past 30 Days

		ACCULTURATION LEVEL							Index	Index
		Hghly	Prtly			Non-	Born	Born	US	Non-US
		Acc	Acc	Unacc	Span	Span	In The	Outside	Born -	Born -
	TOTAL	0-49	50-84	85-100	Dmnt	Dmnt	U.S.	U.S.	Wh/Ot	US Brn
Cornmeal	46.4	30.5-	46.8	50.0	60.6+	42.6	27.4	52.1+	154	190
Flour	62.9	64.9	63.7	62.8	69.4	62.2	63.1+	62.9+	150	100
Shortening	65.3	33.9-	67.7	79.4+	82.4+	64.1	42.6+	72.2+	220	169
Olive Oil	55.9	65.1	53.1	61.5	69.6+	54.5	48.1	58.3+	98	121
Salad/Cooking Oil	89.9	86.5	88.4	92.3	89.8	89.3	86.9+	90.8+	134	104

Packaged Foods Purchased For Use In Past 30 Days

		ACCULTURATION LEVEL							Index	Index
		Hghly	Prtly			Non-	Born	Born	US	Non-US
		Acc	Acc	Unacc	Span	Span	In The	Outside	Born -	Born -
	TOTAL	0-49	50-84	85-100	Dmnt	Dmnt	U.S.	U.S.	Wh/Ot	US Brn
Sliced Bread	87.4	81.2	87.1	88.5	85.3	87.2	88.7	87.0	102	98
Sliced American Cheese	69.1	68.1	68.5	68.6	65.4	69.1	77.6+	66.6+	131	86
Dry Milk	9.4	3.6	9.5	8.8	11.9	7.9	10.7	9.0	113	84
Packaged Regular Rice	90.5	92.0	90.7	90.5	91.1	90.7	88.0+	91.3+	143	104
Pckgd Flav/Seasoned Rice	30.4	48.6+	29.1	22.8-	23.5	30.8	42.0	26.9-	104	64
Packaged Dry Beans/Peas	76.2	64.7-	75.4	86.1	86.8+	75.5	57.6+	81.8+	180	142
Packaged Dry Soup	40.2	45.8	40.5	42.8	45.6	41.1	40.4+	40.2+	128	99
Packaged Dry Spaghetti	78.1	73.0	77.5	88.4+	83.9	79.6	69.7	80.6+	97	116
Powdered Fruit Drinks	37.3	34.7	38.9	33.4	35.8	36.8	41.3+	36.1+	167	87

Fresh Fruit/Vegetables Purchased For Use In Past 30 Days

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Fresh Apples	91.5	84.5-	91.5	94.2	93.8	91.0	84.2+	93.6+	115	111
Fresh Peaches	67.0	75.5	69.8	63.1	62.8	69.6	64.4	67.8+	105	105
Fresh Oranges	85.8	87.0	86.2	86.1	78.2-	88.1	78.0+	88.1+	116	113
Fresh Avocados	77.1	60.5-	74.2	85.1+	74.6	76.3	63.2+	81.4+	190	129
Fresh Corn	59.9	78.5+	59.5	60.8	64.0	61.8	68.5	57.3-	106	84
Fresh Green Beans	52.7	46.1	55.0	55.8	50.7	54.9	40.4-	56.4+	83	139
Fresh Tomatoes	95.9	96.6	97.8	96.1	95.8	97.4	93.7+	96.6+	114	103
Fresh Asparagus	39.7	42.4	37.2	36.7	39.7	37.2	28.9	43.0+	88	149

Fresh Dairy/Meat Purchased For Use In Past 30 Days

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Fresh Beef	91.9	86.8	92.2	95.7+	91.9	92.8	86.8+	93.4+	116	108
Fresh Eggs	96.3	90.2-	97.4	97.7	94.9	97.0	95.2+	96.6+	112	101
Fresh Chicken	93.3	89.8	94.2	96.6	90.4	95.3	90.4	94.2+	108	104
Fresh Fish	64.6	60.4	66.5	69.4	81.3+	63.5	48.1-	69.6+	96	145

Bottled/Canned Goods Purchased For Use In Past 30 Days

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Bottled Fruit Drinks	66.6	70.1	67.5	64.0	67.4	66.6	70.5	65.5	113	93
BBQ/Season Sauces	60.1	68.3	61.9	55.3	56.2	61.5	74.3+	55.8-	135	75
Bottled Salad Dressing	57.1	78.2+	60.2	44.5-	47.8-	59.5	73.9	52.0-	110	70
Canned Evaporated Milk	34.0	33.4	34.3	39.7	43.8	34.2	25.8+	36.5+	178	141
Canned Soup	42.8	59.1+	43.1	33.4-	34.8	43.5	61.2	37.2-	98	61
Canned Tomato Paste	54.5	49.2	53.6	54.4	61.2	51.6	49.7	55.9+	110	113
Canned Tomato Sauce	73.2	68.2	70.8	76.5	71.5	72.5	76.2+	72.3+	132	95
Canned Tomatoes	32.8	34.1	32.9	27.4	32.7	31.0	44.0	29.4-	101	67
Canned Chili	45.4	43.6	42.6	41.7	34.6	44.1	43.1+	46.0+	168	107
Canned Tuna	71.7	81.2	72.9	69.1	67.0	73.9	76.7	70.2	110	92
Cnd Beans in Water/Salt	36.2	44.0	35.0	32.7	36.8	35.0	41.9+	34.4	125	82
Cnd Ready to Eat Beans	40.5	52.6+	36.4	36.9	42.8	37.6	48.9+	38.0-	117	78
Canned Vegetables	55.7	59.9	55.6	51.1	59.2	53.7	64.3+	53.1	122	83
Canned Spaghetti	17.7	18.8	20.0	16.8	22.7	18.0	27.2+	14.9-	185	55
Canned Spaghetti Sauce	61.2	58.9	57.2	62.4	57.3	59.4	57.7+	62.2+	152	108

Pet Products Purchased For Use In Past 30 Days

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Net Purch Cat Food:	12.9	31.5	11.1	7.6	11.7	12.6	20.9	10.5	69	50
Canned Cat Food	9.4	21.2+	8.8	6.8	8.8	9.9	14.7	7.9-	78	54
Dry Cat Food	11.5	27.2+	9.0	6.4-	7.9	10.9	19.8	8.9-	71	45
Net Purch Dog Food:	22.7	32.6	24.7	12.9	17.1	23.0	35.9	18.7	124	52
Canned Dog Food	13.6	21.2+	14.9	8.0-	11.2	13.9	25.7+	10.0-	175	39
Dry Dog Food	20.7	30.5+	22.2	10.8-	17.1	20.1	32.3+	17.3-	120	53
Flea/Tick Care Products	17.5	18.4	20.4	13.5	20.0	17.5	20.6	16.5	119	80

Baby Products Purchased For Use In Past 30 Days

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Baby Food in Jars	20.0	21.0	18.7	23.6	23.5	19.9	19.0+	20.3+	241	107
Infant Cereal	27.6	23.0	25.7	35.2+	27.9	28.5	20.8+	29.7+	206	143
Infant Formula	17.7	7.2-	14.3	20.9	15.4	15.6	16.1+	18.2+	349	113
Baby Shampoo	36.0	27.9	32.9	45.4+	42.6	34.9	27.0+	38.7+	216	144
Baby Vitamins	22.2	21.2	17.5-	30.0+	25.8	21.1	15.7+	24.1+	234	154
Disposable Diapers	29.6	17.2-	28.6	31.9	31.5	27.6	28.3+	30.0+	244	106

Large Ticket Items Household Plans To Buy In Next 60 Days

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Home	5.7	7.6	5.1	7.1	8.0	5.6	5.0	5.9+	142	119
New Automobile	5.7	11.6+	4.0	5.9	3.9	5.9	8.4	4.9	163	58
Used Automobile	12.2	12.6	9.5	15.1	11.2	11.7	14.7+	11.4+	229	77
Truck/Van	5.4	7.2	3.6	5.8	1.3	5.5	6.1	5.2	189	85
Boat	1.8	1.1	1.5	1.0	1.8	1.2	2.9	1.5	147	52

Auto Supplies/Parts Household Plans To Buy In Next 60 Days

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Car Batteries	13.8	16.4	10.3-	14.1	12.2	12.2	12.1+	14.4+	353	119
Spark Plugs	30.0	19.1-	31.7	23.8-	19.5-	29.4	27.1+	30.9+	238	114
Motor Oil	54.1	58.6	56.7	45.4-	43.3-	55.6	59.1+	52.6+	134	89
Tires	23.2	24.0	19.3	24.2	15.7	22.6	21.6+	23.7+	168	110

Electronics Household Plans To Buy In Next 60 Days

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Compact Disc Player	11.7	7.9	10.4	12.4	10.6	10.8	9.1	12.5+	150	137
Television Set	10.5	5.2	8.3	11.1	10.0	8.6	8.3	11.2	112	135
Camcorder	8.9	14.1	7.3	9.5	10.2	8.5	9.0+	8.9+	279	99
Personal Computer	5.0	3.0	4.6	7.9	2.4	6.1	5.7	4.9-	64	86
Video Game System	11.1	21.6+	9.2	13.0	15.8	11.1	11.2+	11.0+	449	98

Health and Medicinal Aids Used In Past 30 Days

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Cough drops	26.2	17.7	27.0	23.0	30.9	23.2	21.8	27.5+	126	126
Cough Syrup	34.3	17.8-	31.8	42.7+	42.4+	31.6	23.4+	37.6+	173	161
Eye Wash/Drops	37.6	31.5	39.4	34.7	38.5	36.6	36.4+	37.9+	132	104
Pain Rlvng Rubs/Lqds	27.3	29.2	25.3	28.2	26.2	26.8	26.6	27.6+	121	104
Net Headache/Pain Rem:	57.4	60.8	53.1	62.3	56.4	57.0	57.2	57.4	101	100
Aspirin Formula	38.6	43.3	33.1-	41.6	38.1	36.8	36.3	39.3+	107	108
Non-Aspirin Formula	37.0	35.0	34.4	38.5	38.6	35.2	38.7	36.5	95	94
Cold/Sinus/Allergy Rem	38.0	24.0-	33.5	41.9	46.7+	32.4	31.1	40.1+	101	129
Indiges Aids/Stmch Rem	40.0	25.4-	34.0-	50.1+	43.8	36.8	29.9	43.1+	90	144
Laxatives	16.3	17.6	16.2	19.9	24.0	16.2	13.8+	17.0+	215	124
Adhesive Bandages	55.3	52.3	52.9	62.8+	59.9	55.1	43.1	59.0+	100	137
Suntan/Sunscreen Prdts	31.8	35.5	35.4	27.1	18.8-	35.8	46.4+	27.4-	99	59
Sunburn Remedy	18.3	14.6	17.8	17.2	14.8	17.7	21.8+	17.3	122	79

Women's Products Used In Past 30 Days

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Home Permanents	12.6	12.5	15.4	15.3	21.4	13.4	9.6	13.4	130	140
Hand Cream/Lotion	85.0	86.7	87.4	88.7	90.5	87.1	83.4	85.4+	111	102
Lipstick/Lip Gloss	72.7	71.7	76.3	69.4	77.3	72.0	75.5	72.0	98	95
Mascara	44.2	43.6	50.5	38.2	33.8	47.9	60.7+	39.8-	112	65
Eye Shadow	46.4	44.1	53.5	47.5	51.8	49.8	47.2	46.2+	109	98
Eye Liner	55.1	60.3	59.3	51.7	58.2	56.0	55.2+	55.1+	128	100
Nail Polish	61.3	54.4	66.3	64.0	74.3	61.5	57.3	62.4+	115	109
Tampons	14.4	14.6	15.1	9.2	10.9	13.3	26.3	11.2-	73	43
Sanitary Napkins	73.9	45.5-	76.6	79.7	67.5	76.4	62.1+	77.1+	158	124
Panty Shields/Liners	39.4	34.6	49.6+	29.2-	39.2	40.4	46.1	37.5	117	81
In-Home Preg Test	5.7	7.8	5.0	3.6	2.7	5.3	3.5	6.3+	105	179
Perfume/Cologne	77.4	74.7	81.2	78.3	85.5	77.8	82.3+	76.1	114	92
Hair Coloring Product	36.0	37.5	39.5	37.8	45.2	36.9	32.1	37.0+	123	115
Hair Spray	64.1	75.5	68.2	62.6	56.5	69.5	74.5+	61.3	117	82
Styling Gels/Lotions	51.5	59.9	51.7	47.6	60.4	48.5	62.3+	48.6	144	78
Hair Mousse	49.5	45.8	52.3	48.5	54.4	49.1	49.5+	49.5+	176	100

Condiments/Staples Personally Consumed In Past 30 Days

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Corn Tortillas	68.7	66.8	66.4	70.3	63.3	68.7	65.3+	69.7+	151	107
Flour Tortillas	55.8	72.4+	57.5	49.7	50.3	58.2	70.4+	51.4+	146	73
Mustard	51.4	65.2+	52.5	43.6-	45.2	52.6	71.0	45.5-	96	64
Ketchup	79.0	84.1	77.5	77.0	81.2	77.4	82.0	78.0	105	95
Salsa	52.9	70.4+	50.7	47.0	37.6-	55.0	61.5+	50.3	112	82
Mayonnaise/Dressing	81.1	71.7-	78.7	82.9	77.5	79.6	82.2	80.7	105	98

Alcoholic Beverages Personally Consumed In Past 30 Days

		ACCULTURATION LEVEL							Index	Index
		Hghly Acc	Prtly Acc	Unacc	Span	Non-Span	Born In The	Born Outside	US Born -	Non-US Born -
	TOTAL	0-49	50-84	85-100	Dmnt	Dmnt	U.S.	U.S.	Wh/Ot	US Brn
Any Alcohol Bev (Net)	44.8	50.3	42.7	39.8	33.4	44.7	47.5	44.0	97	93
Dom Beer (Subnet)	40.3	47.1	39.7	34.5	28.4	41.2	41.6	39.8	93	96
Low Calorie Beer	21.9	26.7	21.1	20.1	13.3-	23.3	24.7	21.1-	88	85
Regular Beer	36.9	44.0	35.5	31.2	27.3	36.9	37.5	36.7	94	98
Imp Beer (Subnet)	31.6	39.5	28.5	29.2	22.0	31.8	33.7	30.9	107	92
Low Calorie Beer	15.9	20.3	12.5	12.7	6.2-	15.1	18.1+	15.2+	143	84
Regular Beer	28.7	35.1	27.3	26.7	20.6	29.7	28.0	28.9	99	103
Liquor Products	37.9	43.6	38.2	33.2	35.7	37.6	43.8	36.1	81	82
Brandy/Cognac	10.5	9.0	11.4	7.3	8.9	10.0	8.1	11.2	84	138
Rum	11.5	5.2	10.7	8.6	9.2	9.4	13.5	10.9	133	81
Scotch/Bourbon	9.9	7.7	12.0	8.8	10.2	10.5	6.4-	11.0	50	171
Vodka	10.2	17.4+	10.4	8.6	8.3	11.2	18.2	7.8-	94	43
Gin	6.0	10.1	4.4	3.4	4.9	4.8	9.5	5.0-	111	53
Tequila	11.5	14.7	13.1	7.1-	4.0-	13.0	20.5+	8.7-	175	43
Cordials/Liqueurs	13.0	11.7	12.5	10.4	11.3	11.8	14.8	12.5	107	85
Dinner/Table Wines	22.2	30.4	20.6	20.5	20.3	22.1	24.7-	21.4-	62	87

Meats Personally Consumed In Past 30 Days

		ACCULTURATION LEVEL							Index	Index
		Hghly Acc	Prtly Acc	Unacc	Span	Non-Span	Born In The	Born Outside	US Born -	Non-US Born -
	TOTAL	0-49	50-84	85-100	Dmnt	Dmnt	U.S.	U.S.	Wh/Ot	US Brn
Franks/Wnrs/Hot Dogs	65.0	68.0	59.9-	65.3	65.2	62.1	70.2+	63.4	117	90
Cold Cuts	67.8	65.5	66.0	71.5	65.7	68.2	72.7+	66.3	116	91

Snack Items Personally Consumed In Past 30 Days

		ACCULTURATION LEVEL							Index	Index
		Hghly Acc	Prtly Acc	Unacc	Span	Non-Span	Born In The	Born Outside	US Born -	Non-US Born -
	TOTAL	0-49	50-84	85-100	Dmnt	Dmnt	U.S.	U.S.	Wh/Ot	US Brn
Potato Chips	70.6	71.2	69.3	70.7	70.2	69.9	72.8	69.9	111	96
Packaged Pop Corn	42.4	55.8+	38.5	40.0	44.2	40.4	48.2+	40.6	131	84
Pretzels	30.2	30.0	28.3	26.6	24.3	28.7	40.6	27.0-	93	66
Corn Tortilla Chips	58.6	65.1	59.0	57.1	53.3	60.4	67.3+	56.0	125	83
Crackers	69.1	73.7	68.2	74.6	72.4	70.6	70.6	68.6	101	97
Peanut Butter	44.9	41.6	42.7	42.7	41.8	42.8	56.1	41.6-	101	74

Dairy Products Personally Consumed In Past 30 Days

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Margarine	67.4	58.3	68.5	69.6	68.5	67.4	65.6	68.0+	106	104
Butter	75.5	71.6	75.0	77.5	78.3	74.8	74.7+	75.7+	117	101
Sour Cream	37.9	41.0	39.0	36.4	33.0	39.6	50.1+	34.2-	110	68
Grated Cheese	53.7	58.0	52.6	56.2	59.8	53.2	58.1	52.4	108	90
Cottage Cheese	31.8	44.0+	29.2	23.7-	28.0	29.5	36.6	30.4	109	83
Spread Cheese	41.3	39.7	39.7	43,3	48.4	39.2	30.5+	44.6+	162	146
Non-Dairy Substitute	12.9	19.1	12.4	14.8	14.5	13.9	15.0	12.3-	77	82
Yogurt	58.2	60.3	53.8	70.8+	66.3	58.6	49.9	60.7+	97	122

Desserts and Sweets Personally Consumed In Past 30 Days

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Sweet Rolls/Pastries	58.3	43.0-	54.9	56.2	50.8	54.6	53.2	59.8+	108	112
Frozen Yogurt	44.8	42.7	42.3	53.9+	55.9+	43.9	33.3	48.3+	88	145
Ice Cream	77.8	85.8	78.7	76.7	79.2	78.9	76.2	78.3	101	103
Sherbet/Pops/Fruit Bars	42.7	52.2	43.8	33.3-	33.6	43.2	51.0+	40.2	128	79
Prepared Puddings	27.2	30.0	24.5	25.3	34.3+	23.5	29.3+	26.5+	140	91
Snack Cakes	40.8	39.0	44.0	41.9	46.0	42.1	36.8+	42.1+	144	114
Cookies	66.6	57.3	70.3	64.4	69.3	66.3	69.3	65.9	102	95
Gelatin	60.7	57.3	60.7	68.5+	67.0	61.9	47.3+	64.8+	172	137
Artificial Sweeteners	23.1	35.8+	20.2	23.3	27.6	22.1	29.1	21.3-	95	73
Candy Bars	47.5	35.7-	48.0	47.3	50.8	45.3	49.9	46.7-	100	94

Beverages Personally Consumed In Past 30 Days

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Diet Cola	23.7	29.5	20.9	21.8	26.8	21.2	24.4-	23.4-	64	96
Diet Non-Cola	18.9	19.4	15.7	19.6	15.1	17.9	23.4	17.5-	88	75
Regular Cola	58.9	59.1	58.7	50.7-	51.1	57.3	69.5+	55.7	131	80
Reg-Carb Non-Cola	37.3	33.3	40.5	30.5-	32.1	37.4	45.0+	35.0	128	78
Flavored Seltzer Water	27.0	25.2	27.3	25.4	28.6	26.0	22.0	28.5+	91	129
Energy/Isotonic Drinks	14.3	13.2	16.9	7.9-	9.7	14.5	23.1+	11.6-	150	51
Bottled Drinking Water	70.7	63.1	72.6	54.8-	68.8	65.2	71.8+	70.4+	126	98
Tomato Juice	32.7	20.8-	31.2	41.1+	40.6	31.4	19.2	36.8+	91	192

Beverages Personally Consumed In Past 30 Days (Con't)

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Fruit Juices	80.7	76.2	83.4	79.3	81.4	81.2	84.7+	79.5	112	94
Fruit Nectars	52.4	29.9-	53.6	53.9	63.1+	48.1	43.5+	55.1+	188	127
Instant Iced Tea	39.5	35.3	34.3-	39.7	30.3	37.4	38.2	39.9+	125	104
Regular Tea	47.2	52.0	43.7	54.7+	45.0	48.9	48.5-	46.8-	90	96
Regular Ground Coffee	46.8	64.8+	48.7	46.5	56.3	48.6	43.1-	47.9	83	111
Decaf Ground Coffee	30.0	28.4	28.7	34.7	49.3+	26.5-	23.4	32.0+	106	137
Latin Style Grnd Coffee	40.5	23.0-	42.8	47.9+	57.6+	38.6	25.1+	45.2+	158	180
Regular Instant Coffee	43.7	41.6	40.6	43.4	48.1	40.2	32.6	47.1+	116	145
Decaf Instant Coffee	33.3	22.6-	29.7	43.7+	47.4+	30.2	20.9	37.1+	99	178
Latin Style Inst Coffee	33.3	19.8-	32.4	38.8	48.3+	29.6	17.2+	38.2+	228	222

Health & Beauty Aids Personally Used In Past 30 Days

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Breath Mints	52.4	39.6-	49.4	52.6	59.8+	46.9	46.2	54.3+	112	117
Vitamins/Minerals	49.0	58.5	45.9	45.8	53.8	46.0	57.5	46.4-	96	81
Mouthwash	79.4	71.4	79.0	79.8	81.2	77.7	73.6+	81.1+	134	110
Baby Powder	35.7	42.7	34.9	37.2	29.2	38.2	41.7+	33.8	159	81
Spray Deods/Anti-pers	47.2	52.1	42.4	41.1	39.9	43.9	46.4+	47.5+	160	102
Solid Deods/Anti-pers	70.3	73.8	72.0	68.4	65.9	72.2	80.9+	67.1+	135	83
Roll-on Deods/Anti-pers	56.8	61.6	60.8	52.6	60.6	57.7	60.9+	55.6	125	91
Toothpaste from Pump	31.4	43.2+	31.0	26.1	29.9	31.1	32.5	31.0	121	95
Toothpaste from Tube	87.0	90.0	87.1	83.7	86.8	86.3	88.2	86.7	106	98
Tartar Control Tthpst	72.5	70.3	70.0	76.1	77.6	70.7	69.7	73.4+	108	105
Regular Toothpaste	84.3	84.6	83.2	86.0	87.3	83.6	83.8+	84.5+	118	101
Personal Bar Soap	89.6	90.3	89.8	94.6+	93.4	91.0	92.9+	88.6	107	95
Liquid Hand Soap	64.6	77.9+	62.2	62.1	64.1	64.1	64.3	64.7+	107	101
Shampoo	95.4	98.7	92.2-	98.0	97.1	94.3	97.3+	94.8+	106	97
Hair Conditioners	75.6	67.9	75.8	75.5	75.8	74.5	80.5+	74.1+	128	92

Breakfast Foods Personally Used In Past 30 Days

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Hot Cereals	48.3	32.8-	44.0	55.2+	60.4+	43.1	37.3	51.6+	128	138
Cold Cereals	57.4	75.7+	59.0	49.5-	53.5	59.0	79.0+	50.8-	112	64
Powder Instant Brkfst	10.3	16.8	8.4	10.4	13.4	9.3	13.0+	9.5	195	73
English Muffins	29.8	41.8+	30.2	26.6	29.1	30.7	41.0	26.4-	92	65
Jams/Jellies/Preserves	52.9	57.2	53.0	50.5	47.9	53.8	54.0-	52.6-	88	98

Shopped In The Past 30 Days At Fast Foods/Drive Thru Restaurants

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Hamburger	63.5	64.4	63.6	59.3	58.3	63.2	69.8+	61.6	111	88
Pizza	58.8	59.1	61.8	60.1	59.2	61.3	58.8	58.8	93	100
Chicken	58.8	59.0	56.3	56.7	59.6	56.1	61.1+	58.1+	134	95
Mexican/Taco	47.2	57.0	48.0	32.2-	30.8-	47.0	65.5+	41.7-	134	64
Chinese	50.7	43.1	52.7	45.5	54.9	48.0	58.1	48.4-	116	83

Credit Cards Personally Have

	TOTAL	ACCULTURATION LEVEL Hghly Acc 0-49	Prtly Acc 50-84	Unacc 85-100	Span Dmnt	Non-Span Dmnt	Born In The U.S.	Born Outside U.S.	Index US Born - Wh/Ot	Index Non-US Born - US Brn
Any Credit Card (Net)	46.7	68.3	51.5	32.9	39.7	49.3	61.5	42.2	82	69
American Exp card	11.9	17.2	11.9	10.0	9.2	12.6	15.2	10.9-	72	72
Visa card	39.1	64.9+	41.7	27.0-	34.9	40.9	53.0	34.8-	85	66
MasterCard	28.4	43.9+	28.0	22.7	22.5	29.5	38.7	25.3-	91	65
Diners Club card	2.5	5.3	1.3	1.3	2.3	1.6	3.9+	2.1	235	53
Discover card	16.8	20.5	16.6	17.0	13.6	18.0	25.3	14.2-	109	56
Amer Exp OPTIMA	6.3	8.9	5.0	2.5-	3.3	5.0	11.1+	4.9-	168	44

XI.

TOP 50 HISPANIC MARKETS

XI. TOP 50 U.S. HISPANIC MARKETS

A. Introduction

The following pages contain market data for the Top 50 Hispanic Markets in order of Hispanic population. This information was derived both from primary and secondary research. Each market begins with a short synopsis on the market.

The data shown for each market is:

- Maps of the counties
- Hispanic Buying Power
- Population Trends: '80, '92, '94, '96
- Population and Households
  U.S. vs. Hispanic
  By counties
- Country of Origin
- Hispanic Population
  By Age & Sex
- Hispanic Retail Sales
  By Store Types
- Media in the Marketplace

Buying power in this report is synonymous with "purchasing power," "discretionary income," "effective buying income," and "disposable income." It is the gross income available to a household after taxes to purchase goods and services.

The following table trends the Total U.S. Hispanic Market Buying Power over the years, as reported by Strategy Research Corporation.

Total U.S. Hispanic Market
Annual Buying Power

Year	(billions)
1984	$ 94.1
1987	134.1
1989	171.1
1991	182.1
1994	206.0
1996	**228.1**

Source: Strategy Research Corporation

There are some markets which have no listings of Hispanic newspapers, radio or television stations. Every effort has been made by Strategy Research Corporation to include all of the media covering a given market and to ensure the accuracy of the listings. A lack of media listings does not necessarily mean that the market is not reached by Hispanic media. Small community newspapers may be available but are not listed in secondary sources; radio stations with strong signals from larger markets may reach some smaller markets; and markets without Spanish TV station affiliates may be covered by the Spanish-language networks via cable or satellite.

TOP 50 MARKETS RANKING BY POPULATION 1/1/96

Rank	Market	Population
1.	Los Angeles	6,012,300
2.	New York	3,278,100
3.	Miami	1,358,100
4.	San Francisco	1,120,100
5.	Chicago	1,106,800
6.	Houston	1,078,600
7.	San Antonio	1,018,000
8.	McAllen/Browns.	803,800
9.	Dallas-Ft. Worth	740,000
10.	El Paso	644,800
11.	San Diego	642,700
12.	Albuquerque	637,700
13.	Fresno	632,500
14.	Phoenix	586,600
15.	Sacramento	553,300
16.	Denver	378,600
17.	Philadelphia	355,500
18.	Corpus Christi	335,700
19.	Washington D.C.	310,500
20.	Boston	289,700
21.	Tucson	285,000
22.	Austin	248,600
23.	Tampa	233,400
24.	Salinas	223,100
25.	Orlando	200,000
26.	Laredo	186,400
27.	Bakersfield	180,400
28.	Hartford	175,700
29.	El Centro - Yuma	166,600
30.	Santa Barbara	158,000
31.	Odessa	153,100
32.	Seattle	139,500
33.	Las Vegas	137,800
34.	Lubbock	124,500
35.	Salt Lake City	122,800
36.	Colorado Springs	119,700
37.	Portland	119,600
38.	West Palm Beach	115,000
39.	Waco	111,500
40.	Palm Springs	109,000
41.	Yakima	107,400
42.	Amarillo	101,800
43.	Detroit	101,300
44.	Atlanta	92,700
45.	Milwaukee	84,200
46.	Providence	72,300
47.	Cleveland	70,100
48.	New Orleans	62,500
49.	Springfield	61,600
50.	Kansas City	59,500

TOP 50 MARKETS RANKING BY HOUSEHOLDS 1/1/96

Rank	Market	Households
1.	Los Angeles	1,480,100
2.	New York	1,011,600
3.	Miami	468,500
4.	San Francisco	306,700
5.	Chicago	288,300
6.	Houston	288,300
7.	San Antonio	287,800
8.	Albuquerque	202,300
9.	Dallas-Ft. Worth	198,900
10.	McAllen/Browns.	197,900
11.	El Paso	171,900
12.	Phoenix	163,100
13.	San Diego	157,000
14.	Fresno	155,100
15.	Sacramento	148,400
16.	Denver	116,000
17.	Philadelphia	100,400
18.	Corpus Christi	94,900
19.	Washington D.C.	90,200
20.	Boston	82,900
21.	Tucson	82,700
22.	Tampa	74,200
23.	Austin	73,000
24.	Orlando	61,000
25.	Hartford	51,800
26.	Salinas	49,400
27.	Laredo	47,800
28.	Bakersfield	43,900
29.	El Centro - Yuma	41,100
30.	Odessa	40,900
31.	Las Vegas	39,700
32.	Seattle	39,600
33.	Colorado Springs	38,200
34.	Santa Barbara	37,400
35.	West Palm Beach	33,500
36.	Salt Lake City	33,200
37.	Lubbock	33,000
38.	Waco	30,200
39.	Detroit	30,000
40.	Portland	29,500
41.	Amarillo	27,900
42.	Atlanta	27,100
43.	Palm Springs	26,600
44.	Yakima	24,500
45.	Milwaukee	22,200
46.	Cleveland	21,300
47.	Providence	21,100
48.	New Orleans	20,900
49.	Springfield	17,600
50.	Kansas City	17,100

TOP 50 MARKETS RANKING BY TOTAL BUYING POWER 1/1/96

Rank	Market	Total Buying Power
1.	Los Angeles	$50,641,708,966
2.	New York	$29,671,805,861
3.	Miami	$13,678,342,875
4.	San Francisco	$10,140,244,495
5.	Chicago	$9,071,456,169
6.	Houston	$8,739,854,017
7.	San Antonio	$8,545,237,526
8.	McAllen/Browns.	$6,358,872,345
9.	Dallas-Ft. Worth	$6,042,399,534
10.	Albuquerque	$5,533,666,152
11.	San Diego	$5,377,627,288
12.	El Paso	$5,317,227,249
13.	Fresno	$4,925,584,778
14.	Sacramento	$4,609,480,551
15.	Phoenix	$4,570,720,060
16.	Denver	$3,147,932,162
17.	Washington D.C.	$2,949,622,027
18.	Philadelphia	$2,845,677,288
19.	Corpus Christi	$2,792,634,924
20.	Boston	$2,580,330,763
21.	Tucson	$2,327,963,610
22.	Tampa	$2,254,062,904
23.	Austin	$2,121,452,463
24.	Orlando	$1,813,900,562
25.	Salinas	$1,719,019,678
26.	Laredo	$1,511,817,479
27.	Santa Barbara	$1,453,335,067
28.	Hartford	$1,383,486,166
29.	Bakersfield	$1,343,839,710
30.	El Centro - Yuma	$1,333,032,875
31.	Seattle	$1,140,413,873
32.	Odessa	$1,135,223,642
33.	West Palm Beach	$1,053,528,566
34.	Las Vegas	$1,037,987,836
35.	Portland	$946,235,528
36.	Colorado Springs	$933,596,952
37.	Salt Lake City	$930,940,719
38.	Lubbock	$919,176,342
39.	Waco	$910,290,373
40.	Palm Springs	$845,196,033
41.	Detroit	$823,711,069
42.	Atlanta	$818,722,349
43.	Yakima	$805,388,983
44.	Amarillo	$730,243,300
45.	Milwaukee	$629,317,951
46.	Providence	$614,097,349
47.	Cleveland	$567,113,060
48.	New Orleans	$557,435,575
49.	Springfield	$522,451,795
50.	Kansas City	$488,643,076

TOP 50 MARKETS RANKING BY HISPANIC PCT OF POPULATION 1/1/96

Rank	Market	Hispanic Pop (%)
1.	Laredo	97.7
2.	McAllen/Browns.	90.3
3.	El Paso	73.0
4.	El Centro - Yuma	60.2
5.	Corpus Christi	58.4
6.	San Antonio	51.0
7.	Fresno	40.1
8.	Albuquerque	38.2
9.	Odessa	37.8
10.	Los Angeles	37.3
11.	Miami	37.1
12.	Salinas	32.9
13.	Lubbock	32.1
14.	Palm Springs	29.8
15.	Bakersfield	29.6
16.	Tucson	29.5
17.	Santa Barbara	25.4
18.	San Diego	23.6
19.	Houston	23.5
20.	Austin	22.0
21.	Amarillo	21.4
22.	Yakima	19.6
23.	Phoenix	18.0
24.	San Francisco	16.9
25.	Colorado Springs	16.8
26.	Sacramento	16.6
27.	New York	16.4
28.	Dallas-Ft. Worth	14.2
29.	Waco	14.1
30.	Las Vegas	13.0
31.	Denver	12.5
32.	Chicago	11.8
33.	Springfield	9.3
34.	West Palm Beach	8.2
35.	Orlando	7.5
36.	Tampa	6.8
37.	Hartford	6.8
38.	Washington D.C.	5.7
39.	Salt Lake City	5.7
40.	Boston	5.0
41.	Providence	4.8
42.	Philadelphia	4.6
43.	Portland	4.6
44.	Milwaukee	4.0
45.	Seattle	3.6
46.	New Orleans	3.6
47.	Kansas City	2.9
48.	Atlanta	2.2
49.	Detroit	2.1
50.	Cleveland	1.8

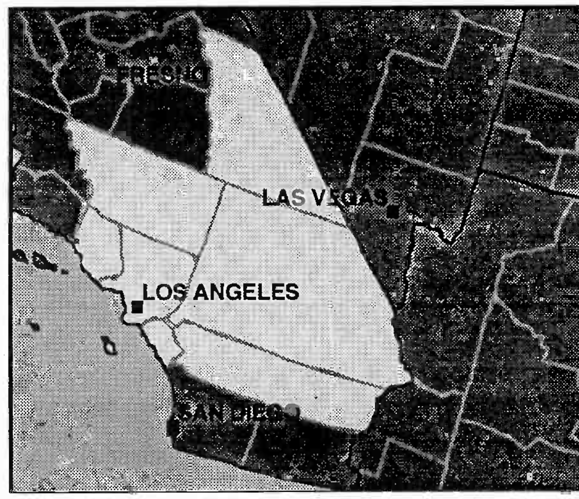
TOP 50 MARKETS RANKING BY PER CAPITA BUYING POWER 1/1/96

TOP 50 MARKETS RANKING BY TOTAL RETAIL SALES 1/1/96

Rank	Market	Per Capita Buying Power	Rank	Market	Total Retail Sales (000)
1.	Miami	$10,072	1.	Los Angeles	$28,922,743
2.	Tampa	$9,658	2.	New York	$17,633,478
3.	Washington D.C.	$9,500	3.	Miami	$9,037,243
4.	Santa Barbara	$9,198	4.	San Francisco	$6,032,670
5.	West Palm Beach	$9,161	5.	Chicago	$5,983,128
6.	Orlando	$9,070	6.	Houston	$5,457,472
7.	San Francisco	$9,053	7.	San Antonio	$5,377,614
8.	New York	$9,052	8.	Dallas-Ft. Worth	$4,005,417
9.	New Orleans	$8,919	9.	Albuquerque	$3,548,684
10.	Boston	$8,907	10.	San Diego	$2,979,368
11.	Atlanta	$8,832	11.	McAllen/Browns.	$2,823,038
12.	Albuquerque	$8,678	12.	Phoenix	$2,741,039
13.	Austin	$8,534	13.	Sacramento	$2,640,385
14.	Providence	$8,494	14.	El Paso	$2,485,172
15.	Springfield	$8,481	15.	Fresno	$2,200,830
16.	Los Angeles	$8,423	16.	Denver	$1,983,014
17.	San Antonio	$8,394	17.	Washington D.C.	$1,878,284
18.	San Diego	$8,367	18.	Boston	$1,678,909
19.	Sacramento	$8,331	19.	Corpus Christi	$1,440,510
20.	Corpus Christi	$8,319	20.	Philadelphia	$1,404,078
21.	Denver	$8,315	21.	Austin	$1,316,253
22.	El Paso	$8,246	22.	Tampa	$1,284,182
23.	Kansas City	$8,212	23.	Orlando	$1,154,660
24.	Chicago	$8,196	24.	Tucson	$1,023,994
25.	Seattle	$8,175	25.	Salinas	$878,218
26.	Tucson	$8,168	26.	Hartford	$847,716
27.	Dallas-Ft. Worth	$8,165	27.	Laredo	$765,839
28.	Waco	$8,164	28.	Seattle	$748,075
29.	Detroit	$8,131	29.	Santa Barbara	$669,571
30.	Laredo	$8,111	30.	Las Vegas	$666,924
31.	Houston	$8,103	31.	Bakersfield	$666,720
32.	Cleveland	$8,090	32.	El Centro - Yuma	$657,768
33.	Philadelphia	$8,005	33.	West Palm Beach	$656,718
34.	El Centro - Yuma	$8,001	34.	Odessa	$632,579
35.	Portland	$7,912	35.	Salt Lake City	$584,045
36.	McAllen/Browns.	$7,911	36.	Lubbock	$552,232
37.	Hartford	$7,874	37.	Detroit	$548,382
38.	Colorado Springs	$7,799	38.	Colorado Springs	$546,523
39.	Phoenix	$7,792	39.	Portland	$545,571
40.	Fresno	$7,787	40.	Atlanta	$500,048
41.	Palm Springs	$7,754	41.	Palm Springs	$490,197
42.	Salinas	$7,705	42.	Amarillo	$468,762
43.	Salt Lake City	$7,581	43.	Waco	$458,215
44.	Las Vegas	$7,533	44.	Yakima	$408,986
45.	Yakima	$7,499	45.	Providence	$407,612
46.	Milwaukee	$7,474	46.	Cleveland	$358,190
47.	Bakersfield	$7,449	47.	New Orleans	$313,351
48.	Odessa	$7,415	48.	Milwaukee	$307,937
49.	Lubbock	$7,383	49.	Kansas City	$306,501
50.	Amarillo	$7,173	50.	Springfield	$297,116

LOS ANGELES

MARKET #1



The Los Angeles Market, with over 6 million Hispanics, continues to be the largest Hispanic market area in the country. As a matter of fact, this market has a greater Hispanic population than many Latin American countries including El Salvador, Puerto Rico, and Costa Rica.

Traditionally, Mexican immigrants have made Los Angeles their location for migrating to the U.S. The fact that 75% of the Hispanics are of Mexican origin translates to over four and a half million of them in the L.A. market. This means there are more Mexicans in Los Angeles than the entire population of the Seattle-Tacoma A.D.I.!

L.A. also happens to have the most Hispanic media outlets of any A.D.I. in the U.S. You will note that there are over 30 Hispanic media sources between radio, television and newspapers.

MARKET BUYING POWER
$50,641,709,000

PER CAPITA BUYING POWER
$8,423

MEAN HOUSEHOLD INCOME
$42,769

POPULATION

	Total	Hispanic
Population	16,122,200	6,012,300
Rank	2	1
Household	5,817,700	1,480,100
Avg. Person/HH	2.86	4.06

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	75
San Salvador	8
Guatemala	4
South America	3
Other	10

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	10,959,700	2,737,600	24.9
1992	16,086,100	5,362,800	33.3
1994	16,053,800	5,605,800	34.9
1996	16,122,200	6,012,300	37.3

LOS ANGELES

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Inyo	CA	1.9	0.5	9.5	20.4	8.2
Kern -East	CA	52.0	14.5	33.0	157.7	55.7
Los Angeles	CA	4,184.7	1,042.0	42.6	9,823.2	3,594.9
Orange	CA	736.1	167.8	28.0	2,628.9	935.2
Riverside -West	CA	305.9	80.0	28.8	1,062.3	381.0
San Bernardino	CA	504.0	122.9	30.4	1,657.9	585.4
Ventura	CA	227.7	52.4	29.5	771.8	257.3
TOTAL		**6,012.3**	**1,480.1**	**37.3%**	**16,122.2**	**5,817.7**

1/1/96 Hispanic Population (000)

MEN 18-20	224.4
MEN 21-24	333.5
MEN 25-34	699.0
MEN 35-49	501.2
MEN 50-54	83.4
MEN 55-64	114.4
MEN 65+	82.5
MEN 18+	**2038.4**
WOMEN 18-20	173.4
WOMEN 21-24	245.6
WOMEN 25-34	597.0
WOMEN 35-49	498.9
WOMEN 50-54	93.9
WOMEN 55-64	137.1
WOMEN 65+	128.7
WOMEN 18+	**1874.6**
TEENS 12-17	**628.5**
CHILDREN 0-11	**1470.8**
CHILDREN 2-11	**1199.4**
TOTAL PERSONS 2+	**5740.9**
TOTAL PERSONS	**6012.3**
HOUSEHOLDS	**1480.1**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$6,325,055
Eating & Drinking	3,525,386
General Merchandise	3,156,955
Apparel & Accessories	1,774,105
Furniture/Appliance/ Home Furnishings	1,398,664
Automotive Dealers	6,388,664
Gasoline Service	1,631,482
Drug Stores	806,939
All Others	3,915,493
Total Retail Sales	**$28,922,743**

LOS ANGELES

Radio

Station	Dial Position	Spanish Format
AM		
KALI	1430	Traditional Mexican
KCAL	1410	Mexican Hits
KDIF	1440	Top 40
KHPY	1530	
KKHJ	930	Contemporary Hits
KNSE	1510	Mexican Contemporary
KOXR	910	Spanish Hits
KTNQ	1020	Adult Contemporary
KTRO	1520	Ranchera
KTSJ	1220	Variety
KUTY	1470	Ranchera
KWIZ	1480	Adult Contemporary
KWKW	1330	News/Talk
KWRM	1370	News/Talk
KWRN	1550	Tejano/Ranchera
KXED	1540	Oldies
FM		
KBUE	105.5	Norteña
KLAX	97.9	Contemporary
KLVE	107.5	Hispanic Hits
KMAX	107.1	Gospel
KMQA	98.3	Mexican Contemporary
KXLM	102.9	Contemporary Hits
KXRS	105.7	
KWIZ	96.7	

Newspapers

Name	Published
20 de Mayo	Weekly
Alcancia de Ahorros	Bi-Weekly
Azteca News	Weekly
El Economico	Weekly
Enfoque: In Focus	Weekly
Excelsior	Weekly
La Opinion	Daily
La Prensa Hispana	Bi-Weekly
La Voz	Weekly
La Voz Libre	Weekly
Mi Casa	Bi-Weekly
Novedades	Weekly
Nuestro Tiempo	Weekly
Tu Mundo/Mundo Artistico	Weekly
Union Hispana	Weekly
Variedades	Weekly
Vecinos Del Valle	Weekly
Vida	Weekly
Vida Nueva	Weekly

Cable/VCRs/Telephone

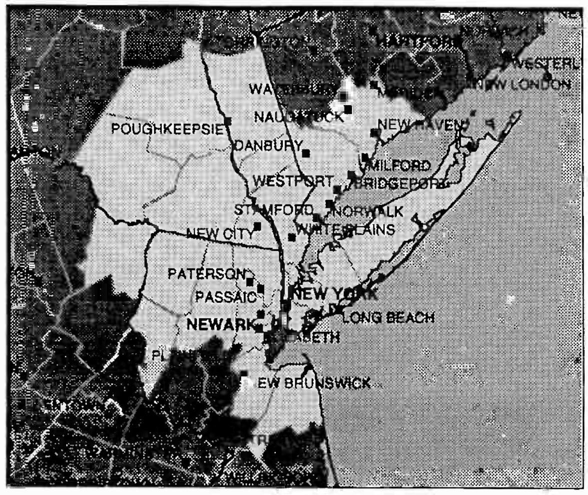
Cable Penetration:	18%
Household with VCR:	79%
TV Sets/HH:	2.1
Unlisted Phone Numbers:	58%

Television

Station	Channel	Affiliation
KMEX	34	Univision
KVEA	52	Telemundo
KWHY	22	Independent

NEW YORK

MARKET #2



The "Big Apple" is the second largest Hispanic market in the United States, with nearly 3.3 million Hispanics representing 16.4% of the market's total population. Further, New York contains 12.0% of total U.S. Hispanics.

Traditionally, New York has been considered a Puerto Rican (43%) or Caribbean market, but significant numbers of other Hispanics reside in the 29 counties that comprise the ADI. Mexicans and Central Americans now make up at least 15% of New York Hispanics.

Four counties (boroughs) contain the vast majority of the market's Hispanic population. Bronx, Kings (Brooklyn), New York (Manhattan) and Queens Counties each contain over 400,000 Hispanics and a total of nearly 2 million or 61% of market total.

POPULATION

	Total	Hispanic
Population	19,981,700	3,278,100
Rank	1	2
Household	7,599,000	1,011,600
Avg. Person/HH	2.63	3.24

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	5
Puerto Rico	43
Cuba	5
Dominican Republic	18
Central America	10
Colombia	6
Ecuador	4
Other	9

MARKET BUYING POWER
$29,671,806,000

PER CAPITA BUYING POWER
$9,052

MEAN HOUSEHOLD INCOME
$36,664

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	18,158,600	2,064,200	11.3
1992	18,459,300	3,037,500	16.5
1994	19,295,600	3,094,600	16.0
1996	19,981,700	3,278,100	16.4

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Fairfield	CT	85.8	24.5	10.1	849.6	303.4
Bergen	NJ	64.5	19.5	7.2	896.1	335.1
Essex	NJ	110.3	32.6	14.0	787.7	279.3
Hudson	NJ	210.5	69.4	37.1	567.3	316.4
Hunterdon	NJ	2.1	0.6	1.8	119.4	41.1
Middlesex	NJ	74.3	20.8	10.3	721.5	257.7
Monmouth	NJ	28.8	8.1	4.7	613.2	227.1
Morris	NJ	26.6	7.2	5.5	483.3	172.7
Ocean	NJ	17.7	4.9	3.6	490.9	189.5
Passaic	NJ	124.8	33.8	25.0	499.3	180.5
Somerset	NJ	15.3	4.6	5.0	305.4	109.1
Sussex	NJ	3.9	1.0	2.5	157.8	54.3
Union	NJ	85.6	25.9	15.9	538.1	207.3
Warren	NJ	2.4	0.8	2.3	105.5	39.1
Bronx	NY	588.4	185.5	46.8	1,257.3	483.6
Dutchess	NY	11.7	2.6	4.3	272.1	93.8
Kings	NY	504.0	154.7	21.3	2,366.2	908.9
Nassau	NY	99.2	26.7	6.9	1,437.2	495.6
New York	NY	430.4	153.8	27.7	1,554.0	792.2
Orange	NY	27.3	7.7	7.8	350.4	115.9
Putnam	NY	2.9	0.8	3.1	94.9	32.7
Queens	NY	465.5	145.4	22.1	2,106.3	798.0
Richmond	NY	38.1	11.2	9.9	384.5	132.6
Rockland	NY	23.7	6.2	7.4	320.9	103.5
Suffolk	NY	106.6	26.4	7.4	1,440.1	462.1
Sullivan	NY	6.2	1.4	7.4	83.5	31.0
Ulster	NY	8.2	2.2	4.7	175.1	64.9
Westchester	NY	112.0	32.9	11.7	957.3	352.1
Pike	PA	1.3	0.4	2.8	46.8	19.5
TOTAL		**3,278.1**	**1,011.6**	**16.4%**	**19,981.7**	**7,599.0**

NEW YORK

1/1/96 Hispanic Population (000)

MEN 18-20	86.4
MEN 21-24	122.9
MEN 25-34	319.8
MEN 35-49	313.0
MEN 50-54	68.4
MEN 55-64	99.4
MEN 65+	64.1
MEN 18+	**1074.0**
WOMEN 18-20	82.5
WOMEN 21-24	119.3
WOMEN 25-34	335.3
WOMEN 35-49	360.6
WOMEN 50-54	85.8
WOMEN 55-64	123.2
WOMEN 65+	110.9
WOMEN 18+	**1217.6**
TEENS 12-17	**315.6**
CHILDREN 0-11	**670.9**
CHILDREN 2-11	**556.3**
TOTAL PERSONS 2+	**3163.5**
TOTAL PERSONS	**3278.1**
HOUSEHOLDS	**1011.6**

Newspapers

Name	Published
El Diario/La Prensa	Daily
El Especial	Weekly
El Tiempo	Weekly
EL Vocero	Daily
Impacto Latin News	Weekly
La Tribuna Hispana	Weekly
La Voz Hispana	Weekly
Mensaje	Weekly
Noticias del Mundo	Daily
Nuevo Amanecer	Weekly

Television

Station	Channel	Affiliation
WNJU	47	Telemundo
WXTV	41	Univision

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$4,714,947
Eating & Drinking	1,744,035
General Merchandise	1,708,545
Apparel & Accessories	1,604,826
Furniture/Appliance/ Home Furnishings	917,178
Automotive Dealers	2,662,585
Gasoline Service	870,023
Drug Stores	462,285
All Others	2,949,054
Total Retail Sales	**$17,633,478**

Radio

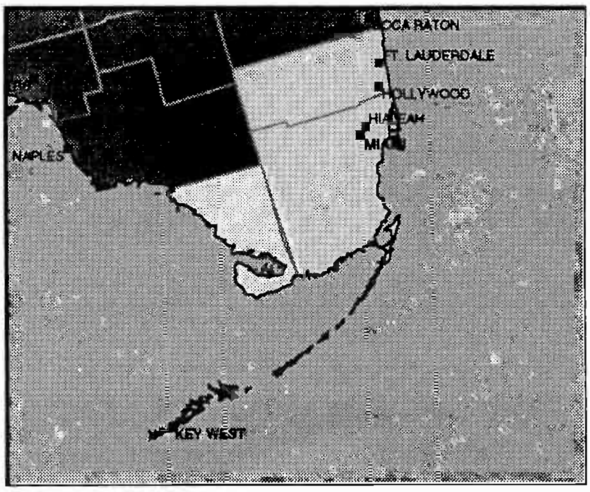
Station	Dial Position	Spanish Format
AM		
WADO	1280	News/Talk
WCUM	1450	Country
WKDM	1380	Contemporary
WSKQ	620	Contemporary/Oldies
FM		
WNWK	107.5	Mexican Contemporary
WRTN	93.5	Oldies
WSKQ	97.9	Top 40/Contemporary

Cable/VCRs/Telephone

Cable Penetration:	21%
Household with VCR:	92%
TV Sets/HH:	2.5
Unlisted Phone Numbers:	84%

MIAMI

MARKET #3



The third largest U.S. Hispanic market is Miami with 1.36 million Hispanics representing 37% of the total ADI population and 5% of the national Hispanic population. Nearly 88% (1.91 million) of Miami's Hispanics live in Dade County, making them the majority (56%) of this county's population.

Miami has often been considered a "Cuban" market and in fact 58% of the area's Hispanics are of Cuban origin but large numbers of Hispanics from Central and South America have also migrated to South Florida. This Gateway to Latin America is 9% Nicaraguan, 8% Puerto Rican and 6% Colombian.

Miami is rich in Spanish language media outlets. The market has 13 radio stations and 12 newspapers. In addition, it is the headquarters of several international broadcast and cable television networks.

MARKET BUYING POWER
$13,678,343,000

PER CAPITA BUYING POWER
$10,072

MEAN HOUSEHOLD INCOME
$36,495

POPULATION

	Total	Hispanic
Population	3,661,000	1,358,100
Rank	14	3
Household	1,484,600	468,500
Avg. Person/HH	2.47	2.90

COUNTRY OF ORIGIN

Country	% Distribution
Cuba	58
Nicaragua	9
Puerto Rico	8
Dominican Republic	3
Colombia	6
Peru	2
Mexico	3
Other	11

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	2,471,800	712,000	28.8
1992	3,449,400	1,187,600	34.4
1994	3,526,600	1,237,100	35.1
1996	3,661,000	1,358,100	37.1

MIAMI

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Broward	FL	155.1	53.1	10.8	1436.2	623.9
Dade	FL	1191.0	410.7	55.8	2134.4	819.6
Monroe	FL	12.0	4.7	13.3	90.4	41
TOTAL		**1358.1**	**468.5**	**37.1%**	**3661.0**	**1484.6**

1/1/96 Hispanic Population (000)

MEN 18-20 .... 28.6
MEN 21-24 .... 40.1
MEN 25-34 .... 119.2
MEN 35-49 .... 128.9
MEN 50-54 .... 38.5
MEN 55-64 .... 67.3
MEN 65+ 71.9
MEN 18+ 494.5

WOMEN 18-20 .... 27.0
WOMEN 21-24 .... 39.9
WOMEN 25-34 .... 124.3
WOMEN 35-49 .... 143.3
WOMEN 50-54 .... 43.1
WOMEN 55-64 .... 76.8
WOMEN 65+ 108.8
WOMEN 18+ 563.2

TEENS 12-17 .... 106.1
CHILDREN 0-11 .... 194.3
CHILDREN 2-11 .... 162.9

TOTAL PERSONS 2+ 1326.7
TOTAL PERSONS 1358.1
HOUSEHOLDS 468.5

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food $2,154,991
Eating & Drinking 982,118
General Merchandise 971,904
Apparel & Accessories 692,849
Furniture/Appliance/
Home Furnishings 512,219
Automotive Dealers 1,673,834
Gasoline Service 518,543
Drug Stores 230,572
All Others 1,300,213

Total Retail Sales $9,037,243

MIAMI

Radio

Station	Dial Position	Spanish Format
AM		
WAQI	710	News/Talk
WCMQ	1210	Contemporary
WOCN	1450	Contemporary
WQBA	1140	News/Talk/Music
WRFM	830	Sports
WRHC	1550	News/talk
WSUA	1260	Light/Contemporary
WVCG	1080	Music/Talk
FM		
WAMR	107.5	Adult Contemp./Romance
WCMQ	92.3	Latin Contemporary
WQBA	98.3	Contemporary Hits
WRMA	106.7	Adult Contemp./Romance
WXDJ	95.7	Contemporary Hits

Newspapers

Name	Published
Diario Las Americas	Daily
El Expreso De Miami	Weekly
El Heraldo De Broward y Palm Beach	Weekly
El Matancero Libre	Daily
El Nuevo Herald	Daily
El Nuevo Patria	Weekly
Estilo	Weekly
Exito	Weekly
La Prensa Centroamericana	Weekly
La Prensa Grafica	Weekly
Libre	Weekly
Mi Casa	Weekly

Cable/VCRs/Telephone

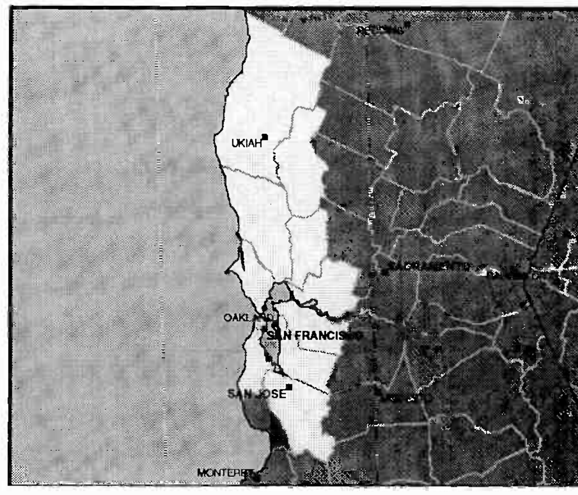
Cable Penetration:	50%
Household with VCR:	72%
TV Sets/HH:	2.2
Unlisted Phone Numbers:	54%

Television

Station	Channel	Affiliation
WJAN	41	Independent
WLTV	23	Univision
WSCV	51	Telemundo

SAN FRANCISCO

MARKET #4



The San Francisco market area has a Hispanic population of over 1.1 million. Hispanics represent nearly 17% of the total market area's population, and 23% of Santa Clara County which contains the city of San Jose. The eleven county San Francisco ADI is made up of several major California cities including San Francisco, San Jose, and Oakland.

Since 1980, San Francisco's Hispanic population has nearly doubled. This is a result of continued immigration of Mexico and various Central American countries. Two-thirds of the Bay area's Hispanics are of Mexican origin, while 7% are from San Salvador and 5% are from Nicaragua.

POPULATION

	Total	Hispanic
Population	6,630,000	1,120,100
Rank	5	4
Household	2,514,800	306,700
Avg. Person/HH	2.64	3.65

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	66
Puerto Rico	4
Nicaragua	5
San Salvador	7
South America	6
Other	12

MARKET BUYING POWER
$10,140,245,000

PER CAPITA BUYING POWER
$9,053

MEAN HOUSEHOLD INCOME
$41,328

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	4,971,300	628,100	12.6
1992	6,223,200	996,200	16.0
1994	6,374,800	1,023,300	16.1
1996	6,630,000	1,120,100	16.9

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Alameda	CA	216.5	61.8	15.4	1,405.8	543.0
Contra Costa	CA	117.7	32.3	12.9	912.5	340.6
Lake	CA	4.9	1.3	8.0	60.7	25.6
Marin	CA	23.7	6.6	9.8	241.9	92.7
Mendocino	CA	10.9	2.5	12.8	84.9	32.1
Napa	CA	20.6	5.4	17.0	121.6	46.6
San Francisco	CA	115.2	37.2	14.6	789.1	341.5
San Mateo	CA	145.7	39.4	20.2	721.2	282.2
Santa Clara	CA	388.3	99.7	23.2	1,673.8	589.7
Solano -West	CA	22.5	6.2	12.6	178.6	52.3
Sonoma	CA	54.1	14.3	12.3	439.9	168.5
TOTAL		**1,120.1**	**306.7**	**16.9%**	**6,630.0**	**2,514.8**

SAN FRANCISCO

1/1/96 Hispanic Population (000)

MEN	18-20	33.6
MEN	21-24	53.0
MEN	25-34	132.9
MEN	35-49	107.5
MEN	50-54	19.5
MEN	55-64	30.2
MEN	65+	24.0
MEN	**18+**	**400.7**
WOMEN	18-20	29.2
WOMEN	21-24	41.4
WOMEN	25-34	112.5
WOMEN	35-49	103.2
WOMEN	50-54	21.9
WOMEN	55-64	35.2
WOMEN	65+	40.0
WOMEN	**18+**	**383.4**
TEENS 12-17		**97.5**
CHILDREN 0-11		**238.5**
CHILDREN 2-11		**195.2**
TOTAL PERSONS 2+		**1076.8**
TOTAL PERSONS		**1120.1**
HOUSEHOLDS		**306.7**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$1,444,104
Eating & Drinking	805,433
General Merchandise	606,255
Apparel & Accessories	447,236
Furniture/Appliance/ Home Furnishings	355,795
Automotive Dealers	820,546
Gasoline Service	310,470
Drug Stores	255,324
All Others	987,507
Total Retail Sales	**$6,032,670**

Newspapers

Name	Published
Alianza Metropolitan News	Bi-Weekly
El Continental	Monthly
El Bohemio News	Weekly
El Mensajero	Weekly
El Mundo	Weekly
El Observador	Weekly
Horizontes	Weekly
La Nueva Prensa	Bi-Weekly
La Oferta Review	Bi-Weekly
La Voz Latina	Weekly
Latino	Weekly
Tiempo Latino	Weekly

Radio

Station	Dial Position	Spanish Format
AM		
KAZA	1290	Contemporary/Oldies
KIQI	1010	Latin
KLOK	1170	Mexican Blend
KNTA	1430	Sports/Music
KRRS	1460	Various Contemporary
FM		
KBRG	104.9	Top 40 Hits
KVRG	107.1	Adult Contemporary
KZWC	92.1	Banda/Baladas

Television

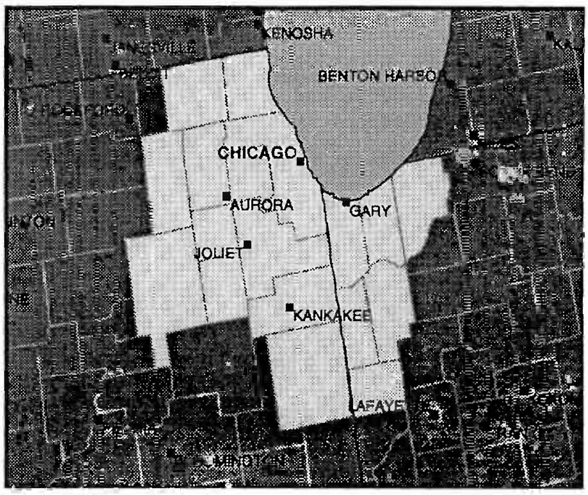
Station	Channel	Affiliation
KCU	36	Independent
KDTV	14	Univision
KSTS	48	Telemundo

Cable/VCRs/Telephone

Cable Penetration:	45%
Household with VCR:	80%
TV Sets/HH:	2.3
Unlisted Phone Numbers:	71%

CHICAGO

MARKET #5



The Chicago ADI is comprised of seventeen counties, of which twelve are in the state of Illinois and five are in the state of Indiana. Most Chicago area Hispanics (75%) live in Cook County, Illinois.

This market, located on the shores of Lake Michigan, closely reflects the makeup of the U.S. Hispanic population in terms of country of origin. The market includes Mexicans, Puerto Ricans, Cubans, Central Americans and Hispanics from many other countries.

Hispanics now represent nearly 12% of the market's total population and make up 15% of Cook County. They have an estimated market Buying Power of $9 billion.

POPULATION

	Total	Hispanic
Population	9,341,700	1,106,800
Rank	3	5
Household	3,445,700	288,300
Avg. Person/HH	2.71	3.84

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	68
Puerto Rico	19
Cuba	2
Guatemala	2
Other	9

MARKET BUYING POWER

$9,071,456,000

PER CAPITA BUYING POWER

$8,196

MEAN HOUSEHOLD INCOME

$39,332

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	8,295,400	640,200	7.7
1992	8,758,700	986,500	11.3
1994	8,966,600	1,019,000	11.4
1996	9,341,700	1,106,800	11.8

CHICAGO

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Cook	IL	839.0	220.6	15.3	5,483.7	2,073.5
De Kalb	IL	3.0	0.7	3.3	91.7	32.4
Du Page	IL	46.4	12.0	5.0	927.9	342.6
Grundy	IL	1.0	0.2	2.4	40.0	15.0
Iroquois	IL	0.9	0.2	2.3	40.3	15.8
Kane	IL	59.2	13.6	15.6	379.4	135.1
Kankakee	IL	2.5	0.5	2.4	104.8	38.4
Kendall	IL	2.5	0.6	4.8	52.8	18.8
Lake	IL	52.2	12.4	8.7	600.4	204.3
La Salle	IL	4.4	1.3	3.4	130.0	51.5
McHenry	IL	9.1	2.3	3.7	246.7	88.0
Will	IL	27.7	6.9	6.4	432.9	144.5
Jasper	IN	0.3	0.1	1.3	23.6	7.8
Lake	IN	51.6	14.9	10.1	511.2	180.9
La Porte	IN	1.9	0.5	1.6	117.2	41.5
Newton	IN	0.2	0.1	1.5	15.3	5.6
Porter	IN	4.9	1.4	3.4	143.8	50.0
TOTAL		**1,106.8**	**288.3**	**11.8%**	**9,341.7**	**3,445.7**

CHICAGO

1/1/96 Hispanic Population (000)

MEN 18-20	38.2
MEN 21-24	52.5
MEN 25-34	123.6
MEN 35-49	99.5
MEN 50-54	17.9
MEN 55-64	26.2
MEN 65+	14.2
MEN 18+	**372.1**
WOMEN 18-20	28.7
WOMEN 21-24	40.1
WOMEN 25-34	104.4
WOMEN 35-49	94.1
WOMEN 50-54	18.0
WOMEN 55-64	26.0
WOMEN 65+	17.9
WOMEN 18+	**329.2**
TEENS 12-17	**124.2**
CHILDREN 0-11	**281.3**
CHILDREN 2-11	**233.5**
TOTAL PERSONS 2+	**1059.0**
TOTAL PERSONS	**1106.8**
HOUSEHOLDS	**288.3**

Newspapers

Name	Published
Catolico	Monthly
El Conquistador	Bi-Weekly
El Dia	Weekly
El Heraldo	Weekly
El Manana	Daily
El Imparcial	Weekly
Exito	Weekly
Extra Bilingual Community Newspaper	Weekly
Impacto News Magazine	Monthly
La Raza	Weekly
La Voz	Weekly
Mundo Hispano	Weekly
Su Noticiero Bilingue	Bi-Weekly

Television

Station	Channel	Affiliation
WGBO	66	Univision
WSNS	44	Telemundo

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$1,273,428
Eating & Drinking	629,799
General Merchandise	649,657
Apparel & Accessories	490,153
Furniture/Appliance/ Home Furnishings	294,201
Automotive Dealers	1,009,481
Gasoline Service	419,053
Drug Stores	262,913
All Others	954,443
Total Retail Sales	**$5,983,128**

Radio

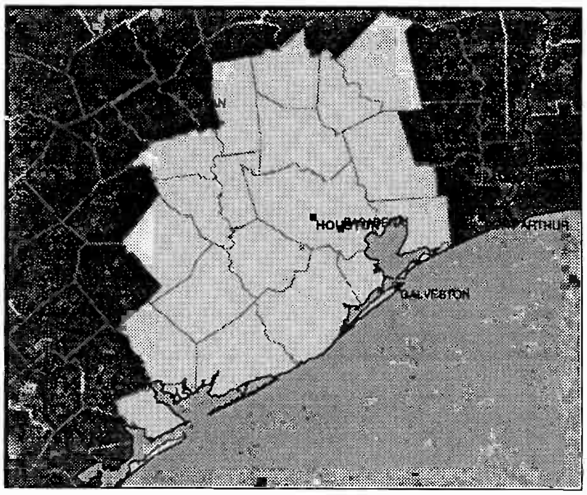
Station	Dial Position	Spanish Format
AM		
WCRW	1240	Contemporary
WEDC	1240	Variety
WIND	560	News/Talk/Sports/Music
WKGA	1500	Contemporary
WONX	1590	Contemporary
WOPA	1200	Contemporary Hits
WPNA	1490	Religious
WRMN	1410	Musical Variety
WSBC	1240	Contemporary
WTAQ	1300	Adult Contemporary
FM		
WOJO	105.1	Adult Contemporary

Cable/VCRs/Telephone

Cable Penetration:	24%
Household with VCR:	88%
TV Sets/HH:	2.2
Unlisted Phone Numbers:	38%

HOUSTON

MARKET #6



The Houston market area has a Hispanic population of slightly over one million. Hispanics represent nearly a quarter of the total market area's population, and 27% of Harris County which accounts for 78% of the market's total Hispanic population.

This makes Houston the sixth largest U.S. Hispanic market. Harris County contains the third largest Hispanic population from among all U.S. counties. Only Los Angeles County, CA, and Dade County, FL, have larger Hispanic populations. The market has a 1996 estimated Buying Power of $8.7 billion and spending in Retail stores is expected to amount to $5.5 billion.

Since 1980, Houston's Hispanic population has more than doubled, going from four hundred eighty-five thousand to over one million. The vast majority (80%) of Houston's Hispanics are of Mexican origin.

POPULATION

	Total	Hispanic
Population	4,597,500	1,078,600
Rank	10	6
Household	1,695,500	288,300
Avg. Person/HH	2.71	3.74

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	80
San Salvador	7
Colombia	2
Other	11

MARKET BUYING POWER
$8,739,854,000

PER CAPITA BUYING POWER
$8,103

MEAN HOUSEHOLD INCOME
$37,894

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	3,236,700	484,700	14.9
1993	4,125,200	881,800	21.4
1994	4,378,800	953,200	21.8
1996	4,597,500	1,078,600	23.5

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Austin	TX	2.9	0.9	12.1	24.0	8.9
Brazoria	TX	45.5	11.4	20.3	224.2	75.6
Calhoun	TX	8.4	2.5	38.5	21.9	7.8
Chambers	TX	1.6	0.3	7.1	22.8	8.0
Colorado	TX	3.1	0.9	16.1	19.5	7.4
Fort Bend	TX	61.2	15.2	20.0	306.0	98.6
Galveston	TX	38.4	11.5	15.6	245.9	92.0
Grimes	TX	3.7	0.8	15.8	23.3	7.3
Harris	TX	846.5	228.7	27.0	3,135.3	1,189.8
Jackson	TX	3.4	0.9	22.6	14.9	5.5
Liberty	TX	4.3	0.9	7.0	61.4	20.8
Matagorda	TX	10.8	2.6	26.9	40.1	14.6
Montgomery	TX	21.9	5.6	9.3	235.7	82.4
Polk	TX	2.5	0.7	6.0	41.0	15.8
San Jacinto	TX	0.7	0.1	3.0	22.8	8.7
Walker	TX	7.1	1.1	12.0	58.9	17.9
Waller	TX	3.7	0.9	12.6	29.5	9.0
Washington	TX	1.4	0.3	4.9	28.0	10.2
Wharton	TX	11.5	3.0	27.1	42.3	15.2
TOTAL		**1,078.6**	**288.3**	**23.5%**	**4,597.5**	**1,695.5**

HOUSTON

1/1/96 Hispanic Population (000)

MEN 18-20	32.3
MEN 21-24	47.5
MEN 25-34	129.1
MEN 35-49	99.5
MEN 50-54	14.4
MEN 55-64	19.4
MEN 65+	12.1
MEN 18+	**354.3**
WOMEN 18-20	27.7
WOMEN 21-24	39.7
WOMEN 25-34	109.9
WOMEN 35-49	91.4
WOMEN 50-54	14.6
WOMEN 55-64	21.8
WOMEN 65+	17.2
WOMEN 18+	**322.3**
TEENS 12-17	**116.5**
CHILDREN 0-11	**285.5**
CHILDREN 2-11	**236.7**
TOTAL PERSONS 2+	**1029.8**
TOTAL PERSONS	**1078.6**
HOUSEHOLDS	**288.3**

Newspapers

Name	Published
El Heraldo	Weekly
El Mexica	Weekly
Hola	Weekly
La Buene Suerte	Weekly
La Informacion	Weekly
La Subasta	Tri-Weekly
La Voz	Weekly
Libreta de Ahorros	Monthly
Semana	Weekly

Television

Station	Channel	Affiliation
KTFH	49	Independent
KTMD	48	Telemundo
KXLN	45	Univision

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$1,555,708
Eating & Drinking	511,856
General Merchandise	631,815
Apparel & Accessories	355,795
Furniture/Appliance/ Home Furnishings	214,048
Automotive Dealers	1,171,385
Gasoline Service	285,912
Drug Stores	152,741
All Others	578,212
Total Retail Sales	**$5,457,472**

Radio

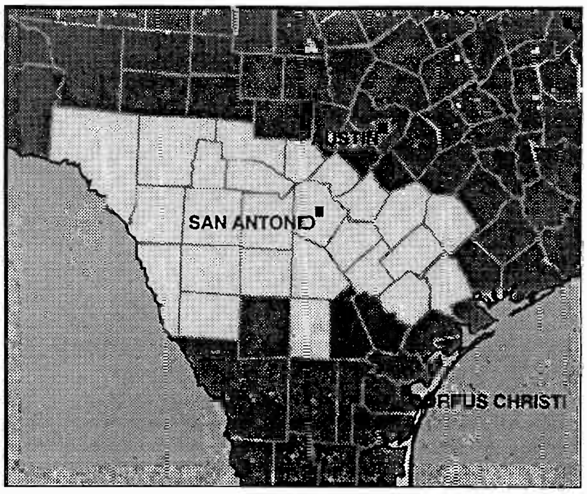
Station	Dial Position	Spanish Format
AM		
KEYH	850	Adult Contemporary
KLAT	1010	News/Sports/Talk/Music
KLVL	1480	Adult Contemporary
KMPQ	980	Tropical/International
KXYZ	1320	Adult Contemporary
KYST	920	Tejano Hits/International Hits
FM		
KLTN	93.3	Adult Contemporary
KLTO	104.9	Adult Contemporary
KXTJ	107.9	Tejano
KQQK	106.5	Tejano Hits

Cable/VCRs/Telephone

Cable Penetration:	34%
Household with VCR:	71%
TV Sets/HH:	2.1
Unlisted Phone Numbers:	79%

SAN ANTONIO

MARKET #7



The San Antonio Market, with slightly over one million Hispanics, is the seventh largest Hispanic market area in the country. Hispanic residents are now the majority (51%) of this ADI. Bexar county (pronounced like Bear) has a Hispanic population of 713,700 which represents 70% of the ADI's Hispanics and 54% of that county's total.

San Antonio is a highly Mexican market (92%) with a significant total Buying Power of roughly \$8.5 billion. The market has an amazing 17 radio stations broadcasting to the local Hispanic market.

POPULATION

	Total	Hispanic
Population	1,994,800	1,018,000
Rank	26	7
Household	687,200	287,800
Avg. Person/HH	2.90	3.54

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	92
Other	8

MARKET BUYING POWER
\$8,545,238,000

PER CAPITA BUYING POWER
\$8,394

MEAN HOUSEHOLD INCOME
\$37,114

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	1,369,000	638,500	46.6
1992	1,775,200	860,700	48.5
1994	1,926,300	941,000	48.9
1996	1,994,800	1,018,000	51.0

SAN ANTONIO

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Atascosa	TX	20.0	5.6	56.2	35.6	11.8
Bandera	TX	1.9	0.6	16.7	11.4	4.5
Bexar	TX	713.7	205.8	53.7	1,329.0	458.2
Comal	TX	16.2	4.4	23.8	68.1	25.2
De Witt	TX	5.2	1.5	25.7	20.2	7.6
Dimmit	TX	10.7	2.8	88.4	12.1	3.3
Edwards	TX	1.8	0.4	56.3	3.2	1.1
Frio	TX	13.0	3.4	77.4	16.8	5.0
Goliad	TX	2.3	0.6	37.1	6.2	2.1
Gonzales	TX	7.4	1.9	38.9	19.0	7.0
Guadalupe	TX	25.8	7.1	32.3	79.8	28.5
Karnes	TX	6.8	1.9	50.7	13.4	6.1
Kendall	TX	3.8	1.2	18.1	21.0	7.6
Kerr	TX	7.9	2.2	18.5	42.6	17.0
Kinney	TX	1.8	0.5	51.4	3.5	1.1
La Salle	TX	4.8	1.4	81.4	5.9	2.0
La Vaca	TX	1.9	0.5	9.3	20.5	7.9
McMullen	TX	0.4	0.1	40.0	1.0	0.4
Maverick	TX	49.7	12.4	97.5	51.0	13.2
Medina	TX	15.5	4.4	47.0	33.0	11.5
Real	TX	0.7	0.2	24.1	2.9	1.0
Uvalde	TX	17.7	4.6	64.4	27.5	8.9
Val Verde	TX	35.3	9.3	73.8	47.8	14.5
Victoria	TX	30.5	8.7	37.6	81.2	28.7
Wilson	TX	10.5	2.9	37.2	28.2	9.3
Zavala	TX	12.7	3.4	91.4	13.9	3.7
TOTAL		**1,018.0**	**287.8**	**51.0%**	**1,994.8**	**687.2**

SAN ANTONIO

1/1/96 Hispanic Population (000)

MEN 18-20	27.9
MEN 21-24	33.1
MEN 25-34	91.0
MEN 35-49	85.6
MEN 50-54	17.1
MEN 55-64	27.7
MEN 65+	27.6
MEN 18+	**310.0**
WOMEN 18-20	29.1
WOMEN 21-24	34.6
WOMEN 25-34	92.6
WOMEN 35-49	97.3
WOMEN 50-54	20.4
WOMEN 55-64	35.3
WOMEN 65+	41.1
WOMEN 18+	**350.4**
TEENS 12-17	**113.5**
CHILDREN 0-11	**244.1**
CHILDREN 2-11	**205.5**
TOTAL PERSONS 2+	**979.4**
TOTAL PERSONS	**1018.0**
HOUSEHOLDS	**287.8**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$1,405,505
Eating & Drinking	569,981
General Merchandise	627,857
Apparel & Accessories	337,364
Furniture/Appliance/ Home Furnishings	196,843
Automotive Dealers	1,177,084
Gasoline Service	410,621
Drug Stores	105,391
All Others	546,968
Total Retail Sales	**$5,377,614**

Newspapers

Name	Published
La Prensa de San Antonio	Weekly
Sun	Weekly

Radio

Station	Dial Position	Spanish Format
AM		
KCOR	1350	Ranchera/Norteña
KEDA	1540	Contemporary
KEPS	1270	Contemporary
KRME	1460	Contemporary
KSAH	720	News
KSLR	630	Contemporary
KVAR	1160	Contemporary
KVOU	1400	Top 40 Hits
KVWG	1280	Tex-Mex/International
KXTN	1310	Tejano
XEMU	580	Country
FM		
KHER	94.3	Top 40 Hits
KROM	92.9	International/Ballads
KTDR	96.3	Contemporary Hits
KUVA	102.3	Tejano-Country
KVWG	95.3	Contemporary
KXTN	107.5	Tejano
XHSG	99.9	International/Ballads

Television

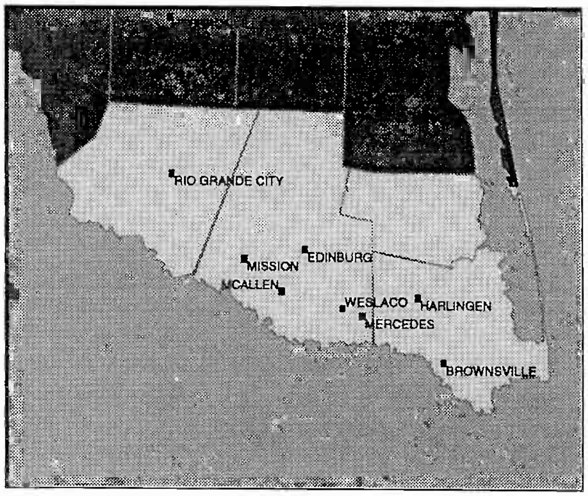
Station	Channel	Affiliation
KVDA	60	Telemundo
KWEX	41	Univision

Cable/VCRs/Telephone

Cable Penetration:	45%
Household with VCR:	70%
TV Sets/HH:	2.1
Unlisted Phone Numbers:	68%

MCALLEN-BROWNSVILLE

MARKET #8



Roughly nine out of every ten residents of the McAllen-Brownsville market area are of Hispanic origin. Of all U.S. Hispanic markets, only Laredo has a higher percentage of Hispanics. With just over eight hundred thousand Hispanics, McAllen (also known as the Lower Rio Grande Valley) is the eighth largest U.S. Hispanic market.

Due to its geographic proximity to Mexico, McAllen-Brownsville Hispanics are predominantly of Mexican origin. There are nearly two hundred thousand Hispanic households in this ADI and they have a total estimated Buying Power of $6.4 billion.

POPULATION

	Total	Hispanic
Population	890,000	803,800
Rank	35	8
Household	252,500	197,900
Avg. Person/HH	3.52	4.06

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	96
Other	4

MARKET BUYING POWER
$6,358,872,000

PER CAPITA BUYING POWER
$7,911

MEAN HOUSEHOLD INCOME
$40,165

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	474,900	432,200	91.0
1992	745,600	646,200	86.7
1994	796,000	696,300	87.5
1996	890,000	803,800	90.3

MCALLEN-BROWNSVILLE

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Cameron	TX	281.4	70.4	87.8	320.5	94.3
Hidalgo	TX	449.4	109.1	90.9	494.4	138.2
Starr	TX	54.8	13.6	99.6	55.0	14.5
Willacy	TX	18.2	4.8	90.6	20.1	5.5
TOTAL		**803.8**	**197.9**	**90.3%**	**890.0**	**252.5**

1/1/96 Hispanic Population (000)

MEN 18-20	24.3
MEN 21-24	26.1
MEN 25-34	58.9
MEN 35-49	62.6
MEN 50-54	13.6
MEN 55-64	19.9
MEN 65+	22.5
MEN 18+	**227.9**
WOMEN 18-20	24.7
WOMEN 21-24	27.6
WOMEN 25-34	64.4
WOMEN 35-49	76.6
WOMEN 50-54	15.8
WOMEN 55-64	26.9
WOMEN 65+	28.7
WOMEN 18+	**264.7**
TEENS 12-17	**110.9**
CHILDREN 0-11	**200.3**
CHILDREN 2-11	**168.6**
TOTAL PERSONS 2+	**772.1**
TOTAL PERSONS	**803.8**
HOUSEHOLDS	**197.9**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$856,876
Eating & Drinking	211,275
General Merchandise	462,796
Apparel & Accessories	227,200
Furniture/Appliance/ Home Furnishings	96,263
Automotive Dealers	467,499
Gasoline Service	158,613
Drug Stores	45,598
All Others	296,918
Total Retail Sales	**$2,823,038**

MCALLEN-BROWNSVILLE

Radio

Station	Dial Position	Spanish Format
AM		
KBOR	1600	Cumbia/Ranchero/Norteña
KGBT	1530	Ranchero/Norteña
KIRT	1580	Ranchero
XERKS	940	Top 40 Hits
XERT	1170	Ranchero
FM		
KCTM	103.1	Contemporary
KIWW	96.1	Tejano
KKPS	99.5	
KQXX	98.5	Spanish Top 40
KTJN	106.3	Tejano Top 40
KTJX	105.5	Tejano

Newspapers

Name	Published
El Clamor	Bi-Weekly
El Heraldo	Daily
El Periodico U.S.A.	Weekly

Cable/VCRs/Telephone

Cable Penetration:	45%
Household with VCR:	70%
TV Sets/HH:	2.0
Unlisted Phone Numbers:	65%

Television

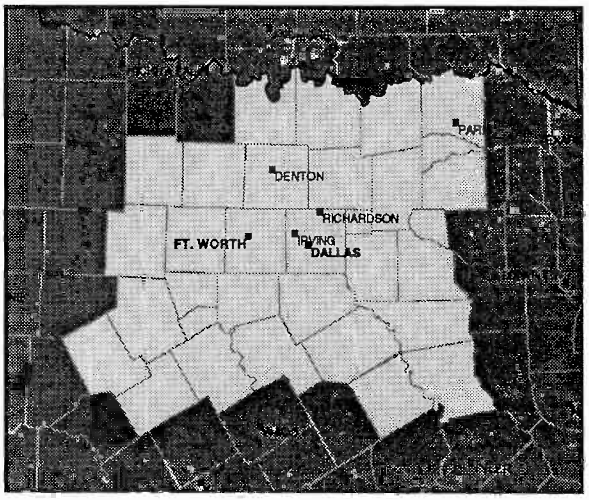
Station	Channel	Affiliation
KNVO	48	Univision
XERV	9	Independent
XHAB	7	Independent
XHRIO	2	Telemundo

DALLAS-FORT WORTH

MARKET #9

The Dallas-Ft. Worth market area has a Hispanic population of nearly 750,000. Hispanics represent just over 14% of the total market area's population, and 20% of Dallas county. The 32 county Dallas ADI is made up of two major Texas cities, Dallas and Ft. Worth.

Since 1980, Dallas' Hispanic population has nearly tripled. The two counties of Dallas and Tarrant contain nearly 600,000 Hispanic residents, representing 81% of the market's total Hispanic population. As with all Texas markets, the vast majority (86%) of the area's Hispanics are of Mexican origin. The market has a 1996 estimated Buying Power of $6.0 billion.



POPULATION

	Total	Hispanic
Population	5,199,300	740,000
Rank	8	4
Household	1,985,000	198,900
Avg. Person/HH	2.62	3.72

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	86
San Salvador	2
Honduras	2
Puerto Rico	2
Other	8

MARKET BUYING POWER
$6,042,400,000

PER CAPITA BUYING POWER
$8,165

MEAN HOUSEHOLD INCOME
$37,974

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	3,356,800	266,700	7.9
1992	4,794,400	610,800	12.7
1994	3,197,700	657,300	20.6
1996	5,199,300	740,000	14.2

DALLAS-FORT WORTH

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Anderson	TX	5.2	0.7	9.9	52.7	16.1
Bosque	TX	1.9	0.5	11.8	16.2	6.9
Collin	TX	28.1	7.3	8.0	351.5	118.3
Comanche	TX	2.6	0.7	19.7	13.1	5.0
Cooke	TX	2.0	0.5	5.7	34.3	12.9
Dallas	TX	411.7	111.4	20.0	2,058.5	818.2
Delta	TX	0.1	0.0	2.0	5.0	1.8
Denton	TX	28.2	7.7	8.3	339.3	123.0
Ellis	TX	14.6	3.4	15.0	97.0	33.3
Erath	TX	3.4	0.8	11.0	31.3	12.9
Fannin	TX	0.6	0.1	2.3	24.6	9.9
Freestone	TX	0.8	0.2	4.9	16.2	6.0
Grayson	TX	3.6	1.0	3.7	98.6	38.8
Hamilton	TX	0.5	0.1	6.6	7.0	2.9
Henderson	TX	3.4	0.8	5.1	67.2	26.8
Hill	TX	2.8	0.7	9.6	29.1	11.5
Hood	TX	2.0	0.4	5.4	37.0	14.6
Hopkins	TX	1.9	0.7	6.2	31.3	12.2
Hunt	TX	3.7	0.9	5.6	66.3	25.5
Jack	TX	0.4	0.1	4.6	7.8	3.1
Johnson	TX	10.3	2.7	9.5	108.5	38.3
Kaufman	TX	4.7	1.2	7.7	61.4	21.4
Lamar	TX	0.5	0.2	1.2	44.6	17.2
Navarro	TX	3.6	0.9	8.6	41.5	16.2
Palo Pinto	TX	2.9	0.8	11.0	26.8	10.4
Parker	TX	3.6	0.9	4.8	75.0	27.5
Rains	TX	0.2	0.1	3.0	7.6	3.2
Rockwall	TX	2.4	0.6	7.2	33.5	11.8
Somervell	TX	1.0	0.3	17.5	5.8	2.4
Tarrant	TX	187.6	51.8	14.1	1,330.7	507.3
Van Zandt	TX	2.1	0.6	5.1	41.2	15.6
Wise	TX	3.6	0.8	9.2	38.7	14.0
TOTAL		**740.0**	**198.9**	**14.2%**	**5,199.3**	**1,985.0**

DALLAS-FORT WORTH

1/1/96 Hispanic Population (000)

MEN 18-20	23.5
MEN 21-24	39.3
MEN 25-34	99.1
MEN 35-49	63.8
MEN 50-54	9.6
MEN 55-64	11.6
MEN 65+	7.5
MEN 18+	**254.4**
WOMEN 18-20	19.2
WOMEN 21-24	29.9
WOMEN 25-34	75.7
WOMEN 35-49	56.1
WOMEN 50-54	9.1
WOMEN 55-64	13.4
WOMEN 65+	9.8
WOMEN 18+	**213.2**
TEENS 12-17	**74.6**
CHILDREN 0-11	**197.8**
CHILDREN 2-11	**161.4**
TOTAL PERSONS 2+	**703.6**
TOTAL PERSONS	**740.0**
HOUSEHOLDS	**198.9**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$1,061,191
Eating & Drinking	427,534
General Merchandise	539,733
Apparel & Accessories	266,609
Furniture/Appliance/ Home Furnishings	179,204
Automotive Dealers	801,114
Gasoline Service	280,581
Drug Stores	59,747
All Others	389,704
Total Retail Sales	**$4,005,417**

Newspapers

Name	Published
El Extra	Weekly
El Heraldo News	Weekly
El Hispano News	Weekly
El Informador Hispano	Weekly
El Sol De Texas	Weekly
La Prensa News	Weekly
La Vida News	Weekly
Novedades News	Weekly

Radio

Station	Dial Position	Spanish Format
AM		
KCOM	1550	Top 40 Hits
KESS	1270	Contemporary
KFJZ	870	Spanish Variety
KMRT	1480	Norteña/Banda
KRVA	1600	
KSGB	1540	Religious
KXEB	910	Metropolitan
FM		
KAND	107.9	Contemporary
KRVA	95.3	Latin Jazz

Television

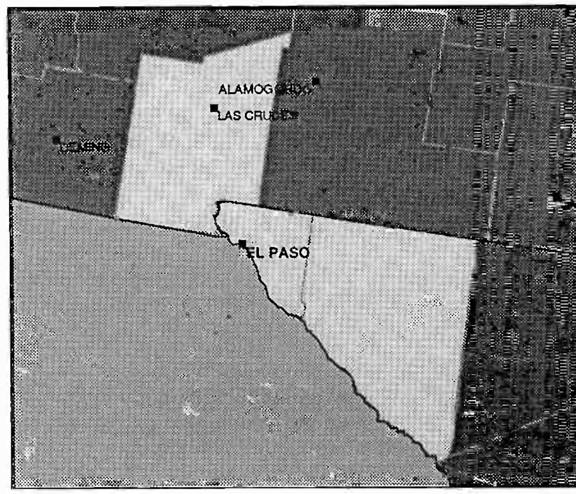
Station	Channel	Affiliation
KFWD	52	Telemundo
KUVN	23	Univision

Cable/VCRs/Telephone

Cable Penetration:	23%
Household with VCR:	73%
TV Sets/HH:	2.1
Unlisted Phone Numbers:	65%

EL PASO

MARKET #10



The El Paso ADI is comprised of three counties, two of which are in the state of Texas and one is in the state of New Mexico. Most El Paso area Hispanics (84%) live in El Paso County, Texas.

This market whose counties all share a border with Mexico has a Hispanic population of approximately 644,800. Ninety-six percent of the market's Hispanics are of Mexican origin. With an estimated market Buying Power of $5.3 billion, this fast growing Hispanic market has a total of 29 Spanish language radio stations.

POPULATION

	Total	Hispanic
Population	883,500	644,800
Rank	36	10
Household	277,300	171,900
Avg. Person/HH	3.19	3.75

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	96
Other	4

MARKET BUYING POWER
$5,317,227,000

PER CAPITA BUYING POWER
$8,246

MEAN HOUSEHOLD INCOME
$38,665

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	607,800	364,700	60.0
1992	797,700	544,500	68.3
1994	817,100	573,800	70.2
1996	883,500	644,800	73.0

EL PASO

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Doña Ana	NM	99.5	28.3	61.0	163.0	56.4
El Paso	TX	542.8	143.0	75.7	717.0	219.7
Hudspeth	TX	2.5	0.6	71.3	3.5	1.2
TOTAL		**644.8**	**171.9**	**73.0%**	**883.5**	**277.3**

1/1/96 Hispanic Population (000)

MEN 18-20	18.8	
MEN 21-24	20.0	
MEN 25-34	51.0	
MEN 35-49	50.8	
MEN 50-54	10.6	
MEN 55-64	17.5	
MEN 65+	16.6	
MEN 18+		**185.3**
WOMEN 18-20	20.1	
WOMEN 21-24	22.1	
WOMEN 25-34	59.3	
WOMEN 35-49	61.2	
WOMEN 50-54	14.6	
WOMEN 55-64	24.4	
WOMEN 65+	24.4	
WOMEN 18+		**226.1**
TEENS 12-17		**80.6**
CHILDREN 0-11		**152.8**
CHILDREN 2-11		**128.9**
TOTAL PERSONS 2+		**620.9**
TOTAL PERSONS		**644.8**
HOUSEHOLDS		**171.9**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$622,737
Eating & Drinking	227,767
General Merchandise	408,543
Apparel & Accessories	150,933
Furniture/Appliance/ Home Furnishings	103,600
Automotive Dealers	477,601
Gasoline Service	219,353
Drug Stores	46,663
All Others	227,975
Total Retail Sales	**$2,485,172**

EL PASO

Radio

Station	Dial Position	Spanish Format
AM		
KAMA	750	Adult Contemporary
KBNA	920	Adult Contemporary
KELP	1590	Christian
KEPZ	1190	Country Mexican
KFNA	1060	Oldies Hits
KOTS	1230	Adult Contemporary
KSVE	1150	Adult Contemporary
KVIV	1340	Gospel
XECJC	1490	Adult Contemporary
XEF	1420	Adult Contemporary
XEFV	1000	Ranchero
XEJ	970	Oldies
XEJCC	1520	Mexican
XEJPV	1560	Tropical
XEP	1300	Romantic
XEROK	800	Ballads
XEWG	1240	Tropical
XEWR	1110	Modern Mexican
XEYC	1460	Adult Contemporary
XEZOL	860	Romantic
FM		
KBNA	97.5	Adult Contemporary
KINT	93.9	
KPAS	103.1	Contemporary Christian
XHEM	103.5	Spanish Rock
XHH	100.7	Adult Contemporary
XHIM	105.1	Ranchero
XHNZ	107.5	Romantic
XHPX	98.3	Latin Contemporary
XHTO	104.3	Romantic

Newspapers

Name	Published
Diario de Juarez	Daily
El Correo del Paso	Weekly
El Paso Herald-Post	Daily
El Paso Times	Daily
Norte de Ciudad Juarez	Daily
Vecinos	Weekly

Cable/VCRs/Telephone

Cable Penetration:	12%
Household with VCR:	85%
TV Sets/HH:	2.0
Unlisted Phone Numbers:	64%

Television

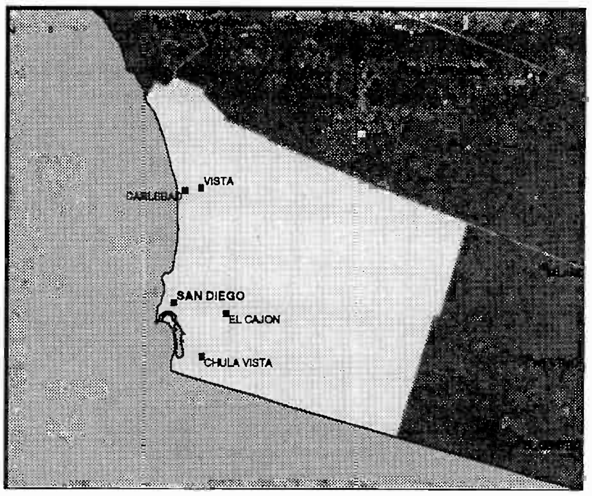
Station	Channel	Affiliation
KINT	26	Univision
XEJ	5	Independent Mex.
XHIJ	44	Telemundo

SAN DIEGO

MARKET #11

The San Diego ADI is one geographically large county - San Diego County, California. An estimated six hundred forty-three thousand Hispanics reside here, representing nearly one quarter of the total population. The Buying Power of Hispanics in San Diego is estimated to be $5.4 billion in 1996, with Retail Sales at $3.0 billion.

Because of its contiguous border with Mexico and specifically Tijuana, San Diego has traditionally been a point of entry into the U.S. for thousands of Mexicans. As a result of the easy flow of people and goods across the border, for Marketing purposes, San Diego can be said to comprise not only the 643,000 U.S.-side Hispanics but also the approximately 2 million residents of the Tijuana area.



POPULATION

	Total	Hispanic
Population	2,723,500	642,700
Rank	19	11
Household	968,300	157,000
Avg. Person/HH	2.81	4.09

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	88
Central America	2
South America	2
Other	8

MARKET BUYING POWER
$5,377,627,000

PER CAPITA BUYING POWER
$8,367

MEAN HOUSEHOLD INCOME
$42,816

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	1,841,200	275,200	14.9
1992	2,652,600	570,300	21.5
1994	2,699,100	596,500	22.1
1996	2,723,500	642,700	23.6

SAN DIEGO

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
San Diego	CA	642.7	157.0	23.6	2,723.5	968.3
TOTAL		**642.7**	**157.0**	**23.6%**	**2,723.5**	**968.3**

1/1/96 Hispanic Population (000)

MEN 18-20	23.6
MEN 21-24	33.8
MEN 25-34	73.0
MEN 35-49	48.2
MEN 50-54	8.2
MEN 55-64	13.2
MEN 65+	10.4
MEN 18+	**210.4**
WOMEN 18-20	19.4
WOMEN 21-24	27.3
WOMEN 25-34	64.7
WOMEN 35-49	52.4
WOMEN 50-54	10.1
WOMEN 55-64	15.8
WOMEN 65+	15.5
WOMEN 18+	**205.2**
TEENS 12-17	**67.2**
CHILDREN 0-11	**159.9**
CHILDREN 2-11	**130.9**
TOTAL PERSONS 2+	**613.7**
TOTAL PERSONS	**642.7**
HOUSEHOLDS	**157.0**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$699,775
Eating & Drinking	370,856
General Merchandise	348,607
Apparel & Accessories	198,180
Furniture/Appliance/ Home Furnishings	164,889
Automotive Dealers	514,631
Gasoline Service	178,462
Drug Stores	96,047
All Others	407,921
Total Retail Sales	**$2,979,368**

SAN DIEGO

Radio

Station	Dial Position	Spanish Format
AM		
KPRZ	1210	Religious
KURS	1040	Spanish Contemporary
XEAZ	1270	Spanish Contemporary
XEBG	1550	Modern Latino
XEDX	1010	Spanish Contemporary
XEMMM	800	Ranchero
XEMO	860	Contemporary Mexican
XERCN	1470	Spanish Top 40
XEXX	1240	Ranchero
XPRS	1090	Ranchero
FM		
KBAX	107.1	
XHBCN	99.7	Contemporary
XHFG	107.3	Top 40 Hits
XHKY	95.7	Ranchero
XHQF	98.9	Spanish Contemporary
XHTY	94.5	Ranchero
XLTN	104.5	Contemporary Romantic

Newspapers

Name	Published
Ahora/Now	Weekly
California Weekly	Weekly
El Latino San Diego	Weekly
El Sol de San Diego	Weekly
Flash	Weekly
Hispanos Unidos	Bi-Weekly
La Prensa San Diego	Weekly

Cable/VCRs/Telephone

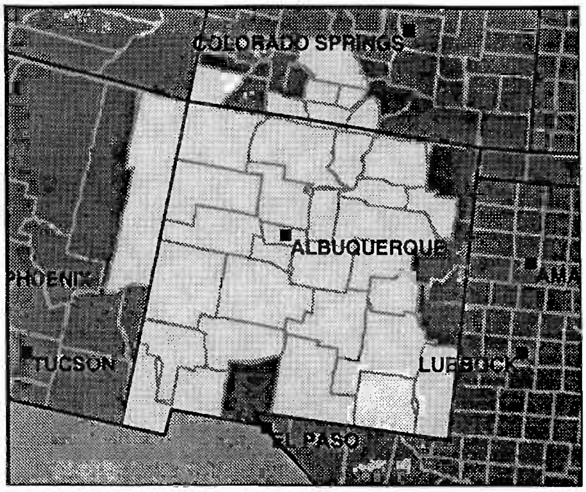
Cable Penetration:	51%
Household with VCR:	74%
TV Sets/HH:	1.9
Unlisted Phone Numbers:	56%

Television

Station	Channel	Affiliation
KBNT	19	Univision
XEWT	12	Independent
XHAS	33	Telemundo
XHBJ	45	Independent
XHUA	57	Televisa

ALBUQUERQUE

MARKET #12



The twelfth largest U.S. Hispanic market is Albuquerque with six hundred thirty-eight thousand Hispanics representing 38% of the total ADI population and 2.3% of the national Hispanic population. Nearly 34% (217,000) of Albuquerque's Hispanics live in Bernalillo County, making them 39% of this county's population.

This market is one of the largest in area, covering practically all of the state of New Mexico and parts of Colorado and Arizona. Most of Albuquerque's Hispanics are of Mexican origin, but as the city was originally founded by Spanish settlers in 1706, many area residents consider themselves direct descendants of the conquistadors.

POPULATION

	Total	Hispanic
Population	1,670,800	637,700
Rank	28	12
Household	600,800	202,300
Avg. Person/HH	2.78	3.15

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	52
Other	48

MARKET BUYING POWER

$5,533,666,000

PER CAPITA BUYING POWER

$8,678

MEAN HOUSEHOLD INCOME

$34,192

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	901,400	360,500	39.9
1992	1,483,000	526,300	35.5
1994	1,600,600	579,200	36.2
1996	1,670,800	637,700	38.2

ALBUQUERQUE

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Apache -North	AZ	3.3	0.9	5.5	60.2	16.0
Alamosa	CO	6.5	2.2	42.4	15.3	5.6
Archuleta	CO	1.6	0.5	25.0	6.4	2.7
Conejos	CO	5.1	1.7	62.8	8.1	2.8
Costilla	CO	2.8	0.9	80.0	3.5	1.3
Montezuma	CO	2.4	0.9	9.3	25.6	9.4
Rio Grande	CO	5.2	1.6	44.0	11.8	4.0
Saguache	CO	2.7	0.9	50.0	5.4	1.9
Bernalillo	NM	216.8	70.8	39.4	550.4	213.4
Catron	NM	0.8	0.3	30.1	2.7	0.9
Chaves	NM	26.2	7.6	41.0	64.0	24.2
Cibola	NM	12.2	3.5	48.7	25.0	8.0
Colfax	NM	7.7	2.5	50.9	15.1	5.5
De Baca	NM	0.9	0.3	35.4	2.6	1.3
Eddy	NM	21.7	6.0	39.2	55.4	19.9
Grant	NM	16.7	5.2	53.4	31.4	11.2
Guadalupe	NM	4.0	1.6	89.9	4.4	1.6
Harding	NM	0.6	0.2	49.3	1.2	0.7
Lea North	NM	20.5	5.3	33.4	61.5	22.0
Lincoln	NM	4.8	1.6	30.4	15.7	6.1
Los Alamos	NM	2.4	0.6	11.6	20.4	7.9
Luna	NM	13.1	3.9	53.7	24.5	8.8
McKinley	NM	11.3	3.3	15.0	75.1	21.3
Mora	NM	4.5	1.5	89.0	5.1	1.7
Otero	NM	15.0	4.5	26.1	57.6	20.1
Rio Arriba	NM	30.0	9.9	77.1	38.9	12.9
Roosevelt	NM	6.3	1.8	31.1	20.3	6.9
Sandoval	NM	23.9	7.4	29.4	81.3	26.0
San Juan	NM	15.8	4.5	15.0	105.5	34.4
San Miguel	NM	24.5	8.3	83.6	29.4	10.1
Santa Fe	NM	61.4	20.7	50.1	122.5	47.3
Sierra	NM	3.0	1.0	24.9	12.0	5.4
Socorro	NM	8.7	2.8	51.5	16.8	5.5
Taos	NM	18.0	6.0	67.5	26.6	9.5
Torrance	NM	5.2	1.6	38.8	13.3	4.7
Valencia	NM	32.1	10.0	57.5	55.8	19.8
TOTAL		**637.7**	**202.3**	**38.2%**	**1,670.8**	**600.8**

ALBUQUERQUE

1/1/96 Hispanic Population (000)

MEN 18-20	16.3
MEN 21-24	20.9
MEN 25-34	62.7
MEN 35-49	58.1
MEN 50-54	12.0
MEN 55-64	17.7
MEN 65+	18.4
MEN 18+	**206.1**
WOMEN 18-20	15.6
WOMEN 21-24	21.2
WOMEN 25-34	63.0
WOMEN 35-49	62.3
WOMEN 50-54	13.5
WOMEN 55-64	21.6
WOMEN 65+	24.8
WOMEN 18+	**222.0**
TEENS 12-17	**62.3**
CHILDREN 0-11	**147.3**
CHILDREN 2-11	**125.0**
TOTAL PERSONS 2+	**615.4**
TOTAL PERSONS	**637.7**
HOUSEHOLDS	**202.3**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$903,504
Eating & Drinking	383,010
General Merchandise	438,037
Apparel & Accessories	176,037
Furniture/Appliance/ Home Furnishings	135,878
Automotive Dealers	612,865
Gasoline Service	269,742
Drug Stores	118,707
All Others	510,904
Total Retail Sales	**$3,548,684**

Newspapers

Name	Published
El Crepusculo	Weekly
El Hispano News	Weekly

Radio

Station	Dial Position	Spanish Format
AM		
KABQ	1350	
KALY	1240	
KARS	860	Ranchero
KATK	740	Contemporary
KCCC	930	Country Western
KCRX	1430	Contemporary
KDCE	970	Ranchero
KFUN	1230	Spanish Contemporary
KKIT	1340	Easy Listening
KNMX	540	Variety Spanish
KSIL	1340	Mexican
KSLV	1240	Top 40 Country
KXKS	1190	Ranchero/Norteña
FM		
KMIO	102.3	Variety Spanish
KIOT	102.5	International

Television

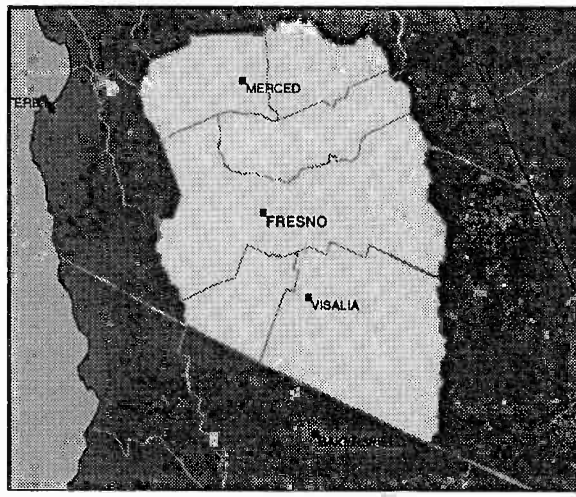
Station	Channel	Affiliation
K59DB	59	Telemundo
KLUZ	41	Univision

Cable/VCRs/Telephone

Cable Penetration:	50%
Household with VCR:	71%
TV Sets/HH:	2.1
Unlisted Phone Numbers:	44%

FRESNO

MARKET #13



The Fresno Market, with over six hundred thirty-two thousand Hispanics, is the thirteenth largest Hispanic market in the country. Hispanics represent roughly 40% of the total population of this six county ADI.

Mexican immigrants have traditionally made Fresno a popular location for settlement after migrating to the U.S. The fact that 93% of the Fresno Hispanics are of Mexican origin translates to well over half a million area residents. Since 1980, Fresno's Hispanic population has more than doubled in size.

The Fresno Hispanic market has a total Buying Power of $4.9 billion and a Mean Household Income of $39,697.

POPULATION

	Total	Hispanic
Population	1,579,200	632,500
Rank	29	13
Household	509,900	155,100
Avg. Person/HH	3.1	4.08

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	93
Other	7

MARKET BUYING POWER
$4,925,585,000

PER CAPITA BUYING POWER
$7,787

MEAN HOUSEHOLD INCOME
$39,697

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	988,300	295,400	29.8
1992	1,489,600	533,200	35.8
1994	1,537,200	574,500	37.4
1996	1,579,200	632,500	40.1

FRESNO

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Fresno	CA	306.9	80.7	39.8	771.1	259.1
Kings	CA	45.3	10.5	38.1	118.9	35.4
Madera	CA	43.5	9.9	39.6	109.9	35.1
Mariposa	CA	0.9	0.3	5.4	16.3	6.4
Merced	CA	75.8	17.4	37.3	203.2	61.9
Tulare	CA	160.1	36.3	44.5	359.8	112.0
TOTAL		**632.5**	**155.1**	**40.1%**	**1,579.2**	**509.9**

1/1/96 Hispanic Population (000)

MEN 18-20	17.7
MEN 21-24	24.0
MEN 25-34	64.1
MEN 35-49	51.1
MEN 50-54	8.9
MEN 55-64	13.0
MEN 65+	10.4
MEN 18+	**189.2**
WOMEN 18-20	15.7
WOMEN 21-24	23.4
WOMEN 25-34	61.5
WOMEN 35-49	53.1
WOMEN 50-54	8.3
WOMEN 55-64	15.6
WOMEN 65+	14.1
WOMEN 18+	**191.7**
TEENS 12-17	**67.7**
CHILDREN 0-11	**183.9**
CHILDREN 2-11	**151.1**
TOTAL PERSONS 2+	**599.7**
TOTAL PERSONS	**632.5**
HOUSEHOLDS	**155.1**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$745,524
Eating & Drinking	168,513
General Merchandise	328,840
Apparel & Accessories	184,572
Furniture/Appliance/ Home Furnishings	76,450
Automotive Dealers	262,116
Gasoline Service	121,043
Drug Stores	97,508
All Others	216,264
Total Retail Sales	**$2,200,830**

FRESNO

Radio

Station	Dial Position	Spanish Format
AM		
KFIG	1430	Adult Contemporary
KGEN	1370	
KGST	1600	News/Talk/Contemporary
KJOP	1250	Traditional
KLBS	1330	Contemporary
KLOQ	1580	News
KOQO	790	Adult Contemporary
KXEX	1550	Mexican
FM		
KFIE	106.3	Top 40 Hits
KGST	105.1	Contemporary
KMMM	107.3	Adult Contemporary
KNTO	95.5	Ranchero
KOJJ	100.5	Adult Contemporary
KOQO	101.9	Ranchero
KSJV	91.5	Traditional Mex.
KXMX	92.1	Adult Contemporary
KZFO	92.1	

Newspapers

Name	Published
El Popular	Weekly
El Sol del Valle	Bi-Monthly
La Republica	Bi-Monthly
Vida en el Valle	Bi-Weekly

Cable/VCRs/Telephone

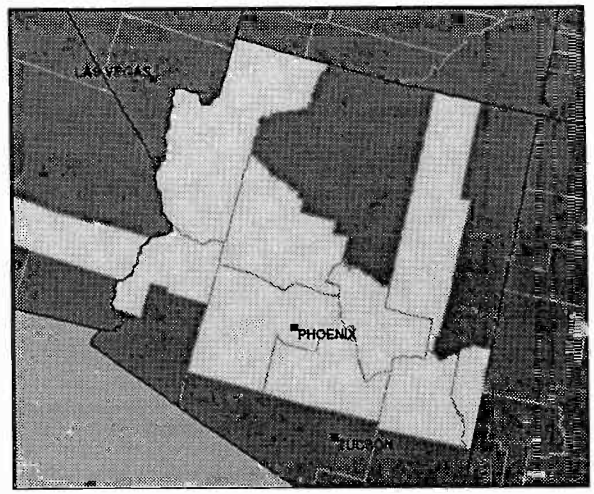
Cable Penetration:	20%
Household with VCR:	65%
TV Sets/HH:	1.8
Unlisted Phone Numbers:	79%

Television

Station	Channel	Affiliation
KFTV	21	Univision
KMSG	59	Telemundo

PHOENIX

MARKET #14



Phoenix, the fourteenth largest Hispanic market in the United States, has nearly six hundred thousand Hispanics representing 18% of the market's total population. Further, the state of Arizona contains 3.4% of total U.S. Hispanics. One county (Maricopa) contains the vast majority (81%) of the market's Hispanic population.

Traditionally, Phoenix has been considered a Mexican market, as Hispanics of Mexican origin comprise 90% of the market's Hispanic population. The estimated Hispanic market Buying Power for Phoenix is $4.6 billion and the Per Capita Buying Power is $7,792.

POPULATION

	Total	Hispanic
Population	3,252,700	586,600
Rank	17	14
Household	1,246,100	163,100
Avg. Person/HH	2.61	3.60

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	90
Puerto Rico	2
Central America	3
Other	5

MARKET BUYING POWER
$4,570,720,000

PER CAPITA BUYING POWER
$7,792

MEAN HOUSEHOLD INCOME
$35,030

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	1,736,100	256,300	14.7
1992	2,879,700	463,800	16.1
1994	2,918,600	495,800	17.0
1996	3,252,700	586,600	18.0

PHOENIX

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Gila	AZ	9.9	3.2	19.0	52.1	19.8
Graham	AZ	8.6	2.5	27.0	32.0	9.5
Greenlee	AZ	4.9	1.5	43.9	11.2	3.8
La Paz	AZ	4.8	1.2	27.8	17.3	7.0
Maricopa	AZ	475.8	132.0	18.5	2,571.9	994.8
Mohave	AZ	8.0	2.4	5.9	135.6	56.5
Navajo	AZ	8.4	2.4	8.2	102.4	29.8
Pinal	AZ	47.0	12.6	31.1	151.1	51.1
Yavapai	AZ	10.1	3.1	6.8	148.5	62.9
Riverside -East	CA	9.1	2.2	29.7	30.6	10.9
TOTAL		**586.6**	**163.1**	**18.0%**	**3,252.7**	**1,246.1**

PHOENIX

1/1/96 Hispanic Population (000)

MEN 18-20	17.8
MEN 21-24	25.3
MEN 25-34	59.3
MEN 35-49	48.6
MEN 50-54	8.4
MEN 55-64	11.4
MEN 65+	9.0
MEN 18+	**179.8**
WOMEN 18-20	16.4
WOMEN 21-24	21.7
WOMEN 25-34	56.1
WOMEN 35-49	47.7
WOMEN 50-54	7.9
WOMEN 55-64	12.9
WOMEN 65+	12.0
WOMEN 18+	**174.7**
TEENS 12-17	**66.9**
CHILDREN 0-11	**165.2**
CHILDREN 2-11	**135.3**
TOTAL PERSONS 2+	**556.7**
TOTAL PERSONS	**586.6**
HOUSEHOLDS	**163.1**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$746,062
Eating & Drinking	280,621
General Merchandise	296,276
Apparel & Accessories	187,146
Furniture/Appliance/ Home Furnishings	128,853
Automotive Dealers	477,886
Gasoline Service	159,120
Drug Stores	101,442
All Others	363,633
Total Retail Sales	**$2,741,039**

Newspapers

Name	Published
Ave Fenix de Arizona	Bi-Monthly
El Sol de Arizona	Weekly
Recycler Classifieds	Weekly

Radio

Station	Dial Position	Spanish Format
AM		
KJAA	1240	Country
KPHX	1480	Country
KSUN	1400	Adult Contemporary
KVVA	860	Contemporary
FM		
KVVA	107.1	Contemporary
KLVA	105.5	Christian

Television

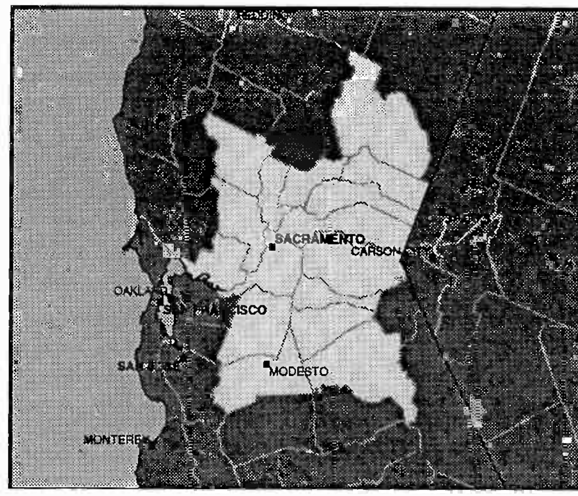
Station	Channel	Affiliation
K64DR	64	Telemundo
KTVW	33	Univision

Cable/VCRs/Telephone

Cable Penetration:	29%
Household with VCR:	75%
TV Sets/HH:	2.2
Unlisted Phone Numbers:	71%

SACRAMENTO

MARKET #15



The fifteenth largest U.S. Hispanic market is Sacramento with 553,300 Hispanics representing 16.6% of the total ADI population. Nearly three hundred thousand (53%) of Sacramento's Hispanics live in Sacramento or San Joaquin Counties.

Sacramento has often been considered a "Mexican" market and in fact, 78% of the area's Hispanics are of Mexican origin. However, large numbers of Hispanics from Central and South America have also migrated to the capital of the state of California. The market has 6 Radio stations and 5 newspapers. Sacramento has achieved a good level of Cable Peneration (44%) among Hispanic residents.

POPULATION

	Total	Hispanic
Population	3,333,100	553,300
Rank	16	15
Household	1,208,100	148,400
Avg. Person/HH	2.76	3.73

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	78
Guatemala	4
Puerto Rico	4
South America	4
Other	10

MARKET BUYING POWER
$4,609,481,000

PER CAPITA BUYING POWER
$8,331

MEAN HOUSEHOLD INCOME
$38,826

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	2,061,200	261,400	12.6
1992	3,273,200	466,400	14.2
1994	3,174,400	496,300	15.6
1996	3,333,100	553,300	16.6

SACRAMENTO

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Amador	CA	3.5	1.0	9.8	35.7	13.5
Calaveras	CA	2.4	0.7	5.8	41.5	16.5
Colusa	CA	7.3	1.9	40.7	18.0	6.5
El Dorado	CA	12.6	3.4	8.3	151.9	56.2
Nevada	CA	4.3	1.2	4.7	92.5	36.2
Placer	CA	18.6	5.6	8.9	209.3	77.8
Plumas	CA	1.2	0.3	4.8	25.2	10.3
Sacramento	CA	152.7	44.5	13.0	1,179.2	457.9
San Joaquin	CA	143.0	36.0	26.2	545.8	179.0
Sierra	CA	0.4	0.2	5.6	7.1	2.7
Solano -East	CA	34.6	10.3	15.6	221.9	73.1
Stanislaus	CA	110.7	26.7	25.0	442.7	147.8
Sutter	CA	14.4	3.7	18.8	76.8	27.6
Tuolumne	CA	4.9	1.2	8.5	57.8	21.2
Yolo	CA	34.2	9.5	21.4	159.9	58.1
Yuba	CA	8.5	2.2	12.6	67.8	23.7
TOTAL		**553.3**	**148.4**	**16.6%**	**3,333.1**	**1,208.1**

SACRAMENTO

1/1/96 Hispanic Population (000)

MEN 18-20	14.6
MEN 21-24	20.7
MEN 25-34	60.9
MEN 35-49	50.7
MEN 50-54	7.5
MEN 55-64	13.7
MEN 65+	11.9
MEN 18+	**180.0**
WOMEN 18-20	15.0
WOMEN 21-24	19.4
WOMEN 25-34	54.7
WOMEN 35-49	49.0
WOMEN 50-54	9.3
WOMEN 55-64	15.0
WOMEN 65+	14.1
WOMEN 18+	**176.5**
TEENS 12-17	**55.6**
CHILDREN 0-11	**141.2**
CHILDREN 2-11	**117.8**
TOTAL PERSONS 2+	**529.9**
TOTAL PERSONS	**553.3**
HOUSEHOLDS	**148.4**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$695,254
Eating & Drinking	304,212
General Merchandise	249,668
Apparel & Accessories	181,306
Furniture/Appliance/ Home Furnishings	122,575
Automotive Dealers	499,350
Gasoline Service	164,916
Drug Stores	80,540
All Others	342,564
Total Retail Sales	**$2,640,385**

Newspapers

Name	Published
El Popular	Weekly
El Heraldo Catolico	Bi-Monthly
El Hispano	Weekly
La Nacion	Weekly
El Tiempo	Weekly

Radio

Station	Dial Position	Spanish Format
AM		
KCVR	1570	Ranchero
KLOC	920	Modern
KRCX	1110	Ranchero to New Age
KTRB	860	News/Talk
FM		
KSTN	107.3	Top 40
KZSA	92.1	

Television

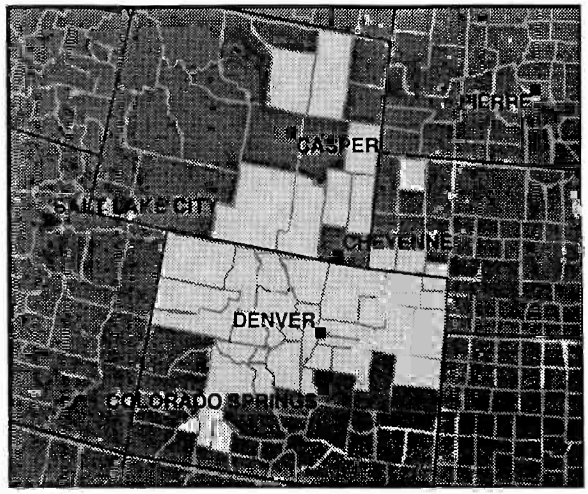
Station	Channel	Affiliation
KCSO	19	Univision
KDQ-K47DQ	47	Telemundo

Cable/VCRs/Telephone

Cable Penetration:	44%
Household with VCR:	83%
TV Sets/HH:	2.2
Unlisted Phone Numbers:	61%

DENVER

MARKET #16



The Denver market area has a Hispanic population approaching four hundred thousand. Hispanics represent nearly 13% of the total market area's population. The Hispanic population of the large 48 county Denver ADI is concentrated in Denver (130,000), Adams (64,000), Weld (36,000) and Arapahoe (29,000) Counties. The ADI also contains counties from Nebraska and Wyoming.

Since 1980, Denver's Hispanic population has nearly doubled. Two-thirds of the area's Hispanics are of Mexican origin. The market's Buying Power is projected to be $3.1 billion in 1996, and Retail Sales are projected at $2 billion.

POPULATION

	Total	Hispanic
Population	3,030,900	378,600
Rank	18	16
Household	1,192,800	116,000
Avg. Person/HH	2.54	3.26

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	67
Puerto Rico	2
Other	31

MARKET BUYING POWER

$3,147,932,000

PER CAPITA BUYING POWER

$8,315

MEAN HOUSEHOLD INCOME

$33,922

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	2,141,400	221,000	10.3
1992	2,632,500	308,200	11.7
1994	2,847,700	338,200	11.9
1996	3,030,900	378,600	12.5

DENVER

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Adams	CO	63.9	18.7	20.8	307.1	114.7
Arapahoe	CO	29.2	9.4	6.3	462.7	182.9
Boulder	CO	20.0	5.9	7.6	263.4	102.9
Chaffee	CO	1.7	0.5	9.9	16.8	6.6
Clear Creek	CO	0.3	0.1	3.8	8.8	3.8
Delta	CO	2.5	0.8	10.0	25.5	10.1
Denver	CO	129.6	42.6	25.4	510.3	231.3
Douglas	CO	3.5	1.0	3.6	98.6	33.2
Eagle	CO	5.0	1.3	16.9	29.3	11.0
Elbert	CO	0.3	0.1	2.6	10.6	3.8
Garfield	CO	2.5	0.7	6.5	37.9	14.7
Gilpin	CO	0.1	0.0	3.8	3.5	1.7
Grand	CO	0.2	0.1	3.0	6.7	2.8
Gunnison	CO	0.5	0.1	3.9	12.3	4.6
Hinsdale	CO	0.0	0.0	0.0	0.6	0.2
Jackson	CO	0.2	0.1	9.6	1.6	0.7
Jefferson	CO	40.5	12.1	7.7	528.9	199.1
Kit Carson	CO	0.6	0.1	8.0	7.5	3.0
Lake	CO	1.8	0.6	25.3	7.1	2.5
Larimer	CO	16.1	4.7	7.2	223.6	85.1
Logan	CO	1.6	0.4	8.9	17.7	7.1
Mineral	CO	0.0	0.0	5.2	0.6	0.2
Moffat	CO	0.9	0.2	6.9	13.5	5.0
Morgan	CO	5.4	1.5	21.5	25.2	9.2
Park	CO	0.4	0.1	3.2	12.4	4.1
Phillips	CO	0.2	0.0	4.8	4.5	1.9
Pitkin	CO	0.7	0.2	5.0	14.4	6.8
Prowers	CO	3.8	1.1	26.0	14.7	5.9
Rio Blanco	CO	0.3	0.1	4.5	6.7	2.2
Routt	CO	0.5	0.1	2.8	16.2	6.3
San Juan	CO	0.1	0.0	17.0	0.6	0.3
Sedgwick	CO	0.2	0.1	8.5	2.4	1.2
Summit	CO	0.8	0.3	3.6	21.9	8.9
Teller	CO	0.5	0.1	3.1	17.7	6.4
Washington	CO	0.2	0.0	3.8	5.3	1.9
Weld	CO	35.9	10.0	23.7	151.4	56.4
Yuma	CO	0.3	0.1	3.3	10.0	1.8
Cheyenne	NE	0.3	0.1	3.8	7.9	3.3
Dawes	NE	0.1	0.0	1.7	6.3	2.4
Deuel	NE	0.1	0.0	4.7	2.1	1.0
Kimball	NE	0.2	0.1	4.3	4.7	1.9
Albany	WY	2.1	0.7	6.7	31.3	13.2
Campbell	WY	1.1	0.3	3.2	34.3	12.4
Carbon	WY	2.6	0.8	15.8	16.3	5.9
Goshen	WY	1.2	0.3	9.5	13.1	5.1
Johnson	WY	0.1	0.0	1.5	6.7	2.7
Niobrara	WY	0.0	0.0	2.6	1.7	1.1
Platte	WY	0.4	0.1	5.1	8.5	3.5
TOTAL		**378.6**	**116.0**	**12.5%**	**3,030.9**	**1,192.8**

DENVER

1/1/96 Hispanic Population (000)

MEN 18-20	10.2
MEN 21-24	12.6
MEN 25-34	36.6
MEN 35-49	37.3
MEN 50-54	7.0
MEN 55-64	9.4
MEN 65+	7.0
MEN 18+	**120.1**
WOMEN 18-20	9.8
WOMEN 21-24	13.0
WOMEN 25-34	36.9
WOMEN 35-49	36.7
WOMEN 50-54	6.8
WOMEN 55-64	11.1
WOMEN 65+	9.2
WOMEN 18+	**123.5**
TEENS 12-17	**38.5**
CHILDREN 0-11	**96.5**
CHILDREN 2-11	**79.9**
TOTAL PERSONS 2+	**362.0**
TOTAL PERSONS	**378.6**
HOUSEHOLDS	**116.0**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$523,170
Eating & Drinking	225,132
General Merchandise	234,085
Apparel & Accessories	106,888
Furniture/Appliance/ Home Furnishings	91,298
Automotive Dealers	309,875
Gasoline Service	131,165
Drug Stores	43,133
All Others	318,268
Total Retail Sales	**$1,983,014**

Newspapers

Name	Published
La Voz	Weekly

Radio

Station	Dial Position	Spanish Format
AM		
KBNO	1220	Top 40
KCUV	1150	Contemporary Hits
KJME	1390	Mexican Contemporary
KVVS	1170	Ranchero
FM		

Television

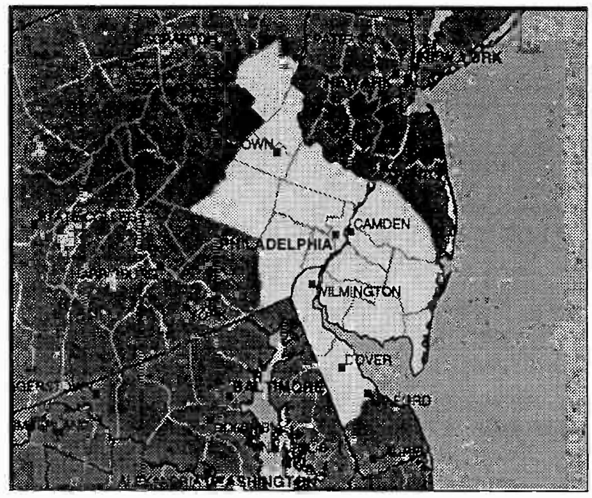
Station	Channel	Affiliation
KCEC	50	Univision
KUBD	59	Telemundo

Cable/VCRs/Telephone

Cable Penetration:	43%
Household with VCR:	77%
TV Sets/HH:	1.9
Unlisted Phone Numbers:	70%

PHILADELPHIA

MARKET #17



The Philadelphia ADI is comprised of nineteen counties, of which nine are in the state of Pennsylvania and eight are in the state of New Jersey. The area's 355,500 Hispanics represent nearly 5% of this large northeastern market's total population. In Philadelphia County, PA, there are 102,500 Hispanics in 30,100 homes. The ADI contains two major cities separated by the Delaware River, Philadelphia, Pennsylvania and Camden, New Jersey.

The majority of Philadelphia's Hispanics are of Puerto Rican origin, while 5% are from Mexico and 3% are from Cuba. The City of Brotherly Love's Hispanics have a Mean Household Income of $35,429 and a Per Capita Buying Power of $8,005.

POPULATION

	Total	Hispanic
Population	7,695,900	355,500
Rank	4	17
Household	2,878,200	100,400
Avg. Person/HH	2.67	3.54

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	5
Puerto Rico	72
Cuba	3
Dominican Republic	2
Colombia	2
Other	16

MARKET BUYING POWER
$2,845,677,000

PER CAPITA BUYING POWER
$8,005

MEAN HOUSEHOLD INCOME
$35,429

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	6,850,700	182,000	2.6
1992	7,393,700	317,300	4.3
1994	7,463,400	328,100	4.4
1996	7,695,900	355,500	4.6

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Kent	DE	3.2	0.9	2.5	129.2	45.2
New Castle	DE	14.8	4.3	3.0	492.9	183.8
Atlantic	NJ	20.8	6.0	8.8	235.9	89.9
Burlington	NJ	15.1	3.8	3.6	419.3	145.8
Camden	NJ	44.7	11.8	8.5	528.4	195.5
Cape May	NJ	2.3	0.6	2.2	106.3	44.8
Cumberland	NJ	21.2	5.9	15.3	138.2	48.5
Gloucester	NJ	5.2	1.6	2.0	262.3	90.2
Mercer	NJ	25.8	7.3	7.0	369.1	136.1
Salem	NJ	1.7	0.4	2.5	66.3	24.5
Berks	PA	22.1	6.1	6.2	355.8	140.4
Bucks	PA	11.1	3.3	2.0	554.5	198.0
Chester	PA	10.5	2.7	2.5	419.6	149.0
Delaware	PA	7.1	2.1	1.2	595.0	223.5
Lehigh	PA	19.3	5.5	6.2	314.6	126.3
Monroe	PA	3.3	0.9	2.6	127.3	45.4
Montgomery	PA	10.3	3.0	1.5	711.4	270.0
Northampton	PA	14.5	4.1	5.5	263.2	97.1
Philadelphia	PA	102.5	30.1	6.4	1,606.6	624.2
TOTAL		**355.5**	**100.4**	**4.6%**	**7,695.9**	**2,878.2**

PHILADELPHIA

1/1/96 Hispanic Population (000)

MEN 18-20	10.7
MEN 21-24	13.6
MEN 25-34	31.9
MEN 35-49	30.7
MEN 50-54	5.7
MEN 55-64	8.6
MEN 65+	5.2
MEN 18+	**106.4**
WOMEN 18-20	10.9
WOMEN 21-24	12.8
WOMEN 25-34	33.3
WOMEN 35-49	33.1
WOMEN 50-54	6.2
WOMEN 55-64	9.0
WOMEN 65+	8.3
WOMEN 18+	**113.6**
TEENS 12-17	**42.1**
CHILDREN 0-11	**93.4**
CHILDREN 2-11	**77.0**
TOTAL PERSONS 2+	**339.1**
TOTAL PERSONS	**355.5**
HOUSEHOLDS	**100.4**

Newspapers

Name	Published
Al Dia	Weekly
El Hispano	Weekly
El Veterano	Weekly

Television

Station	Channel	Affiliation
W42B	42	Univision
WTGI	61	Telemundo

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$374,307
Eating & Drinking	122,148
General Merchandise	156,799
Apparel & Accessories	93,391
Furniture/Appliance/ Home Furnishings	59,242
Automotive Dealers	257,115
Gasoline Service	75,788
Drug Stores	50,721
All Others	214,567
Total Retail Sales	**$1,404,078**

Radio

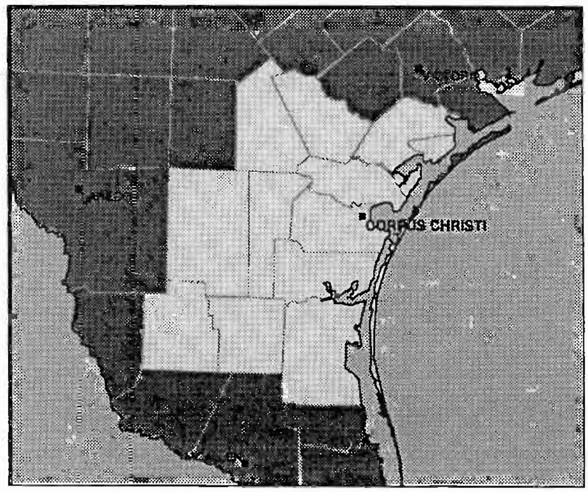
Station	Dial Position	Spanish Format
AM		
WHOL	1600	News/Music
WMIZ	1270	Contemporary
WPHE	690	News/Talk
WSSJ	1310	Music/News/Sports
WTEL	860	Contemporary
FM		

Cable/VCRs/Telephone

Cable Penetration:	50%
Household with VCR:	74%
TV Sets/HH:	2.4
Unlisted Phone Numbers:	93%

CORPUS CHRISTI

MARKET #18



The Corpus Christi market area has a Hispanic population of 335,700. Hispanics represent the majority (58%) of the total market area's population, and 57% of Nueces County which accounts for 54% of the market's total Hispanic population.

This makes Corpus Christi the eighteenth largest U.S. Hispanic market. This market has a 1996 estimated Buying Power of $2.8 billion, and spending in Retail stores is expected to amount to $1.4 billion. Since 1980, Corpus Christi's Hispanic population increased 39%, going from two hundred forty-one thousand to nearly three hundred forty thousand. The vast majority (93%) of the area's Hispanics are of Mexican origin.

POPULATION

	Total	Hispanic
Population	575,100	335,700
Rank	43	18
Household	193,300	94,900
Avg. Person/HH	2.98	3.54

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	93
Other	7

MARKET BUYING POWER
$2,792,635,000

PER CAPITA BUYING POWER
$8,319

MEAN HOUSEHOLD INCOME
$36,784

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	442,100	241,400	54.6
1992	528,00	295,800	56.0
1994	554,200	309,800	55.9
1996	575,100	335,700	58.4

CORPUS CHRISTI

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Aransas	TX	5.0	1.5	21.6	23.1	8.8
Bee	TX	14.0	4.2	55.4	25.3	8.4
Brooks	TX	8.5	2.7	93.2	9.1	2.8
Duval	TX	12.6	3.9	95.0	13.3	4.2
Jim Hogg	TX	5.4	1.7	93.1	5.8	1.9
Jim Wells	TX	34.9	10.2	77.4	45.1	14.7
Kenedy	TX	0.5	0.1	78.7	0.7	0.3
Kleberg	TX	24.1	6.8	64.4	37.4	12.3
Live Oak	TX	4.1	1.3	37.2	11.0	3.6
Nueces	TX	182.0	51.0	56.6	321.6	109.8
Refugio	TX	3.7	1.0	41.5	9.0	3.1
San Patricio	TX	40.9	10.5	55.5	73.7	23.4
TOTAL		**335.7**	**94.9**	**58.4%**	**575.1**	**193.3**

CORPUS CHRISTI

1/1/96 Hispanic Population (000)

MEN 18-20	8.8	
MEN 21-24	9.9	
MEN 25-34	29.1	
MEN 35-49	29.6	
MEN 50-54	4.8	
MEN 55-64	9.7	
MEN 65+	9.4	
MEN 18+		**101.3**
WOMEN 18-20	9.5	
WOMEN 21-24	10.2	
WOMEN 25-34	30.6	
WOMEN 35-49	33.2	
WOMEN 50-54	6.6	
WOMEN 55-64	11.7	
WOMEN 65+	13.0	
WOMEN 18+		**114.8**
TEENS 12-17		**40.0**
CHILDREN 0-11		**79.6**
CHILDREN 2-11		**67.6**
TOTAL PERSONS 2+		**323.7**
TOTAL PERSONS		**335.7**
HOUSEHOLDS		**94.9**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$450,623
Eating & Drinking	128,542
General Merchandise	178,996
Apparel & Accessories	68,462
Furniture/Appliance/ Home Furnishings	39,637
Automotive Dealers	315,252
Gasoline Service	89,010
Drug Stores	26,958
All Others	143,030
Total Retail Sales	**$1,440,510**

Newspapers

No Data Available

Radio

Station	Dial Position	Spanish Format
AM		
KCCT	1150	Tex/Mex/Chicano
KDSI	1070	Conjunto/Chicano
KIBL	1490	
KPSO	1260	Tejano
KUNO	1400	Music/News/Weather
FM		
KBSO	94.7	Tejano/International
KFLZ	107.1	Tex-Mex
KMIQ	105.1	International
KPSO	106.3	Tejano
KSAB	99.9	Contemporary

Television

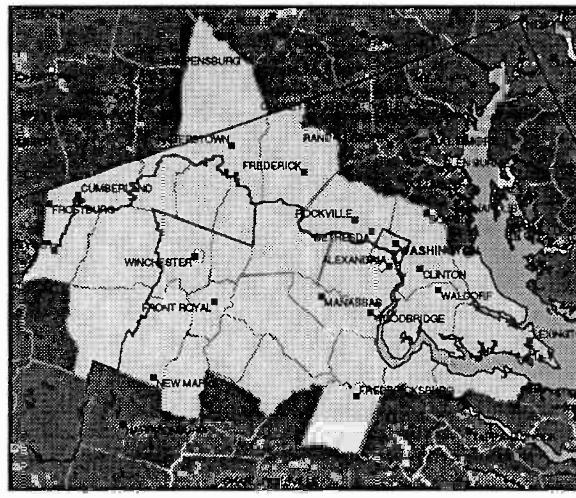
Station	Channel	Affiliation
KORO	28	Univision
KAJA	69	Telemundo

Cable/VCRs/Telephone

Cable Penetration:	65%
Household with VCR:	77%
TV Sets/HH:	2.2
Unlisted Phone Numbers:	63%

WASHINGTON D.C.

MARKET #19



The Washington D.C. Market, with slightly over three hundred thousand Hispanics, is the nineteenth largest Hispanic market area in the country. Hispanic residents now account for 5.7% of this ADI. One of the fastest growing Hispanic markets in the country, D.C.'s Hispanic population has gone from 99,600 in 1980 to 310,500 in 1996. This is an increase of 212%.

D.C. is also one of the most diverse Hispanic markets in terms of country of origin. The largest single group (San Salvador) accounts for only 25% of the Hispanic total. Mexicans are 12% and Puerto Ricans 9%. With a total market Buying Power of nearly $3.0 billion, Washington D.C. ranks third in Per Capita Buying Power at $9,500. If the adjacent Baltimore ADI is taken into account, the combined Buying Power approximates $3.5 billion.

POPULATION

	Total	Hispanic
Population	5,484,300	310,500
Rank	17	19
Household	2,019,800	90,200
Avg. Person/HH	2.72	3.44

COUNTRY OF ORIGIN

Country	% Distribution
San Salvador	25
Nicaragua	4
Guatemala	4
Puerto Rico	9
Mexico	12
Cuba	4
Dominican Republic	2
Honduras	2
Panama	2
South America	11
Other	25

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	3,972,900	99,600	2.5
1992	4,687,100	242,400	5.2
1994	4,774,200	257,000	5.4
1996	5,484,300	310,500	5.7

MARKET BUYING POWER
$2,949,622,000

PER CAPITA BUYING POWER
$9,500

MEAN HOUSEHOLD INCOME
$40,876

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
District of Columbia	DC	38.2	12.4	6.1	631.3	259.6
Allegany	MD	0.3	0.1	0.4	76.9	29.7
Calvert	MD	0.7	0.2	1.1	68.2	22.5
Charles	MD	2.2	0.6	1.9	117.1	36.7
Frederick	MD	2.5	0.7	1.3	184.2	61.2
Montgomery	MD	74.8	22.0	8.5	885.2	328.8
Prince George's	MD	36.5	10.3	4.6	793.5	283.0
St. Mary's	MD	1.6	0.3	1.8	88.9	29.2
Washington	MD	1.1	0.3	0.9	120.3	44.5
Franklin	PA	1.4	0.4	1.0	146.0	55.6
Arlington	VA	34.8	10.9	17.5	198.9	92.5
Clarke	VA	0.1	0.0	0.8	13.8	5.1
Culpeper	VA	0.2	0.1	0.7	31.6	11.0
Fairfax	VA	70.9	19.2	7.4	958.1	340.0
Fauquier	VA	0.9	0.3	1.4	66.7	22.8
Frederick	VA	0.4	0.1	0.6	66.7	22.0
King George	VA	0.5	0.3	1.8	28.6	9.5
Loudoun	VA	3.6	1.0	3.1	115.5	40.2
Page	VA	0.1	0.0	0.5	22.0	8.1
Prince William	VA	13.8	3.4	5.5	251.3	80.9
Rappahannock	VA	0.1	0.0	1.2	8.3	3.2
Shenandoah	VA	0.4	0.1	1.1	32.3	12.6
Spotsylvania	VA	1.3	0.4	1.8	71.3	23.4
Stafford	VA	2.0	0.5	2.5	80.0	25.2
Warren	VA	0.5	0.2	1.2	37.6	14.3
Westmoreland	VA	0.1	0.0	0.6	16.0	6.4
Berkeley	WV	0.5	0.1	0.8	58.0	22.3
Hampshire	WV	0.1	0.0	0.6	20.2	7.6
Hardy	WV	0.1	0.0	0.4	13.0	5.1
Jefferson	WV	0.6	0.1	1.4	40.4	14.9
Mineral	WV	0.1	0.0	0.4	28.3	10.7
Morgan	WV	0.1	0.0	0.6	9.0	3.6
Alexandria City	VA	14.0	4.2	12.4	112.9	53.8
Fairfax City	VA	1.6	0.4	7.7	20.7	7.7
Falls Church City	VA	0.8	0.2	7.8	9.7	4.3
Fredericksburg City	VA	0.7	0.2	3.2	22.3	8.8
Manassas City	VA	2.5	0.6	7.8	32.7	10.9
Manassas Park	VA	0.4	0.1	6.1	6.8	2.1
TOTAL		**310.5**	**90.2**	**5.7%**	**5,484.3**	**2,019.8**

WASHINGTON, D.C.

1/1/96 Hispanic Population (000)

MEN 18-20	10.5
MEN 21-24	18.1
MEN 25-34	43.2
MEN 35-49	31.4
MEN 50-54	4.6
MEN 55-64	5.9
MEN 65+	3.4
MEN 18+	**117.1**
WOMEN 18-20	8.3
WOMEN 21-24	13.9
WOMEN 25-34	36.9
WOMEN 35-49	32.0
WOMEN 50-54	6.1
WOMEN 55-64	7.8
WOMEN 65+	6.6
WOMEN 18+	**111.6**
TEENS 12-17	**24.3**
CHILDREN 0-11	**57.5**
CHILDREN 2-11	**45.7**
TOTAL PERSONS 2+	**298.7**
TOTAL PERSONS	**310.5**
HOUSEHOLDS	**90.2**

Newspapers

Name	Published
El Diario de la Nacion	Weekly
El Pregonero	Weekly
El Tiempo Latino	Weekly

Television

Station	Channel	Affiliation
WMDO	48	Univision
W64BW	64	Telemundo
W42AJ	42	Sur

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$490,438
Eating & Drinking	217,219
General Merchandise	224,145
Apparel & Accessories	132,235
Furniture/Appliance/ Home Furnishings	97,544
"Automotive Dealers	344,804
Gasoline Service	122,993
Drug Stores	48,221
All Others	200,685
Total Retail Sales	**$1,878,284**

Radio

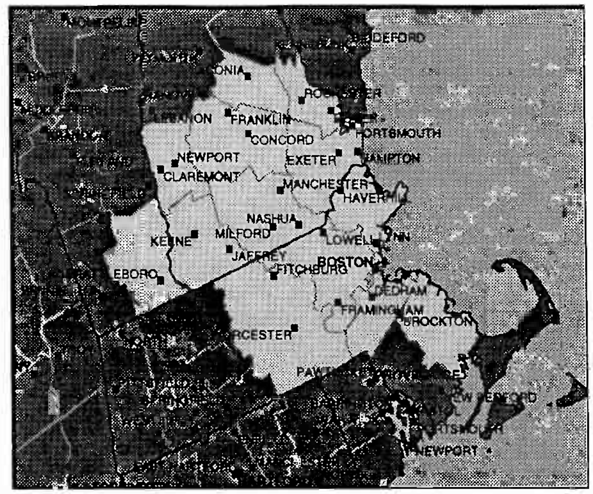
Station	Dial Position	Spanish Format
AM		
WILC	900	Latin AM Music
WMDO	1540	Popular/Traditional Music
WMET	1150	News/Talk
FM		

Cable/VCRs/Telephone

Cable Penetration:	58%
Household with VCR:	78%
TV Sets/HH:	1.8
Unlisted Phone Numbers:	47%

BOSTON

MARKET #20



The Northernmost city among the top-twenty U.S. Hispanic markets is Boston, Massachusetts. With just under 300,000 Hispanics, Boston is the twentieth largest U.S. Hispanic market. This large New England market has more than doubled its Hispanic population since 1980.

Slightly over half of the Hispanic population of the Boston area is made up of Puerto Ricans (37%) and Dominicans (15%). There are over 80,000 Hispanic households in this ADI and they have a total estimated Buying Power of $2.6 billion. Boston ranks 10th in Per Capita Buying Power ($8,907).

POPULATION

	Total	Hispanic
Population	5,841,000	289,700
Rank	6	20
Household	2,180,200	82,900
Avg. Person/HH	2.68	3.49

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	6
Puerto Rico	37
Cuba	4
Dominican Republic	15
Guatemala	4
Honduras	2
San Salvador	7
Colombia	5
Peru	2
Other	18

MARKET BUYING POWER
$2,580,331,000

PER CAPITA BUYING POWER
$8,907

MEAN HOUSEHOLD INCOME
$38,907

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	5,376,300	109,600	2.0
1992	5,825,800	259,400	4.5
1994	5,898,600	263,200	4.5
1996	5,841,000	289,700	5.0

BOSTON

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Barnstable	MA	3.0	1.0	1.4	216.0	90.8
Essex	MA	64.4	18.0	9.4	683.1	256.7
Middlesex	MA	59.7	17.3	4.3	1,404.7	523.1
Nantucket	MA	0.1	0.0	1.5	6.7	2.7
Norfolk	MA	10.7	3.0	1.7	620.2	231.2
Plymouth	MA	12.6	3.4	2.8	450.4	153.6
Suffolk	MA	82.9	24.3	13.0	639.6	249.9
Worcester	MA	42.6	11.8	5.8	734.1	270.6
Belknap	NH	0.3	0.1	0.6	50.0	19.1
Cheshire	NH	0.4	0.1	0.6	66.7	24.7
Hillsborough	NH	7.6	2.3	2.1	360.6	134.7
Merrimack	NH	0.9	0.2	0.7	135.3	50.4
Rockingham	NH	3.0	0.9	1.1	274.9	98.2
Strafford	NH	1.0	0.3	0.9	111.1	40.5
Sullivan	NH	0.2	0.1	0.5	40.0	15.3
Windham	VT	0.3	0.1	0.7	47.6	18.7
TOTAL		**289.7**	**82.9**	**5.0%**	**5,841.0**	**2,180.2**

BOSTON

1/1/96 Hispanic Population (000)

MEN 18-20	10.4
MEN 21-24	16.1
MEN 25-34	35.4
MEN 35-49	24.3
MEN 50-54	3.5
MEN 55-64	4.7
MEN 65+	3.3
MEN 18+	**97.7**
WOMEN 18-20	10.9
WOMEN 21-24	14.6
WOMEN 25-34	32.1
WOMEN 35-49	26.7
WOMEN 50-54	4.7
WOMEN 55-64	6.8
WOMEN 65+	5.9
WOMEN 18+	**101.7**
TEENS 12-17	**26.2**
CHILDREN 0-11	**64.1**
CHILDREN 2-11	**51.8**
TOTAL PERSONS 2+	**277.4**
TOTAL PERSONS	**289.7**
HOUSEHOLDS	**82.9**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$439,210
Eating & Drinking	216,989
General Merchandise	174,249
Apparel & Accessories	105,247
Furniture/Appliance/ Home Furnishings	72,543
Automotive Dealers	311,074
Gasoline Service	90,995
Drug Stores	60,355
All Others	208,247
Total Retail Sales	**$1,678,909**

Newspapers

Name	Published
El Mundo	Weekly
La Semana	Weekly

Radio

Station	Dial Position	Spanish Format
AM		
WCCM	800	News/Talk
WLLH	1400	Hit/Music
WNNW	1110	Adult Contemporary
WUNR	1600	Top 40 Hits
FM		
WSSH	99.5	Adult Contemporary

Television

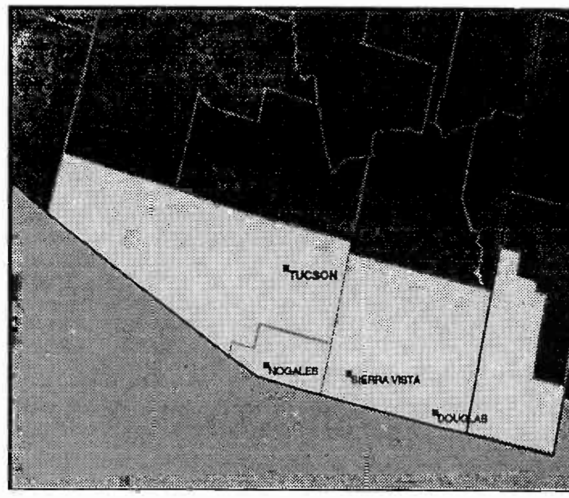
Station	Channel	Affiliation
W19AH	19	Telemundo
WUNI	27	Univision

Cable/VCRs/Telephone

Cable Penetration:	74%
Household with VCR:	74%
TV Sets/HH:	1.9
Unlisted Phone Numbers:	50%

TUCSON

MARKET #21



Nine out of every ten Hispanic residents of the Tucson market area is of Mexican origin. Thirty percent of the total area's population is Hispanic. Thus there are over a quarter of a million Tucson area residents of Mexican origin.

Pima County contains 75% of Tucson's 285,000 Hispanics. There are roughly eighty-three thousand Hispanic households in this ADI and they have a total estimated Buying Power of $2.4 billion. The market has a high cable television penetration of approximately 50%. The combined markets of Phoenix and Tucson have a total Hispanic population of 871,600 and a Buying Power of $7 billion.

POPULATION

	Total	Hispanic
Population	965,000	285,000
Rank	34	21
Household	375,700	82,700
Avg. Person/HH	2.57	3.45

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	90
Other	10

MARKET BUYING POWER
$2,327,964,000

PER CAPITA BUYING POWER
$8,168

MEAN HOUSEHOLD INCOME
$35,187

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	598,800	153,700	25.6
1992	848,100	236,000	27.8
1994	912,200	253,900	27.8
1996	965,000	285,000	29.5

TUCSON

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Apache -South	AZ	0.7	0.2	2.3	30.4	8.0
Cochise	AZ	36.2	10.3	31.6	114.4	41.4
Pima	AZ	213.0	62.6	27.4	776.1	312.0
Santa Cruz	AZ	31.3	8.5	84.4	37.1	12.0
Hidalgo	NM	3.8	1.1	54.2	7.0	2.3
TOTAL		**285.0**	**82.7**	**29.5%**	**965.0**	**375.7**

1/1/96 Hispanic Population (000)

MEN 18-20	8.0
MEN 21-24	9.9
MEN 25-34	25.5
MEN 35-49	23.3
MEN 50-54	4.5
MEN 55-64	7.0
MEN 65+	6.8
MEN 18+	**85.0**
WOMEN 18-20	9.1
WOMEN 21-24	10.7
WOMEN 25-34	25.9
WOMEN 35-49	25.9
WOMEN 50-54	5.3
WOMEN 55-64	8.8
WOMEN 65+	9.5
WOMEN 18+	**95.2**
TEENS 12-17	**32.3**
CHILDREN 0-11	**72.5**
CHILDREN 2-11	**58.9**
TOTAL PERSONS 2+	**271.4**
TOTAL PERSONS	**285.0**
HOUSEHOLDS	**82.7**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$372,566
Eating & Drinking	83,370
General Merchandise	112,334
Apparel & Accessories	53,434
Furniture/Appliance/ Home Furnishings	37,590
Automotive Dealers	135,137
Gasoline Service	64,534
Drug Stores	40,288
All Others	124,741
Total Retail Sales	**$1,023,994**

TUCSON

Radio

Station	Dial Position	Spanish Format
AM		
KAPR	930	
KEVT	1030	Gospel/Ranchero
KQTL	1210	News/Talk/Sports
KTZR	1450	Contemporary Hits
KXEW	1600	Mexican Classics/Ranchero
FM		
KOHT	98.3	Contemporary Hits

Newspapers

No Data Available

Cable/VCRs/Telephone

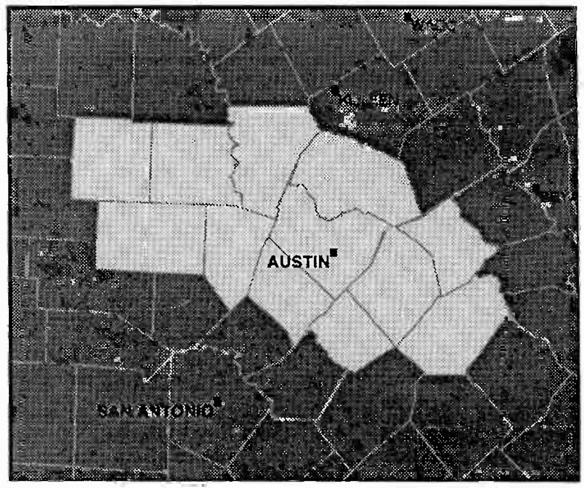
Cable Penetration:	50%
Household with VCR:	77%
TV Sets/HH:	2.1
Unlisted Phone Numbers:	61%

Television

Station	Channel	Affiliation
K52AO	52	Univision
KHRR	14	Telemundo

AUSTIN

MARKET #22



The Austin market area has a Hispanic population of nearly a quarter of a million. Hispanics represent 22% of the total market area's population, and 24% of Travis County. This county contains over one hundred sixty thousand Hispanic residents, representing 64% of the market's total Hispanic population.

Since 1980, Austin's Hispanic population has more than doubled. As with all Texas markets, the vast majority (89%) of the area's Hispanics are of Mexican origin. The market has a 1996 estimated Buying Power of $2.1 billion and a Mean Household Income of $36,326.

POPULATION

	Total	Hispanic
Population	1,128,500	248,600
Rank	32	22
Household	440,400	73,000
Avg. Person/HH	2.56	3.41

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	89
Central America	2
South America	2
Other	7

MARKET BUYING POWER
$2,121,452,000

PER CAPITA BUYING POWER
$8,534

MEAN HOUSEHOLD INCOME
$36,326

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	617,400	110,600	17.9
1992	983,600	201,600	20.5
1994	1,057,600	217,300	20.5
1996	1,128,500	248,600	22.0

AUSTIN

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Bastrop	TX	9.4	2.4	21.0	44.9	16.6
Blanco	TX	1.2	0.3	17.0	7.3	3.2
Burnet	TX	3.5	0.9	13.1	26.5	10.8
Caldwell	TX	12.2	3.2	41.8	29.1	9.8
Fayette	TX	2.3	0.7	10.3	22.3	9.0
Gillespie	TX	3.2	0.9	16.0	20.2	8.3
Hays	TX	23.5	6.2	28.3	83.0	27.9
Lee	TX	2.0	0.4	13.7	14.7	5.3
Llano	TX	0.7	0.2	4.8	15.2	6.6
Mason	TX	1.0	0.2	22.0	4.6	2.2
Travis	TX	160.2	49.4	23.7	676.0	277.1
Williamson	TX	29.4	8.2	15.9	184.7	63.6
TOTAL		**248.6**	**73.0**	**22.0%**	**1,128.5**	**440.4**

AUSTIN

1/1/96 Hispanic Population (000)

MEN 18-20	8.6
MEN 21-24	12.5
MEN 25-34	30.7
MEN 35-49	20.2
MEN 50-54	3.0
MEN 55-64	3.9
MEN 65+	3.4
MEN 18+	**82.3**
WOMEN 18-20	8.6
WOMEN 21-24	11.4
WOMEN 25-34	28.8
WOMEN 35-49	20.2
WOMEN 50-54	3.4
WOMEN 55-64	4.7
WOMEN 65+	4.7
WOMEN 18+	**81.8**
TEENS 12-17	**23.0**
CHILDREN 0-11	**61.5**
CHILDREN 2-11	**50.8**
TOTAL PERSONS 2+	**237.9**
TOTAL PERSONS	**248.6**
HOUSEHOLDS	**73.0**

Newspapers

No Data Available

Television

Station	Channel	Affiliation
K11SF	11	Telemundo
KCFP	54	Univision

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$325,888
Eating & Drinking	141,882
General Merchandise	139,456
Apparel & Accessories	91,920
Furniture/Appliance/ Home Furnishings	62,487
Automotive Dealers	272,069
Gasoline Service	69,471
Drug Stores	37,308
All Others	175,772
Total Retail Sales	**$1,316,253**

Radio

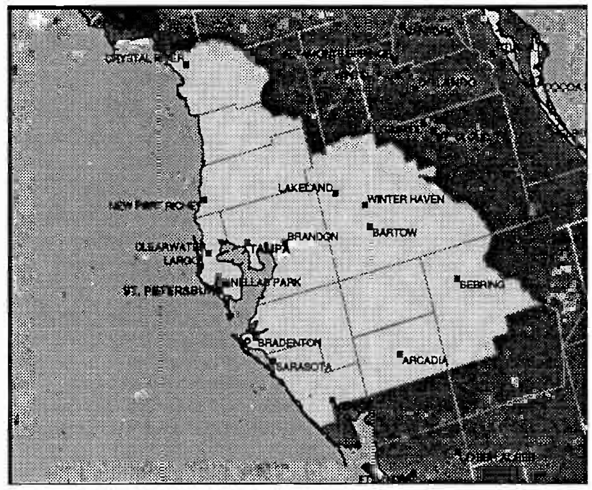
Station	Dial Position	Spanish Format
AM		
KELG	1440	Hits
KSPL	1470	Tejano
KTAE	1260	Adult Contemporary
KTXZ	1560	Talk
FM		
KKLB	92.5	Tejano Top 40

Cable/VCRs/Telephone

Cable Penetration:	68%
Household with VCR:	68%
TV Sets/HH:	1.5
Unlisted Phone Numbers:	44%

TAMPA-ST.PETERSBURG

MARKET #23



The Tampa-St. Petersburg ADI is comprised of eleven counties. Most Tampa area Hispanics (57%) live in Hillsborough County, but there are also significant Hispanic populations in Pinellas and Polk Counties. With an estimated market Buying Power of $2.3 Billion, this fast growing Hispanic market has the second highest Per Capita Buying Power ($9,658) in the U.S.

Often considered a Cuban market, this area actually has a diverse Hispanic population in terms of country of origin. While 29% are of Cuban origin, 26% are Puerto Rican and the remainder are from the various other Latin American countries. Further, the Mexican population of the adjacent areas has been growing rapidly in recent years.

POPULATION

	Total	Hispanic
Population	3,452,300	233,400
Rank	15	23
Household	1,448,600	74,200
Avg. Person/HH	2.38	3.15

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	9
Puerto Rico	26
Cuba	29
Central America	4
Colombia	4
Other	28

MARKET BUYING POWER

$2,254,063,000

PER CAPITA BUYING POWER

$9,658

MEAN HOUSEHOLD INCOME

$37,973

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	2,230,500	101,400	4.5
1992	3,326,700	202,500	6.1
1994	3,403,500	212,500	6.2
1996	3,452,300	233,400	6.8

TAMPA-ST. PETERSBURG

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Citrus	FL	2.5	0.9	2.1	116.9	48.9
De Soto	FL	3.3	0.6	12.0	27.8	9.9
Hardee	FL	6.4	1.3	27.4	23.4	7.6
Hernando	FL	4.4	1.5	3.4	129.8	52.4
Highlands	FL	4.8	1.2	5.8	82.2	34.6
Hillsborough	FL	133.2	44.6	14.8	900.1	352.8
Manatee	FL	13.0	3.3	5.5	236.9	101.7
Pasco	FL	11.9	3.6	3.9	304.6	132.8
Pinellas	FL	25.1	9.2	2.9	864.7	393.3
Polk	FL	21.3	5.7	4.7	452.9	171.7
Sarasota	FL	7.5	2.3	2.4	313.0	142.9
TOTAL		**233.4**	**74.2**	**6.8%**	**3,452.3**	**1,448.6**

1/1/96 Hispanic Population (000)

MEN 18-20	5.3
MEN 21-24	7.8
MEN 25-34	21.5
MEN 35-49	22.6
MEN 50-54	5.2
MEN 55-64	9.4
MEN 65+	12.1
MEN 18+	**83.9**
WOMEN 18-20	4.8
WOMEN 21-24	6.9
WOMEN 25-34	20.1
WOMEN 35-49	23.4
WOMEN 50-54	6.5
WOMEN 55-64	11.5
WOMEN 65+	17.1
WOMEN 18+	**90.3**
TEENS 12-17	**19.5**
CHILDREN 0-11	**39.7**
CHILDREN 2-11	**32.4**
TOTAL PERSONS 2+	**226.1**
TOTAL PERSONS	**233.4**
HOUSEHOLDS	**74.2**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$334,491
Eating & Drinking	145,917
General Merchandise	152,913
Apparel & Accessories	72,945
Furniture/Appliance/ Home Furnishings	46,241
Automotive Dealers	255,411
Gasoline Service	82,197
Drug Stores	43,418
All Others	150,649
Total Retail Sales	**$1,284,182**

TAMPA-ST. PETERSBURG

Radio

Station	Dial Position	Spanish Format
AM		
WAMA	1550	Contemporary
WDCF	1350	Mexican Contemporary
WQBN	1300	News/Talk/Music
WRMD	680	Adult Contemporary
FM		

Newspapers

Name	Published
Community Connections	Weekly
La Gaceta	Weekly
Nuevo Siglo	Weekly

Cable/VCRs/Telephone

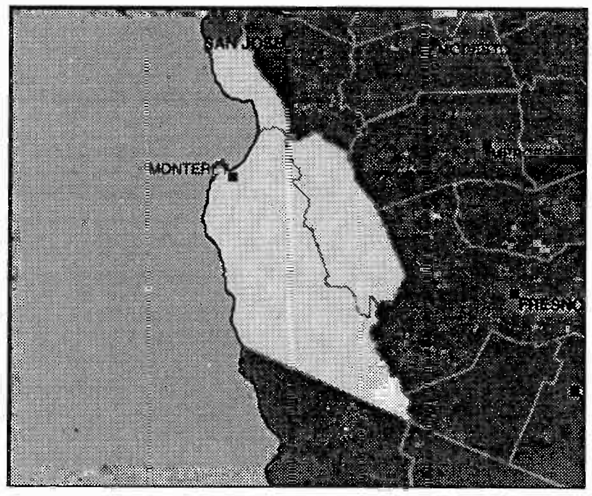
Cable Penetration:	60%
Household with VCR:	71%
TV Sets/HH:	1.9
Unlisted Phone Numbers:	75%

Television

Station	Channel	Affiliation
W57BA	57	Telemundo
WVEA	61	Univision

SALINAS-MONTEREY

MARKET #24



The Salinas ADI is comprised of three California counties. Most Salinas-area Hispanics (65%) live in Monterey County which is 37% Hispanic. The market's 223,100 Hispanics represent roughly one-third of the total area population.

Ninety-three percent of the market's Hispanics are of Mexican origin. Salinas has an estimated market Buying Power of $1.7 billion for 1996 and a Mean Household Income of $43,497. Total Retail Sales for 1996 are expected to be $878 million.

POPULATION

	Total	Hispanic
Population	677,700	223,100
Rank	39	24
Household	232,600	49,400
Avg. Person/HH	2.91	4.52

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	93
Other	7

MARKET BUYING POWER
$1,719,020,000

PER CAPITA BUYING POWER
$7,705

MEAN HOUSEHOLD INCOME
$43,497

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	487,600	114,200	23.4
1992	648,300	198,400	30.6
1994	671,700	206,900	30.8
1996	677,700	223,100	32.9

SALINAS-MONTEREY

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Monterey	CA	144.7	31.4	37.0	391.1	128.1
San Benito	CA	21.1	5.1	48.2	43.8	14.7
Santa Cruz	CA	57.3	12.9	23.6	242.8	89.8
TOTAL		**223.1**	**49.4**	**32.9%**	**677.7**	**232.6**

1/1/96 Hispanic Population (000)

MEN 18-20 .... 6.7
MEN 21-24 .... 9.8
MEN 25-34 .... 24.3
MEN 35-49 .... 17.6
MEN 50-54 .... 2.7
MEN 55-64 .... 4.3
MEN 65+ 2.7
MEN 18+ 68.1

WOMEN 18-20 .... 7.1
WOMEN 21-24 .... 9.0
WOMEN 25-34 .... 21.6
WOMEN 35-49 .... 16.5
WOMEN 50-54 .... 3.1
WOMEN 55-64 .... 4.3
WOMEN 65+ 3.1
WOMEN 18+ 64.7

TEENS 12-17 .... 23.9
CHILDREN 0-11 .... 66.4
CHILDREN 2-11 .... 54.6

TOTAL PERSONS 2+ 211.3
TOTAL PERSONS 223.1
HOUSEHOLDS 49.4

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food $222,154
Eating & Drinking 120,236
General Merchandise 71,506
Apparel & Accessories 48,950
Furniture/Appliance/
Home Furnishings 37,051
Automotive Dealers 155,574
Gasoline Service 60,959
Drug Stores 27,905
All Others 133,883

Total Retail Sales $878,218

SALINAS-MONTEREY

Radio

Station	Dial Position	Spanish Format
AM		
KCTY	980	Mexican Traditional
KMPG	1520	International
KTGE	1570	Adult Contemporary
FM		
KLFA	93.9	Adult Contemporary
KRAY	103.5	Adult Contemporary
KVRG	107.1	Adult Contemporary

Newspapers

Name	Published
El Sol	Weekly

Cable/VCRs/Telephone

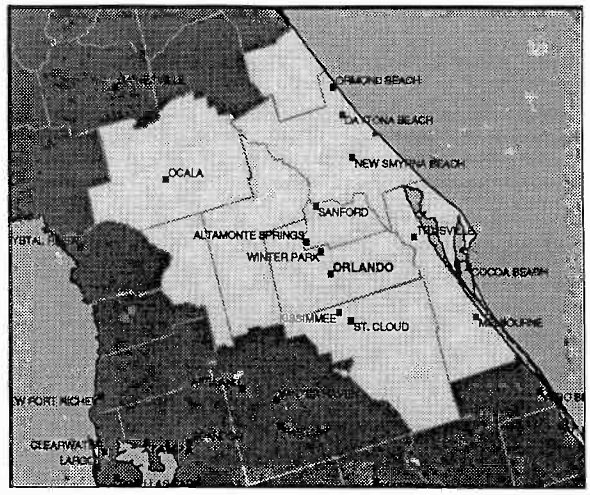
Cable Penetration:	40%
Household with VCR:	75%
TV Sets/HH:	2.2
Unlisted Phone Numbers:	58%

Television

Station	Channel	Affiliation
K15CU	15	Telemundo
KSMS	67	Univision

ORLANDO-DAYTONA MELBOURNE

MARKET #25



The Orlando ADI is comprised of nine Florida counties. An estimated two hundred thousand Hispanics reside here, representing nearly 8% of the total population. Orange County now contains 93,000 Hispanics. The Buying Power of Hispanics in Orlando is estimated to be $1.8 billion in 1996, with Retail Sales at $1.2 billion.

The Orlando Hispanic population has increased by a factor of five (494%) since 1980. This is the third largest percentage increase of any U.S. market. Although the market in general has grown rapidly, the Hispanic rate of growth has outpaced the general market. In 1980, Hispanics accounted for 3% of the area's total population whereas today, Hispanics account for 7.5% of area residents.

POPULATION

	Total	Hispanic
Population	2,651,600	200,000
Rank	20	25
Household	1,037,300	61,000
Avg. Person/HH	2.56	3.28

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	11
Puerto Rico	54
Cuba	11
Central America	4
South America	9
Other	11

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	1,339,300	40,500	3.0
1992	2,402,400	158,000	6.6
1994	2,519,200	171,900	6.8
1996	2,651,600	200,000	7.5

MARKET BUYING POWER
$1,813,901,000

PER CAPITA BUYING POWER
$9,070

MEAN HOUSEHOLD INCOME
$37,170

ORLANDO-DAYTONA-MELBOURNE

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Brevard	FL	16.9	5.4	3.6	468.4	190.8
Flagler	FL	2.3	0.8	5.5	41.7	18.3
Lake	FL	6.0	1.6	3.2	186.0	79.3
Marion	FL	8.7	2.7	3.6	242.8	98.2
Orange	FL	93.0	28.5	12.0	774.8	286.2
Osceola	FL	22.4	6.5	16.4	136.4	47.8
Seminole	FL	28.0	8.7	8.1	346.1	128.2
Sumter	FL	1.2	0.2	2.8	41.2	15.6
Volusia	FL	21.5	6.6	5.2	414.2	172.9
TOTAL		**200.0**	**61.0**	**7.5%**	**2,651.6**	**1,037.3**

1/1/96 Hispanic Population (000)

MEN 18-20 .... 5.8
MEN 21-24 .... 8.7
MEN 25-34 .... 21.0
MEN 35-49 .... 18.4
MEN 50-54 .... 3.7
MEN 55-64 .... 6.3
MEN 65+ 5.3
MEN 18+ 69.2

WOMEN 18-20 .... 5.0
WOMEN 21-24 .... 6.8
WOMEN 25-34 .... 18.9
WOMEN 35-49 .... 21.0
WOMEN 50-54 .... 4.7
WOMEN 55-64 .... 7.4
WOMEN 65+ 7.4
WOMEN 18+ 71.2

TEENS 12-17 .... 19.7
CHILDREN 0-11 .... 39.9
CHILDREN 2-11 .... 33.3

TOTAL PERSONS 2+ 193.4
TOTAL PERSONS 200.0
HOUSEHOLDS 61.0

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food $284,868
Eating & Drinking 131,670
General Merchandise 127,904
Apparel & Accessories 60,626
Furniture/Appliance/
Home Furnishings 54,978
Automotive Dealers 223,237
Gasoline Service 78,137
Drug Stores 36,966
All Others 156,274

Total Retail Sales $1,154,660

ORLANDO-DAYTONA-MELBOURNE

Radio

Station	Dial Position	Spanish Format
AM		
WHBS	1270	
WONQ	1140	News/Talk/Sports
FM		

Newspapers

Name	Published
La Prensa	Weekly

Cable/VCRs/Telephone

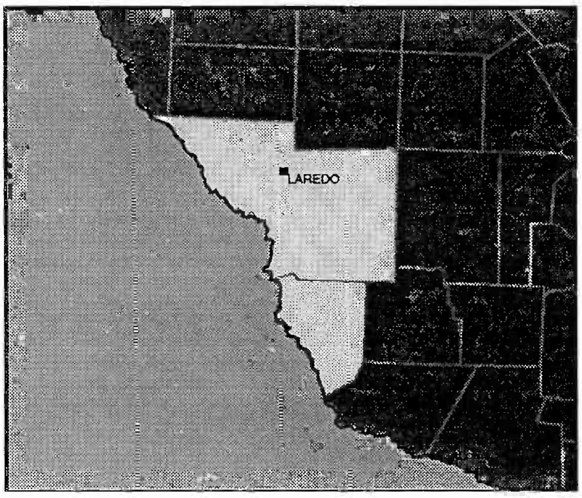
Cable Penetration:	66%
Household with VCR:	74%
TV Sets/HH:	1.9
Unlisted Phone Numbers:	50%

Television

Station	Channel	Affiliation
W07BZ	7	Telemundo
W63BH	63	Univision

LAREDO

MARKET #26



The Laredo ADI is made up of two Texas counties. Of all U.S. Hispanic markets, Laredo has the highest percentage of Hispanic residents. With just under two hundred thousand Hispanics, Laredo is 98% Hispanic. Webb county holds 95% of the market's Hispanics, and is 98% Hispanic.

Due to its geographic proximity to Mexico, Laredo Hispanics are predominantly of Mexican origin (97%). There are nearly fifty thousand Hispanic households in this ADI and they have a total estimated Buying Power of $1.5 billion.

POPULATION

	Total	Hispanic
Population	190,800	186,400
Rank	50	26
Household	48,900	47,800
Avg. Person/HH	3.90	3.90

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	97
Other	3

MARKET BUYING POWER

$1,511,817,000

PER CAPITA BUYING POWER

$8,111

MEAN HOUSEHOLD INCOME

$39,535

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	100,800	95,800	95.0
1992	151,600	147,700	93.5
1994	164,100	155,800	94.9
1996	190,800	186,400	97.7

LAREDO

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Webb	TX	176.2	44.8	98.4	179.1	45.3
Zapata	TX	10.2	3.0	87.5	11.7	3.6
TOTAL		**186.4**	**47.8**	**97.7%**	**190.8**	**48.9**

1/1/96 Hispanic Population (000)

MEN 18-20	5.1	
MEN 21-24	5.9	
MEN 25-34	14.3	
MEN 35-49	14.3	
MEN 50-54	2.9	
MEN 55-64	5.1	
MEN 65+	5.6	
MEN 18+		**53.2**
WOMEN 18-20	5.8	
WOMEN 21-24	6.3	
WOMEN 25-34	15.6	
WOMEN 35-49	16.5	
WOMEN 50-54	3.9	
WOMEN 55-64	7.1	
WOMEN 65+	9.1	
WOMEN 18+		**64.3**
TEENS 12-17		**23.8**
CHILDREN 0-11		**45.1**
CHILDREN 2-11		**37.9**
TOTAL PERSONS 2+		**179.2**
TOTAL PERSONS		**186.4**
HOUSEHOLDS		**47.8**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$174,567
Eating & Drinking	65,184
General Merchandise	130,443
Apparel & Accessories	61,214
Furniture/Appliance/ Home Furnishings	50,049
Automotive Dealers	95,608
Gasoline Service	43,747
Drug Stores	27,765
All Others	117,262
Total Retail Sales	**$765,839**

LAREDO

Radio

Station	Dial Position	Spanish Format
AM		
KDOS	1490	Mexican Regional
KLAR	1300	Top 40
KVOZ	890	Adult Contemporary
XEAS	1410	Modern Hits
XEGNK	1370	Adult Contemporary/Nostalgia
XEK	960	Top 50
XENLT	1000	News/Talk
XENU	1550	Tropical Ballads
XEWL	1090	Tex-Mex
FM		
KZTQ	106.1	Tejano
KJBZ	92.7	
XENLO	97.1	Oldies, Easy Listening
XHMW	102.3	News,Talk, Easy Listening
XHNK	99.3	Contemporary Hits
XHNOE	91.3	Adult Contemporary
XHRT	95.3	Easy Listening
XHSG	99.9	Easy Listening
XHTLN	94.1	Easy Listening

Newspapers

Name	Published
Noticias En Español/Times	Daily

Cable/VCRs/Telephone

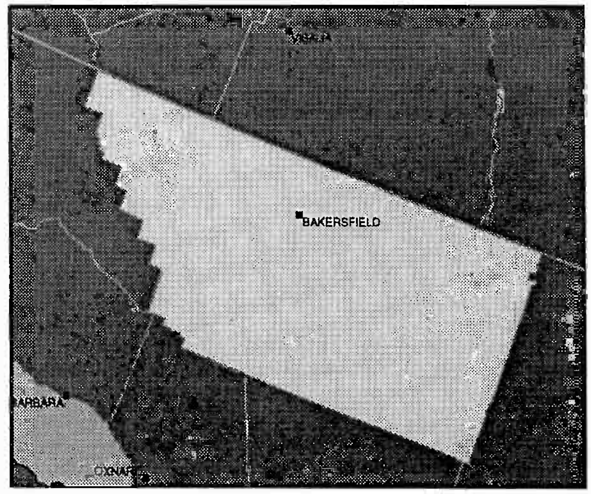
Cable Penetration:	72%
Household with VCR:	64%
TV Sets/HH:	2.0
Unlisted Phone Numbers:	64%

Television

Station	Channel	Affiliation
KEFE	2	Univision
KLDO	27	Telemundo
XHBR	11	Independent

BAKERSFIELD

MARKET #27



The Bakersfield market has a Hispanic population of roughly 180,000. Hispanics represent nearly a third (30%) of the total market area's population. This makes Bakersfield the twenty-seventh largest U.S. Hispanic market.

The Bakersfield ADI is defined as the Western portion of Kern County, California. Eastern Kern is part of the Los Angeles ADI. The Bakersfield market has a 1996 estimated Buying Power of $1.3 billion and spending in Retail stores is expected to amount to $667,000. Nine out of every ten Bakersfield Hispanics is of Mexican origin.

Since 1980 Bakersfield's Hispanic population has more than doubled, going from 87,000 to over 180,000. The vast majority (89%) of Bakersfield's Hispanics are of Mexican origin.

POPULATION

	Total	Hispanic
Population	609,300	180,400
Rank	42	27
Household	208,500	43,900
Avg. Person/HH	2.92	4.11

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	89
Central America	2
Other	9

MARKET BUYING POWER
$1,343,840,000

PER CAPITA BUYING POWER
$7,449

MEAN HOUSEHOLD INCOME
$38,264

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	315,800	87,000	27.5
1992	565,200	157,700	27.9
1994	603,200	167,100	27.7
1996	609,300	180,400	29.6

BAKERSFIELD

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Kern -West	CA	180.4	43.9	29.6	609.3	208.5
TOTAL		**180.4**	**43.9**	**29.6%**	**609.3**	**208.5**

1/1/96 Hispanic Population (000)

MEN 18-20 .... 4.4
MEN 21-24 .... 6.2
MEN 25-34 .... 18.7
MEN 35-49 .... 14.3
MEN 50-54 .... 2.2
MEN 55-64 .... 3.7
MEN 65+ 3.2
MEN 18+ 52.7

WOMEN 18-20 .... 4.7
WOMEN 21-24 .... 5.9
WOMEN 25-34 .... 17.0
WOMEN 35-49 .... 13.5
WOMEN 50-54 .... 2.2
WOMEN 55-64 .... 4.4
WOMEN 65+ 3.4
WOMEN 18+ 51.1

TEENS 12-17 .... 19.2
CHILDREN 0-11 .... 57.4
CHILDREN 2-11 .... 47.3

TOTAL PERSONS 2+ 170.3
TOTAL PERSONS 180.4
HOUSEHOLDS 43.9

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food $206,586
Eating & Drinking 66,680
General Merchandise 62,141
Apparel & Accessories 35,510
Furniture/Appliance/
Home Furnishings 27,456
Automotive Dealers 103,925
Gasoline Service 59,496
Drug Stores 20,194
All Others 84,732

Total Retail Sales $666,720

BAKERSFIELD

Radio

Station	Dial Position	Spanish Format
AM		
KAFY	970	Top 40 Hits
KCHJ	1010	Sports/News
KERI	1180	Top 40 Hits
KWAC	1490	Contemporary Mexican
FM		
KIWI	92.1	News/Sports
KSUV	102.9	Mexican
KTQX	90.1	Top 40 Hits
KMYX	103.9	

Newspapers

Name	Published
El Mexicalo	Weekly
El Popular	Weekly

Cable/VCRs/Telephone

Cable Penetration: 70%
Household with VCR: 75%
TV Sets/HH: 1.6
Unlisted Phone Numbers: 30%

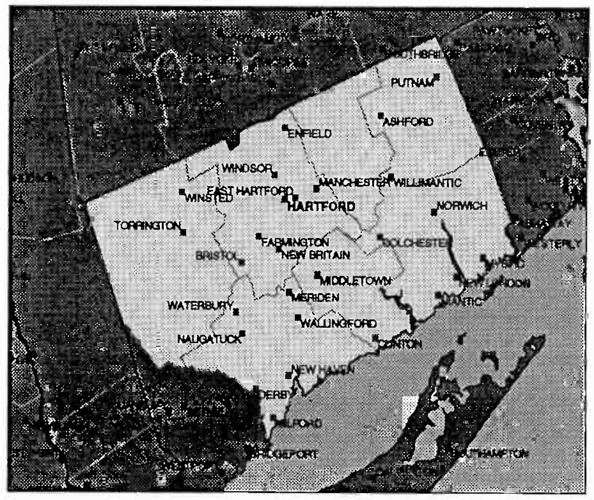
Television

Station	Channel	Affiliation

No Data Available

HARTFORD-NEW HAVEN

MARKET #28



The Hartford-New Haven Market, with 175,700 Hispanics, is the twenty-eighth largest Hispanic market area in the country. Hispanic residents are nearly 7% of this Connecticut market. Hartford and New Haven Counties represent 85% of the ADI's Hispanic population.

Hartford is a highly Puerto Rican market (79%) with a significant total Buying Power of roughly $1.4 billion. Retail sales for 1996 are expected to reach close to $850 million.

POPULATION

	Total	Hispanic
Population	2,587,800	175,700
Rank	21	28
Household	973,100	51,800
Avg. Person/HH	2.66	3.39

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	2
Puerto Rico	79
Cuba	3
Colombia	2
Peru	3
Other	11

MARKET BUYING POWER

$1,383,486,000

PER CAPITA BUYING POWER

$7,874

MEAN HOUSEHOLD INCOME

$33,385

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	1,971,800	77,300	3.9
1992	2,547,100	159,200	6.3
1994	2,503,200	162,000	6.5
1996	2,587,800	175,700	6.8

HARTFORD-NEW HAVEN

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Hartford	CT	87.2	25.6	9.9	880.9	336.1
Litchfield	CT	2.5	0.7	1.3	189.0	71.1
Middlesex	CT	3.6	1.0	2.3	157.5	60.2
New Haven	CT	63.4	19.3	7.6	834.2	318.8
New London	CT	10.5	3.0	3.9	268.4	97.2
Tolland	CT	3.0	0.6	2.0	148.1	49.4
Windham	CT	5.5	1.6	5.0	109.7	40.3
TOTAL		**175.7**	**51.8**	**6.8%**	**2,587.8**	**973.1**

1/1/96 Hispanic Population (000)

MEN 18-20	5.2
MEN 21-24	7.1
MEN 25-34	16.1
MEN 35-49	13.5
MEN 50-54	2.3
MEN 55-64	3.2
MEN 65+	2.3
MEN 18+	**49.7**
WOMEN 18-20	4.8
WOMEN 21-24	7.7
WOMEN 25-34	19.0
WOMEN 35-49	15.5
WOMEN 50-54	2.6
WOMEN 55-64	4.2
WOMEN 65+	3.2
WOMEN 18+	**57.0**
TEENS 12-17	**20.3**
CHILDREN 0-11	**48.7**
CHILDREN 2-11	**41.0**
TOTAL PERSONS 2+	**168.0**
TOTAL PERSONS	**175.7**
HOUSEHOLDS	**51.8**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$216,768
Eating & Drinking	93,295
General Merchandise	60,073
Apparel & Accessories	49,511
Furniture/Appliance/ Home Furnishings	37,745
Automotive Dealers	162,697
Gasoline Service	59,481
Drug Stores	27,639
All Others	140,507
Total Retail Sales	**$847,716**

HARTFORD-NEW HAVEN

Radio

Station	Dial Position	Spanish Format
AM		
WLAT	1230	Contemporary
WRYM	840	News/Talk
WXCT	1220	Adult Contemporary
FM		

Newspapers

No Data Available

Cable/VCRs/Telephone

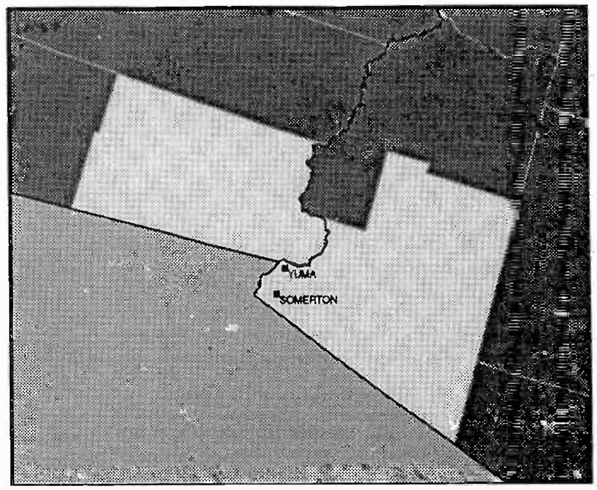
Cable Penetration: 60%
Household with VCR: 55%
TV Sets/HH: 2.0
Unlisted Phone Numbers: 90%

Television

Station	Channel	Affiliation
W13BF	13	Telemundo
W47AD	47	Univision

EL CENTRO-YUMA

MARKET #29



The El Centro-Yuma market area has a Hispanic population of nearly one hundred sixty-seven thousand. Hispanics represent just over 60% of the total market area's population, and 73% of El Centro County.

Since 1980, El Centro's Hispanic population has more than doubled. As with all border markets, the vast majority (94%) of the area's Hispanic are of Mexican origin. The market has a 1996 estimated Buying Power of $1.3 billion.

POPULATION

	Total	Hispanic
Population	276,800	166,600
Rank	49	29
Household	86,300	41,100
Avg. Person/HH	3.21	4.05

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	94
Puerto Rico	2
Other	4

MARKET BUYING POWER

$1,333,033,000

PER CAPITA BUYING POWER

$8,001

MEAN HOUSEHOLD INCOME

$40,542

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	168,200	78,000	46.4
1992	220,700	121,000	54.8
1994	243,200	138,400	56.9
1996	276,800	166,600	60.2

EL CENTRO-YUMA

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Yuma	AZ	63.5	15.5	47.1	134.8	44.7
Imperial	CA	103.1	25.6	72.3	142.0	41.6
TOTAL		**166.6**	**41.1**	**60.2%**	**276.8**	**86.3**

1/1/96 Hispanic Population (000)

MEN 18-20	5.5
MEN 21-24	5.4
MEN 25-34	14.9
MEN 35-49	12.6
MEN 50-54	3.1
MEN 55-64	3.3
MEN 65+	3.4
MEN 18+	**48.2**
WOMEN 18-20	3.9
WOMEN 21-24	6.1
WOMEN 25-34	15.9
WOMEN 35-49	13.7
WOMEN 50-54	2.6
WOMEN 55-64	3.8
WOMEN 65+	4.7
WOMEN 18+	**50.7**
TEENS 12-17	**20.2**
CHILDREN 0-11	**47.5**
CHILDREN 2-11	**40.8**
TOTAL PERSONS 2+	**159.9**
TOTAL PERSONS	**166.6**
HOUSEHOLDS	**41.1**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$189,629
Eating & Drinking	57,727
General Merchandise	87,528
Apparel & Accessories	33,492
Furniture/Appliance/ Home Furnishings	17,343
Automotive Dealers	109,643
Gasoline Service	65,070
Drug Stores	25,167
All Others	72,169
Total Retail Sales	**$657,768**

EL CENTRO-YUMA

Radio

Station	Dial Position	Spanish Format
AM		
XEMBC	1190	Top 40
XEWV	940	Ranchera
XEYX	820	Contemporary
FM		
KBCD	99.3	Contemporary
KUBO	88.7	News
XEWV	106.7	Mexican Folk

Newspapers

No Data Available

Cable/VCRs/Telephone

No Data Available

Television

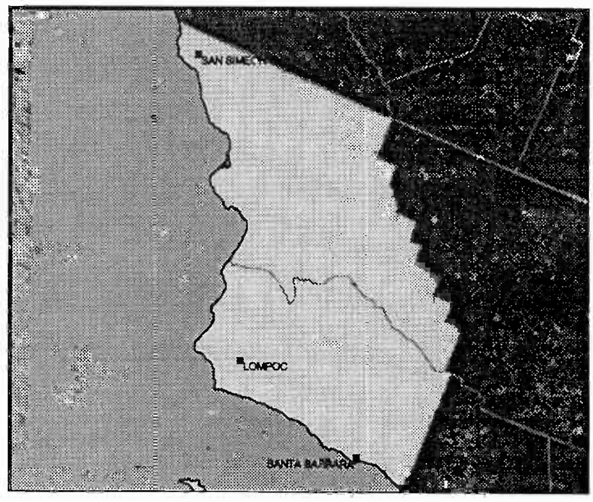
Station	Channel	Affiliation
KSWT	13	Telemundo

SANTA BARBARA-SANTA MARIA-SAN LUIS OBISPO

MARKET #30

The Santa Barbara-Santa Maria-San Luis Obispo market area has a Hispanic population of 158,000. Hispanics represent roughly one quarter of the total market area's population and 31% of Santa Barbara County which contains the city of Santa Maria.

Since 1980 Santa Barbara's Hispanic population has more than doubled. This is a result of continued immigration from Mexico and various Central American countries. Eighty-seven percent of the area's Hispanics are of Mexican origin. Hispanics in this market have a Buying Power of $1.5 billion.



POPULATION

	Total	Hispanic
Population	623,200	158,000
Rank	41	30
Household	225,700	37,400
Avg. Person/HH	2.76	4.22

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	87
Central America	4
Other	9

MARKET BUYING POWER

$1,453,335,000

PER CAPITA BUYING POWER

$9,198

MEAN HOUSEHOLD INCOME

$48,574

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	449,700	70,200	15.6
1992	606,500	135,800	22.4
1994	618,000	144,400	23.4
1996	623,200	158,000	25.4

SANTA BARBARA-SANTA MARIA-SAN LUIS OBISPO

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
San Luis Obispo	CA	36.1	8.4	15.6	231.2	86.0
Santa Barbara	CA	121.9	29.0	31.1	392.0	139.7
TOTAL		**158.0**	**37.4**	**25.4%**	**623.2**	**225.7**

1/1/96 Hispanic Population (000)

MEN 18-20	8.0
MEN 21-24	10.2
MEN 25-34	21.1
MEN 35-49	13.4
MEN 50-54	2.5
MEN 55-64	3.3
MEN 65+	2.9
MEN 18+	**61.4**
WOMEN 18-20	6.5
WOMEN 21-24	7.3
WOMEN 25-34	14.9
WOMEN 35-49	12.0
WOMEN 50-54	2.5
WOMEN 55-64	3.6
WOMEN 65+	4.0
WOMEN 18+	**50.8**
TEENS 12-17	**13.1**
CHILDREN 0-11	**32.7**
CHILDREN 2-11	**26.9**
TOTAL PERSONS 2+	**152.2**
TOTAL PERSONS	**158.0**
HOUSEHOLDS	**37.4**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$199,446
Eating & Drinking	81,620
General Merchandise	50,491
Apparel & Accessories	44,382
Furniture/Appliance/ Home Furnishings	33,350
Automotive Dealers	85,727
Gasoline Service	53,613
Drug Stores	16,270
All Others	104,672
Total Retail Sales	**$669,571**

SANTA BARBARA-SANTA MARIA-SAN LUIS OBISPO

Radio

Station	Dial Position	Spanish Format
AM		
KJDJ	1030	Top 40 Spanish
KSBQ	1480	Adult Contemporary
KSPE	1490	Mexican Regional
KTAP	1600	Traditional Mexican
KTME	1410	Contemporary
FM		
KIDI	105.5	Contemporary Hits
KRQK	100.9	Mexican Regional

Newspapers

Name	Published
El Nuevo Tiempo	Weekly
Las Noticias de los Tres Condados	Bi-Weekly

Cable/VCRs/Telephone

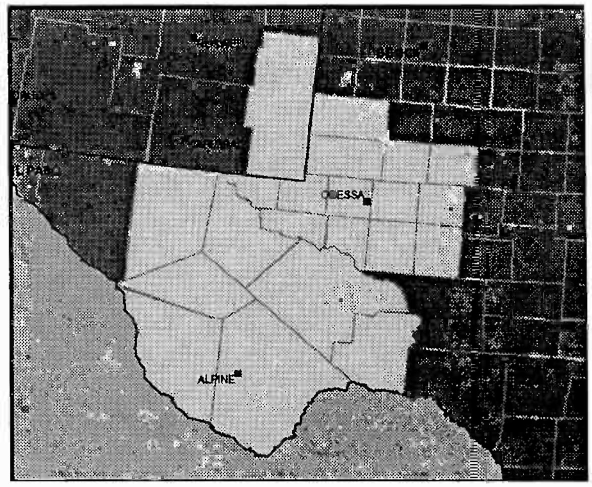
Cable Penetration:	50%
Household with VCR:	70%
TV Sets/HH:	1.7
Unlisted Phone Numbers:	61%

Television

Station	Channel	Affiliation
K09UF	9	Univision
K27EA	27	Telemundo
KTA	7	Univision
KSTV	57	Independent

ODESSA-MIDLAND

MARKET #31



The Odessa-Midland ADI is comprised of part of one New Mexico county, and twenty Texas counties. An estimated one hundred fifty-three thousand Hispanics reside here, representing nearly 38% of the total population. The Buying Power of Hispanics in Odessa is estimated to be $1.1 billion in 1996, with retail sales at $633 million.

POPULATION

	Total	Hispanic
Population	404,900	153,100
Rank	46	31
Household	142,100	40,900
Avg. Person/HH	2.85	3.74

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	95
Other	5

MARKET BUYING POWER
$1,135,224,000

PER CAPITA BUYING POWER
$7,415

MEAN HOUSEHOLD INCOME
$34,695

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	335,400	90,300	26.9
1992	390,100	133,300	34.2
1994	396,300	138,800	35.0
1996	404,900	153,100	37.8

ODESSA-MIDLAND

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Lea South	NM	3.4	0.3	34.9	9.7	3.4
Andrews	TX	5.4	1.4	37.6	14.5	4.8
Brewster	TX	4.0	1.3	44.9	8.9	3.5
Crane	TX	1.8	0.4	39.6	4.6	1.5
Culberson	TX	2.6	0.8	78.2	3.3	1.1
Ector	TX	46.1	12.4	37.1	124.1	44.1
Gaines	TX	5.2	1.3	35.3	14.7	4.6
Glasscock	TX	0.4	0.1	31.2	1.4	0.5
Howard	TX	9.8	2.5	30.4	32.3	11.3
Jeff Davis	TX	0.9	0.3	38.8	2.3	0.9
Loving	TX	0.0	0.0	12.0	0.1	0.1
Martin	TX	2.2	0.5	43.9	4.9	1.6
Midland	TX	29.4	8.0	25.2	116.6	42.7
Pecos	TX	9.2	2.6	63.4	14.5	4.6
Presidio	TX	6.8	2.2	88.3	7.7	2.6
Reagan	TX	2.3	0.6	50.2	4.5	1.4
Reeves	TX	12.4	3.3	81.4	15.2	4.6
Terrell	TX	0.8	0.3	60.4	1.3	0.5
Upton	TX	1.8	0.5	43.4	4.1	1.5
Ward	TX	5.2	1.4	43.0	12.2	4.1
Winkler	TX	3.5	0.9	43.4	8.0	2.7
TOTAL		**153.1**	**40.9**	**37.8%**	**404.9**	**142.1**

ODESSA-MIDLAND

1/1/96 Hispanic Population (000)

MEN 18-20	4.0
MEN 21-24	5.7
MEN 25-34	13.6
MEN 35-49	11.4
MEN 50-54	2.2
MEN 55-64	3.1
MEN 65+	2.2
MEN 18+	**42.2**
WOMEN 18-20	4.3
WOMEN 21-24	5.3
WOMEN 25-34	15.0
WOMEN 35-49	12.8
WOMEN 50-54	1.8
WOMEN 55-64	3.1
WOMEN 65+	3.0
WOMEN 18+	**45.3**
TEENS 12-17	**18.5**
CHILDREN 0-11	**47.1**
CHILDREN 2-11	**39.6**
TOTAL PERSONS 2+	**145.6**
TOTAL PERSONS	**153.1**
HOUSEHOLDS	**40.9**

Newspapers

Name	Published
El Editor Permian Basin	Weekly
Nueva Vista	Bi-weekly

Television

Station	Channel	Affiliation
K60EE	60	Telemundo

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$205,572
Eating & Drinking	49,267
General Merchandise	85,118
Apparel & Accessories	29,973
Furniture/Appliance/ Home Furnishings	14,362
Automotive Dealers	122,197
Gasoline Service	55,562
Drug Stores	16,832
All Others	53,696
Total Retail Sales	**$632,579**

Radio

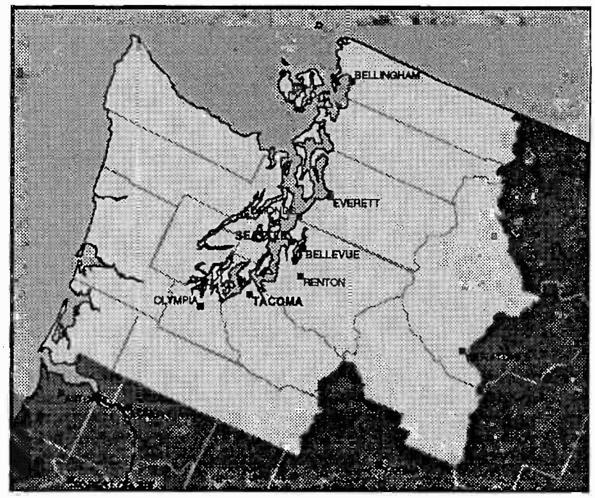
Station	Dial Position	Spanish Format
AM		
KERB	600	International
KFST	860	Top 40 Spanish
KIKZ	1250	Top 40 Spanish
KION	1400	Spanish Country
KNDA	1000	Tex/Mex
KOZA	1230	International
KULF	1240	Adult Contemporary
KWEL	1070	Mexican
FM		
KERB	106.3	International
KFST	94.3	Top 40 Spanish
KMRK	96.1	Adult Contemporary

Cable/VCRs/Telephone

No Data Available

SEATTLE-TACOMA

MARKET #32



The thirty-second largest U.S. Hispanic market is Seattle with 139,500 Hispanics representing 3.6% of the total ADI population. Nearly 39% (55,000) of Seattle's Hispanics live in King County, making them 3.4% of this county's population. The Seattle Hispanic market has a Per Capita Buying Power of $8,175.

POPULATION

	Total	Hispanic
Population	3,896,800	139,500
Rank	12	32
Household	1,508,300	39,600
Avg. Person/HH	2.58	3.52

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	55
Puerto Rico	5
Cuba	3
Colombia	2
Peru	2
Other	33

MARKET BUYING POWER

$1,140,414,000

PER CAPITA BUYING POWER

$8,175

MEAN HOUSEHOLD INCOME

$35,998

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	2,666,600	66,800	2.5
1992	3,634,800	115,400	3.2
1994	3,805,200	124,400	3.3
1996	3,896,800	139,500	3.6

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Chelan	WA	7.0	1.8	12.2	57.2	22.6
Clallam	WA	1.6	0.4	2.5	63.4	25.4
Grays Harbor	WA	1.5	0.4	2.1	67.9	27.1
Island	WA	2.7	0.7	3.8	69.7	25.4
Jefferson	WA	0.3	0.1	1.2	25.1	10.9
King	WA	54.7	17.2	3.4	1,603.6	653.3
Kitsap	WA	8.4	2.1	3.7	227.6	82.9
Kittitas West	WA	0.1	0.0	3.2	3.1	1.2
Lewis	WA	1.9	0.4	2.9	66.7	25.0
Mason	WA	1.4	0.2	2.8	48.2	18.0
Pacific	WA	0.6	0.2	2.9	20.9	8.7
Pierce	WA	26.2	7.1	4.0	651.3	236.6
San Juan	WA	0.2	0.1	1.5	11.8	5.2
Skagit	WA	6.4	1.5	6.7	95.5	36.6
Snohomish	WA	14.5	4.1	2.7	540.3	198.1
Thurston	WA	6.9	2.0	3.6	194.0	74.3
Whatcom	WA	5.2	1.4	3.5	150.5	57.0
TOTAL		**139.5**	**39.6**	**3.6%**	**3,896.8**	**1,508.3**

SEATTLE

1/1/96 Hispanic Population (000)

MEN 18-20	5.0
MEN 21-24	6.7
MEN 25-34	15.2
MEN 35-49	12.5
MEN 50-54	1.3
MEN 55-64	3.9
MEN 65+	2.2
MEN 18+	**46.8**
WOMEN 18-20	4.1
WOMEN 21-24	5.5
WOMEN 25-34	13.3
WOMEN 35-49	10.6
WOMEN 50-54	2.2
WOMEN 55-64	3.6
WOMEN 65+	2.2
WOMEN 18+	**41.5**
TEENS 12-17	**15.6**
CHILDREN 0-11	**35.6**
CHILDREN 2-11	**29.7**
TOTAL PERSONS 2+	**133.6**
TOTAL PERSONS	**139.5**
HOUSEHOLDS	**39.6**

Newspapers

No Data Available

Television

No Data Available

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$200,457
Eating & Drinking	89,189
General Merchandise	75,349
Apparel & Accessories	48,727
Furniture/Appliance/ Home Furnishings	36,305
Automotive Dealers	101,958
Gasoline Service	47,798
Drug Stores	31,370
All Others	116,922
Total Retail Sales	**$748,075**

Radio

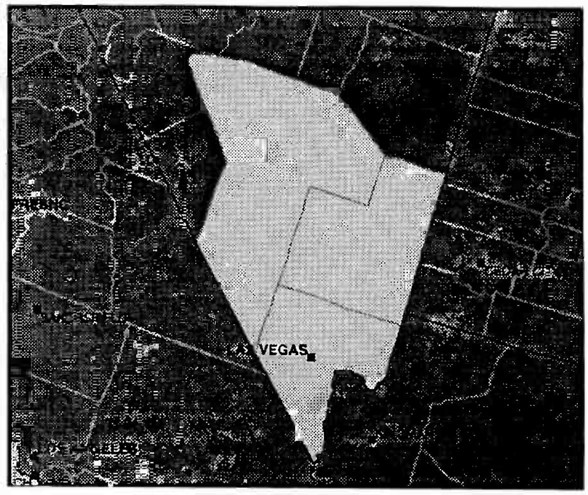
Station	Dial Position	Spanish Format
AM		
KKMO	1360	Big Band Spanish
FM		

Cable/VCRs/Telephone

No Data Available

LAS VEGAS

MARKET #33



The three county Las Vegas Market, with nearly one hundred forty thousand Hispanics, is the thirty-third largest Hispanic market in the country. Hispanics represent roughly 13% of this market's total population. Two-thirds of the area's Hispanics are of Mexican origin. The Las Vegas Hispanic population has grown 46% since 1992.

POPULATION

	Total	Hispanic
Population	1,057,200	137,800
Rank	33	33
Household	408,900	39,700
Avg. Person/HH	2.59	3.47

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	66
Puerto Rico	4
Cuba	8
San Salvador	3
Other	19

MARKET BUYING POWER

$1,037,988,000

PER CAPITA BUYING POWER

$7,533

MEAN HOUSEHOLD INCOME

$32,682

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	403,400	20,400	5.1
1992	828,200	94,100	11.4
1994	913,000	109,200	12.0
1996	1,057,200	137,800	13.0

LAS VEGAS

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Clark	NV	136.0	39.3	13.2	1030.3	398.3
Lincoln	NV	0.1	0.0	3.0	4.5	1.5
Nye South	NV	1.7	0.4	7.6	22.4	9.1
TOTAL		**137.8**	**39.7**	**13.0%**	**1057.2**	**408.9**

1/1/96 Hispanic Population (000)

MEN 18-20	3.8
MEN 21-24	5.1
MEN 25-34	13.8
MEN 35-49	10.1
MEN 50-54	2.1
MEN 55-64	3.3
MEN 65+	2.9
MEN 18+	**41.1**
WOMEN 18-20	3.9
WOMEN 21-24	5.2
WOMEN 25-34	13.0
WOMEN 35-49	9.9
WOMEN 50-54	1.7
WOMEN 55-64	3.3
WOMEN 65+	2.7
WOMEN 18+	**39.7**
TEENS 12-17	**17.4**
CHILDREN 0-11	**39.6**
CHILDREN 2-11	**32.6**
TOTAL PERSONS 2+	**130.8**
TOTAL PERSONS	**137.8**
HOUSEHOLDS	**39.7**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$186,173
Eating & Drinking	75,836
General Merchandise	69,879
Apparel & Accessories	42,390
Furniture/Appliance/ Home Furnishings	27,023
Automotive Dealers	105,157
Gasoline Service	35,225
Drug Stores	20,651
All Others	104,590
Total Retail Sales	**$666,924**

Television

Station	Channel	Affiliation
K27AF	27	Univision

Newspapers

No Data Available

Cable/VCRs/Telephone

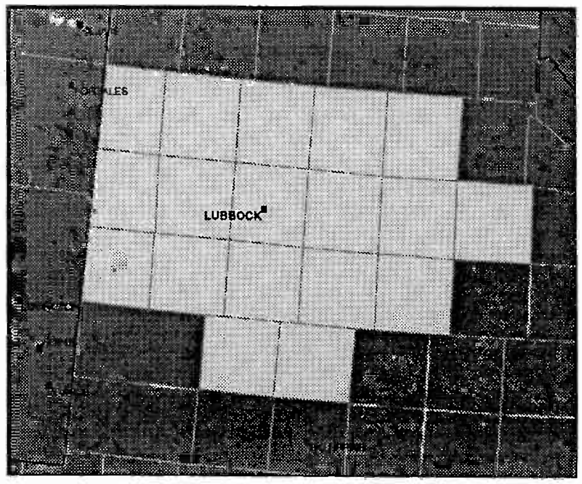
No Data Available

Radio

No Data Available

LUBBOCK

MARKET #34



Lubbock is the thirty-fourth largest Hispanic market in the United States, with nearly one hundred twenty-five thousand Hispanics representing 32% of the market's total population. Traditionally, Lubbock has been considered a Mexican market, and Hispanics of Mexican origin comprise 92% of the market's Hispanic population. The estimated Hispanic market Buying Power for Lubbock is $919 million and the Per Capita Buying Power is $7,383.

POPULATION

	Total	Hispanic
Population	388,300	124,500
Rank	47	34
Household	138,100	33,000
Avg. Person/HH	2.81	3.77

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	92
Other	8

MARKET BUYING POWER
$919,176,000

PER CAPITA BUYING POWER
$7,383

MEAN HOUSEHOLD INCOME
$34,817

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	402,500	104,500	25.9
1992	392,600	121,800	31.0
1994	398,800	124,800	31.3
1996	388,300	124,500	32.1

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Bailey	TX	2.9	0.8	43.0	6.7	2.4
Borden	TX	0.1	0.0	16.0	0.8	0.3
Cochran	TX	2.0	0.5	47.9	4.2	1.4
Crosby	TX	3.5	0.9	47.3	7.3	2.6
Dawson	TX	6.6	1.7	47.1	14.0	4.8
Dickens	TX	0.5	0.1	20.5	2.4	1.1
Floyd	TX	3.6	0.9	44.4	8.1	2.8
Garza	TX	1.4	0.4	31.5	4.6	1.8
Hale	TX	17.0	4.2	47.1	36.1	11.9
Hockley	TX	8.6	2.2	35.3	24.3	8.0
Kent	TX	0.1	0.0	14.2	1.0	0.4
King	TX	0.1	0.0	18.0	0.4	0.1
Lamb	TX	6.1	1.7	41.1	14.9	5.5
Lubbock	TX	59.8	16.3	25.5	234.6	85.1
Lynn	TX	3.0	0.8	45.6	6.5	2.3
Motley	TX	0.1	0.0	9.8	1.4	0.6
Terry	TX	5.6	1.4	43.7	12.7	4.3
Yoakum	TX	3.5	0.9	42.3	8.3	2.7
TOTAL		**124.5**	**33.0**	**32.1%**	**388.3**	**138.1**

LUBBOCK

1/1/96 Hispanic Population (000)

MEN 18-20	3.9
MEN 21-24	5.1
MEN 25-34	12.8
MEN 35-49	9.2
MEN 50-54	1.3
MEN 55-64	2.6
MEN 65+	1.8
MEN 18+	**36.7**
WOMEN 18-20	3.4
WOMEN 21-24	4.6
WOMEN 25-34	11.4
WOMEN 35-49	8.8
WOMEN 50-54	1.3
WOMEN 55-64	2.6
WOMEN 65+	2.0
WOMEN 18+	**34.1**
TEENS 12-17	**17.7**
CHILDREN 0-11	**36.0**
CHILDREN 2-11	**30.7**
TOTAL PERSONS 2+	**119.2**
TOTAL PERSONS	**124.5**
HOUSEHOLDS	**33.0**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$144,229
Eating & Drinking	51,288
General Merchandise	65,812
Apparel & Accessories	30,777
Furniture/Appliance/ Home Furnishings	15,745
Automotive Dealers	124,827
Gasoline Service	44,908
Drug Stores	10,512
All Others	64,134
Total Retail Sales	**$552,232**

Newspapers

No Data Available

Radio

Station	Dial Position	Spanish Format
AM		
KLFB	1420	Spanish Contemporary
KTLK	1460	Spanish Contemporary
KXTQ	950	Tejano
FM		
KXTQ	93.7	Top 40

Television

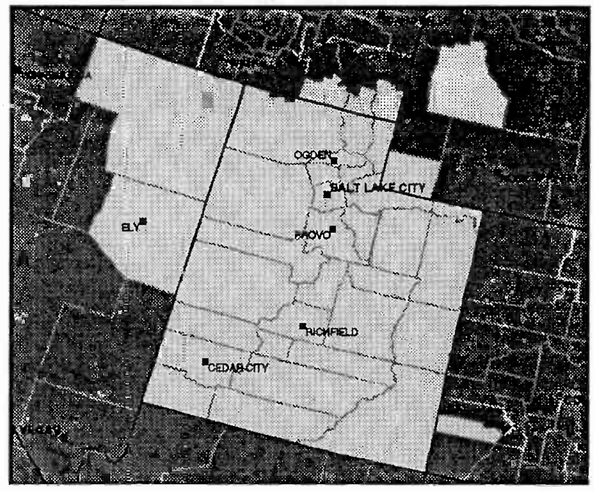
No Data Available

Cable/VCRs/Telephone

No Data Available

SALT LAKE CITY

MARKET #35



The Thirty-fifth largest U.S. Hispanic market is Salt Lake City with 122,800 Hispanics representing 5.7% of the total ADI population. Two-thirds of the area's Hispanics are of Mexican origin. The Hispanic population of the large 40 county Salt Lake City ADI is concentrated in Salt Lake (55,000), Weber (14,000) and Utah (11,000) Counties. The ADI also contains counties from Colorado, Idaho, Nevada and Wyoming

POPULATION

	Total	Hispanic
Population	2,138,700	122,800
Rank	23	35
Household	669,300	33,200
Avg. Person/HH	3.20	3.70

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	66
Puerto Rico	3
Central America	3
South America	5
Other	23

MARKET BUYING POWER

$930,941,000

PER CAPITA BUYING POWER

$7,581

MEAN HOUSEHOLD INCOME

$35,050

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	1,508,100	85,800	5.7
1992	1,958,400	100,000	5.1
1994	2,003,600	108,900	5.4
1996	2,138,700	122,800	5.7

SALT LAKE CITY

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Dolores	CO	0.1	0.0	3.4	1.7	0.7
Bear Lake	ID	0.2	0.0	2.7	6.6	2.2
Franklin	ID	0.3	0.1	3.1	10.5	3.2
Oneida	ID	0.1	0.0	1.9	3.8	1.2
Elko	NV	6.2	1.8	14.7	42.5	14.8
White Pine	NV	0.9	0.2	9.6	9.1	3.0
Beaver	UT	0.2	0.0	2.9	5.3	1.8
Box Elder	UT	1.9	0.5	4.9	39.8	11.9
Cache	UT	2.5	0.6	3.2	77.4	22.4
Carbon	UT	2.4	0.8	11.8	20.7	7.2
Daggett	UT	0.0	0.0	2.4	0.8	0.3
Davis	UT	9.1	2.3	4.1	219.2	62.4
Duchesne	UT	0.5	0.1	3.5	14.1	4.3
Emery	UT	0.2	0.1	2.3	10.9	3.2
Garfield	UT	0.0	0.0	0.9	4.1	1.3
Grand	UT	0.4	0.1	4.7	8.1	3.1
Iron	UT	0.6	0.1	2.1	26.0	7.8
Juab	UT	0.1	0.0	1.4	6.7	2.1
Kane	UT	0.1	0.0	2.4	6.1	2.1
Millard	UT	0.5	0.1	4.5	12.2	3.6
Morgan	UT	0.1	0.0	1.7	6.6	1.7
Piute	UT	0.0	0.0	1.1	1.4	0.5
Rich	UT	0.0	0.0	1.4	1.9	0.5
Salt Lake	UT	55.4	15.7	6.8	818.5	270.0
San Juan	UT	0.6	0.1	4.0	14.3	3.8
Sanpete	UT	0.9	0.2	4.3	19.9	5.7
Sevier	UT	0.4	0.1	2.3	17.5	5.5
Summit	UT	0.5	0.2	2.3	23.5	7.9
Tooele	UT	3.8	1.0	12.5	29.9	9.6
Uintah	UT	0.9	0.2	3.5	25.2	7.7
Utah	UT	11.4	2.4	3.8	302.4	79.9
Wasatch	UT	0.4	0.1	3.1	12.0	3.6
Washington	UT	1.6	0.4	2.1	73.3	23.1
Wayne	UT	0.0	0.0	1.2	2.4	0.7
Weber	UT	13.8	3.9	7.8	177.5	59.6
Big Horn	WY	0.7	0.2	6.1	11.0	4.2
Sublette	WY	0.1	0.0	1.4	5.7	2.2
Sweetwater	WY	4.0	1.2	9.9	40.8	14.4
Uinta	WY	1.0	0.3	4.8	20.6	6.6
Washakie	WY	0.9	0.3	10.5	8.7	3.5
TOTAL		**122.8**	**33.2**	**5.7%**	**2138.7**	**669.3**

SALT LAKE CITY

1/1/96 Hispanic Population (000)

MEN 18-20	3.6
MEN 21-24	4.8
MEN 25-34	11.9
MEN 35-49	10.4
MEN 50-54	2.1
MEN 55-64	2.6
MEN 65+	2.7
MEN 18+	**38.1**
WOMEN 18-20	3.3
WOMEN 21-24	4.4
WOMEN 25-34	10.9
WOMEN 35-49	8.7
WOMEN 50-54	1.6
WOMEN 55-64	2.9
WOMEN 65+	2.1
WOMEN 18+	**33.9**
TEENS 12-17	**15.2**
CHILDREN 0-11	**35.6**
CHILDREN 2-11	**30.8**
TOTAL PERSONS 2+	**118.0**
TOTAL PERSONS	**122.8**
HOUSEHOLDS	**33.2**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$169,260
Eating & Drinking	52,463
General Merchandise	69,718
Apparel & Accessories	33,695
Furniture/Appliance/ Home Furnishings	27,637
Automotive Dealers	92,459
Gasoline Service	45,299
Drug Stores	12,468
All Others	81,046
Total Retail Sales	**$584,045**

Newspapers

No Data Available

Radio

No Data Available

Television

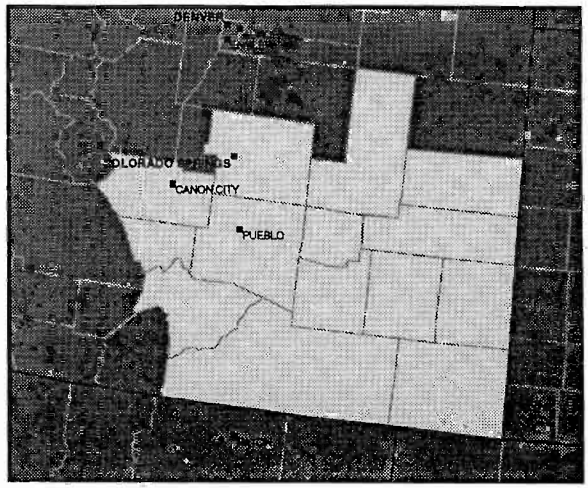
No Data Available

Cable/VCRs/Telephone

No Data Available

COLORADO SPRINGS

MARKET #36



The Colorado-Springs market area has a Hispanic population approaching one hundred twenty thousand. Hispanics represent nearly 17% of the total market area's population. The Hispanic population of this Rocky Mountain ADI is concentrated in El Paso (45,000), and Pueblo (51,000) Counties. Since 1980, Colorado Springs' Hispanic population has increased 32%.

The market's Buying Power is projected to be just under $1 billion in 1996, and Retail Sales are projected at $546 million.

POPULATION

	Total	Hispanic
Population	712,900	119,700
Rank	38	36
Household	267,100	38,200
Avg. Person/HH	2.67	3.13

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	58
Puerto Rico	6
Central America	3
South America	2
Other	31

MARKET BUYING POWER

$933,597,000

PER CAPITA BUYING POWER

$7,799

MEAN HOUSEHOLD INCOME

$30,550

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	534,800	90,900	16.9
1992	630,500	101,800	16.1
1994	671,000	109,100	16.3
1996	712,900	119,700	16.8

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Baca	CO	0.2	0.1	5.8	4.3	1.7
Bent	CO	1.5	0.5	29.4	5.2	1.9
Cheyenne	CO	0.1	0.0	4.1	2.3	0.9
Crowley	CO	1.1	0.2	25.5	4.4	1.1
Custer	CO	0.1	0.0	3.2	2.7	1.0
El Paso	CO	44.7	13.8	9.4	476.1	177.7
Fremont	CO	3.7	0.8	9.3	39.8	13.7
Huerfano	CO	2.6	1.0	41.2	6.3	2.7
Kiowa	CO	0.1	0.0	3.9	1.6	0.7
Las Animas	CO	6.8	2.5	46.9	14.4	5.8
Lincoln	CO	0.1	0.0	2.0	4.6	1.8
Otero	CO	7.9	2.5	38.1	20.7	7.8
Pueblo	CO	50.9	16.8	39.0	130.5	50.3
TOTAL		**119.7**	**38.2**	**16.8%**	**712.9**	**267.1**

COLORADO SPRINGS

1/1/96 Hispanic Population (000)

MEN 18-20	3.6	
MEN 21-24	4.7	
MEN 25-34	12.1	
MEN 35-49	8.8	
MEN 50-54	1.8	
MEN 55-64	3.3	
MEN 65+	2.7	
MEN 18+		**37.0**
WOMEN 18-20	3.1	
WOMEN 21-24	4.1	
WOMEN 25-34	9.9	
WOMEN 35-49	9.2	
WOMEN 50-54	1.9	
WOMEN 55-64	3.8	
WOMEN 65+	3.1	
WOMEN 18+		**35.1**
TEENS 12-17		**17.1**
CHILDREN 0-11		**30.5**
CHILDREN 2-11		**25.9**
TOTAL PERSONS 2+		**115.1**
TOTAL PERSONS		**119.7**
HOUSEHOLDS		**38.2**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$177,727
Eating & Drinking	46,798
General Merchandise	56,714
Apparel & Accessories	48,157
Furniture/Appliance/ Home Furnishings	21,133
Automotive Dealers	79,551
Gasoline Service	31,749
Drug Stores	11,548
All Others	73,146
Total Retail Sales	**$546,523**

Newspapers

No Data Available

Radio

No Data Available

Television

No Data Available

Cable/VCRs/Telephone

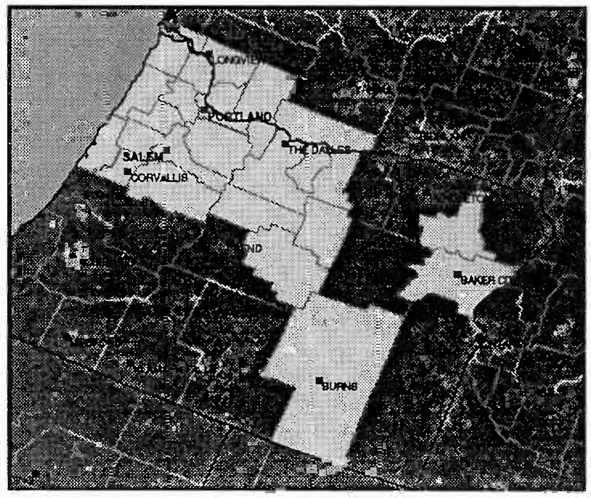
No Data Available

PORTLAND

MARKET #37

The Portland ADI is comprised of twenty-seven counties, of which twenty-two are in the state of Oregon and five are in the state of Washington. The area's 119,600 Hispanics represent nearly 5% of this market's total population. The majority (68%) of Portland's Hispanics are of Mexican origin.

The market's Hispanics have a Mean Household Income of $40,095 and a Per Capita Buying Power of $7,912.



POPULATION

	Total	Hispanic
Population	2,579,800	119,600
Rank	22	37
Household	988,400	29,500
Avg. Person/HH	2.61	4.05

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	68
Puerto Rico	4
Cuba	2
Central America	5
South America	5
Other	16

MARKET BUYING POWER
$946,236,000

PER CAPITA BUYING POWER
$7,912

MEAN HOUSEHOLD INCOME
$40,095

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	835,100	49,000	5.9
1992	2,252,100	91,700	3.6
1994	2,445,200	102,600	4.2
1996	2,579,800	119,600	4.6

PORTLAND

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Baker	OR	0.4	0.1	2.1	16.7	6.7
Benton	OR	2.2	0.6	2.8	76.7	28.7
Clackamas	OR	10.0	2.3	3.1	319.9	118.5
Clatsop	OR	0.8	0.2	2.3	35.9	14.3
Columbia	OR	0.9	0.2	2.1	42.0	15.5
Crook	OR	0.6	0.2	3.5	16.5	6.4
Gilliam	OR	0.0	0.0	1.6	2.0	0.8
Harney	OR	0.2	0.1	3.3	7.2	3.0
Hood River	OR	3.9	1.2	21.1	18.7	7.1
Jefferson	OR	2.2	0.5	13.1	16.4	5.8
Lincoln	OR	0.8	0.2	1.8	45.0	19.0
Linn	OR	2.8	0.7	2.8	100.4	37.9
Marion	OR	25.1	5.5	9.7	258.2	93.4
Multnomah	OR	23.5	6.9	3.8	623.3	256.9
Polk	OR	4.0	0.9	6.9	58.0	21.2
Sherman	OR	0.0	0.0	1.6	1.9	0.8
Tillamook	OR	0.5	0.1	2.1	24.0	9.9
Union	OR	0.5	0.2	1.9	25.4	9.7
Wasco	OR	1.4	0.4	6.3	23.0	9.2
Washington	OR	21.2	4.8	5.7	374.0	142.3
Wheeler	OR	0.0	0.0	1.0	1.7	0.6
Yamhill	OR	6.0	1.2	7.9	75.7	25.5
Clark	WA	8.8	2.3	3.0	296.5	109.3
Cowlitz	WA	2.2	0.5	2.4	89.4	34.3
Klickitat	WA	1.3	0.3	7.0	18.3	6.8
Skamania	WA	0.2	0.0	2.6	9.2	3.4
Wahkiakum	WA	0.1	0.0	2.3	3.8	1.4
TOTAL		**119.6**	**29.5**	**4.6%**	**2,579.8**	**988.4**

PORTLAND

1/1/96 Hispanic Population (000)

MEN 18-20	3.8
MEN 21-24	5.2
MEN 25-34	14.5
MEN 35-49	9.9
MEN 50-54	2.3
MEN 55-64	2.8
MEN 65+	1.5
MEN 18+	**40.0**
WOMEN 18-20	2.9
WOMEN 21-24	3.9
WOMEN 25-34	12.5
WOMEN 35-49	8.2
WOMEN 50-54	1.4
WOMEN 55-64	2.9
WOMEN 65+	1.5
WOMEN 18+	**33.3**
TEENS 12-17	**13.2**
CHILDREN 0-11	**33.1**
CHILDREN 2-11	**27.9**
TOTAL PERSONS 2+	**114.4**
TOTAL PERSONS	**119.6**
HOUSEHOLDS	**29.5**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$145,527
Eating & Drinking	70,861
General Merchandise	67,579
Apparel & Accessories	33,810
Furniture/Appliance/ Home Furnishings	26,357
Automotive Dealers	65,368
Gasoline Service	35,135
Drug Stores	17,820
All Others	83,114
Total Retail Sales	**$545,571**

Radio

No Data Available

Newspapers

No Data Available

Television

No Data Available

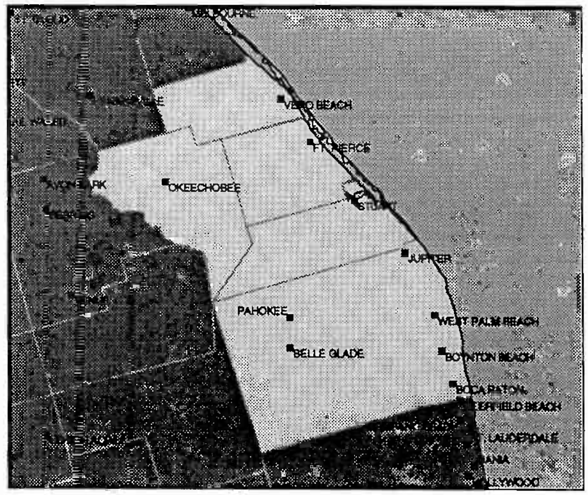
Cable/VCRs/Telephone

No Data Available

WEST PALM BEACH

MARKET #38

The West Palm Beach ADI is comprised of five counties. Most West Palm Beach area Hispanics (80%) live in Palm Beach County. With an estimated market Buying Power of $1.1 Billion, this fast growing Hispanic market has the fifth highest Per Capita Buying Power ($9,161). The Palm Beach area has a diverse Hispanic population in terms of country of origin. While 28% are of Cuban origin, 20% are Puerto Rican and the remainder are from the various other Latin American countries.



POPULATION

	Total	Hispanic
Population	1,406,200	115,000
Rank	31	38
Household	585,200	33,500
Avg. Person/HH	2.40	3.43

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	17
Puerto Rico	20
Cuba	28
Dominican Republic	2
Guatemala	2
Nicaragua	2
Colombia	6
Other	23

MARKET BUYING POWER
$1,053,529,000

PER CAPITA BUYING POWER
$9,161

MEAN HOUSEHOLD INCOME
$39,311

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	713,800	34,700	4.9
1992	1,320,500	93,000	7.0
1994	1,376,200	102,400	7.4
1996	1,406,200	115,000	8.2

WEST PALM BEACH

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Indian River	FL	3.4	1.0	3.5	99.0	41.6
Martin	FL	6.2	1.5	5.5	112.1	47.4
Okeechobee	FL	5.0	1.1	15.4	32.2	10.6
Palm Beach	FL	91.6	27.3	9.3	987.9	418.4
St. Lucie	FL	8.8	2.5	5.0	175.0	67.2
TOTAL		**115.0**	**33.5**	**8.2%**	**1406.2**	**585.2**

1/1/96 Hispanic Population (000)

MEN 18-20 .... 3.7
MEN 21-24 .... 4.9
MEN 25-34 .... 10.5
MEN 35-49 .... 13.3
MEN 50-54 .... 2.9
MEN 55-64 .... 4.2
MEN 65+ 3.9
MEN 18+ 43.4

WOMEN 18-20 .... 2.5
WOMEN 21-24 .... 3.4
WOMEN 25-34 .... 8.3
WOMEN 35-49 .... 11.5
WOMEN 50-54 .... 2.5
WOMEN 55-64 .... 4.9
WOMEN 65+ 4.7
WOMEN 18+ 37.8

TEENS 12-17 .... 11.6
CHILDREN 0-11 .... 22.2
CHILDREN 2-11 .... 18.2

TOTAL PERSONS 2+ 111.0
TOTAL PERSONS 115.0
HOUSEHOLDS 33.5

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food $160,081
Eating & Drinking 73,778
General Merchandise 78,295
Apparel & Accessories 39,285
Furniture/Appliance/
Home Furnishings 37,951
Automotive Dealers 118,710
Gasoline Service 41,099
Drug Stores 20,600
All Others 86,919

Total Retail Sales $656,718

Radio

No Data Available

Newspapers

No Data Available

Cable/VCRs/Telephone

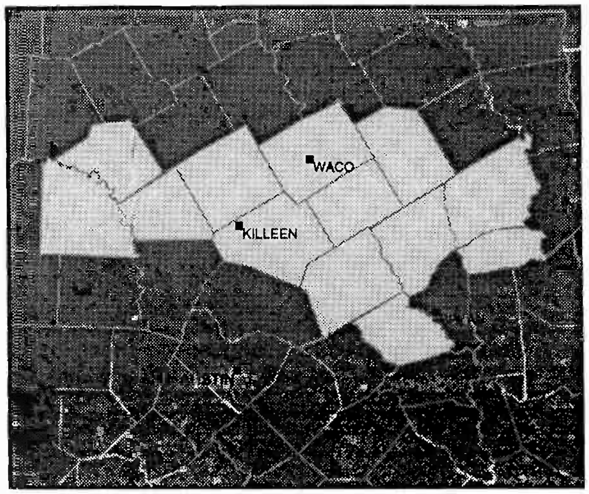
No Data Available

Television

No Data Available

WACO-TEMPLE

MARKET #39



The Waco market area has a Hispanic population of 111,500. Hispanics represent 14% of the total market area's population. This makes Waco the thirty-ninth largest U.S. Hispanic market. The market has a 1996 estimated Buying Power of just under $1 billion and spending in Retail stores is expected to amount to nearly half a billion. Since 1980, Waco's Hispanic population increased 106%, going from fifty-four thousand to nearly one hundred twelve thousand. The vast majority (92%) of the area's Hispanics are of Mexican origin.

POPULATION

	Total	Hispanic
Population	789,600	111,500
Rank	37	39
Household	278,400	30,200
Avg. Person/HH	2.84	3.69

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	92
Puerto Rico	2
Other	6

MARKET BUYING POWER
$910,290,000

PER CAPITA BUYING POWER
$8,164

MEAN HOUSEHOLD INCOME
$37,678

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	568,900	54,200	9.5
1992	747,600	89,800	12.0
1994	714,200	94,000	13.2
1996	789,600	111,500	14.1

WACO-TEMPLE

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Bell	TX	33.5	9.7	14.4	232.2	81.9
Brazos	TX	21.2	5.8	15.9	133.6	47.8
Burleson	TX	2.0	0.6	13.2	15.0	5.8
Coryell	TX	8.2	1.6	10.7	76.7	20.4
Falls	TX	2.4	0.6	13.2	18.0	6.4
Lampasas	TX	2.4	0.7	14.6	16.3	6.1
Limestone	TX	1.8	0.4	8.8	20.9	7.5
Leon	TX	0.7	0.2	5.2	14.1	5.5
Madison	TX	1.5	0.2	12.6	11.5	3.0
McLennan	TX	29.5	8.2	14.7	201.0	74.7
Milam	TX	4.2	1.2	17.7	23.9	9.3
Mills	TX	0.6	0.2	12.7	4.8	2.0
Robertson	TX	2.2	0.6	14.1	15.6	5.7
San Saba	TX	1.2	0.3	20.7	6.0	2.3
TOTAL		**111.5**	**30.2**	**14.1%**	**789.6**	**278.4**

WACO-TEMPLE

1/1/96 Hispanic Population (000)

MEN 18-20	5.8
MEN 21-24	7.7
MEN 25-34	11.2
MEN 35-49	8.0
MEN 50-54	1.6
MEN 55-64	2.6
MEN 65+	2.1
MEN 18+	**39.0**
WOMEN 18-20	3.4
WOMEN 21-24	4.5
WOMEN 25-34	9.0
WOMEN 35-49	8.5
WOMEN 50-54	1.3
WOMEN 55-64	2.3
WOMEN 65+	2.6
WOMEN 18+	**31.6**
TEENS 12-17	**11.3**
CHILDREN 0-11	**29.6**
CHILDREN 2-11	**24.1**
TOTAL PERSONS 2+	**106.0**
TOTAL PERSONS	**111.5**
HOUSEHOLDS	**30.2**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$127,811
Eating & Drinking	40,016
General Merchandise	66,042
Apparel & Accessories	34,220
Furniture/Appliance/ Home Furnishings	13,610
Automotive Dealers	77,171
Gasoline Service	35,861
Drug Stores	9,513
All Others	53,971
Total Retail Sales	**$458,215**

Radio

No Data Available

Newspapers

No Data Available

Television

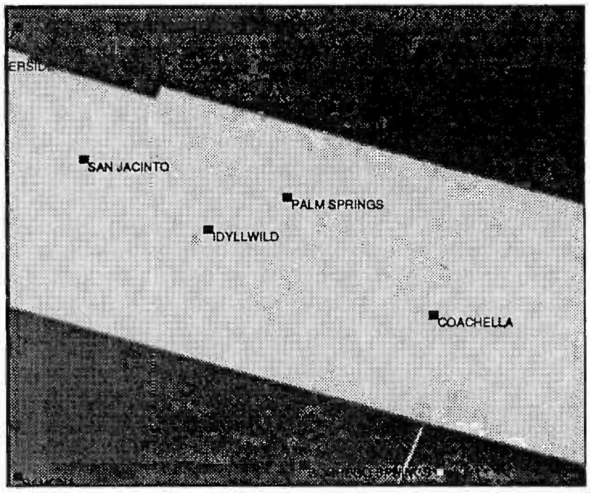
No Data Available

Cable/VCRs/Telephone

No Data Available

PALM SPRINGS

MARKET #40



The Palm Springs market has a Hispanic population of roughly 109,000. Hispanics represent nearly a third (30%) of the total market area's population. This makes Palm Springs the fortieth largest U.S. Hispanic market. The Palm Springs ADI is defined as the Central portion of Riverside County, California. Eastern Riverside is part of the Phoenix ADI and Western Riverside is part of the Los Angeles ADI.

The Palm Springs market has a 1996 estimated Buying Power of $845 million and spending in Retail stores is expected to amount to $490 million. Nine out of every ten Palm Springs' Hispanics are of Mexican origin. Since 1980, Palm Springs' Hispanic population has exploded, going from 12,000 to 109,000.

POPULATION

	Total	Hispanic
Population	365,900	109,000
Rank	48	40
Household	130,400	26,600
Avg. Person/HH	2.81	4.10

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	86
Central America	6
South America	2
Other	6

MARKET BUYING POWER
$845,196,000

PER CAPITA BUYING POWER
$7,754

MEAN HOUSEHOLD INCOME
$39,718

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	134,400	12,400	9.2
1992	318,500	86,000	27.0
1994	348,200	97,500	28.0
1996	365,900	109,000	29.8

PALM SPRINGS

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Riverside-Central	CA	109.0	26.6	29.8	365.9	130.4
TOTAL		**109.0**	**26.6**	**29.8%**	**365.9**	**130.4**

1/1/96 Hispanic Population (000)

MEN 18-20	2.9
MEN 21-24	3.8
MEN 25-34	10.0
MEN 35-49	9.3
MEN 50-54	1.8
MEN 55-64	3.0
MEN 65+	2.3
MEN 18+	**33.1**
WOMEN 18-20	2.8
WOMEN 21-24	3.7
WOMEN 25-34	9.5
WOMEN 35-49	8.8
WOMEN 50-54	1.8
WOMEN 55-64	3.2
WOMEN 65+	2.5
WOMEN 18+	**32.3**
TEENS 12-17	**12.7**
CHILDREN 0-11	**30.9**
CHILDREN 2-11	**25.3**
TOTAL PERSONS 2+	**103.4**
TOTAL PERSONS	**109.0**
HOUSEHOLDS	**26.6**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$120,813
Eating & Drinking	52,289
General Merchandise	53,063
Apparel & Accessories	33,737
Furniture/Appliance/ Home Furnishings	27,526
Automotive Dealers	109,770
Gasoline Service	26,824
Drug Stores	13,579
All Others	52,596
Total Retail Sales	**$490,197**

Radio

Station	Dial Position	Spanish Format
AM		
KCLB	970	Adult Contemporary
KUNA	1400	News/Talk

Television

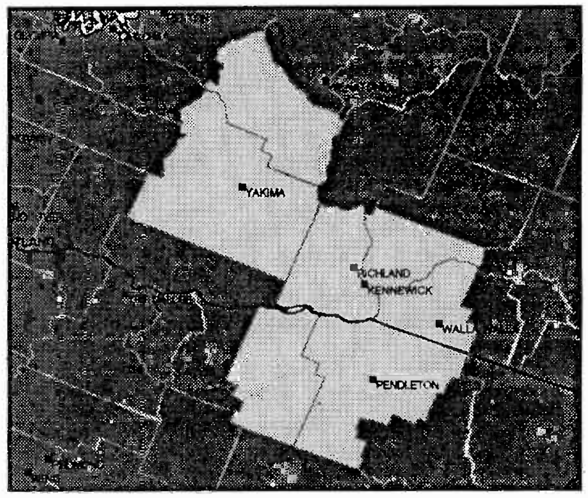
Station	Channel	Affiliation
KMB	6	Independent
KVER	4	Univision

Newspapers

No Data Available

YAKIMA

MARKET #41



The Yakima ADI is comprised of seven counties, of which five are in the state of Washington and two are in the state of Oregon. Most Yakima area Hispanics (58%) live in Yakima County, Washington. Hispanics now represent nearly 20% of the market's total population and are 29% of Yakima County. This mostly Mexican (91%) market has an estimated market Buying Power of $805 million.

POPULATION

	Total	Hispanic
Population	549,100	107,400
Rank	44	41
Household	196,700	24,500
Avg. Person/HH	2.79	4.38

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	91
Other	9

MARKET BUYING POWER
$805,389,000

PER CAPITA BUYING POWER
$7,499

MEAN HOUSEHOLD INCOME
$41,091

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	421,200	43,400	10.3
1992	484,100	82,500	17.1
1994	511,300	91,000	17.8
1996	549,100	107,400	19.6

YAKIMA

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Morrow	OR	1.2	0.3	13.9	8.9	3.4
Umatilla	OR	7.2	1.7	11.3	64.3	23.8
Benton	WA	12.9	3.2	9.5	136.0	51.3
Franklin	WA	16.7	3.8	37.9	44.1	13.9
Kittitas East	WA	0.9	0.3	3.2	27.8	10.8
Walla Walla	WA	6.5	1.4	12.0	53.9	19.5
Yakima	WA	62.0	13.9	29.0	214.1	74.0
TOTAL		**107.4**	**24.5**	**19.6%**	**549.1**	**196.7**

1/1/96 Hispanic Population (000)

MEN 18-20 .... 2.9
MEN 21-24 .... 3.8
MEN 25-34 .... 9.0
MEN 35-49 .... 6.9
MEN 50-54 .... 1.5
MEN 55-64 .... 1.8
MEN 65+ 1.8
MEN 18+ 27.7

WOMEN 18-20 .... 3.8
WOMEN 21-24 .... 5.1
WOMEN 25-34 .... 11.3
WOMEN 35-49 .... 9.2
WOMEN 50-54 .... 1.8
WOMEN 55-64 .... 2.0
WOMEN 65+ 1.5
WOMEN 18+ 34.7

TEENS 12-17 .... 13.2
CHILDREN 0-11 .... 31.8
CHILDREN 2-11 .... 27.5

TOTAL PERSONS 2+ 103.1
TOTAL PERSONS 107.4
HOUSEHOLDS 24.5

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food $107,691
Eating & Drinking 49,577
General Merchandise 47,611
Apparel & Accessories 30,413
Furniture/Appliance/
Home Furnishings 21,504
Automotive Dealers 68,865
Gasoline Service 20,483
Drug Stores 13,365
All Others 49,477

Total Retail Sales $408,986

Radio

Stations	Dial Position	Spanish Format
AM		
KYXE	1020	Contemporary
KZTA	930	Spanish Music
FM		
KDNA	91.9	Contemporary
KZTA	99.3	Spanish Music

Television

No Data Available

Newspapers

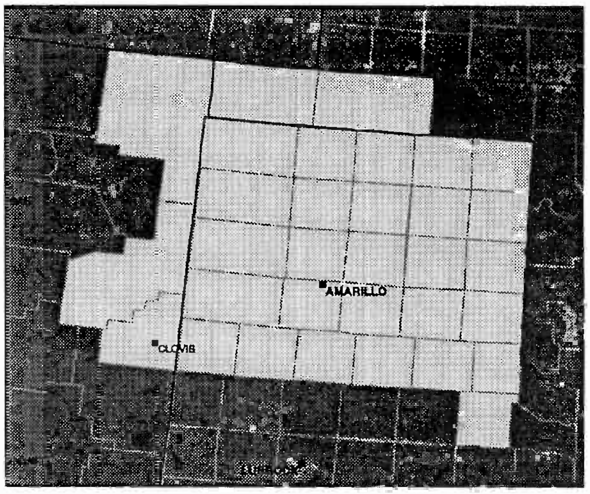
No Data Available

AMARILLO

MARKET #42

The Amarillo Market, with slightly over one-hundred thousand Hispanics, is the forty-second largest Hispanic market area in the country. Hispanic residents are now 21% of this ADI. Amarillo is a highly Mexican market (88%) with a significant total Buying Power of roughly $730 million. The ADI is comprised of 32 counties, 3 in New Mexico, 2 in Oklahoma and the rest in Texas.

The city of Amarillo (which means yellow in Spanish) was named for the color of the sub-soil in the area.



POPULATION

	Total	Hispanic
Population	474,900	101,800
Rank	45	42
Household	177,500	27,900
Avg. Person/HH	2.68	3.65

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	88
Other	12

MARKET BUYING POWER
$730,243,000

PER CAPITA BUYING POWER
$7,173

MEAN HOUSEHOLD INCOME
$32,717

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	451,000	37,700	8.4
1992	450,000	85,700	19.0
1994	453,800	89,300	19.7
1996	474,900	101,800	21.4

AMARILLO

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Curry	NM	13.3	3.8	26.7	49.9	17.7
Quay	NM	4.3	1.5	40.5	10.6	4.2
Union	NM	1.6	0.6	36.7	4.3	1.8
Cimarron	OK	0.5	0.1	14.9	3.1	1.3
Texas	OK	1.9	0.5	11.5	16.4	6.3
Armstrong	TX	0.1	0.0	2.9	2.2	0.9
Briscoe	TX	0.4	0.1	20.7	1.8	0.8
Carson	TX	0.4	0.1	6.3	6.7	2.6
Castro	TX	4.4	1.1	51.9	8.5	2.8
Childress	TX	1.1	0.2	17.0	6.4	2.2
Collingsworth	TX	0.6	0.2	18.2	3.2	1.3
Cottle	TX	0.4	0.1	18.0	2.1	1.0
Dallam	TX	1.5	0.5	24.1	6.3	2.5
Deaf Smith	TX	10.7	2.8	55.0	19.4	6.2
Donley	TX	0.2	0.0	4.0	3.8	1.7
Gray	TX	2.3	0.6	9.8	23.3	9.4
Hall	TX	0.8	0.2	21.1	3.7	1.6
Hansford	TX	1.3	0.4	24.5	5.3	2.1
Hartley	TX	0.2	0.1	6.3	3.7	1.3
Hemphill	TX	0.4	0.1	12.0	3.6	1.4
Hutchinson	TX	3.0	0.8	12.3	24.4	9.2
Lipscomb	TX	0.4	0.1	14.7	2.9	1.2
Moore	TX	7.4	1.9	38.6	19.2	6.5
Ochiltree	TX	1.9	0.5	22.6	8.6	3.1
Oldham	TX	0.2	0.0	10.8	2.2	0.7
Parmer	TX	5.0	1.2	47.6	10.4	3.4
Potter	TX	25.6	6.9	23.8	107.5	39.9
Randall	TX	8.0	2.4	8.2	97.8	37.9
Roberts	TX	0.0	0.0	3.9	1.0	0.4
Sherman	TX	0.7	0.2	23.0	3.0	1.0
Swisher	TX	2.8	0.7	33.7	8.3	3.0
Wheeler	TX	0.4	0.1	7.7	5.3	2.1
TOTAL		**101.8**	**27.9**	**21.4%**	**474.9**	**177.5**

AMARILLO

1/1/96 Hispanic Population (000)

MEN 18-20	2.6	
MEN 21-24	3.5	
MEN 25-34	9.4	
MEN 35-49	8.3	
MEN 50-54	1.0	
MEN 55-64	2.3	
MEN 65+	1.5	
MEN 18+		**28.6**
WOMEN 18-20	2.7	
WOMEN 21-24	3.5	
WOMEN 25-34	8.6	
WOMEN 35-49	7.7	
WOMEN 50-54	1.5	
WOMEN 55-64	2.0	
WOMEN 65+	1.8	
WOMEN 18+		**27.8**
TEENS 12-17		**13.6**
CHILDREN 0-11		**31.8**
CHILDREN 2-11		**26.8**
TOTAL PERSONS 2+		**96.8**
TOTAL PERSONS		**101.8**
HOUSEHOLDS		**27.9**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$125,270
Eating & Drinking	41,096
General Merchandise	63,514
Apparel & Accessories	27,816
Furniture/Appliance/ Home Furnishings	13,578
Automotive Dealers	88,986
Gasoline Service	44,018
Drug Stores	11,780
All Others	52,704
Total Retail Sales	**$468,762**

Newspapers

No Data Available

Radio

Station	Dial Position	Spanish Format
AM		
KZIP	1440	Spanish Music
FM		

Television

No Data Available

Cable/VCRs/Telephone

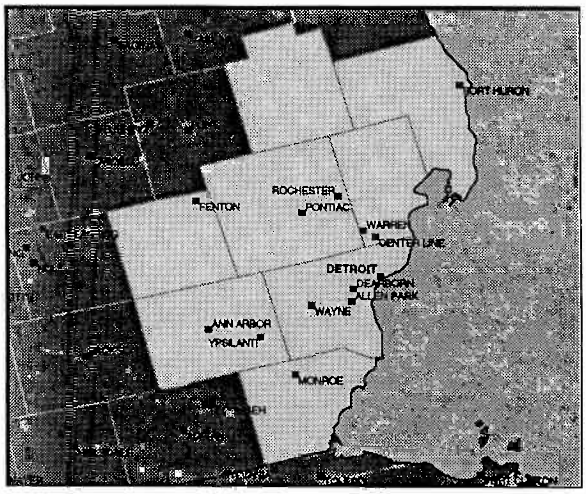
No Data Available

DETROIT

MARKET #43

The Detroit market area has a Hispanic population of more than one hundred thousand. Hispanics represent 2.1% of this large market's total population. Since 1980, Detroit's Hispanic population has increased by 31%. The majority (63%) of the area's Hispanics are of Mexican origin, but 13% are from Puerto Rico.

The market has a 1996 estimated Buying Power of $823 million and a Mean Household Income of $34,321.



POPULATION

	Total	Hispanic
Population	4,734,100	101,300
Rank	9	43
Household	1,754,100	30,000
Avg. Person/HH	2.70	3.38

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	63
Puerto Rico	13
Cuba	3
Central America	2
South America	4
Other	15

MARKET BUYING POWER

$823,711,000

PER CAPITA BUYING POWER

$8,131

MEAN HOUSEHOLD INCOME

$34,321

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	4,763,200	77,500	1.6
1992	4,591,600	94,000	2.0
1994	4,733,900	96,200	2.0
1996	4,734,100	101,300	2.1

DETROIT

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Lapeer	MI	1.8	0.4	2.2	83.4	27.4
Livingston	MI	1.2	0.3	0.9	134.5	45.1
Macomb	MI	9.0	2.8	1.2	729.4	271.1
Monroe	MI	2.4	0.6	1.7	139.6	48.8
Oakland	MI	23.9	7.0	2.1	1,160.6	442.5
St. Clair	MI	3.0	0.8	2.0	154.1	56.0
Washtenaw	MI	6.8	2.0	2.3	292.6	108.5
Wayne	MI	53.2	16.1	2.6	2,039.9	754.7
TOTAL		**101.3**	**30.0**	**2.1%**	**4,734.1**	**1,754.1**

1/1/96 Hispanic Population (000)

MEN 18-20	3.3
MEN 21-24	4.3
MEN 25-34	10.8
MEN 35-49	8.4
MEN 50-54	1.3
MEN 55-64	2.6
MEN 65+	1.9
MEN 18+	**32.6**
WOMEN 18-20	3.0
WOMEN 21-24	4.0
WOMEN 25-34	9.9
WOMEN 35-49	8.4
WOMEN 50-54	1.3
WOMEN 55-64	2.4
WOMEN 65+	1.9
WOMEN 18+	**30.9**
TEENS 12-17	**12.3**
CHILDREN 0-11	**25.5**
CHILDREN 2-11	**21.6**
TOTAL PERSONS 2+	**97.4**
TOTAL PERSONS	**101.3**
HOUSEHOLDS	**30.0**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$135,441
Eating & Drinking	60,706
General Merchandise	60,952
Apparel & Accessories	37,582
Furniture/Appliance/ Home Furnishings	27,107
Automotive Dealers	111,950
Gasoline Service	30,537
Drug Stores	17,091
All Others	67,016
Total Retail Sales	**$548,382**

Radio

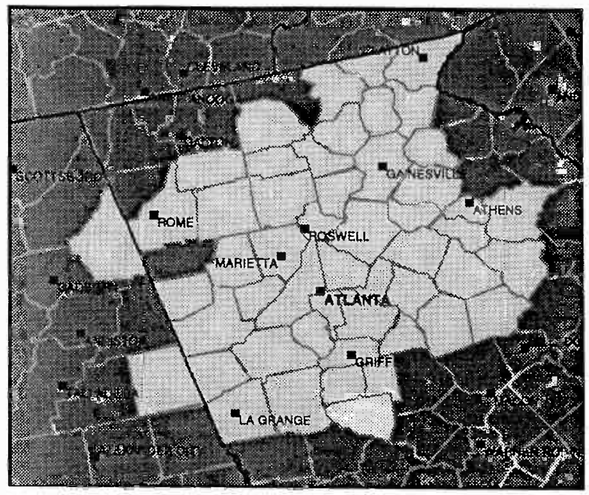
Station	Dial Position	Spanish Format
AM		
WCAR	1090	Adult Contemporary
WNZK	690	Adult Contemporary

Newspapers/Television

No Data Available

ATLANTA

MARKET #44



The Atlanta ADI is comprised of fifty-one counties. The market's 92,700 Hispanics represent roughly 2% of the total area's population. The site of the 1996 Summer Olympics has a diverse mix of Hispanic countries of origin. Thirty-nine percent of the market's Hispanics are of Mexican origin, 14% are from Puerto Rico and 12% are from Cuba.

The Atlanta ADI has an estimated market Buying Power of $818 million for 1996 and total Retail Sales for 1996 are expected to be $500 million.

POPULATION

	Total	Hispanic
Population	4,216,600	92,700
Rank	11	44
Household	1,565,400	27,100
Avg. Person/HH	2.69	3.42

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	39
Puerto Rico	14
Cuba	12
Panama	2
San Salvador	3
Colombia	6
Peru	2
Other	22

MARKET BUYING POWER

$818,722,000

PER CAPITA BUYING POWER

$8,832

MEAN HOUSEHOLD INCOME

$37,764

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	2,806,800	29,300	1.0
1992	3,920,600	76,400	1.9
1994	3,994,900	81,000	2.0
1996	4,216,600	92,700	2.2

ATLANTA

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Cherokee	AL	0.0	0.0	0.2	20.9	8.0
Randolph	AL	0.0	0.0	0.1	20.3	7.9
Banks	GA	0.1	0.0	0.6	11.4	4.2
Barrow	GA	0.4	0.1	1.0	36.1	12.8
Bartow	GA	0.7	0.2	1.1	63.7	22.8
Butts	GA	0.1	0.0	0.5	15.4	4.8
Carroll	GA	0.7	0.2	0.9	78.6	27.9
Chattooga	GA	0.0	0.0	0.2	23.0	8.4
Clarke	GA	1.8	0.6	1.9	92.1	35.3
Clayton	GA	4.7	1.4	2.4	200.1	71.7
Cobb	GA	14.0	4.2	2.6	531.0	203.4
Coweta	GA	0.5	0.2	0.7	72.8	25.5
Dawson	GA	0.1	0.0	0.6	12.1	4.2
De Kalb	GA	18.7	5.6	3.2	589.3	225.2
Douglas	GA	1.0	0.3	1.3	83.5	28.4
Fayette	GA	1.6	0.4	2.0	80.3	27.1
Floyd	GA	1.0	0.3	1.2	83.8	31.5
Forsyth	GA	1.2	0.3	1.9	61.8	22.2
Fulton	GA	17.3	5.4	2.4	713.0	281.5
Gilmer	GA	0.1	0.0	0.8	15.8	5.9
Gordon	GA	0.3	0.1	0.7	38.7	14.1
Greene	GA	0.1	0.0	0.7	12.9	4.5
Gwinnett	GA	14.5	4.3	3.1	462.4	166.7
Habersham	GA	0.5	0.1	1.7	30.1	11.1
Hall	GA	7.3	1.5	6.7	108.9	39.6
Haralson	GA	0.1	0.0	0.4	23.5	8.8
Heard	GA	0.1	0.0	0.8	9.5	3.6
Henry	GA	0.7	0.2	0.8	85.9	29.3
Jackson	GA	0.2	0.1	0.5	34.5	12.3
Jasper	GA	0.0	0.0	0.5	9.1	3.2
Lamar	GA	0.0	0.0	0.0	13.9	5.1
Lumpkin	GA	0.3	0.1	1.9	17.0	5.9
Meriwether	GA	0.1	0.0	0.3	23.2	8.0
Morgan	GA	0.1	0.0	1.0	14.1	4.8
Newton	GA	0.6	0.1	1.1	51.1	17.7
Oconee	GA	0.3	0.1	1.2	21.3	7.3
Oglethorpe	GA	0.0	0.0	0.4	10.9	4.0
Paulding	GA	0.4	0.1	0.7	60.8	20.8
Pickens	GA	0.0	0.0	0.2	17.3	6.6
Pike	GA	0.0	0.0	0.1	11.4	4.0
Polk	GA	0.6	0.2	1.7	34.9	13.1
Putnam	GA	0.1	0.0	0.8	16.1	6.0
Rabun	GA	0.1	0.0	0.7	12.5	5.0
Rockdale	GA	0.9	0.2	1.3	64.3	21.8
Spalding	GA	0.3	0.1	0.5	57.5	20.4
Towns	GA	0.0	0.0	0.2	7.5	3.3
Troup	GA	0.2	0.1	0.4	58.3	21.5
Union	GA	0.1	0.0	0.4	14.2	5.6
Upson	GA	0.1	0.0	0.3	27.1	10.3
Walton	GA	0.4	0.1	0.9	47.5	16.5
White	GA	0.1	0.0	0.9	15.2	5.8
TOTAL		**92.7**	**27.1**	**2.2%**	**4,216.6**	**1,565.4**

ATLANTA

1/1/96 Hispanic Population (000)

MEN 18-20	2.4
MEN 21-24	3.1
MEN 25-34	10.1
MEN 35-49	9.1
MEN 50-54	0.9
MEN 55-64	2.2
MEN 65+	3.6
MEN 18+	**31.4**
WOMEN 18-20	1.8
WOMEN 21-24	2.4
WOMEN 25-34	10.0
WOMEN 35-49	9.8
WOMEN 50-54	2.1
WOMEN 55-64	3.7
WOMEN 65+	2.2
WOMEN 18+	**32.0**
TEENS 12-17	**8.2**
CHILDREN 0-11	**21.1**
CHILDREN 2-11	**17.1**
TOTAL PERSONS 2+	**88.7**
TOTAL PERSONS	**92.7**
HOUSEHOLDS	**27.1**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$125,926
Eating & Drinking	51,365
General Merchandise	51,703
Apparel & Accessories	31,379
Furniture/Appliance/ Home Furnishings	25,613
Automotive Dealers	105,519
Gasoline Service	28,308
Drug Stores	15,670
All Others	64,565
Total Retail Sales	**$500,048**

Newspapers

No Data Available

Radio

No Data Available

Television

No Data Available

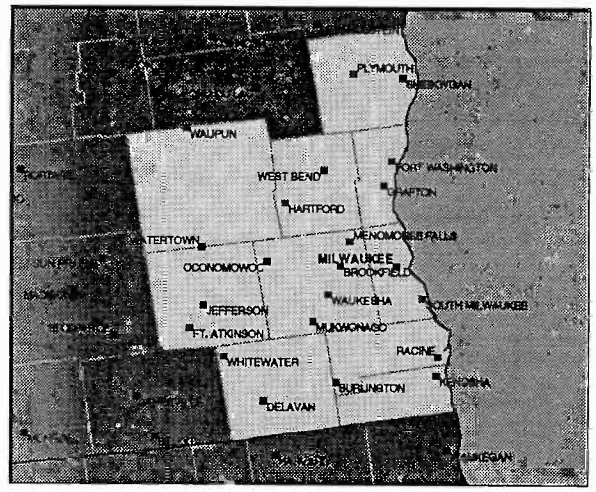
Cable/VCRs/Telephone

No Data Available

MILWAUKEE

MARKET #45

The forty-fifth largest U.S. Hispanic market is Milwaukee with 84,200 Hispanics representing 4.0% of the total ADI population. Nearly fifty-one thousand (60%) of Milwaukee's Hispanics live in Milwaukee County. Fifty-nine percent of the area's Hispanics are of Mexican origin but large numbers of Hispanics from Puerto Rico (31%) have also settled in this Wisconsin market.



POPULATION

	Total	Hispanic
Population	2,127,100	84,200
Rank	24	45
Household	790,800	22,200
Avg. Person/HH	2.69	3.79

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	59
Puerto Rico	31
Central America	2
South America	2
Other	6

MARKET BUYING POWER
$629,318,000

PER CAPITA BUYING POWER
$7,474

MEAN HOUSEHOLD INCOME
$35,435

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	1,908,200	39,700	2.1
1992	2,076,000	75,800	3.7
1994	2,114,500	78,800	3.7
1996	2,127,100	84,200	4.0

MILWAUKEE

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Total Pop %	Pct of Total Pop (000)	Total HHs (000)
Dodge	WI	1.1	0.2	1.4	78.0	27.5
Jefferson	WI	1.5	0.3	2.0	75.3	26.8
Kenosha	WI	7.3	1.8	5.2	140.4	51.4
Milwaukee	WI	50.5	13.7	5.5	925.2	360.6
Ozaukee	WI	0.6	0.1	0.7	79.8	28.4
Racine	WI	10.7	2.8	5.8	183.7	66.4
Sheboygan	WI	2.1	0.5	1.9	108.4	40.4
Walworth	WI	2.6	0.7	3.2	83.2	30.7
Washington	WI	0.9	0.2	0.8	111.3	38.6
Waukesha	WI	7.0	1.9	2.0	341.8	120.0
TOTAL		**84.2**	**22.2**	**4.0%**	**2,127.1**	**790.8**

1/1/96 Hispanic Population (000)

MEN 18-20 .... 2.3
MEN 21-24 .... 3.1
MEN 25-34 .... 8.6
MEN 35-49 .... 6.4
MEN 50-54 .... 2.0
MEN 55-64 .... 2.0
MEN 65+ 1.2
MEN 18+ 25.6

WOMEN 18-20 .... 2.4
WOMEN 21-24 .... 3.2
WOMEN 25-34 .... 6.7
WOMEN 35-49 .... 6.5
WOMEN 50-54 .... 0.9
WOMEN 55-64 .... 1.7
WOMEN 65+ 1.6
WOMEN 18+ 23.0

TEENS 12-17 .... 9.4
CHILDREN 0-11 .... 26.2
CHILDREN 2-11 .... 22.0

TOTAL PERSONS 2+ 80.0
TOTAL PERSONS 84.2
HOUSEHOLDS 22.2

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food $104,407
Eating & Drinking 26,839
General Merchandise 32,043
Apparel & Accessories 28,194
Furniture/Appliance/
Home Furnishings 12,207
Automotive Dealers 40,844
Gasoline Service 19,489
Drug Stores 10,723
All Others 33,191

Total Retail Sales $307,937

Television

Station	Channel	Affiliation
W46AR	46	Univision

Radio

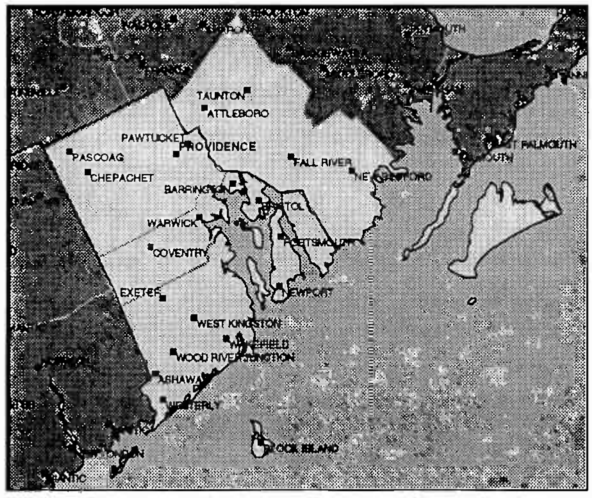
No Data Available

Newspapers

No Data Available

PROVIDENCE-NEW BEDFORD

MARKET #46



The Providence ADI is made up of five Rhode Island counties and two Massachusetts counties. With just roughly seventy-two thousand Hispanics, Providence is nearly 5% Hispanic. Providence County holds 70% of the market's Hispanics, and is 8.7% Hispanic. There are about twenty-one thousand Hispanic households in this ADI and they have a total estimated Buying Power of $614 million.

POPULATION

	Total	Hispanic
Population	1,517,700	72,300
Rank	30	46
Household	567,700	21,100
Avg. Person/HH	2.67	3.43

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	5
Puerto Rico	28
Cuba	2
Dominican Republic	22
Guatemala	10
Colombia	12
Other	21

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	1,658,800	31,300	1.9
1992	1,535,200	64,700	2.6
1994	1,536,600	66,400	4.3
1996	1,517,700	72,300	4.8

MARKET BUYING POWER
$614,097,000

PER CAPITA BUYING POWER
$8,494

MEAN HOUSEHOLD INCOME
$36,380

PROVIDENCE-NEW BEDFORD

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Bristol	MA	15.6	4.8	3.0	513.3	190.0
Dukes	MA	0.2	0.0	1.2	12.9	5.4
Bristol	RI	0.7	0.2	1.4	48.9	17.8
Kent	RI	2.1	0.6	1.3	162.5	62.9
Newport	RI	1.9	0.5	2.2	83.4	31.3
Providence	RI	50.7	14.5	8.7	579.2	218.3
Washington	RI	1.3	0.3	1.1	117.5	42.0
TOTAL		**72.3**	**21.1**	**4.8%**	**1,517.7**	**567.7**

1/1/96 Hispanic Population (000)

MEN 18-20 .... 1.8
MEN 21-24 .... 2.4
MEN 25-34 .... 6.4
MEN 35-49 .... 6.6
MEN 50-54 .... 1.1
MEN 55-64 .... 2.6
MEN 65+ 1.9
MEN 18+ 22.8

WOMEN 18-20 .... 1.9
WOMEN 21-24 .... 2.5
WOMEN 25-34 .... 6.2
WOMEN 35-49 .... 7.0
WOMEN 50-54 .... 1.5
WOMEN 55-64 .... 2.6
WOMEN 65+ 3.0
WOMEN 18+ 24.7

TEENS 12-17 .... 7.3
CHILDREN 0-11 .... 17.5
CHILDREN 2-11 .... 14.7

TOTAL PERSONS 2+ 69.5
TOTAL PERSONS 72.3
HOUSEHOLDS 21.1

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food $111,991
Eating & Drinking 51,698
General Merchandise 45,078
Apparel & Accessories 26,161
Furniture/Appliance/
Home Furnishings 13,584
Automotive Dealers 68,209
Gasoline Service 26,120
Drug Stores 12,454
All Others 52,317

Total Retail Sales $407,612

Radio

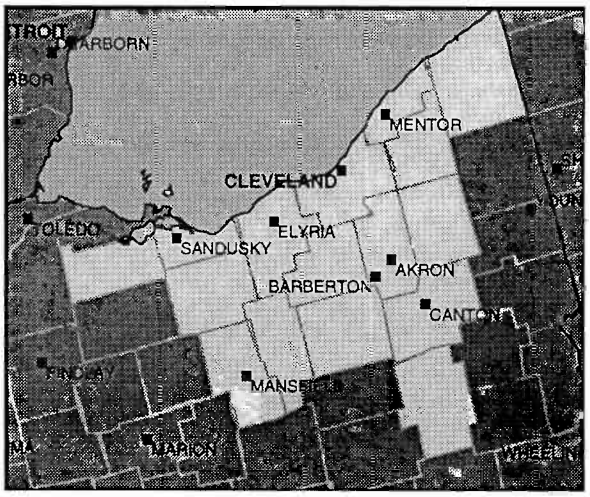
Station	Dial Position	Spanish Format
AM		
WRCP	1290	Portuguese/Spanish
WRIB	1220	Religious

Television/Newspapers

No Data Available

CLEVELAND

MARKET #47



The Cleveland Market, with 70,100 Hispanics, is the forty-seventh largest Hispanic market area in the country. Hispanic residents are nearly 2% of this Midwestern market. Cuyahoga and Lorain Counties represent 76% of the ADI's Hispanic population. Cleveland is a highly Puerto Rican market (65%) with a significant total Buying Power of roughly $567 million. Retail sales for 1996 are expected to reach close to $358 million. The Cleveland Hispanic population has increased by 250% since 1980.

POPULATION

	Total	Hispanic
Population	3,831,100	70,100
Rank	13	47
Household	1,460,000	21,300
Avg. Person/HH	2.62	3.29

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	14
Puerto Rico	65
Cuba	3
Peru	2
Other	16

MARKET BUYING POWER
$567,113,000

PER CAPITA BUYING POWER
$8,090

MEAN HOUSEHOLD INCOME
$33,281

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	3,865,100	20,100	0.05
1992	3,775,900	64,700	1.7
1994	3,814,800	65,600	1.7
1996	3,831,100	70,100	1.8

CLEVELAND

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Ashland	OH	0.2	0.1	0.4	50.8	18.4
Ashtabula	OH	1.9	0.5	1.8	102.7	37.9
Cuyahoga	OH	35.8	11.3	2.6	1,395.8	560.2
Erie	OH	1.3	0.4	1.7	78.3	29.6
Geauga	OH	0.3	0.1	0.4	83.6	27.9
Holmes	OH	0.1	0.0	0.4	36.2	10.2
Huron	OH	1.2	0.3	2.1	58.4	21.0
Lake	OH	1.8	0.5	0.8	222.2	83.7
Lorain	OH	17.8	5.0	6.3	283.2	99.6
Medina	OH	0.9	0.3	0.7	136.7	46.6
Portage	OH	0.9	0.2	0.6	150.9	52.5
Richland	OH	1.0	0.3	0.7	128.6	48.8
Stark	OH	2.8	1.0	0.7	376.3	143.8
Summit	OH	3.4	1.1	0.6	532.0	208.2
Tuscarawas	OH	0.2	0.1	0.3	87.4	33.4
Wayne	OH	0.5	0.1	0.4	108.0	38.2
TOTAL		**70.1**	**21.3**	**1.8%**	**3,831.1**	**1,460.0**

CLEVELAND

1/1/96 Hispanic Population (000)

MEN 18-20	1.9
MEN 21-24	2.5
MEN 25-34	6.4
MEN 35-49	6.3
MEN 50-54	1.2
MEN 55-64	2.2
MEN 65+	1.5
MEN 18+	**22.0**
WOMEN 18-20	1.8
WOMEN 21-24	2.4
WOMEN 25-34	6.0
WOMEN 35-49	6.3
WOMEN 50-54	1.1
WOMEN 55-64	2.8
WOMEN 65+	1.4
WOMEN 18+	**21.8**
TEENS 12-17	**7.9**
CHILDREN 0-11	**18.4**
CHILDREN 2-11	**15.3**
TOTAL PERSONS 2+	**67.0**
TOTAL PERSONS	**70.1**
HOUSEHOLDS	**21.3**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$93,645
Eating & Drinking	37,830
General Merchandise	50,061
Apparel & Accessories	20,064
Furniture/Appliance/ Home Furnishings	15,238
Automotive Dealers	63,742
Gasoline Service	17,034
Drug Stores	12,879
All Others	47,697
Total Retail Sales	**$358,190**

Radio

No Data Available

Newspapers

No Data Available

Television

No Data Available

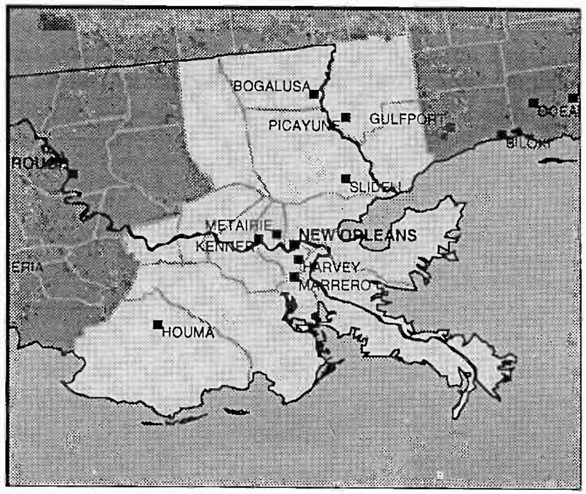
Cable/VCRs/Telephone

No Data Available

NEW ORLEANS

MARKET #48

The New Orleans ADI is comprised of 14 counties, 12 of which are in the state of Louisiana and 2 are in the state of Mississippi. The area's 62,500 Hispanics represent nearly 4% of this large southern market's total population. In Jefferson County, LA., there are 30,400 Hispanics in 10,000 households. The city has a mix of Hispanics from many Latin American countries of origin.



POPULATION

	Total	Hispanic
Population	1,722,600	62,500
Rank	27	48
Household	621,300	20,900
Avg. Person/HH	2.77	2.99

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	15
Puerto Rico	5
Cuba	11
Guatemala	4
Honduras	20
Nicaragua	8
San Salvador	2
Colombia	2
Other	33

MARKET BUYING POWER
$557,436,000

PER CAPITA BUYING POWER
$8,919

MEAN HOUSEHOLD INCOME
$33,339

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	1,627,500	60,100	3.7
1992	1,664,200	59,000	3.5
1994	1,707,900	60,900	3.6
1996	1,722,600	62,500	3.6

NEW ORLEANS

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Jefferson	LA	30.4	10.0	6.6	457.0	170.6
Lafourche	LA	1.2	0.4	1.3	87.2	29.4
Orleans	LA	16.2	5.9	3.4	479.3	180.6
Plaquemines	LA	0.6	0.2	2.3	25.4	7.9
St. Bernard	LA	4.0	1.4	5.9	67.3	23.5
St. Charles	LA	1.3	0.4	2.8	47.0	16.0
St. James	LA	0.0	0.0	0.1	21.1	6.5
St. John Bap	LA	1.1	0.3	2.6	42.1	13.6
St. Tammany	LA	4.2	1.3	2.4	175.8	61.8
Tangipahoa	LA	1.0	0.3	1.1	93.7	32.4
Terrebonne	LA	1.4	0.4	1.4	101.1	33.0
Washington	LA	0.2	0.0	0.4	42.9	15.4
Hancock	MS	0.7	0.2	1.8	38.8	14.8
Pearl River	MS	0.3	0.1	0.8	43.9	15.8
TOTAL		**62.5**	**20.9**	**3.6%**	**1,722.6**	**621.3**

NEW ORLEANS

1/1/96 Hispanic Population (000)

MEN 18-20	1.6
MEN 21-24	2.1
MEN 25-34	5.1
MEN 35-49	6.1
MEN 50-54	1.3
MEN 55-64	2.4
MEN 65+	1.6
MEN 18+	**20.2**
WOMEN 18-20	1.6
WOMEN 21-24	2.1
WOMEN 25-34	5.1
WOMEN 35-49	6.4
WOMEN 50-54	1.6
WOMEN 55-64	2.9
WOMEN 65+	3.0
WOMEN 18+	**22.7**
TEENS 12-17	**6.7**
CHILDREN 0-11	**12.9**
CHILDREN 2-11	**10.0**
TOTAL PERSONS 2+	**59.6**
TOTAL PERSONS	**62.5**
HOUSEHOLDS	**20.9**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$99,832
Eating & Drinking	30,700
General Merchandise	36,402
Apparel & Accessories	17,626
Furniture/Appliance/ Home Furnishings	11,459
Automotive Dealers	50,786
Gasoline Service	19,165
Drug Stores	11,154
All Others	36,227
Total Retail Sales	**$313,351**

Newspapers

No Data Available

Radio

No Data Available

Television

No Data Available

Cable/VCRs/Telephone

No Data Available

SPRINGFIELD

MARKET #49

The Springfield, MA Market, with over 61,000 Hispanics, is the forty-nineth largest Hispanic market area in the country. Hispanic residents now account for 9.3% of this ADI. Springfield's Hispanic population has gone from 38,500 in 1980 to 61,600 in 1996. With a total market Buying Power of nearly $522 million, Springfield ranks fourteenth in Per Capita Buying Power at $8,481. If the adjacent Boston ADI is taken into account, the combined Buying Power approximates $3.1 billion.

POPULATION

	Total	Hispanic
Population	664,300	61,600
Rank	40	49
Household	246,100	17,600
Avg. Person/HH	2.7	3.5

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	2
Puerto Rico	88
South America	2
Other	8

MARKET BUYING POWER

$522,452,000

PER CAPITA BUYING POWER

$8,481

MEAN HOUSEHOLD INCOME

$37,106

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	653,200	38,500	5.9
1992	682,800	55,500	8.1
1994	678,300	56,900	8.4
1996	664,300	61,600	9.3

SPRINGFIELD

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Franklin	MA	1.1	0.3	1.6	70.7	28.2
Hampden	MA	55.4	16.0	12.5	442.4	165.2
Hampshire	MA	5.1	1.3	3.4	151.2	52.7
TOTAL		**61.6**	**17.6**	**9.3%**	**664.3**	**246.1**

1/1/96 Hispanic Population (000)

MEN 18-20	2.3
MEN 21-24	3.1
MEN 25-34	7.8
MEN 35-49	4.6
MEN 50-54	0.6
MEN 55-64	1.2
MEN 65+	1.0
MEN 18+	**20.6**
WOMEN 18-20	2.1
WOMEN 21-24	2.7
WOMEN 25-34	7.0
WOMEN 35-49	4.6
WOMEN 50-54	0.8
WOMEN 55-64	1.6
WOMEN 65+	1.2
WOMEN 18+	**20.0**
TEENS 12-17	**6.1**
CHILDREN 0-11	**14.9**
CHILDREN 2-11	**12.3**
TOTAL PERSONS 2+	**59.0**
TOTAL PERSONS	**61.6**
HOUSEHOLDS	**17.6**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$80,098
Eating & Drinking	20,813
General Merchandise	34,207
Apparel & Accessories	22,431
Furniture/Appliance/ Home Furnishings	14,047
Automotive Dealers	55,322
Gasoline Service	18,014
Drug Stores	9,611
All Others	42,573
Total Retail Sales	**$297,116**

Radio

Station	Dial Position	Spanish Format
AM		
WACE	730	Spanish Music
WACM	1490	Portuguese/Spanish

Television

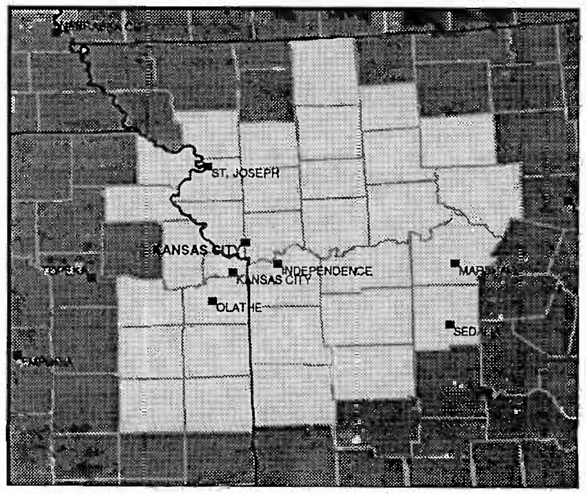
No Data Available

Newspapers

No Data Available

KANSAS CITY

MARKET #50



The Kansas City market, with almost 60,000 Hispanics, is the fiftieth largest Hispanic market area in the country. Hispanic residents are now nearly 3% of this ADI. Kansas City is a highly Mexican market (80%) with a significant total Buying Power of roughly half a billion dollars. Since 1980, the Hispanic population of Kansas City has increased 44%. The market has a Mean Household Income of $35,720.

POPULATION

	Total	Hispanic
Population	2,078,600	59,500
Rank	25	50
Household	798,200	17,100
Avg. Person/HH	2.60	3.48

COUNTRY OF ORIGIN

Country	% Distribution
Mexico	80
Puerto Rico	3
Cuba	3
Central America	2
South America	3
Other	9

MARKET BUYING POWER
$488,643,000

PER CAPITA BUYING POWER
$8,212

MEAN HOUSEHOLD INCOME
$35,720

POPULATION TRENDS

	Total Pop	Hispanic Pop	% of Total
1980	1,887,900	41,300	2.2
1992	2,007,200	53,300	2.7
1994	2,060,000	55,800	2.7
1996	2,078,600	59,500	2.9

KANSAS CITY

1996 Summary by County

County	State	Hisp Pop (000)	Hisp HHs (000)	Pct of Total Pop %	Total Pop (000)	Total HHs (000)
Anderson	KS	0.1	0.0	0.7	7.9	3.1
Atchinson	KS	0.4	0.1	2.6	16.6	6.1
Doniphan	KS	0.0	0.0	0.6	7.3	2.7
Douglas	KS	2.6	0.8	2.9	90.5	33.3
Franklin	KS	0.6	0.2	2.5	23.7	8.9
Johnson	KS	9.3	2.8	2.3	407.3	157.4
Leavenworth	KS	2.8	0.5	4.0	70.4	21.8
Linn	KS	0.0	0.0	0.5	8.7	3.2
Miami	KS	0.3	0.1	1.3	25.4	9.2
Wyandotte	KS	12.0	3.4	7.9	152.5	57.7
Andrew	MO	0.1	0.0	0.8	15.2	5.8
Bates	MO	0.1	0.0	0.6	15.3	6.0
Caldwell	MO	0.1	0.0	0.7	8.8	3.3
Carroll	MO	0.0	0.0	0.3	10.3	4.3
Cass	MO	1.2	0.3	1.6	74.6	26.8
Chariton	MO	0.0	0.0	0.2	8.8	3.6
Clay	MO	4.6	1.4	2.7	166.9	64.4
Clinton	MO	0.2	0.0	1.0	17.7	6.7
Daviess	MO	0.0	0.0	0.6	7.5	2.9
De Kalb	MO	0.3	0.0	2.6	10.3	2.8
Grundy	MO	0.1	0.0	0.8	10.2	4.3
Harrison	MO	0.0	0.0	0.5	8.2	3.5
Henry	MO	0.2	0.1	0.9	21.1	8.7
Jackson	MO	20.8	6.3	3.3	635.6	253.6
Johnson	MO	0.9	0.2	1.9	48.0	17.0
Lafayette	MO	0.3	0.1	0.8	32.5	12.4
Linn	MO	0.1	0.0	0.7	14.1	6.0
Livingston	MO	0.1	0.0	0.4	14.3	5.5
Pettis	MO	0.3	0.1	0.9	37.2	14.8
Platte	MO	1.6	0.5	2.5	67.0	25.8
Ray	MO	0.1	0.0	0.6	21.9	8.0
Saline	MO	0.2	0.1	1.1	22.8	8.6
TOTAL		**59.5**	**17.1**	**2.9%**	**2,078.6**	**798.2**

KANSAS CITY

1/1/96 Hispanic Population (000)

MEN 18-20	1.8	
MEN 21-24	2.4	
MEN 25-34	5.3	
MEN 35-49	4.9	
MEN 50-54	1.4	
MEN 55-64	1.4	
MEN 65+	1.7	
MEN 18+		**18.9**
WOMEN 18-20	1.8	
WOMEN 21-24	2.4	
WOMEN 25-34	5.0	
WOMEN 35-49	5.1	
WOMEN 50-54	1.3	
WOMEN 55-64	1.9	
WOMEN 65+	1.4	
WOMEN 18+		**18.9**
TEENS 12-17		**6.0**
CHILDREN 0-11		**15.7**
CHILDREN 2-11		**12.8**
TOTAL PERSONS 2+		**56.6**
TOTAL PERSONS		**59.5**
HOUSEHOLDS		**17.1**

Hispanic Retail Sales Estimates as of 1/1/96 By Store Group (000)

Food	$73,720
Eating & Drinking	47,952
General Merchandise	35,651
Apparel & Accessories	22,442
Furniture/Appliance/ Home Furnishings	15,742
Automotive Dealers	43,928
Gasoline Service	17,066
Drug Stores	7,254
All Others	42,746
Total Retail Sales	**$306,501**

Radio

No Data Available

Newspapers

No Data Available

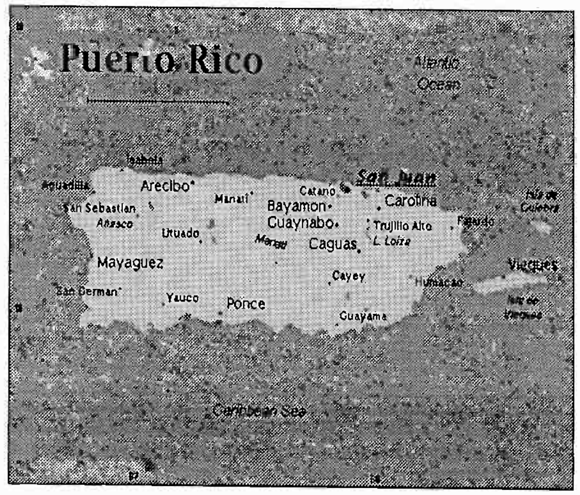
Television

No Data Available

Cable/VCRs/Telephone

No Data Available

PUERTO RICO



The island of Puerto Rico, located just East of Hispaniola in the Greater Antilles, is a self-governing territory of the U.S. Puerto Rico's population has grown from about 3.2 million in 1980 to over 3.7 million today. The population of the small island is concentrated in the capital city of San Juan. In fact, over 43% of Puerto Rico's population reside in San Juan and its surrounding region.

Considering the whole country as one market, Puerto Rico's Market Buying Power of $15.7 billion is comparable to that of San Francisco's Hispanics. Puerto Rico's Median Household Income is $16,200 while the Mean Household Income is $15,610.

POPULATION

	Total
Population	3,706,000
Household	1,117,500
Avg. Person/HH	3.32

POPULATION BY REGION

Region	Population	Households	Pers/HH
Arecibo	450,400	133,200	3.38
Caguas	523,600	153,500	3.41
Mayaguez	539,900	166,900	3.23
Ponce	591,700	167,900	3.52
San Juan	1,600,400	496,000	3.23

POPULATION TRENDS

	Total Population
1980	3,165,000
1990	3,522,000
1996	3,706,000

MARKET BUYING POWER
$ 15,700,000,000

PER CAPITA BUYING POWER
$4,236

MEAN HOUSEHOLD INCOME
$15,610

MEDIAN HH INCOME
$16,200

Cable/TV/VCRs

Cable Penetration	31%
Households with VCR:	40%
TV Sets/HH	1.0

Introduction

Population & Demography

Language

Market Characteristics

Acculturation & Cultural Components

Media Habits

Public Opinion

Brand Building & Advertising

S*T*A*R Personality Ratings

Product Usage

Top 50 Hispanic Markets

Successful Marketing Requires Strategy

Strategy Research Corporation®

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