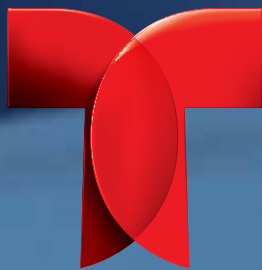




Hispanic Market OUTLOOK

Southern Arizona

*The State of Southern Arizona's Hispanic Market
presented by:*



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**Thank you to the Southern Arizona Hispanic Market
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Allegra - 22nd & Park

Welcome to Hispanic Market Outlook 2015



Congratulations to the Tucson Hispanic Chamber and Telemundo on their inaugural edition of the Southern Arizona Hispanic Market Outlook. This report will serve as an important tool for local businesses as they work to grow their customer base, expand operations and create jobs for the people of Southern Arizona and throughout the state.

The Hispanic population in Arizona is a dynamic, fast-growing market that should be highly valued by businesses focused on their long term success.

As governor of Arizona, I understand the importance of the Hispanic population in our state. Hispanics currently make up more than one third Arizona's population, and by 2035 will be the majority of our state. Our growing Hispanic population will include many young families and future entrepreneurs who seek high quality education for their children and a business-friendly environment to grow their firms. Both of these issues are top priorities for my administration.

I look forward to working closely with the Hispanic business community and the region as a whole to promote Arizona as a great place to live, work and do business.

Congratulations again on the first of many editions of your publication. I look forward to reading it!

A handwritten signature in black ink that reads "Doug Ducey". The signature is written in a cursive, flowing style.

Governor Doug Ducey

Welcome to Hispanic Market Outlook 2015



Lea Márquez Peterson, MBA, IOM
President/CEO



Bienvenidos to our inaugural Southern Arizona Hispanic Market Outlook – the most comprehensive Hispanic market research report covering Pima, Santa Cruz and Cochise Counties! Thank you to Telemundo, our research partner and the Arizona Daily Star and Clear Channel Radio for their media partnership.

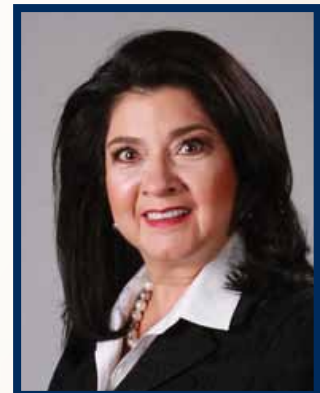
The Southern Arizona Hispanic Market Outlook is one of the most significant events that our Tucson Hispanic Chamber hosts for the Southern Arizona business community. The report provides detailed information that can assist Arizona businesses in reaching the fast growing Hispanic market in Southern Arizona.

Our Tucson Hispanic Chamber and affiliate chambers in Douglas, Nogales and Sierra Vista provide business education workshops, business lending assistance and numerous networking opportunities to assist businesses in Arizona and Sonora. Please contact our team at (520) 620-0005 or visit our website: www.TucsonHispanicChamber.org to learn more about the largest Latino business organization in Arizona.

¡Bienvenidos! On behalf of Telemundo Tucson we are proud to partner with the Tucson Hispanic Chamber of Commerce in their inaugural Southern Arizona Hispanic Market Outlook.

KHRR-TV Telemundo and the Tucson Hispanic Chamber have made a commitment to provide the business communities of Tucson, Southern Arizona and Northern Mexico the facts and figures on the growing population of the region to create opportunities to expand their businesses.

KHRR-TV Telemundo has been a part of the Spanish-speaking community in the Tucson area for more than 20 years. Owned by NBCUniversal, Telemundo Tucson delivers its viewing audience, which reaches to the U.S./Mexico border, local breaking news, weather, entertainment and sports coverage across a variety of platforms, including Noticiero Telemundo Arizona, Enfoque Arizona, online at TelemundoArizona.com and via mobile and social media channels. Telemundo Tucson has received multiple awards for its commitment to journalism and community service. The success of our partners, both in the community and business is at the core of our mission.



Araceli De Leon
President & General Manager
Telemundo Phoenix & Tucson
at NBC Universal, Inc.



Noche de Éxitos



Tucson
Hispanic
Chamber of Commerce
SOUTHERN ARIZONA · MEXICO

Saturday, Oct. 17th
Casino del Sol Resort

Gala and Bi-National Awards



Jaime Chamberlain
Chamberlain Distributing



Patricia Schwabe
Peach Properties /
Penca Restaurant

CELEBRATING the Hispanic Business Man and Woman of the Year

Register at:
TucsonHispanicChamber.org



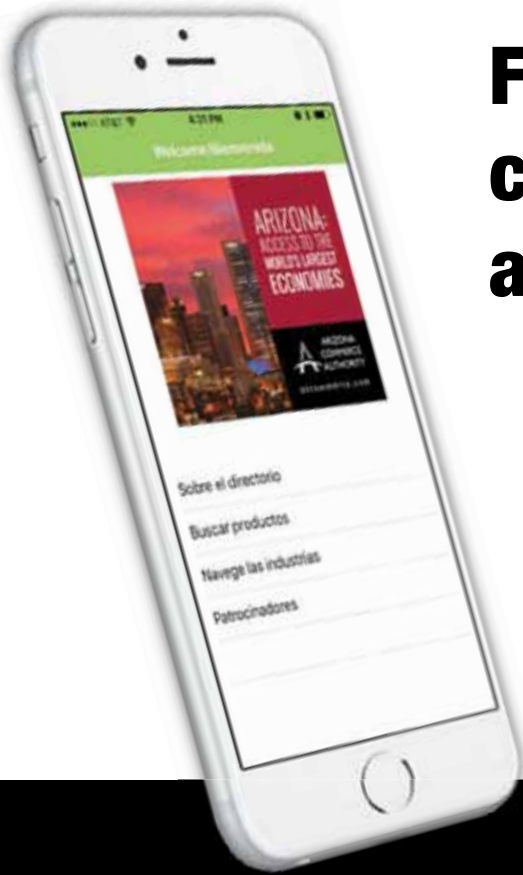
Small Businesses Have
Created 65% of New
U.S. Jobs.*

Small businesses are the engines of neighborhood economies. They create jobs, spur innovation and build lasting local assets.

Citi Community Development is proud to work with community organizations like Tucson Hispanic Chamber of Commerce to support America's small businesses.

Learn more at citicommunitydevelopment.com





Free: the key to cross-border commerce at your fingertips

ARIZONA-SONORA BUSINESS RESOURCE GUIDE

The 2nd edition of the Arizona-Sonora Business Resource Guide is the most comprehensive directory of the businesses and agencies involved in cross-border trade. It's yours at no charge as a phone app. Download it today at <http://tucson.com/azsonoraapp>

Arizona Daily Star  tucson.com



iHeartMedia and its stations proudly support the Tucson Hispanic Chamber of Commerce.



iHeart RADIO

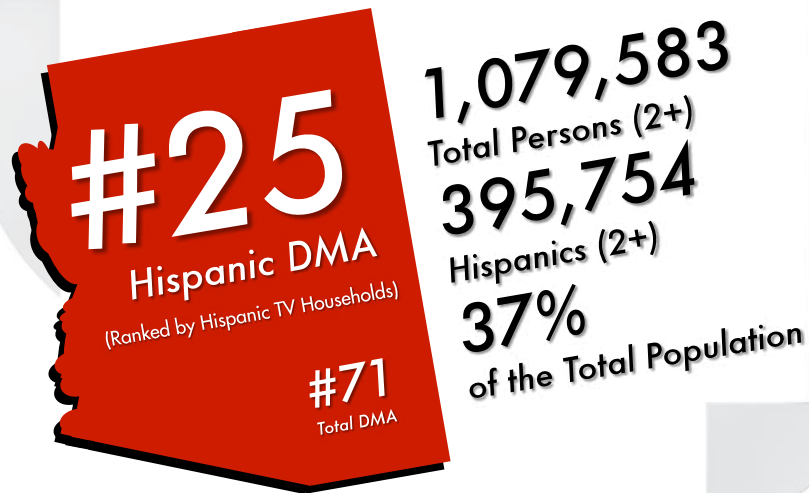
Your favorite live stations
OR
Create your own

MARKET PROFILE

The Hispanic population has led our nation's growth over the last decade with a population of more than 55 million people. The Hispanic community in Arizona has also experienced tremendous growth allowing the state to be identified as one of the fastest growing states in the nation during the last decade. In Arizona, Hispanics represent over a third of the total population and almost two million people.

The Tucson Area is defined throughout this book as Pima County, Santa Cruz County and Cochise County.

The *Tucson Area* is a Top 25 Hispanic Market!

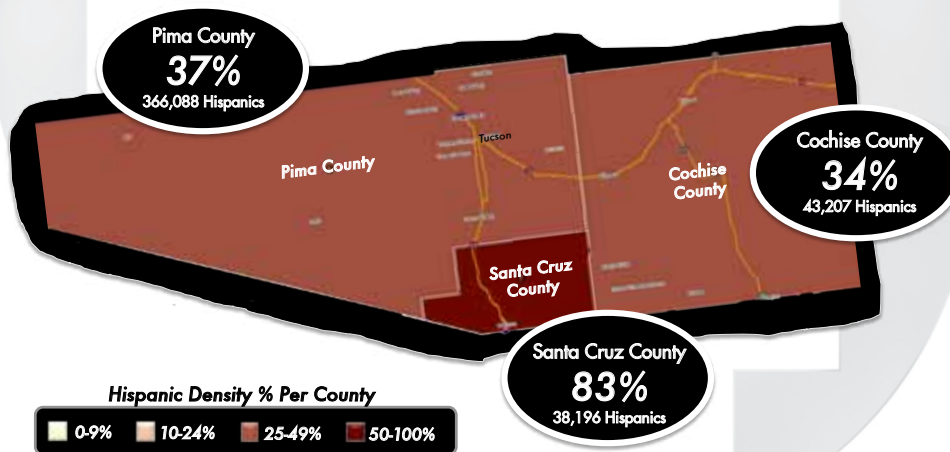


Source: Nielsen 2014-2015 Universal Estimates



Tucson Area Hispanics Represent a Significant Share of the Total Population

Tucson DMA Hispanic Density by County



Source: Nielsen Prime Location/Pop-Facts: 2015 Estimates

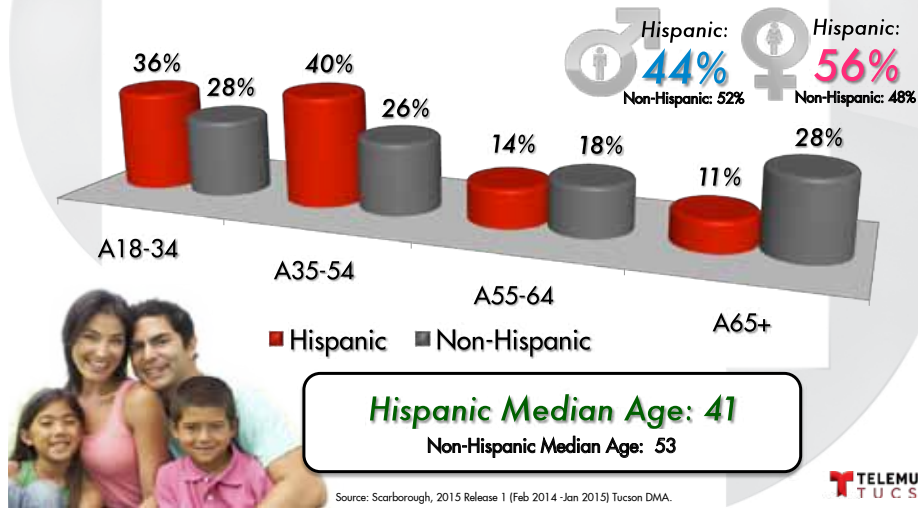


**DMA is Designated Market Area

MARKET PROFILE

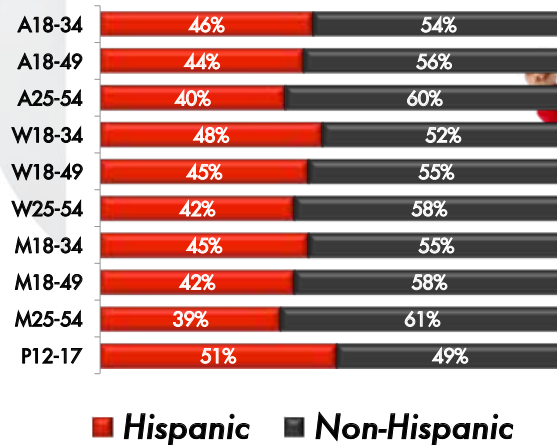
Hispanics in the *Tucson Area* Are More Likely to be Younger

Age & Gender Demographics Among Adults (18+) in the Tucson Area



Tucson Area Hispanics Represent a Large Share of Key Demographics

Share of Tucson DMA Target Demos



Source: Nielsen 2014-2015 Universal Estimates



MARKET PROFILE

Data for the Tucson area, the largest metropolitan area in Southern Arizona mirrors national trends in that the percentage of Hispanic homes with children is higher than the general population. This is valuable information for businesses throughout the region that sell products and services focused on young families.

Children Are Prominent in *Tucson Area* Hispanic Homes

Adults (18+) Who Live in a Household with the Presence of Children 2-17 Years of Age

Live in a Household with Children 2-5

Hispanic- 19%

Non-Hispanic: 10%

Live in a Household with Children 6-11

Hispanic- 25%

Non-Hispanic: 12%

Live in a Household with Children 12-17

Hispanic- 26%

Non-Hispanic: 12%



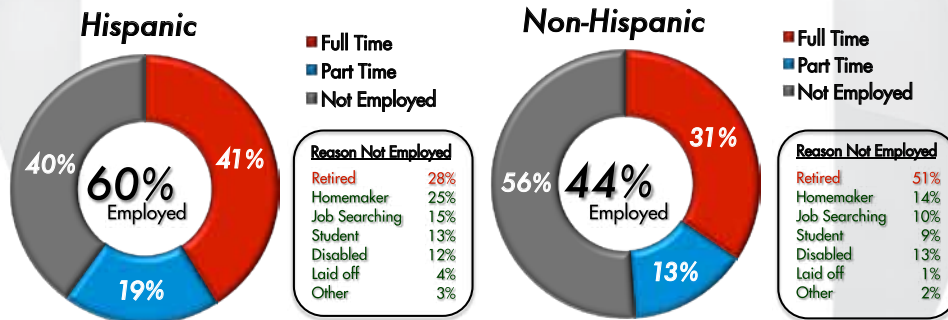
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Source: Scarborough, 2015 Release 1 (Feb 2014 -Jan 2015) Tucson DMA.

MARKET PROFILE

Tucson Area Hispanics Represent a Strong Workforce

Employment Status Among Adults (18+) in the Tucson Area



Source: Scarborough, 2015 Release 1 (Feb 2014 - Jan 2015) Tucson DMA.

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In the Tucson area, most of the full time positions are held by the Hispanic population. With growing employment figures, the Hispanic population in Southern Arizona is on track to become a major economic engine on the supply side (labor force) and the demand side (purchasing power).

The Pima County One-Stop Career Center

The Pima County One-Stop Career Center prepares our workforce by helping young people get their first job, assisting “mature” workers get a post-retirement job, and helping everyone in between. Programs sponsored by One-Stop include Basic Education, English as a Second Language and Occupational Skills Training, including On-the-Job Training and internships.

Specifically, One-Stop:

- Develops skilled workers for quality jobs;
- Assists employers to address workforce and recruitment needs;
- Mitigates the impact of layoffs;
- Assists households in financial crisis; and
- Helps persons with issues, such as homelessness, lack of literacy, or language barriers to transition into employment.

English language learners will get assistance not only with the coursework to help them prepare for the GED, but also with skills training to secure meaningful employment. More than 53 percent of clients using One-Stop’s services are Hispanic.

One-Stop helps the business community by providing on-the-job training to new employees where the employer is reimbursed for up to 50 percent of the wage rate during the training period, then agrees to retain the trainee as a regular employee at the end of the contract.

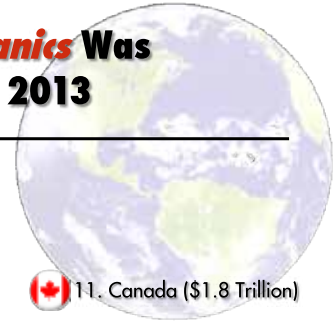
One-Stop helps employers recruit by assisting with advertising, collecting resumes and applications, pre-screening applicants, candidate testing and assessment, offering job space for interviewing and helping with job fairs.

Our dedicated Kino Veterans’ Workforce Center helps military veterans find jobs and get training, benefits and support. We team with employers, who provide the mentoring and supervision of temporary employees and interns while One-Stop pays the salary. One-Stop also provides internship toolkits to help employers get the most out of their interns.

..... PURCHASING POWER

If the U.S. Hispanic population were its own country, it would rank fifth just below Mexico in terms of gross domestic product. It would represent one of the top 20 economies of the world. If today the U.S. Hispanic gross domestic product were combined with the Mexican gross domestic power, the two powerhouses would easily challenge the size of the United Kingdom economy, surpassing India, Russia and Brazil on a one on one basis. Hispanic purchasing power creates a myriad of business opportunities for all industries.

The Purchasing Power of *U.S. Hispanics* Was Greater Than All But 15 Nations in 2013



Countries with a Gross Domestic Product (GDP) of \$1 Trillion or More in 2013

- | | | |
|-----------------------------|----------------------------|--------------------------------|
| 1. U.S. (\$16.8 Trillion) | 6. U.K. (\$2.7 Trillion) | 11. Canada (\$1.8 Trillion) |
| 2. China (\$9.2 Trillion) | 7. Brazil (\$2.2 Trillion) | 12. Australia (\$1.6 Trillion) |
| 3. Japan (\$4.9 Trillion) | 8. Italy (\$2.1 Trillion) | 13. Spain (\$1.4 Trillion) |
| 4. Germany (\$3.7 Trillion) | 9. Russia (\$2.1 Trillion) | 14. S. Korea (\$1.3 Trillion) |
| 5. France (\$2.8 Trillion) | 10. India (\$1.9 Trillion) | 15. Mexico (1.3 Trillion) |

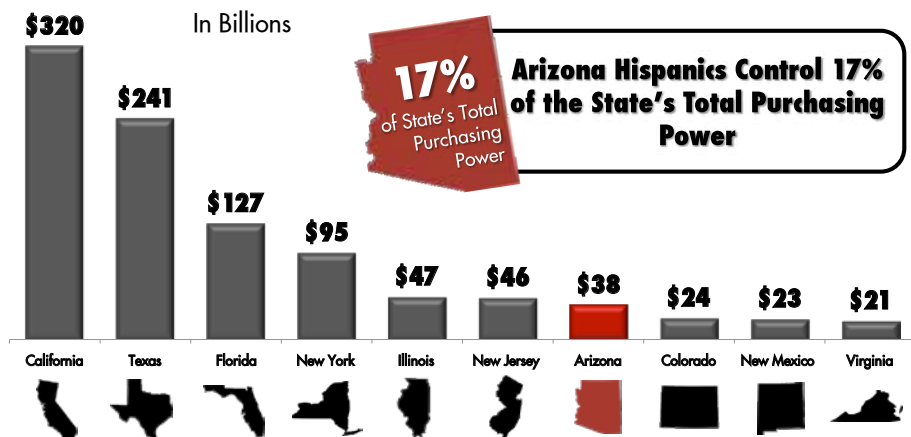
16. U.S. Hispanics (\$1.2 Trillion)

Source: World Bank, 2013



Arizona's Hispanic Purchasing Power Ranks High Among Other States

Arizona Ranks **#7** in 2014 Total Hispanic Purchasing Power



Source: Selig Center for Economic Growth, Terry College of Business, The University of Georgia, June 2014



PURCHASING POWER

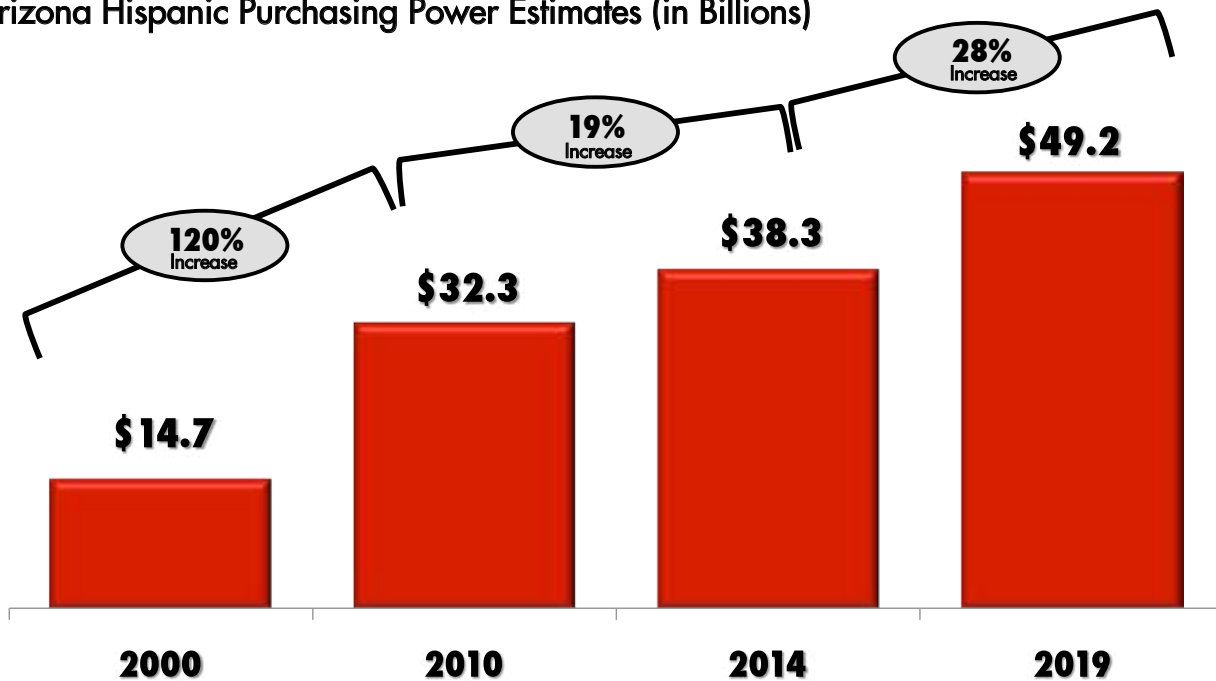
Population growth combined with the fact that the Hispanic rate of poverty has decreased¹, are positive signals of the formation of an upcoming solid Hispanic middle class. Hispanic purchasing power has seen a steady growth over the last 25 years including during the most recent economic recession in 2008. Generalizations of the Hispanic community as being primarily from the blue collar industries are changing as Arizona's Hispanic purchasing power exceeds 38 billion dollars, almost a fifth of the whole state's total purchasing power.

In Pima County, Hispanic purchasing power equates to 8 billion dollars a year. A powerful trend for Southern Arizona businesses is that consumer spending for Hispanics in the Tucson area is expected to increase by 88 percent in the upcoming decade. In general, Hispanics in the Tucson area place a high value on housing and food supplies while they transition from lower socio-economic levels into the middle class. The Hispanic community will be matching their new economic leverage with decision making influence as they have a growing sense of ownership and a need for stability. In addition, as socio economic levels improve for the Hispanic population in Southern Arizona, Hispanics will be looking for upper market goods and services.

¹Pew Research

Arizona's Hispanic Purchasing Power Projected to Grow in the Next 5 Years

Arizona Hispanic Purchasing Power Estimates (in Billions)

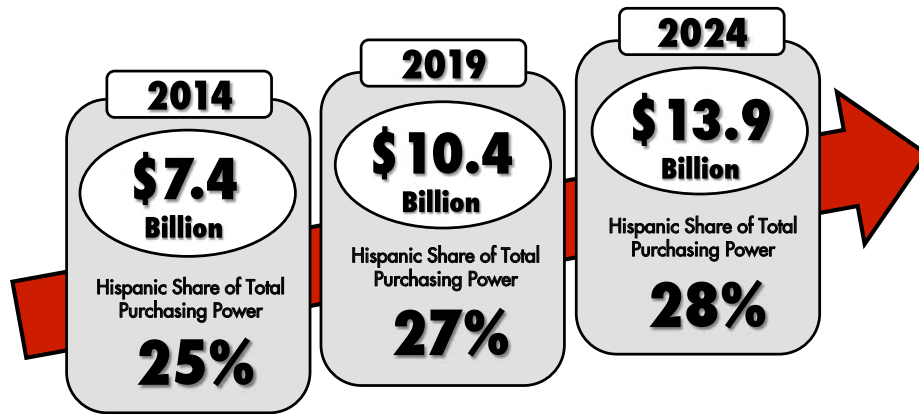


Source: Selig Center for Economic Growth, Terry College of Business, The University of Georgia, June 2014

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PURCHASING POWER

Hispanic Share of Purchasing Power in the *Tucson Area* Estimated to Increase



Consumer Spending in the Tucson Area is Expected to Increase **88%** in the Next 10 Years

Source: IHS Global Insight 2015 Hispanic Market Monitor-Tucson DMA



By 2024, Hispanics are estimated to spend nearly \$14 billion dollars in the Tucson DMA. That equates to 28% of total market spending. Today, Hispanics in the Tucson area spend nearly \$8 billion dollars a year with the majority in Shelter (Mortgage or Rent) and Food at Home and Away from Home. This provides a large opportunity for Southern Arizona real estate developers, apartment owners and food providers.

Hispanics in the *Tucson Area* Spend Millions on Products & Services

Tucson 2014 Hispanic Consumer Spending

Spending Category	2014 Spending
Shelter (Mortgage or Rent)	\$1.399 bil
Food at Home	\$757 mil
Food Away From Home	\$552 mil
Utilities	\$423 mil
Health Care	\$370 mil
Gasoline & Motor Oil	\$367 mil
Other Entertainment	\$364 mil
Quick-Service Restaurants	\$339 mil
Clothing, Except Footwear	\$313 mil
Vehicle Purchases	\$290 mil
Other Vehicle Expenses	\$256 mil
Gas, Electricity & Water	\$242 mil
Personal Care Products & Services	\$210 mil



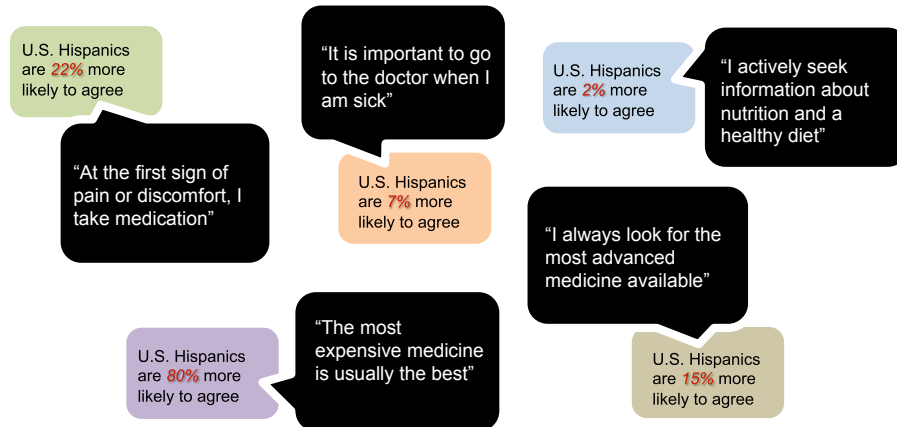
Source: IHS Global Insight 2015 Hispanic Market Monitor-Tucson DMA



HEALTH CARE

U.S. Hispanics Are More Likely to Agree With Statements Regarding Their Health

Hispanics Are Above the National Average With Their Agreement Towards Health Related Topics



Source: Simmons NHCS, Winter 2015 (Feb 2014-Mar 2015), Base: U.S. Adults 18+



A Simmons NHCS report studied U.S. Hispanic attitudes towards health. Interestingly, U.S. Hispanics are 80% more likely to believe that "the most expensive medicine is usually the best". This belief may be attributed to their high television viewing numbers (see Media section) and their access to medicine-related television commercials.

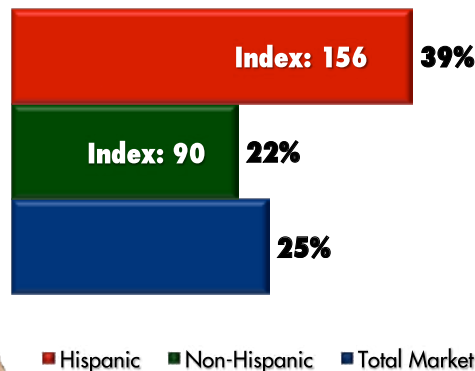
The Hispanic population in the United States indexes higher than the general population on consciousness of their image and how it relates to health. The Simmons NHCS report stresses the importance of convenience and healthy food choices for Hispanics.

U.S. Hispanics Are Actively Engaged in Their Healthy Lifestyle

Hispanics Are More Likely Than the U.S. Population to be Mindful of Their Healthy Image

"Image Shapers"

"Health and image are allied together for them. Looking good means being healthy. Convenience and healthy choices can -and do-go together for this group."



Source: Simmons NHCS, Winter 2015 (Feb 2014-Mar 2015), Base: U.S. Adults 18+



HEALTH CARE

Tucson Area Hispanics Spend Millions on Health Care Services

Estimated Amount Spent on Health Care in 2014

\$370,000,000



That's **18%** of the Total Health Care Spending Category!

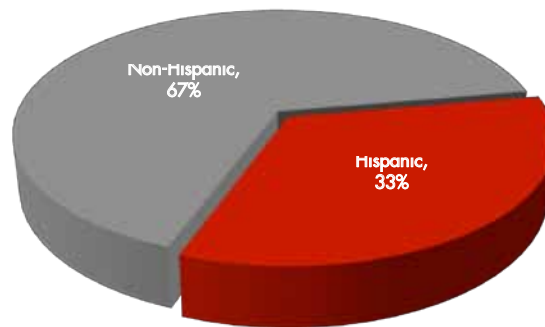
Source: IHS Global Insight 2015 Hispanic Market Monitor-Tucson DMA

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More than 245,000 Hispanics in the Tucson DMA received any medical care services over the past three years. In 2014, medical care services for the Hispanic community in Tucson equated to over \$370 million dollars a year. With projections for population growth of the Hispanic community in the Tucson area, the dollars spent on medical care services will grow exponentially.

Tucson Area Hispanics Represent One Third of Adults Receiving Medical Services

Adults (18+) Whose Households Have Received Any Medical Services in the Past 3 Years



That Translates Into **245,749** Hispanics Who Have Received Any Medical Services in the Past 3 Years

Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA, Adults 18+

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HEALTH CARE

Tucson Area Hispanics Are Above the Market Average with Medical Services

Medical Services Received by Hispanic Households in the Past 3 Years

Health Specialist Used	% of Hispanics	Index
Hospital emergency room	37%	109
Urgent care facility	30%	105
Other medical service	30%	87
Pediatrics	18%	161
Maternity care	13%	163
Orthopedics	12%	105
Neurology	10%	130
Cardiac care	8%	84
Cancer/oncology	6%	70
Corrective eye surgery	5%	77
Mental healthcare	5%	114



Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+

Tucson Medical Center

As a community nonprofit hospital, Tucson Medical Center (TMC) is committed to improving the overall health of our local residents and promoting health equity.

Part of that effort lies in supporting the needs of our Spanish speaking patients within the walls of the hospital.

With Spanish Medical Interpreters on staff, TMC also has trained 90 bilingual employees for dual role interpretation, with a goal of reaching 100 this year.

Outside of the hospital, TMC works closely with the Tucson Hispanic Chamber of Commerce, regularly participating in Chamber-sponsored health fairs and events, and is engaged in medical tourism discussions with Pima County.

TMC also is the lead agency for Safe Kids Pima County, a network of organizations dedicated to preventing accidental childhood injury. With a focus on child passenger safety, bike/pedestrian safety and drowning prevention, the Safe Kids Pima County coalition and TMC's Desert Kids Safety Program provided free to the community in 2013-14:

- 2,700 booster seats
- 7,000 bicycle helmets
- 1,200 swim lessons
- 1,080 car seats

Outreach efforts are focused on areas that are medically and economically under served. Although those areas are increasingly spread throughout the community, TMC conducts a significant amount of outreach in areas with a predominantly Hispanic population, including:

- Reaching more than 700 first graders at elementary schools such as Los Niños, Mission Manor and Cavett through Water Safety is for YOU!
- Providing booster seat and bike helmet education at three Head Start Centers
- Distributing more than 80 booster seats at La Fiesta de San Augustin in 2014

Hispanics Use Many Tucson Area Hospitals and Medical Centers

Hospitals/Medical Centers Used by Hispanics in the Past 3 Years



Hospitals/Medical Centers Used	% of Hispanics	Index
Tucson Medical Center	35%	123
St. Mary's Hospital	19%	135
St. Joseph's Hospital	17%	93
University of Arizona Medical Center - University Campus	15%	102
Carondelet Heart & Vascular Institute	12%	152
Other hospital	11%	115
University of Arizona Medical Center - South Campus	11%	146
University of Arizona Medical Center - Diamond Children's	11%	216
Northwest Medical Center	10%	61
VA Medical Center	5%	69

Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+

HEALTH CARE

Tucson area Hispanics use a variety of health care specialists with Dentists and Eye Doctors (Ophthalmologist) the most common. In addition, Hispanics index higher than the general population in their response to health related advertising. Twenty seven percent of Hispanics in Tucson made an appointment to see a doctor after viewing a health care advertisement.

Tucson Area Hispanics Provide a Growth Opportunity for Health Care Specialists

Health Care Specialists Used by Hispanics in the Past 12 Months

Specialists Used	% of Hispanics	Index
Dentist	40%	89
Eye doctor (ophthalmologist)	23%	86
Eye examiner (optometrist)	19%	93
Other specialist	18%	89
OB/GYN	17%	117
Cardiologist	10%	88
Physical therapist	8%	90
Skin doctor (dermatologist)	7%	44
Chiropractor	5%	65
Cosmetic surgeon	1%	70

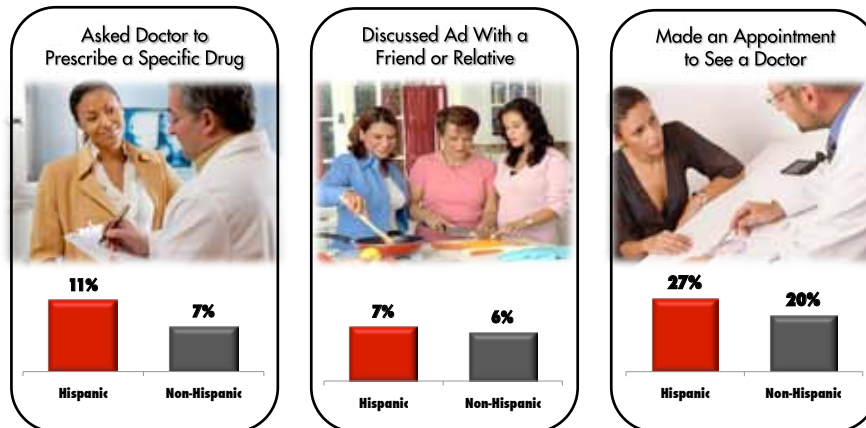


Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+

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Tucson Area Hispanics Respond Positively to Health Related Advertising

Actions Taken as a Result of a Health Ad in the Past 12 Months



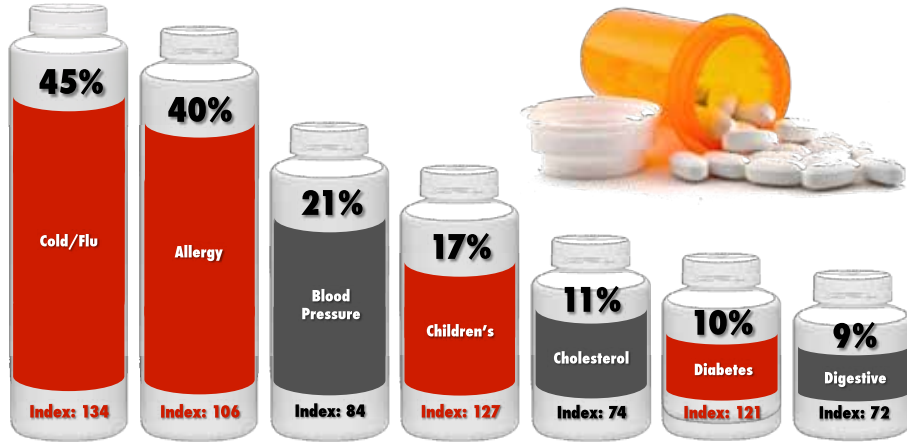
Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+

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HEALTH CARE

Tucson Area Hispanics Are More Likely to Use Many Medications

Medications Purchased by Hispanics (18+) in the Past 12 Months



Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+

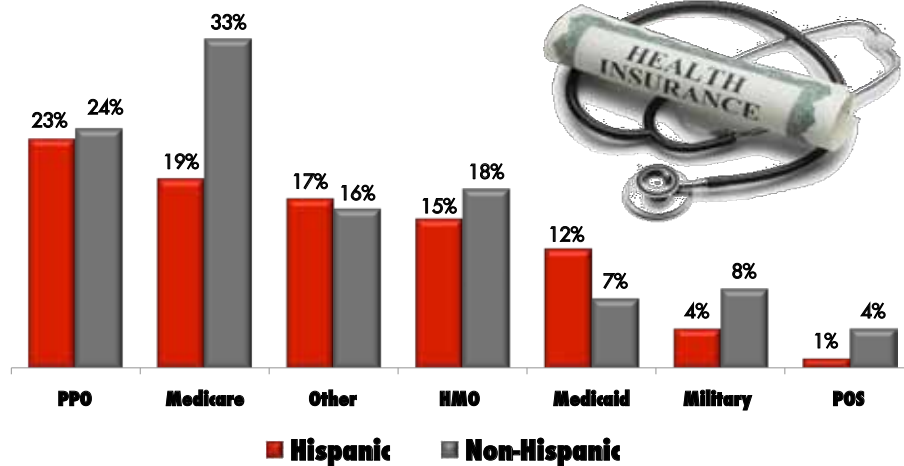
TELEMUNDO TUCSON

Tucson area Hispanics are more likely to use more cold/flu, allergy, children's and diabetic medication than the general population. They are less likely to use blood pressure, cholesterol and digestive medication. In surveying the Hispanic population that is 18 years or older, Scarborough determined that most Hispanics in the Tucson area are in a PPO plan followed by Medicare.

**PPO is Preferred Provider Organization

Tucson Area Hispanics Are More Likely to Use a PPO Health Insurance Policy

Type of Health Insurance Used by Adults (18+)



Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+

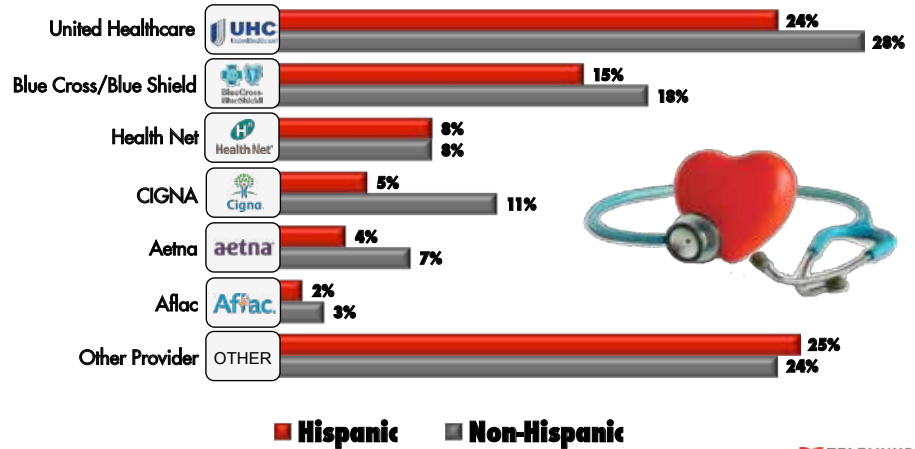
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HEALTH CARE

Tucson Area Hispanics are less likely to have group insurance with a major provider. This creates an opportunity in the market. Individual health insurance is more prominent in the Hispanic population in the Tucson area. This may be led by a variety of factors which could include the rollout of the Affordable Care Act, small business owner individual policies or smaller employers not providing insurance and employees are required to take out individual policies.

Tucson Area Hispanics Are Less Likely to Have Health Insurance Through a Major Provider

Group/Individual Health Insurance Provider Used by Adults (18+)

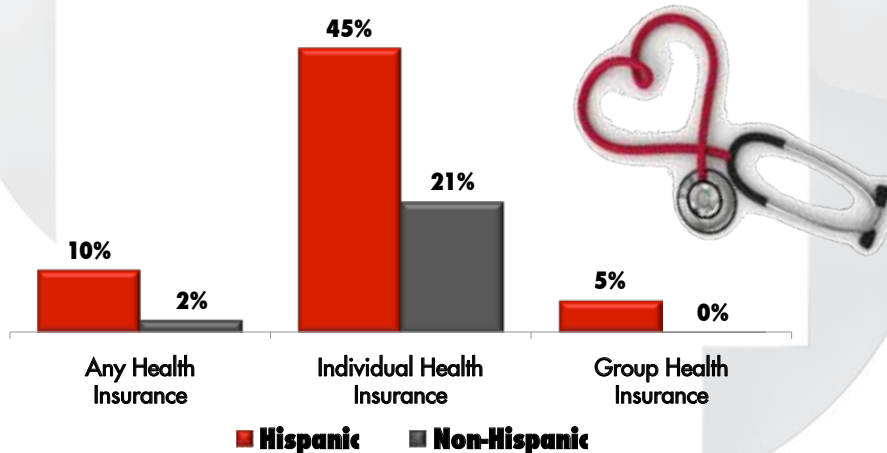


Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+



Health Insurance Policies Among Tucson Area Hispanics Are On the Rise

Year-to-Year Health Insurance Policy Growth Among Adults (18+)



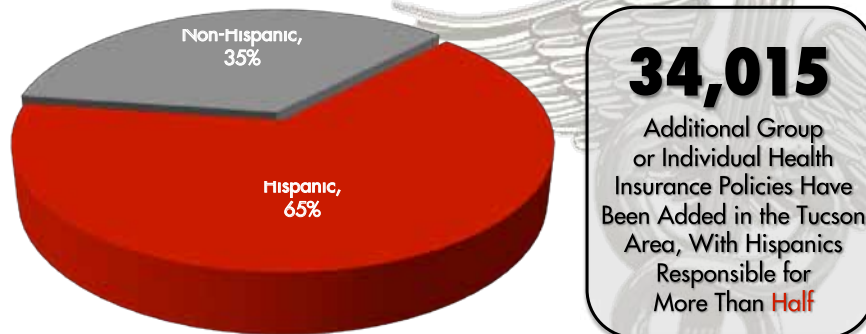
Source: Scarborough, 2014 Release 1 (Feb 2013-Jan 2014) & 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+



HEALTH CARE

Tucson Area Hispanics Lead the Charge in Health Insurance Growth

Additional Health Insurance Policies Added from Year Prior



That Translates Into **22,089** Additional Health Insurance Policies Among Hispanics

Source: Scarborough, 2014 Release 1 (Feb 2013-Jan 2014) & 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+

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Tucson Area Hispanics led the growth in health insurance policies over the last year with more than 22,000 individual or group policies attributed to the Hispanic population.

CareMore

CareMore (www.caremore.com) is a Medicare Advantage Health Plan that provides focused and innovative approaches to the complex problems of aging. The founding physicians created the basis for the company twenty years ago.

CareMore is also a community-focused healthcare delivery system that serves the community and our members by prolonging active and independent lives. Our CareMore Care Centers, in strategic locations within our coverage areas, serve as a physical manifestation of our Model of Care. Many of our Care Centers also have senior-focused gyms attached or adjacent to our clinic space. These are aptly named Nifty After Fifty (www.niftyafterfifty.com) locations.

We serve caregivers and families by providing support, education, and access to services. CareMore's holistic approach to the wellness of our seniors also protects the precious financial resources of seniors and the Medicare program through innovative methods of managing chronic disease, frailty, and end of life.

CareMore's outreach within the Hispanic Community includes a focus on educating and providing health and wellness information related to Medicare-eligible seniors in Arizona. We deliver knowledge via social and educational events, cooking demonstrations, exercise, and other health-related services. Our message is that we want to not only empower our communities, but give seniors the most important aspect of aging - DIGNITY.

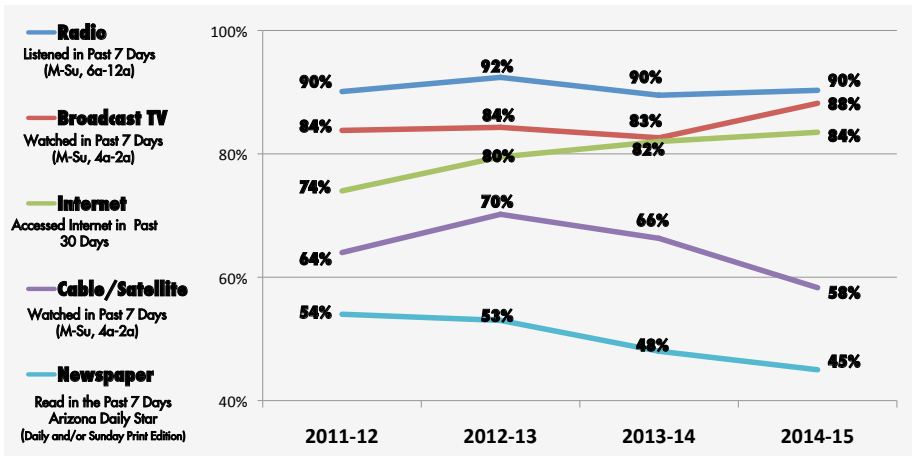
Our services and outreach to the Hispanic Community have included local events and opportunities to educate diverse communities. We have worked with organizations such as the Tucson Hispanic Chamber, Marana Health Centers, El Rio Community Clinics/Centers, American Diabetes Association's Step Out Walk, Better Breathers Clubs in partnership with the American Lung Association, El Pueblo Community Center, City of Tucson, City of South Tucson, and the Community Food Bank. CareMore has been a proud sponsor for Arizona Bilingual's Back to School program, Grandparents' Day at the Tucson Children's Museum, and our signature community forums known as Mas Por Su Medicare in partnership with Univision and Pima Council On Aging (PCOA).

We are a company that is proud to give back and serve the Hispanic Community. Please consider us your community partner for all your endeavors now and in the future.

LANGUAGE & MEDIA

The Way *Tucson Area* Hispanics Are Using Media is Changing

Share of Media Usage Among Tucson Area Hispanics (18+)



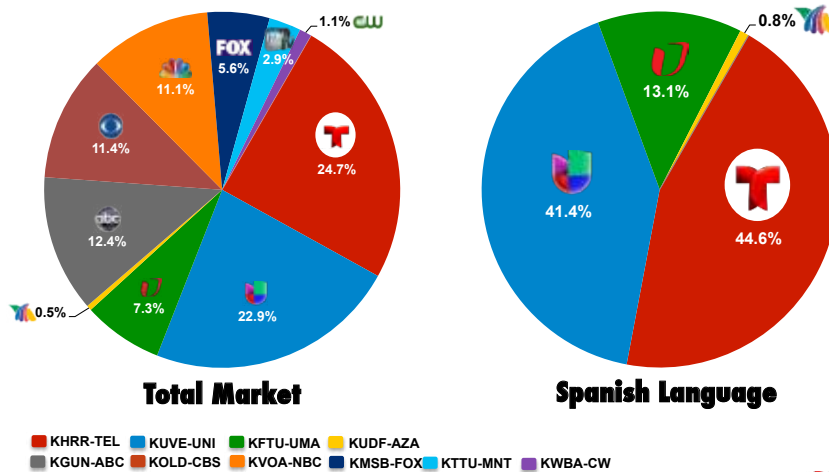
Source: Scarborough, 2012, 2013, 2014 & 2015 Release 1 (Feb-Jan), Tucson DMA



Radio and Broadcast Television continue to provide the greatest percentage of the Hispanic audience in the Tucson area. Though newspaper has seen a steady decline over the last several years, the use of internet to view media continues to grow providing an opportunity for online newspaper viewership. Telemundo captures the largest percentage of the Hispanic viewing audience (18 – 49 years of age) in the Tucson area as of May 2015.

Spanish Language Television Captures a Large Share of *Tucson Area* Hispanics

Total Day (M-Su, 6a-2a) **May 2015** Broadcast Share of Viewing Among Hispanics 18-49



Source: Nielsen, NLTV Ratings Cutback, NSI (Live+24) May 2015, Hispanic Adults 18-49 (M-Su, 6a-2a). Percentages based on Average Impressions



LANGUAGE & MEDIA

Arizona Bilingual Newspaper

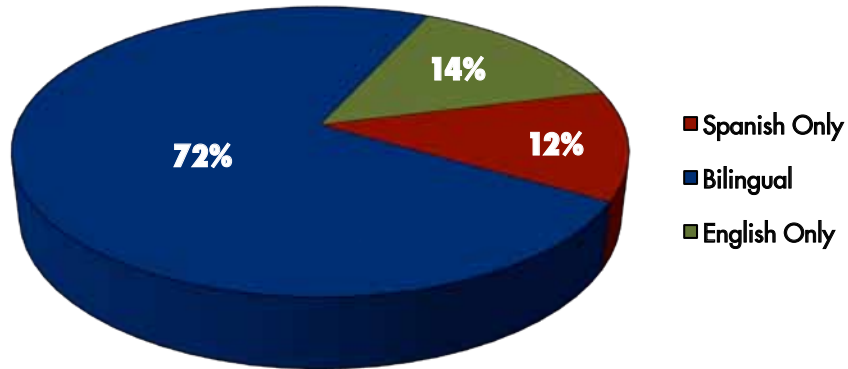
Arizona Bilingual connects with over 150,000 readers every month through 25,000 printed editions, Internet, Social Media and local community events.

Arizona Bilingual Newspaper focuses on outreach to our bilingual and Hispanic communities in Tucson, Southern Arizona and Sonora Mexico. In addition, over the last five years, the Newspaper has hosted a number of local community events focused on education, health, business, and community resources. The purpose is to embrace and develop new business in our communities and be a resource for all with reliable, truthful and accurate information.

The newspaper has over 3,000 points of distribution in Tucson, Oro Valley, Marana, Sahuarita, Green Valley, Rio Rico, Nogales, Sierra Vista, Willcox, Douglas and San Manuel. Also distributed South of the Border; in Nogales, Hermosillo, Puerto Peñasco/Rocky Point, Guaymas/San Carlos, Obregon, Douglas/Agua Prieta, Magdalena, Santa Ana, Imuris and Navojoa, Sonora, Mexico. Newsworthy reporting and Entertainment featuring: Business and Community Profiles, Technology, Health, Fitness, Beauty, and Compelling Stories from both sides of the US/Mexico border. Read the latest edition at www.azbilingual.com.

Many *Tucson Area* Hispanics Speak Both Spanish and English

2014-2015 Language Strata % Among Hispanic TV Households



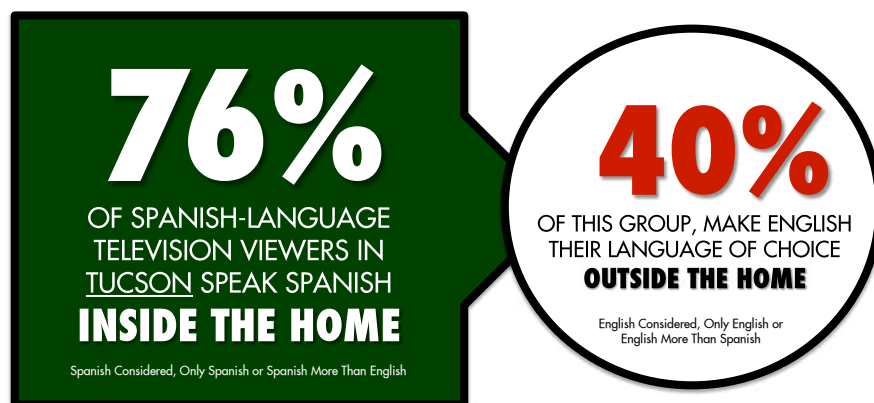
72% of Tucson Area Hispanics Are Bilingual

Source: Nielsen Universal Estimates 2014-2015



Tucson Area Spanish Language Television Viewers Prefer to Speak Spanish in the Home

Language Preference of Spanish Language Television Viewers



Source: Scarborough, 2015 Release 1 (Aug 2013-Jul 2014) Tucson DMA
Spanish Language Stations Include: KHRR-TEL & KUVE-UNII (M-Su, 4a-2a)



LANGUAGE & MEDIA

Tucson Area Hispanics Watch a Variety of Television Programs



TV Programs Typically Watched	% of Hispanics	Index
Movies	65%	97
Comedies	54%	92
Local news – evening	48%	101
Sports	42%	104
Documentaries	41%	97
Mystery/suspense/thriller	36%	86
Dramas	36%	93
Local news – morning	32%	102
Local news – late	24%	112
Kids shows	23%	146
Novelas	23%	262
Game shows	23%	101

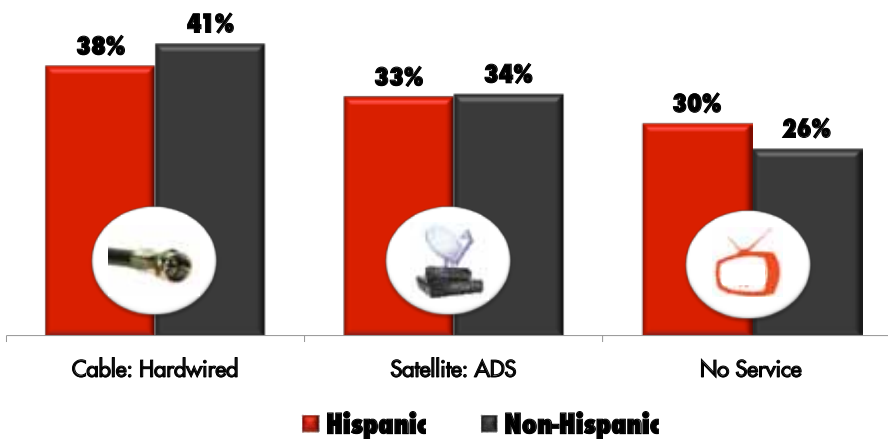
Source: Scarborough, 2015 Release 1 (Feb 2014 - Jan 2015) Tucson DMA.



Tucson area Hispanics are more likely to view local news on television whether morning, evening or late than the general population. This may indicate the importance of local Hispanic news anchors who can attract the Hispanic viewers. Hispanic viewers in the Tucson area utilize hard wired cable service slightly more than satellite service for viewing.

More Hispanics in the Tucson Area Turn to Cable Television Services

Type of Television Service That Hispanic (18+) Households Subscribe To.



Source: Scarborough, 2015 Release 1 (Feb 2013 - Jan 2014) Tucson DMA.

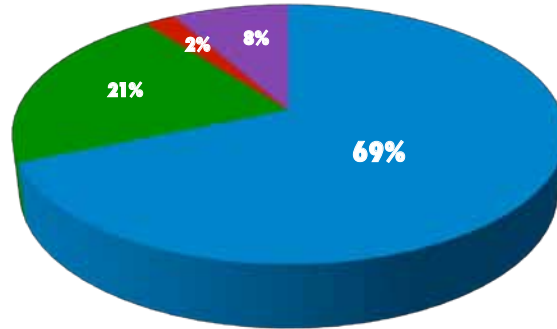


LANGUAGE & MEDIA

Though a majority of Spanish television viewers speak Spanish inside the home, Scarborough found that 40% make English their language of choice outside the home. The use of Spanish in advertising is a dilemma faced by businesses of all sizes. Almost 30% of Hispanics in the United States prefer to read Spanish on a company's website, and are more loyal to companies who advertise in Spanish.

Cox Communications Remains the Cable Provider in the *Tucson Area*

Cable Television Provider Among Hispanic (18+) Households That Subscribe



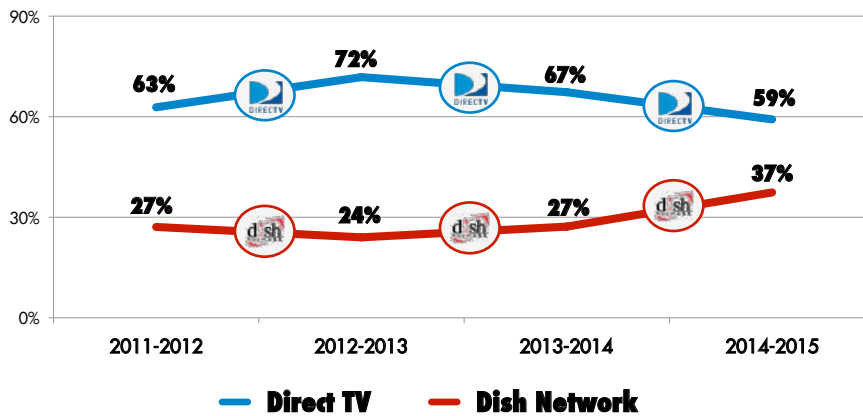
■ Cox ■ XFINITY ■ Cable One ■ Other

Source: Scarborough, 2015 Release 1 (Feb 2014 -Jan 2015) Tucson DMA.



The Competition Among *Tucson Area* Satellite Television Providers is Strong

Satellite Television Provider Share Trends Among Hispanic (18+) Households That Subscribe



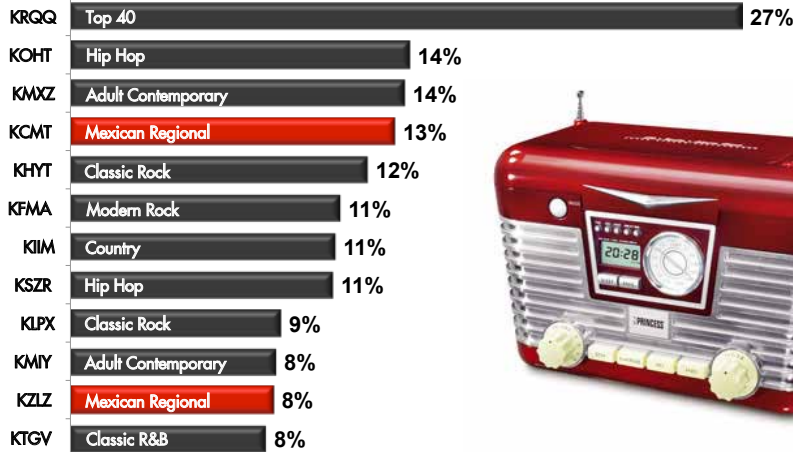
Source: Scarborough, 2012, 2013, 2014 & 2015 Release 1 (Feb-Jan), Tucson DMA



LANGUAGE & MEDIA

Tucson Area Hispanics Listen to a Broad Array of Music

Tucson Area Radio Station Ranker Among Hispanics (18+)



TELEMUNDO TUCSON

Source: Scarborough, 2015 Release 1 (Feb 2014 -Jan 2015) Tucson DMA.

Newspaper Usage Remains Strong Among Tucson Area Hispanics



Share of Hispanics (18+) Who Have Read Arizona Daily Star Print Edition in the Past 12 Months

Daily

26%

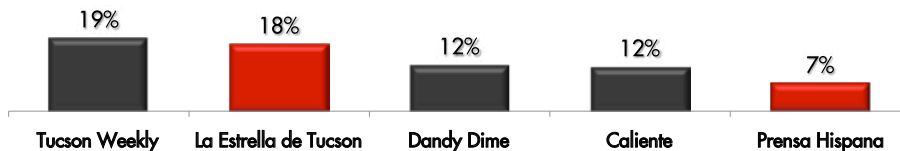
Non-Hispanic: 37%

Sunday

37%

Non-Hispanic: 48%

Share of Hispanics (18+) Who Have Read Non-Daily Newspapers (Print Edition) in the Past 6 Months



TELEMUNDO TUCSON

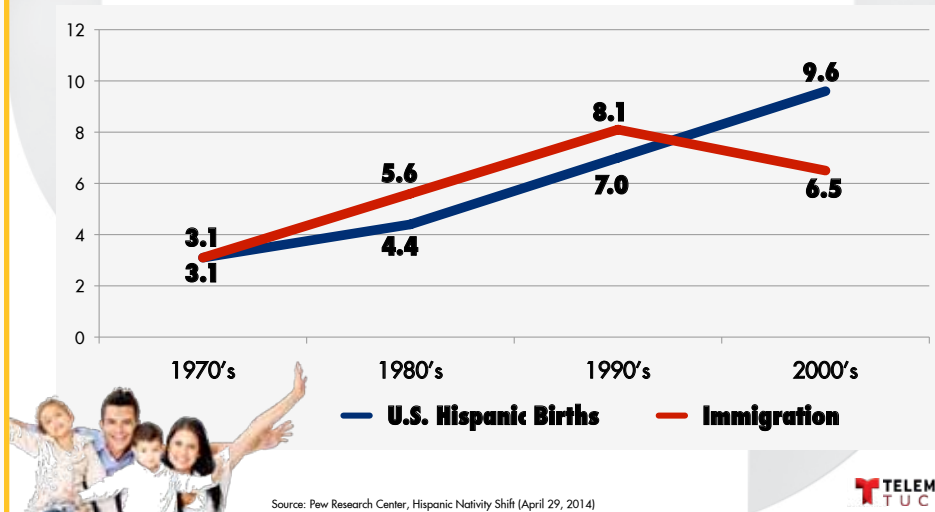
Source: Scarborough, 2015 Release 1 (Feb 2014 -Jan 2015) Tucson DMA.

BIRTH RATE

In the 2000's, Birth rate rather than Immigration attributed to the fast growing Hispanic population in the United States. Similarly in Southern Arizona, Hispanics account for a large portion of all live births. In 2013, there were over 6600 live births in Pima, Cochise and Santa Cruz counties accounting for 47% of all live births.

Births Now Contribute More to *U.S. Hispanic* Population Growth Than Immigration

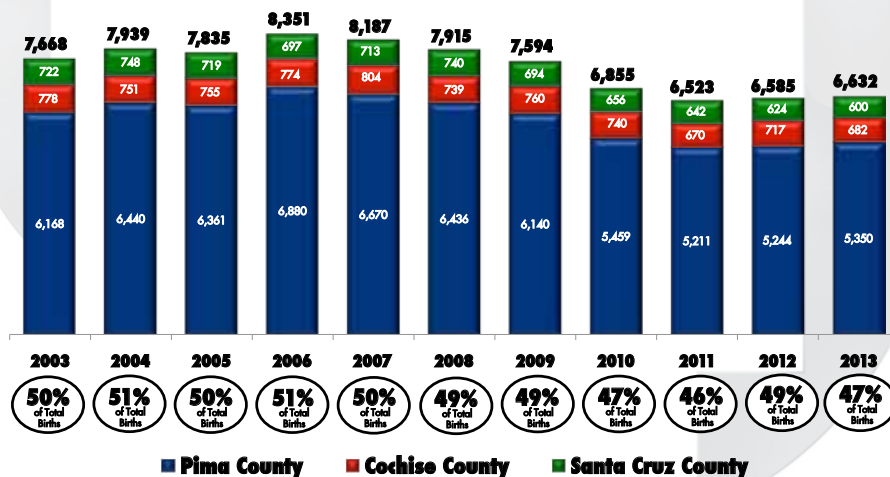
Source of U.S. Hispanic Population Growth by Decade (in Millions)



TELEMUNDO TUCSON

Hispanics Represent a Significant Share of Live Births in the *Tucson Area*

Live Birth Trends Among Hispanics in the Tucson Area



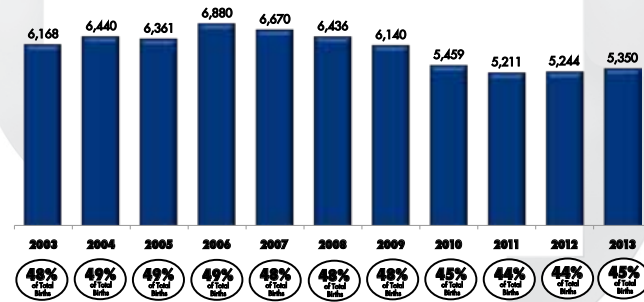
Source: Arizona Department of Health Services

TELEMUNDO TUCSON

BIRTH RATE

Hispanics Represent a Significant Share of Live Births in *Pima County*

Live Birth Trends Among Hispanics in Pima County

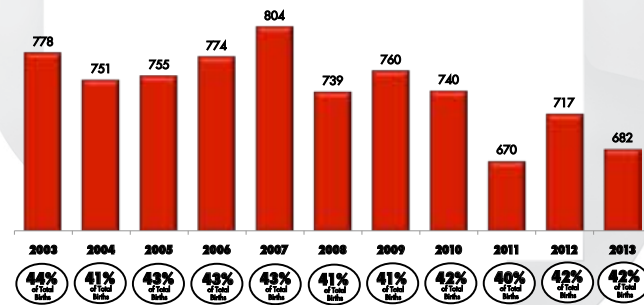


Source: Arizona Department of Health Services

TELEMUNDG
TUCSON

Hispanics Represent a Significant Share of Live Births in *Cochise County*

Live Birth Trends Among Hispanics in Cochise County

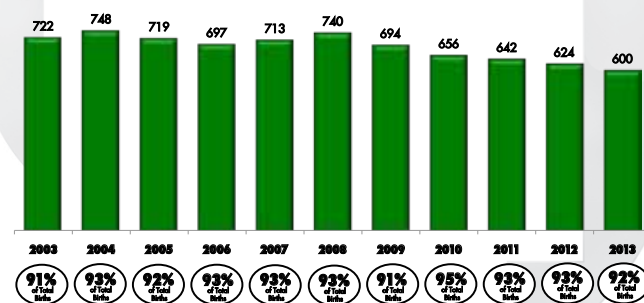


Source: Arizona Department of Health Services

TELEMUNDG
TUCSON

Hispanics Represent a Significant Share of Live Births in *Santa Cruz County*

Live Birth Trends Among Hispanics in Santa Cruz County



Source: Arizona Department of Health Services

TELEMUNDG
TUCSON

EDUCATION

The Pursuit of a College Education is Important to *U.S. Hispanics*

Five Facts About U.S Hispanics and Education

1 Hispanic Dropout Rates Have Dropped Considerably

Has dropped from **32%** in 2000 to just **14%** in 2013 Among Hispanics 18-24

2 College Enrollment Among Hispanics is Growing

Since 1993, Enrollment at Two- or Four-Year College Up **201%** Among Hispanics 18-24

3 Hispanics Are Behind in Obtaining 4-Year Degrees

In 2013, Only **15%** of Hispanics 25-29 Received a 4-Year Degree Compared to **40%** for Whites

4 Hispanics Are More Likely to Attend a 2-Year Public College

In 2013, Nearly Half (**46%**) of All Hispanic College Students Attended a 2-Year Public College

5 Hispanics Are Less Likely to Have Student Loan Debt

Only **22%** of Hispanic Households Have Education Loans, Compared to **42%** for White Households



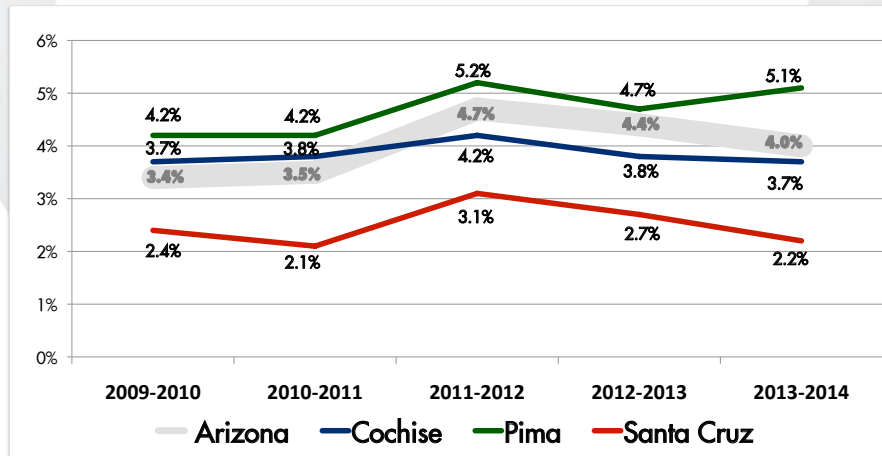
Source: Pew Research Center, Five Facts About Latinos and Education (May 26, 2015)

TELEMUNDO TUCSON

The Hispanic community in the U.S. has made positive strides in education over the last decade. Most notably, high school drop out rates have dropped dramatically from 32% to 14% among Hispanics age 18-34 over the last 13 years. College enrollment figures nationally have grown though completion rates for Hispanic continue to lag the general population. Nearly half of all Hispanics in the Tucson area have enrolled in some college courses. The University of Arizona, Pima and Cochise Community Colleges continue to work on programs to assist students in completing their degrees.

The *Tucson Area* Hispanic Dropout Rate in Some Counties is Below the State Average

Dropout Rate Trends Among Hispanics in the Tucson Area (by County)



Source: Arizona Department of Education, Dropout Rate Study Report

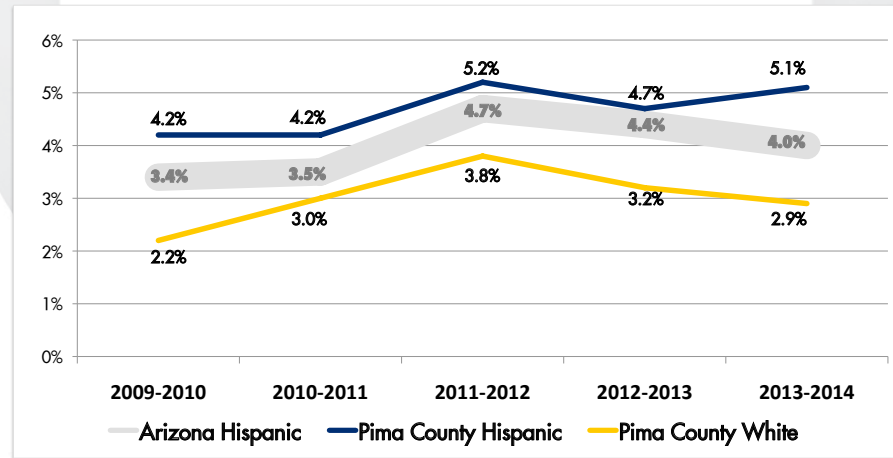
TELEMUNDO TUCSON

EDUCATION

Santa Cruz and Cochise Counties have done a remarkable job in lessening Hispanic high school dropout rates. Both Counties rates are less than the national average. More than 35,000 plan to seek higher education over the next twelve months as reported by Scarborough. This creates a market opportunity for public and private universities and colleges in Southern Arizona.

The *Pima County* Hispanic Dropout Rate is Above the State Average

Dropout Rate Trends Among Hispanics in Pima County

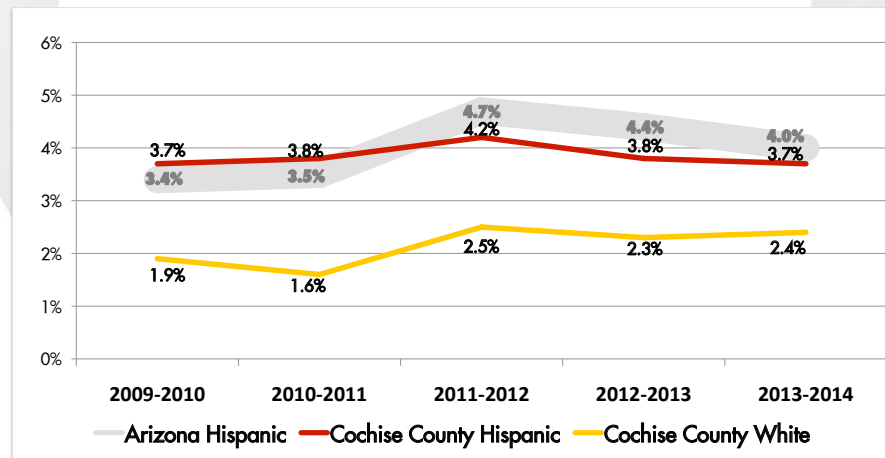


Source: Arizona Department of Education, Dropout Rate Study Report



The *Cochise County* Hispanic Dropout Rate Has Dropped Below the State Average

Dropout Rate Trends Among Hispanics in Cochise County



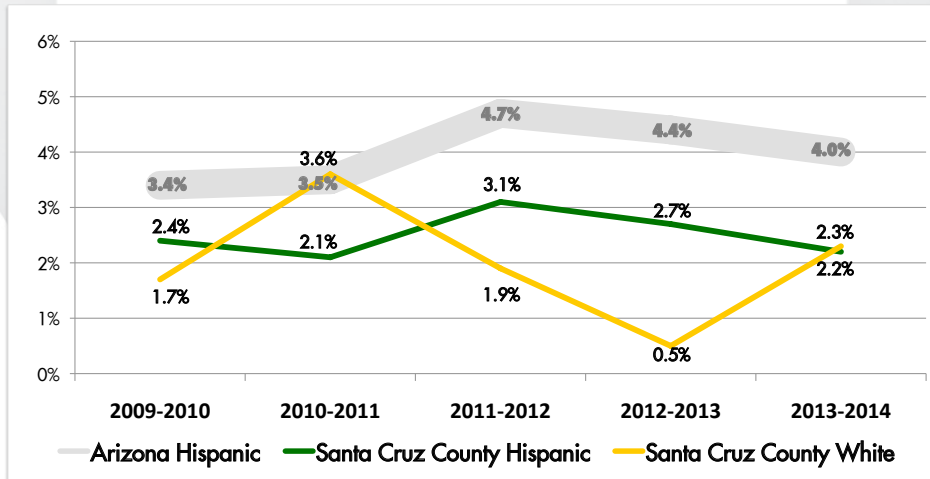
Source: Arizona Department of Education, Dropout Rate Study Report



EDUCATION

The *Santa Cruz County* Hispanic Dropout Rate in Stays Below the State Average

Dropout Rate Trends Among Hispanics in Santa Cruz County



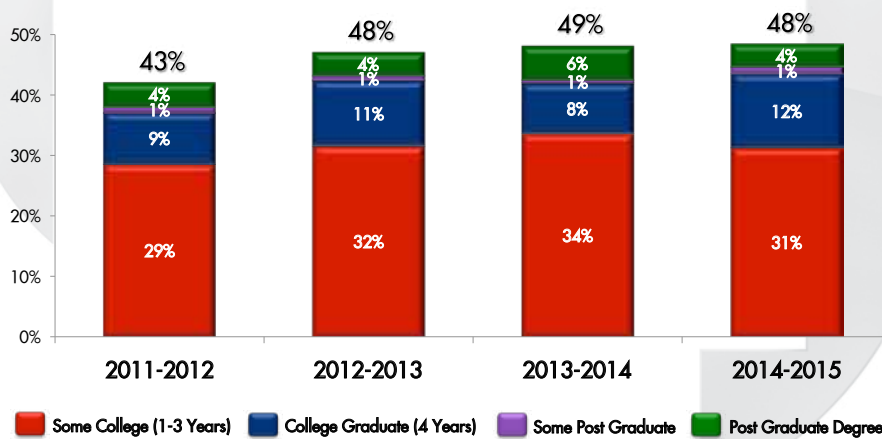
Source: Arizona Department of Education, Dropout Rate Study Report



Tucson area Hispanics 18 and older are more likely than the general population to be going back to school over the next twelve months. This data in combination with the propensity for online learning in the Hispanic community provide a market opportunity for our educational institutions like the University of Arizona, Arizona State University and other colleges which continue to grow their online course offerings.

Nearly Half of All *Tucson Area* Hispanics Have Attended College

Share of Hispanics (18+) Who Have Attended College



Source: Scarborough, 2015 Release 1 (Feb 2014 - Jan 2015) Tucson DMA.

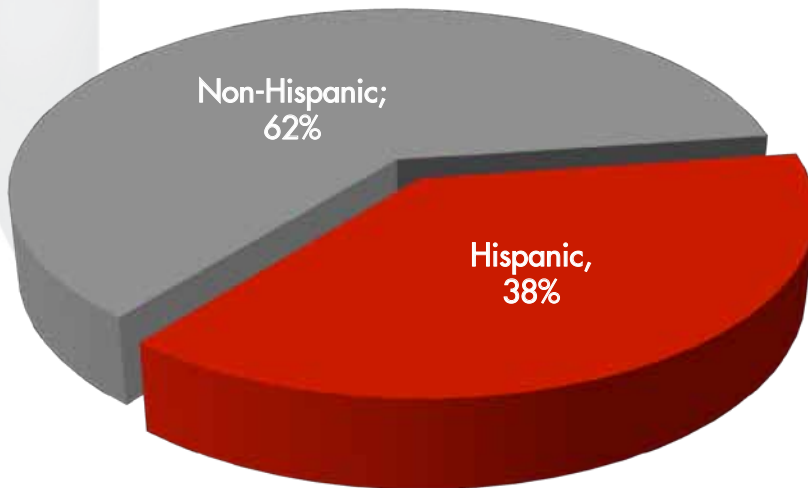


EDUCATION

The racial composition of our high schools is thoroughly studied and debated within the community, especially with our largest school district in Tucson, TUSD being a minority-majority district. The Tucson Hispanic Chamber's Latino Education committee looks closely at the data on the Hispanic student body at each of the school districts and the Hispanic graduation rate. The chamber's committee works closely with organizations such as Expect More Arizona, A for Arizona and grass roots efforts that will assist in lessening high school dropout rates and creating role models for our student population in Southern Arizona.

Many *Tucson Area* Hispanics Plan on Extending Their Education

Hispanics (18+) Who Plan on Going Back to School in the Next 12 Months



That Translates Into **35,811** Hispanics Who Plan on Going Back to School in the Next 12 Months

Source: Scarborough, 2015 Release 1 (Feb 2014 -Jan 2015) Tucson DMA.

TELEMUNDO
TUCSON

EDUCATION

Tucson Area Hispanics Are More Likely to Continue Their Education



Hispanics (18+) Who Plan on Going Back to School in the Next 12 Months

Index: 117

Non-Hispanic Index: 92

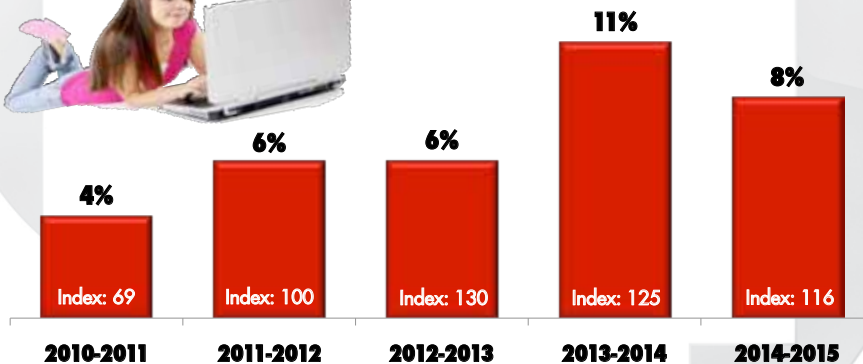
Hispanics (18+) Are More Likely Than Non-Hispanics to Be Planning on Going Back to School in the Next 12 Months.

Source: Scarborough, 2015 Release 1 (Feb 2014 - Jan 2015) Tucson DMA.



Tucson Area Hispanics Are More Likely to Take an Online College Course

Share Trends Among Hispanics (18+) Who Have Taken an Online College Course in the Past 30 Days



Hispanics (18+) Are Above the Market Average When it Comes to Taking an Online College Course in the Past 30 Days.

Source: Scarborough, 2015 Release 1 (Feb 2014 - Jan 2015) Tucson DMA.



EDUCATION

A for Arizona

A for Arizona’s goal is to see rapid expansion in the number of ‘A’-schools serving low-income students in the state. Arizona has created a strong public school choice environment and many excellent examples of highly achieving schools and systems. But we have not yet seen a rapid rate of gain in achievement, particularly in schools serving low-income and Hispanic students.

In order to understand what the best public schools in Arizona need in order to expand their impact, our first priority has been familiarizing ourselves with Arizona’s low-income ‘A’-school leaders. The highest density of low-income “A” schools are in the predominantly Hispanic schools of Southern Arizona, especially rural communities and along the international border.

Since 2014, we have met quarterly with roughly 100 district and charter ‘A’-school leaders.

Based on these conversations, we know that Arizona can be the national leader in achievement gains and a proliferation of new or expanded, high-quality public schools serving low-income and Hispanic students. Thankfully, two major state initiatives are now aimed directly at this goal: Arizona’s Public Schools Achievement District and the design of an efficient student-centered funding formula via the Governor’s Classrooms First Council.

The heart and soul of A for Arizona’s work is to recognize, support, and accelerate the impact of our state’s low-income ‘A’ public schools. This work affects not only the quality of life and economic potential of their students but also directly improves the long-term economic viability of our state and affected communities.



Hispanics Are Very Prominent at Tucson Area Colleges and Universities

Share of Hispanics Enrolled at Tucson Area Universities and Colleges (Fall 2013)

University/College	Under Grad Enrollment	% Hispanic	Hispanic Graduation Rate
University of Arizona	31,670	24%	54%*
Pima Community College	30,082	40%	10%†
Cochise College	4,453	42%	22%†

*Graduation Rate based on students who began their studies in Fall 2008 †Graduation Rate based on students who began their studies in Fall 2011



Source: National Center of Education Statistics: College Navigator



EDUCATION

Graduation Rates Among *Tucson Area* Hispanics Remains Strong

Graduation/Dropout Rates Among Tucson Area School Districts (2013)

School District	Subgroup	Number in Cohort	Number Graduated	Percent Graduated	Dropout Rate
Tucson Unified District	All	3,227	2,571	79.7	2.3
	Hispanic or Latino	1,696	1,299	76.6	2.4
Amphitheater Unified District	All	1,152	994	86.3	2.6
	Hispanic or Latino	369	308	83.5	3.8
Sunnyside Unified District	All	1,035	724	70.0	4.4
	Hispanic or Latino	911	637	69.9	4.4
Sierra Vista Unified District	All	492	400	81.3	1.5
	Hispanic or Latino	131	108	82.4	1.7
Nogales Unified District	All	412	354	85.9	1.7
	Hispanic or Latino	403	347	86.1	1.7
Flowing Wells Unified District	All	379	312	82.3	3.4
	Hispanic or Latino	209	165	78.9	3.3
Catalina Foothills Unified District	All	382	350	91.6	0.5
	Hispanic or Latino	72	65	90.3	0.4
Douglas Unified District	All	308	242	78.6	1.8
	Hispanic or Latino	295	231	78.3	1.9



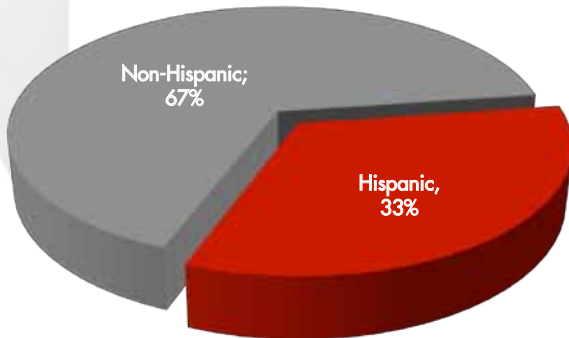
Source: Arizona Department of Education

TELEMUNDO
TUCSON

GROCERY

Tucson Area Hispanics Represent a Significant Share of Grocery Shoppers

Hispanics (18+) Whose Households Have Shopped for Groceries in the Past 7 Days



Tucson area Hispanics spend more weekly on average on groceries than the general population. This may occur due to a number of factors including the larger average size of the Hispanic household. As stated previously in this report, Hispanic households index higher for children age 2 – 17 years of age.

That Translates Into **292,264** Hispanics Whose Households Have Shopped for Groceries in the Past 7 Days

Source: Scarborough, 2015 Release 1 (Feb 2014 -Jan 2015) Tucson DMA.

TELEMUNDO
TUCSON

Tucson Area Hispanics Are Likely to Pay More For Their Weekly Groceries



Average Amount Hispanic (18+) Households Spent on Groceries in the Past 7 Days

\$141.27

Non-Hispanic: \$127.06

Hispanic (18+) Households Spend More Money Per Week on Groceries Than Non-Hispanic Households.

Source: Scarborough, 2015 Release 1 (Feb 2014 -Jan 2015) Tucson DMA.

TELEMUNDO
TUCSON

GROCERY

Grocery Stores Compete For Business Among *Tucson Area* Hispanics

Grocery Stores Shopped by Hispanic (18+) Households in the Past 7 Days

Grocery Stores Shopped in Past 7 Days	% of Hispanics	Index
Fry's	58%	98
Walmart Supercenter	52%	117
Food City	40%	201
Costco	30%	94
Safeway	30%	79
Walmart Neighborhood Market	25%	115
El Super	17%	237
Albertsons	15%	89
Sprouts	8%	55
Target/Super Target	7%	53
Trader Joe's	7%	53
Bashas'	7%	96
Sam's Club	5%	89
Whole Foods Market	2%	43
AJ's Fine Foods	2%	50



Source: Scarborough, 2015 Release 1 (Feb 2014 - Jan 2015) Tucson DMA.

Tucson Area Hispanics Spent Millions on Basic Food Items in the Past Year

Estimated Amount Hispanics Spent on Basic Food Items in 2014

Meat, Eggs & Poultry



\$168,000,000
37% of Total Category

Fruits & Vegetables



\$123,000,000
33% of Total Category

Bakery Products



\$77,000,000
29% of Total Category

Dairy Products



\$68,000,000
31% of Total Category

Tucson Area Hispanics are responsible for nearly one third of the dollars spent on basic food items in 2014!

Source: IHS Global Insight 2015 Hispanic Market Monitor- Tucson DMA



GROCERY

Tucson Area Hispanics Are More Likely to Purchase Many Food Items

Food Products Used by Hispanic (18+) Households in the Past 7 Days

Food Products Purchased	% of Hispanics	Index
Coffee	68%	107
Fresh meat	68%	102
Tortillas	67%	106
Packaged meat (bacon, hot dogs, lunch meat, etc.)	64%	106
Ice cream, frozen juice bars, frozen yogurt	48%	97
Candy	47%	105
Ready-to-eat cereal	44%	92
Pretzels, chips, popcorn	43%	90
Yogurt (not frozen)	39%	94
Soup (canned or dry mix)	37%	93
Any store brand food	35%	99
Nuts	33%	84
Salsa	32%	85
Prepared foods (chicken, salad bars, sandwiches, etc.)	30%	105
Frozen pizza	16%	79
Energy bars/nutrition bars	15%	105
Baby food	4%	102



Source: Scarborough, 2015 Release 1 (Feb 2014 -Jan 2015) Tucson DMA.

Many Beverages Are More Likely to be Consumed by **Tucson Area** Hispanics

Beverages Drank by Hispanics (18+) in the Past 7 Days



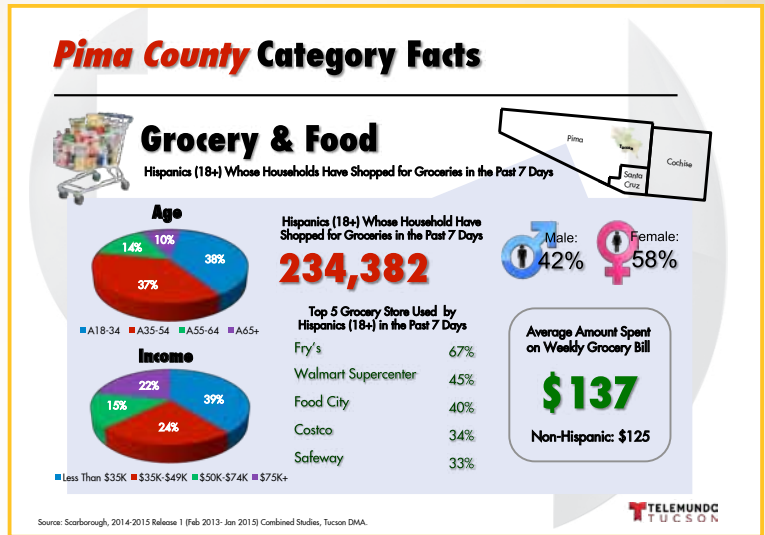
Beverages Drank	% of Hispanics	Index
Regular Soda	61%	115
Bottled Water	58%	108
Bottled/Canned Tea	42%	156
Orange Juice	36%	113
Fruit Juice	36%	124
Sports Drinks	33%	138
Diet Soda	30%	94
Energy Drinks	10%	97



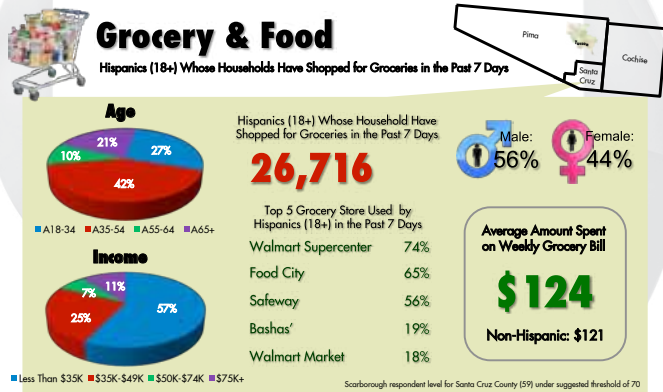
Source: Scarborough, 2015 Release 1 (Feb 2014 -Jan 2015) Tucson DMA.

GROCERY

In Pima County, Hispanics age 18 to 54 encompass the majority of Hispanic grocery shoppers in the last seven days. Thirty nine percent have an income of less than \$35,000. Fry's food stores dominate the market share for grocery stores serving the Hispanic community in Pima County.

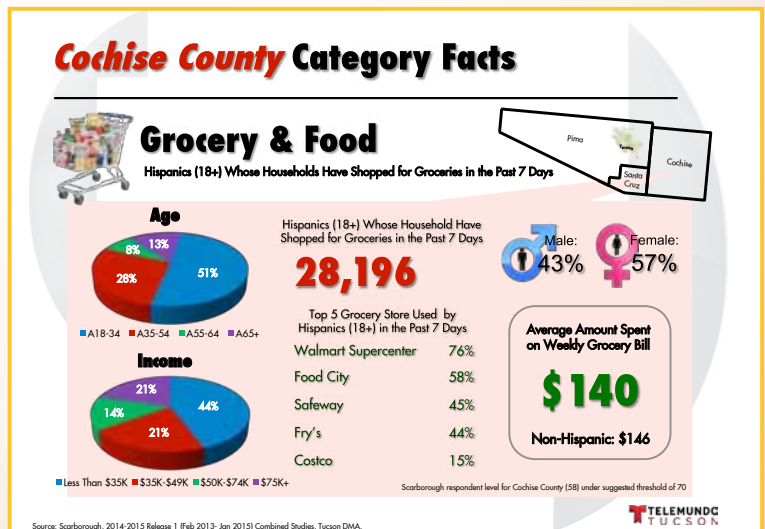


Santa Cruz County Category Facts



In Santa Cruz County, Hispanics age 35 to 54 encompass the majority of Hispanic grocery shoppers in the last seven days. Fifty seven percent have an income of less than \$35,000. The Walmart Super Center dominates the market share for grocery stores serving the Hispanic community in Santa Cruz County.

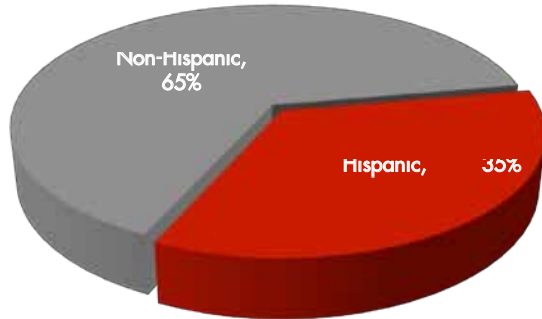
In Cochise County, Hispanics age 18 to 34 encompass the majority of Hispanic grocery shoppers in the last seven days. Forty four percent have an income of less than \$35,000. The Walmart Super Center dominates the market share for grocery stores serving the Hispanic community in Cochise County.



QSR

Tucson Area Hispanics Represent Over One Third of Fast Food Diners

Adults (18+) Who Have Dined at Any Fast Food Restaurant in the Past 30 Days



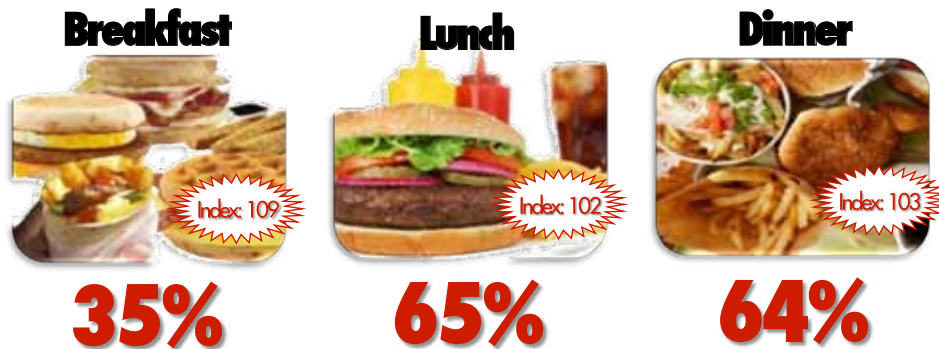
That Translates Into **267,764** Hispanics Who Have Dined at Any Fast Food Restaurant in the Past 30 Days

Source: Scarborough, 2015 Release 1 (Feb 2014- Jan 2015) Tucson DMA.



Fast Food is Popular Throughout the Day for **Tucson Area** Hispanics

Share of Hispanics (18+) Who Have Dined at Any Fast Food Restaurant in the Past 30 Days



Hispanics (18+) Are Over the Market Average When it Comes to Eating Fast Food for Breakfast, Lunch & Dinner!

Source: Scarborough, 2015 Release 1 (Feb 2014- Jan 2015) Tucson DMA.



QSR

Tucson Area Hispanics Are More Likely to Use Fast Food Restaurants

Fast Food Restaurants Used by Hispanics (18+) in the Past 30 Days

Fast Food Restaurants Visited	% of Hispanics	Index
McDonald's	50%	130
Little Caesars	31%	189
Jack in the Box	28%	153
Burger King	27%	136
Eegee's	26%	114
Carl's Jr.	25%	142
Subway	24%	101
Taco Bell	22%	114
In-N-Out Burger	19%	111
Starbucks	18%	133
Peter Piper Pizza	18%	186
Wendy's	16%	131

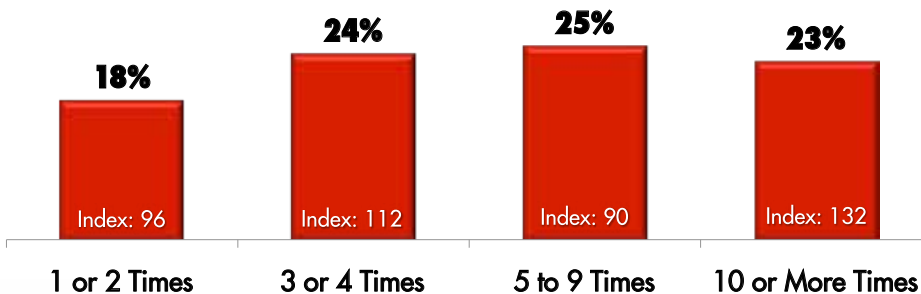


TELEMUNDO TUCSON

Source: Scarborough, 2015 Release 1 (Feb 2014- Jan 2015) Tucson DMA.

Tucson Area Hispanics Are Frequent Users of Fast Food Restaurants

Number of Times Hispanics (18+) Have Used Fast Food Restaurants in the Past 30 Days



Hispanics (18+) Are **32%** Above the Market Average When it Comes to Using a Fast Food Restaurant 10 or More Times in the Past 30 Days.

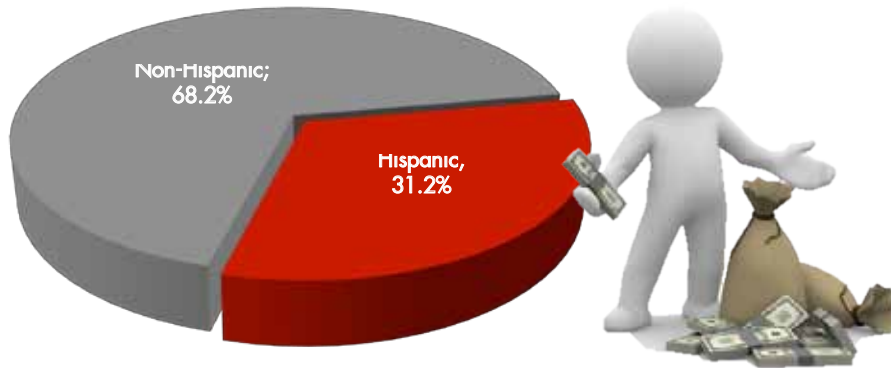
Source: Scarborough, 2015 Release 1 (Feb 2014- Jan 2015) Tucson DMA.

TELEMUNDO TUCSON

BANKING & FINANCIAL

Tucson Area Hispanics Represent One Third of Households That Use a Bank or Credit Union

Adults (18+) Whose Households Use a Bank or Credit Union



That Translates Into **265,014** Hispanics Whose Households Use a Bank or Credit Union.

Source: Scarborough, 2015 Release 1 (Feb 2014 - Jan 2015) Tucson DMA.



Area banks and credit unions have an opportunity in reaching the unbanked Hispanic community in the Tucson area. More than 31,000 Hispanic households in the Tucson area currently do not use a bank or credit union.

Hispanic outreach efforts in the Tucson area by Chase and Wells Fargo have successfully provided them with the highest market share by Hispanic households. Interestingly, Hispanic households index higher with the Tucson area credit unions overall."

Many Tucson Area Hispanics Are in Need of Banking Services

Share of Hispanics (18+) Whose Households Do Not Use a Bank or Credit Union



11%

Index: 139

That Translates Into **31,787** Hispanics Whose Households Do Not Use a Bank or Credit Union.

Source: Scarborough, 2015 Release 1 (Feb 2014 - Jan 2015) Tucson DMA.



BANKING & FINANCIAL

Vantage West Credit Union

It's no secret the Hispanic population is making a growing impact on the U.S., from culture and arts, to business and sports. In Arizona and beyond, the business community is taking notice of this growing and significant market.

At Vantage West, we are committed to continuous learning and understanding how we can best meet the expectations of all our members. With more than thirty percent of the population in Arizona being Hispanic, Arizona-based Vantage West Credit Union recognizes that delivering the best member service means serving members according to their preferences. This includes taking both language and culture into consideration in order to make for the best member experience.

We rely on research from important sources like Hispanic Market Outlook to help us keep up to speed on important findings that ultimately guide our efforts to strengthen our continuing service and outreach to our Hispanic Community.

We stand by our commitment to the Hispanic market and are proud of the great strides we have made. Our efforts have not gone unrecognized.

In fact, Vantage West recently earned an industry designation, which is given to credit unions that have demonstrated a commitment to serving the Hispanic segment through culturally relevant interaction, as well as offering a choice of language preference.

On Sept. 22, Vantage West will be the first credit union in Arizona to raise a flag that symbolizes its newly awarded Juntos Avanzamos designation. This award serves as a point of pride for Vantage West and also reinforces the importance of embracing the rich Hispanic culture in Arizona.

Nationally Recognized Banks Are Popular With *Tucson Area* Hispanics

Banks/Credit Unions Used by Hispanic (18+) Households

Banks/Credit Unions Used	% of Hispanics	Index
Chase	32%	100
Wells Fargo	31%	98
Bank of America	24%	90
Vantage West Credit Union	15%	115
Pima Federal Credit Union	9%	133
Tucson Federal Credit Union	8%	114
Other credit union	7%	56
Hughes Federal Credit Union	6%	83
Other bank	5%	73
Pyramid Federal Credit Union	4%	107
Bank of Tucson	3%	228
BBVA Compass	3%	53



TELEMUNDO
TUCSON

Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA

Many *Tucson Area* Hispanics Take Advantage of Financial Services

Financial Services Used by Hispanic (18+) Households



Financial Services Used	% of Hispanics	Index
Checking account	68%	85
Savings account	60%	90
Debit or ATM card	57%	84
Online bill paying	25%	74
Online banking	24%	69
Home mortgage	21%	77
Auto loan	14%	71
Personal loan	11%	149
Student loan	10%	95
Home improvement or home equity loan	4%	55
Money market account	4%	33
Refinanced home mortgage	3%	41

TELEMUNDO
TUCSON

Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA

WIRELESS TELEPHONE

Tucson Area Hispanics Spend Millions on Their Wireless Telephone Service

Estimated amount Tucson Area Hispanics (18+)
Spent on Wireless Telephone Service in the past month

\$22,797,968



That's **34%** of the
Total Wireless Telephone
Spending Category!

Source: Scarborough, 2015 Release 1 (Feb 2014 - Jan 2015) Tucson DMA.



Tucson Area Hispanics Choose From Many Wireless/Cell Phone Providers

Wireless/Cell Phone Providers Used by Hispanics (18+)

Wireless Telephone Providers Used	% Hispanics	Index
T-Mobile	21%	156
Verizon Wireless	21%	66
Cricket	16%	192
Other carrier	12%	104
Sprint	11%	106
AT&T	6%	73
TracFone	2%	44
Straight Talk	1%	75
Boost Mobile	1%	166



Source: Scarborough, 2015 Release 1 (Feb 2014 - Jan 2015) Tucson DMA.

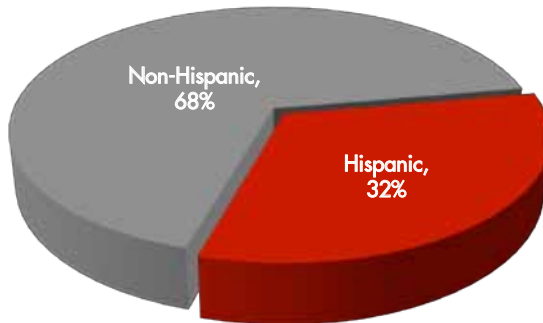


WIRELESS TELEPHONE

Tucson area Hispanics are more likely to use a smartphone than the general population. This is important information for our business community who are focusing on mobile friendly websites and applications for iPhone and androids.

Tucson Area Hispanics Represent One Third of All Wireless/Cell Phone Users

Adults (18+) Who Use a Wireless/Cell Phone Service



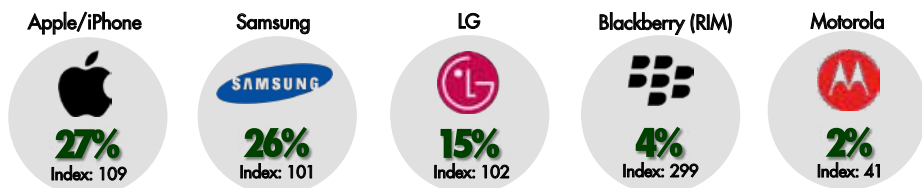
That Translates Into **266,582** Hispanics Who Use a Wireless/Cell Phone Service!

Source: Scarborough, 2015 Release 1 (Feb 2014 -Jan 2015) Tucson DMA.



Tucson Area Hispanics Are More Likely to Use a Smartphone

Wireless/Cell Phone Brand Used by Hispanics (18+)



Hispanics (18+) That Currently Use a Smartphone

Index: 106

Non-Hispanic: 97

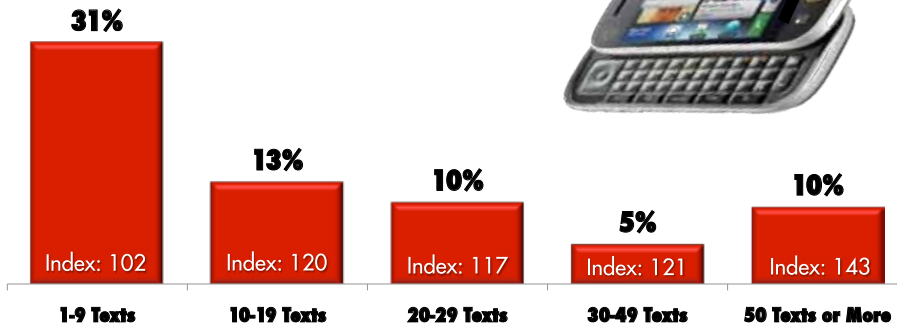
Source: Scarborough, 2015 Release 1 (Aug 2014 -Jan 2015) Tucson DMA.



WIRELESS TELEPHONE

Text Messaging is Very Popular Among Tucson Area Hispanics

Number of Texts Hispanics (18+) Sent Yesterday



Hispanics (18+) Are **43%** Above the Market Average When it Comes to Sending *50 Texts or More* Yesterday.

Source: Scarborough, 2015 Release 1 (Feb 2014 - Jan 2015) Tucson DMA.



Marketing a product or service via text message is an underutilized advertising tool by most businesses. Tucson area Hispanics are more likely to send multiple text messages and spend more on their monthly cell phone bills. One factor may be the likelihood for Hispanic households to add additional services to call and text Mexico which is an additional fee by most carriers.

Tucson Area Hispanics Pay More For Their Wireless Telephone Service



Average Amount Hispanic (18+) Households Spent on Wireless/Cell Phone Bill Last Month

\$85.52

Non-Hispanic: \$78.58

Hispanic (18+) Households Spend More on Their Wireless/Cell Phone Bill Than Non-Hispanics.

Source: Scarborough, 2015 Release 1 (Feb 2014 - Jan 2015) Tucson DMA.



RETAIL

Hispanics in the Tucson area spend more in nearly every clothing category than the general population. Data contained in this report indicated that the Hispanic population focuses on a healthy image which likely would influence purchases of clothing and footwear items. In addition, a factor may be the larger average size of the Hispanic household in the Tucson area.

Tucson Area Hispanics Spend Millions on Clothing and Footwear

Estimated Amount Spent on Clothing & Footwear in 2014

\$406,000,000



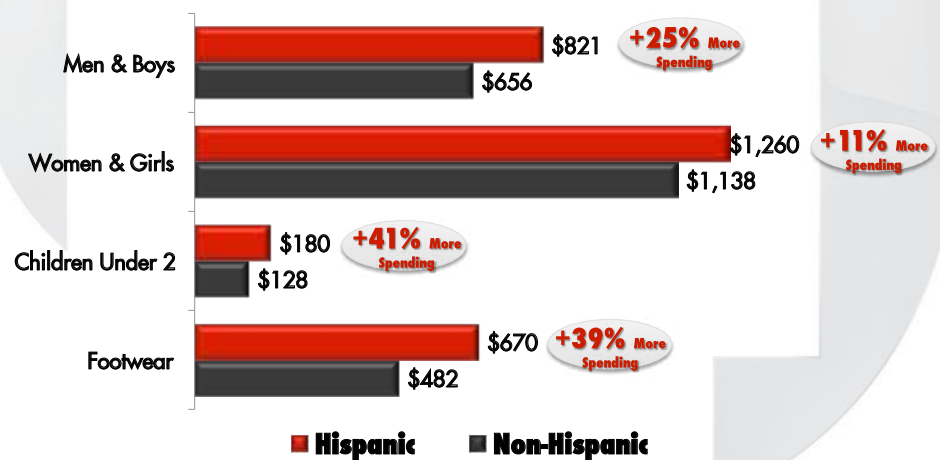
That's **36%** of the Total Clothing & Footwear Spending Category!

Source: IHS Global Insight 2015 Hispanic Market Monitor-Tucson DMA



Tucson Area Hispanics Spend More on Clothing and Footwear

Amount Spent per Household on Clothing & Footwear in 2014



Source: IHS Global Insight 2015 Hispanic Market Monitor-Tucson DMA



RETAIL

Tucson Area Hispanics Have Many Shopping Malls to Choose From

Malls Shopped/Visited by Hispanics (18+) in the Past 3 Months

Malls Shopped or Visited	% of Hispanics	Index
Tucson Mall	54%	119
Park Place	39%	113
El Con Mall	37%	116
Foothills Mall	25%	96
Tucson Spectrum	24%	162
Other shopping center or area	18%	89
VF Outlet	12%	195
La Encantada	11%	68
Arizona Mills	9%	148
The Mall at Sierra Vista	7%	111
Crossroads Festival	5%	61
Oro Valley Marketplace	5%	56
Casas Adobes Plaza	4%	102
St. Phillip's Plaza	3%	74



Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+

TELEMUNDO
TUCSON

Tucson Area Hispanics Are More Likely to Shop at Many Clothing Stores

Clothing Stores Shopped/Visited by Hispanics (18+) in the Past 3 Months



Clothing Stores Shopped or Visited	% of Hispanics	Index
Walmart	56%	117
Ross Dress For Less	31%	141
Target	31%	103
JCPenney	25%	133
Burlington Coat Factory	19%	227
Sears	18%	161
Kmart	18%	155
Old Navy	16%	146
Victoria's Secret	16%	149
Dillard's	14%	103
Forever 21	13%	192
Kohl's	12%	63

Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+

TELEMUNDO
TUCSON

ENTERTAINMENT

Tucson Area Hispanics Spent Millions on Entertainment in the Past Year

Estimated amount Tucson Area Hispanics (18+) Spent on Entertainment in 2014

\$380,000,000



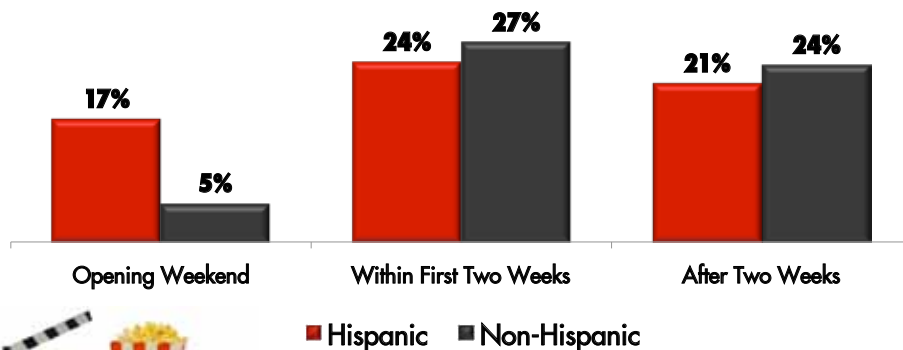
That's **18%** of the Total Entertainment Spending Category!

Source: IHS Global Insight 2015 Hispanic Market Monitor-Tucson DMA

TELEMUNDO
TUCSON

Tucson Area Hispanics Are More Likely to See a Movie on Opening Weekend

When Tucson Area Adults (18+) Saw a New Movie in the Past 12 Months



Hispanics (18+) Are More Likely Than Non-Hispanics to See a New Movie on the Opening Weekend of Its Release

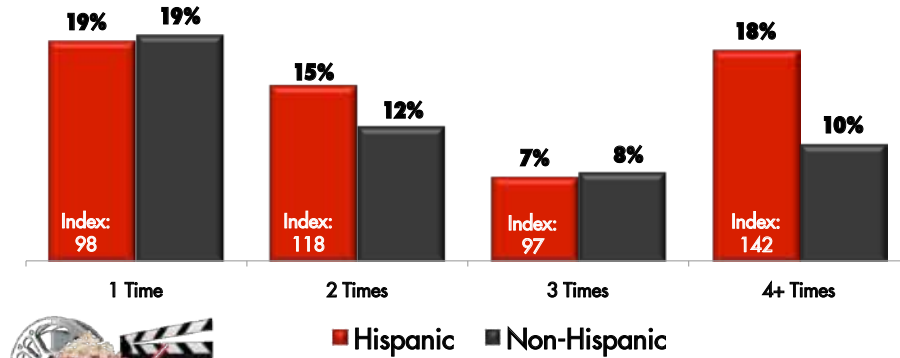
Source: Scarborough, 2015 Release 1 (Feb 2014 - Jan 2015) Tucson DMA.

TELEMUNDO
TUCSON

ENTERTAINMENT

Tucson Area Hispanics Are Frequently Going to the Movies

Number of Times Tucson Area Adults (18+) Went to the Movies in the Past 3 Months



Hispanics (18+) Are Above the Market Average When it Comes to Going to the Movies 4 Times or More in the Past 3 Months.

Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA.



Tucson area Hispanics are heavy movie viewers and indexed much higher than the general population in viewing more than 4 movies at the movie theatres over the last three months. Interestingly, Hispanics in the Tucson area are more likely to attend a new movie on opening weekend than the general population. Advertising in movie theatres may be a good avenue for many industries reaching the Hispanic market in Tucson.

Tucson Area Hispanics Occupy Their Time With Many Leisure Activities

Leisure Activities Done by Hispanics (18+) in the Past 12 Months

Leisure Activities Done	% of Hispanics	Index
Gardening (flowers or vegetables)	38%	89
Jogging - running	31%	130
Lawn care	30%	94
Swimming	30%	91
Bicycling	20%	83
Basketball	18%	153
Volunteer work	14%	63
Bowling	14%	77
Yoga - Pilates	13%	113
Hiking - Backpacking	11%	55
Photography	11%	77
Soccer	9%	129



Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+



ENTERTAINMENT

Many Events or Places Visited Are More Popular With **Tucson Area** Hispanics

Events Attended/Place Visited by Hispanics (18+) in the Past 12 Months



Event Attended/Place Visited	% of Hispanics	Index
Reid Park Zoo	39%	114
Pima County Fair	24%	125
Arizona-Sonora Desert Museum	18%	83
Tucson Rodeo	16%	150
University of Arizona football game	15%	105
High school sports event	13%	143
Old Tucson Studios	11%	135
Rock concert	11%	86
Cinco de Mayo celebration	11%	178
Arizona Diamondbacks baseball game	9%	158
Live theater	9%	59
Health/wellness/fitness expo	8%	130

Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+



Reid Park Zoo

Nothing Gets You Closer! Located in the heart of Tucson, Reid Park Zoo is southern Arizona's most attended gated attraction with over 600,000 visitors last year. Reid Park Zoo's 24-acres provide family friendly entertainment and educational experiences, such as our amazing African elephant family. This family includes Nandi, the first elephant born in Arizona, along with her mother, father, two brothers, and auntie. Visitors also enjoy seeing tigers, rhinos, lions, and more as they learn about the importance of conservation.

The Zoo's nonprofit support organization, Reid Park Zoological Society, utilizes a variety of marketing efforts to reach southern Arizona's Hispanic community for zoo visits, special events, and rentals. Based on statistics, approximately 170,000 of the Zoo's visitors last year were Hispanic. We work with local Spanish radio stations and publications that target families and visitors from Mexico to tour the Zoo as well as to market our children friendly events such as Howl-o-Ween and Zoo Lights. Another promotional area is the opportunity for people to host parties, weddings, quinceañeras, and picnics at the Zoo. Our education programs also bring the Zoo to children in the nearby border community of Nogales, Arizona with our Zoo to You program.

ENTERTAINMENT

Tucson Area Hispanics Are More Likely to be Interested in the NBA, MLS & MLB

Hispanic (18+) Level on Interest in Professional Sports (Very/Somewhat)



Hispanic: 38%
Non-Hispanic: 40%



Hispanic: 29%
Non-Hispanic: 21%



Hispanic: 24%
Non-Hispanic: 16%



Hispanic: 12%
Non-Hispanic: 5%



Hispanic: 11%
Non-Hispanic: 14%



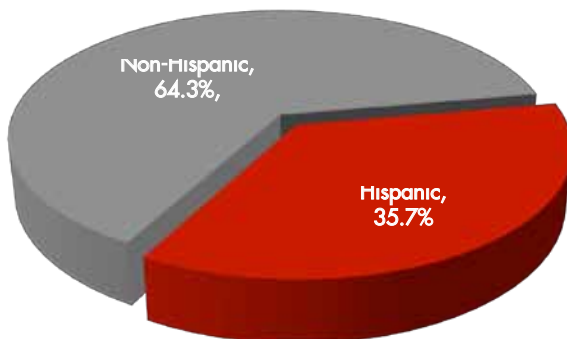
Hispanic: 6%
Non-Hispanic: 10%

Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+



Over One Third of Casino Visitors in the **Tucson Area** are Hispanic

Adults (21+) Who Have Visited a Casino in the Past 12 Months



That Translates Into **126,125** Hispanics Who Have Visited a Casino in the Past 12 Months

Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 21+



ENTERTAINMENT

Tucson Area Hispanics Are More Likely to Visit a Casino



Hispanics (21+) Who Have Visited a Casino in the Past 12 Months.

Index: 112

Non-Hispanic Index: 94

Hispanics (21+) Are More Likely Than Non-Hispanics to Have Visited a Casino in the Past 12 Months.

Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 21+



Many Casinos Are Popular with Tucson Area Hispanics

Share of Hispanics (21+) Who Have Visited a Local Casino in the Past 12 Months

Tucson Area Casinos Visited	% of Hispanic	Index
Desert Diamond Casino (Tuc)	30%	142
Casino Del Sol	30%	123
Desert Diamond Casino (Sah)	20%	106
Other Casino	7%	74
Apache Gold Casino	1%	47



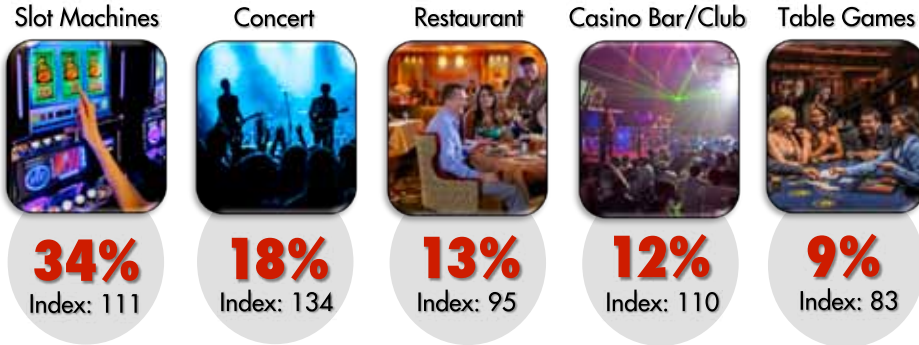
Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 21+



ENTERTAINMENT

Tucson Area Hispanics Enjoy the Entire Casino Experience

Casino Activities Done by Hispanics (21+) in the Past 12 Months



Hispanics (21+) Are More Likely Than Non-Hispanics to Participate in Many Different Casino Activities.

Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+



Thousands of **Tucson Area** Hispanics Have Traveled Via Airline

Hispanics (18+) Who Have Used Any Airline for Domestic/Foreign Travel in the Past 12 Months

77,910

Total Market Air Travelers: **377,537** **21%** Hispanic Share



Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+



ENTERTAINMENT

Tucson Area Hispanics Prefer Many Different Airlines for Travel

Airlines Used by Hispanics (18+) for Foreign/Domestic Travel in the Past 12 Months

Airline Used	% of Hispanics	Index
Southwest	16%	69
US Airways	9%	81
American	7%	48
United	5%	63
Delta	3%	46
Other airline	3%	47
Alaska Airlines	2%	49
AirTran	1%	119
JetBlue	1%	31

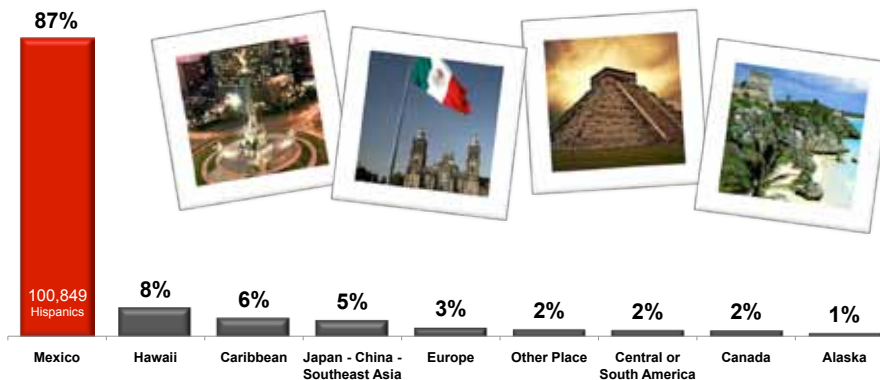


TELEMUNDO
TUCSON

Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+

Mexico is Easily a Top Travel Destination for **Tucson Area** Hispanics

Places Visited by Hispanics (18+) Who Have Traveled Outside the Continental U.S. in the Past 3 Years



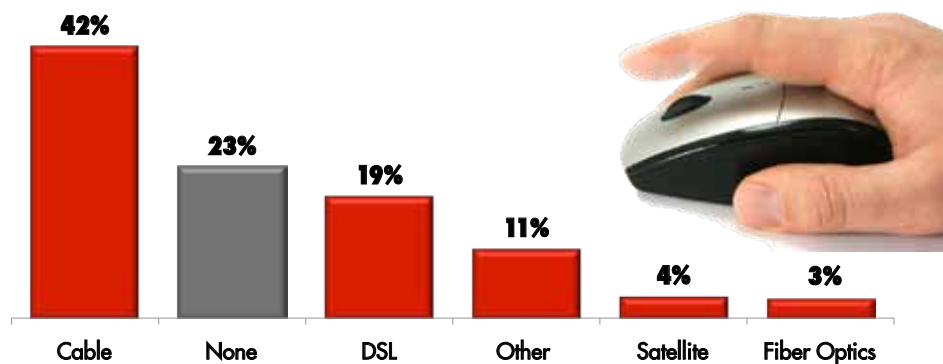
TELEMUNDO
TUCSON

Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+

INTERNET USAGE

Many Internet Connections Are Available to **Tucson Area** Hispanics

Type of Internet Connection That Hispanic (18+) Households Subscribe To



23% of Hispanics (18+) Live in a Household That Does Not Have an Internet Connection.

Source: Scarborough, 2015 Release 1 (Feb 2013- Jan 2014) Tucson DMA, Adults 18+

TELEMUNDO
TUCSON

ArizonaOn Initiative

Nearly one-third of U.S. households (32 percent) lack broadband service.¹ Despite the growing importance of the Internet in American life, 28 percent of Americans do not use the Internet at all.¹ Low-income and minority Americans disproportionately find themselves on the wrong side of the digital divide.

More than 23% of Hispanic Households in the Tucson area do not have an internet connection. Using the Internet is becoming a necessity across more and more facets of life. It's used to complete homework, search for and apply for jobs, connect with family and friends and access government programs.

JOBS: Ninety-six percent of working Americans use new communications technologies as part of their daily life, while sixty-two percent of working Americans use the Internet as an integral part of their jobs.² 94% of recruiters use or plan to use social media to find potential employees. 50% of today's jobs require technology skills, and this percentage is expected to grow to 77% in the next decade.

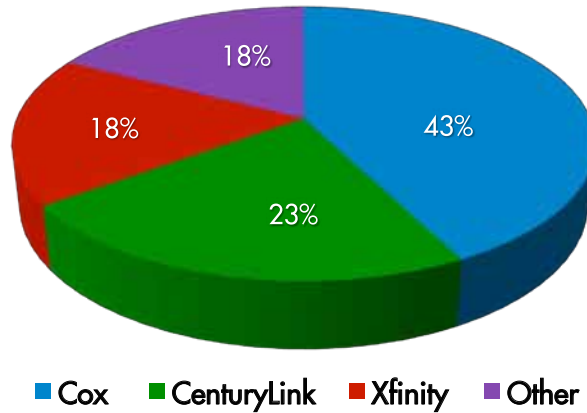
EDUCATION: According to a study of American middle and secondary school teachers conducted by Pew Research, 67% say the internet has a "major impact" on their ability to interact with parents and 57% say it has had such an impact on enabling their interaction with students. Teachers of the lowest income students are more than twice as likely as teachers of the highest income students (56% v. 21%) to say that students' lack of access to digital technologies is a "major challenge" to incorporating more digital tools into their teaching.

HEALTH: 21% of uninsured Americans do not use the Internet, making it impossible for them to use the online health exchanges. A Pew Internet Report revealed 59% of caregivers with internet access say that online resources have been helpful to their ability to provide care and support for the person in their care. ArizonaOn is a state-wide nonprofit focused on connecting low-income students and their families at home to high-speed, low-cost Internet. ArizonaOn works to eliminate the digital, economic, and academic divide by delivering home access to Internet, affordable computers, and digital literacy training for thousands of unconnected households in our state. Learn more at ArizonaOn.org. 1. Digital Nation: Expanding Internet Usage, NTIA Research Preview (Feb. 2011) 2. Pew Internet and American Life Project, Most Working Americans Now Use The Internet or Email at Their Jobs, Sept. 24, 2008.

INTERNET USAGE

Tucson Area Hispanics Can Choose From Many Internet Service Providers

Internet Service Provider Used Among Hispanic (18+) Households That Subscribe



Source: Scarborough, 2015 Release 1 (Feb 2013- Jan 2014) Tucson DMA. Adults 18+



Tucson Area Hispanics Are More Likely to Visit Many Websites

Websites/Apps Visited by Hispanics (18+) in the Past 30 Days

Website/App Visited	% of Hispanics	Index
Google	59%	92
Facebook	57%	104
YouTube	45%	104
Pandora	32%	127
Yahoo!	29%	103
Nefflix	26%	87
Amazon	24%	67
Cox	20%	97
Craigslist	19%	73
MSN	18%	108
Instagram	16%	148
ESPN	16%	114



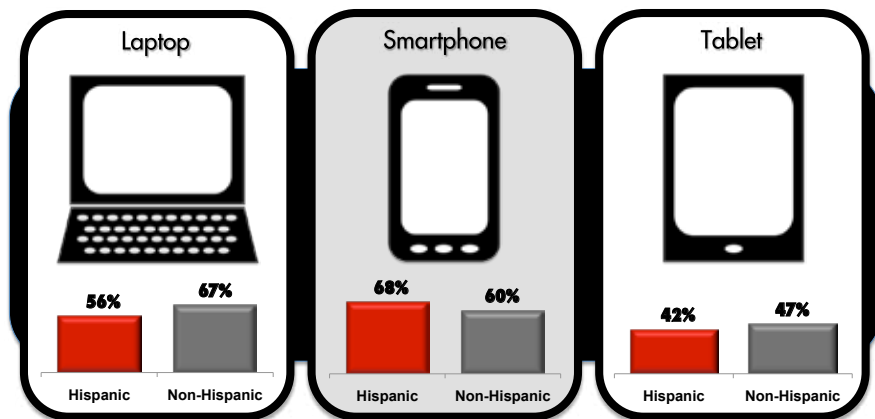
Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+



INTERNET USAGE

Tucson Area Hispanics Are More Likely to Own a Smartphone

Share of Computer/Mobile Devices Currently Owned



Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+



Tucson area Hispanics index higher in the use of Social Media daily. At the Tucson Hispanic Chamber and at our affiliate chambers in Nogales, Sierra Vista and Douglas, we have embraced the use of Facebook to promote our member businesses and our activities. We operate multiple Facebook pages and twitter accounts related to our four Hispanic chambers and the 40 under 40 awards. In addition, we promote the chamber's YouTube account. All of these social media outlets are an opportunity for our member's to post their events and comments. The Tucson Hispanic Chamber reaches more than 10,000 friends on Facebook and has close to 4500 followers on Twitter.

Tucson Area Hispanics Access the Internet From Many Digital Sources

Ways Hispanics (18+) Used Internet/Apps in the Past 30 Days



Ways Used the Internet	Computer	Smartphone	Tablet
Search (Google, Yahoo!, etc.)	45%	37%	23%
Social networking	39%	42%	13%
Banking	28%	23%	8%
Video clips (YouTube, etc.)	24%	24%	13%
National news	21%	10%	4%
Shopping	19%	11%	4%
Maps/GPS	19%	32%	5%
Weather	19%	30%	6%
Instant messaging	18%	35%	5%
Local news	15%	9%	4%
Travel Reservations	15%	6%	3%
Games (play or download)	15%	15%	11%

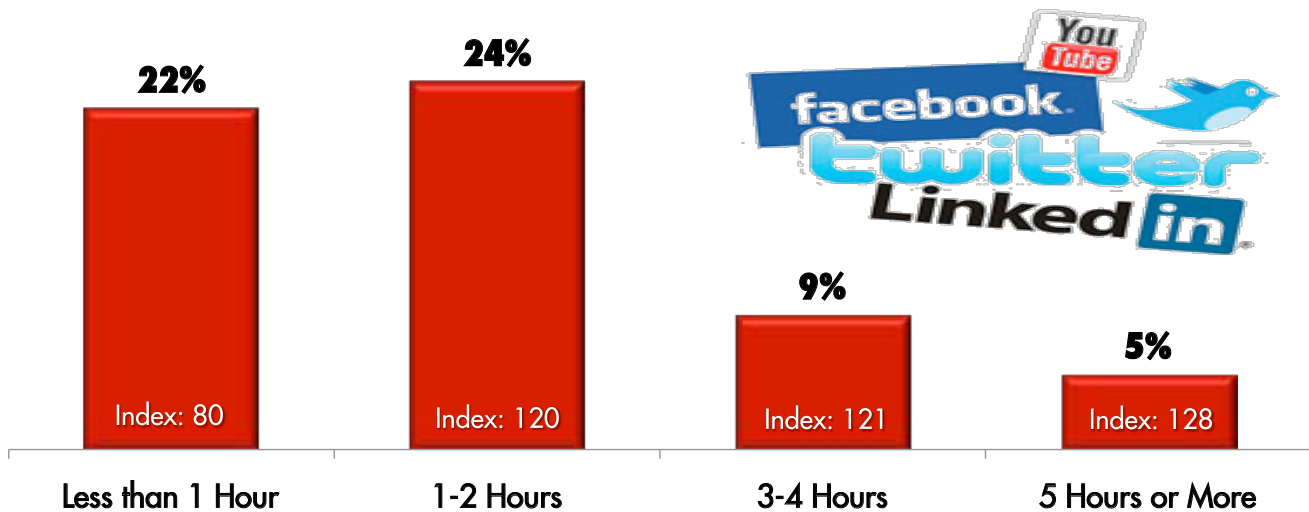
Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+



INTERNET USAGE

Tucson Area Hispanics Devote Hours to Social Networking Sites

Number of Hours Hispanics (18+) Spend on Social Network Sites per Day



Hispanics (18+) Are **28%** Above the Market Average When it Comes to Spending 5 or More Hours per Day on Social Networking Sites.

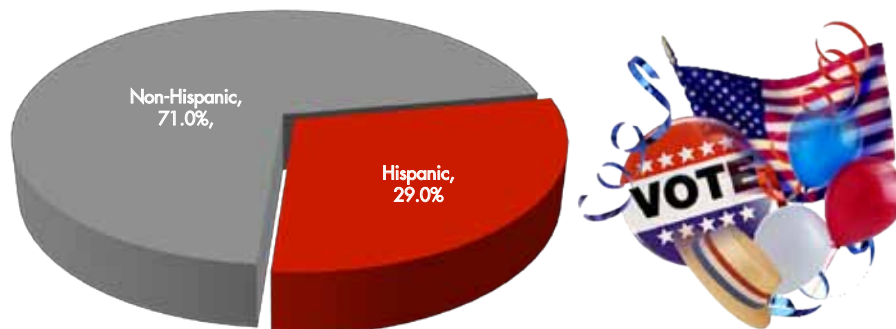
Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+

TELEMUNDO
TUCSON

VOTING

Tucson Area Hispanics Represent a Large Share of Registered Voters

Adults (18+) Who Are Registered to Vote in Their District of Residence



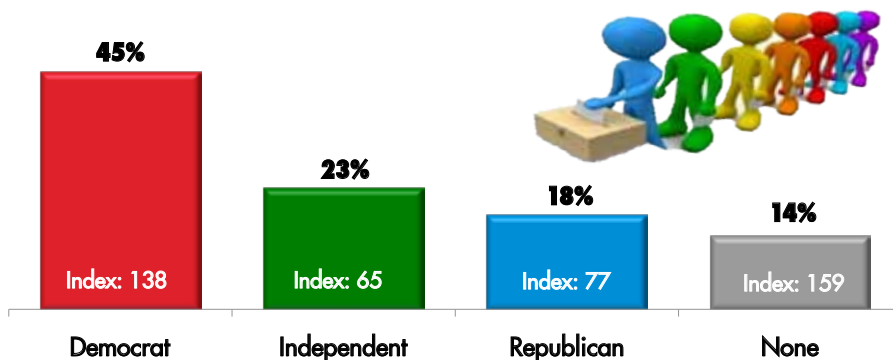
That Translates Into **208,901** Hispanics Who Are Registered to Vote in the Tucson Area

Source: Scarborough, 2015 Release 1 (Feb 2013- Jan 2014) Tucson DMA, Adults 18+

TELEMUNDO
TUCSON

More **Tucson Area** Hispanics are Registered Democrats

Political Party Affiliation Among Hispanics (18+) Registered to Vote



Hispanics (18+) Are **38%** More Likely Than the Total Market to be Registered Democrats.

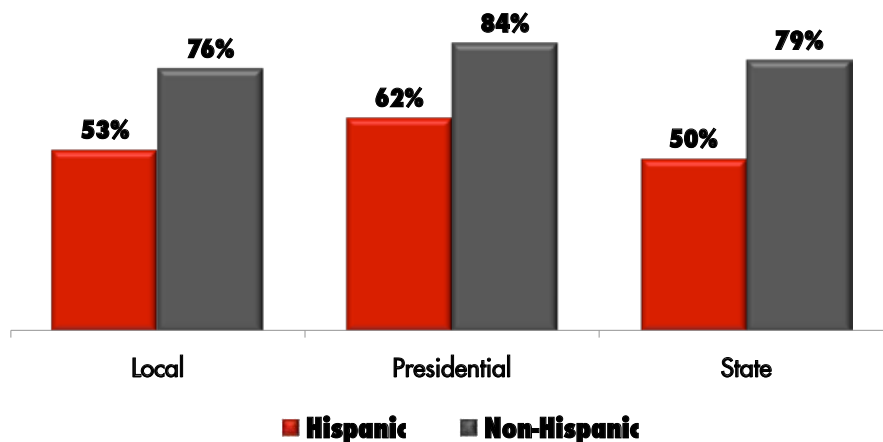
Source: Scarborough, 2015 Release 1 (Feb 2013- Jan 2014) Tucson DMA, Adults 18+

TELEMUNDO
TUCSON

VOTING

Voter Turnout Among *Tucson Area* Hispanics is Under the Market Average

Elections That Adults (18+) Always or Sometimes Participate In



Source: Scarborough, 2015 Release 1 (Feb 2013- Jan 2014) Tucson DMA, Adults 18+

TELEMUNDO
TUCSON

VotaAZ.org

Policy can make or break a lot of things – be it a state’s public image or the ability to bounce back from a declining economy. The Arizona business community knows that good policy matters. Businesses of all sizes and industries have felt the effects – both good and bad – of decisions made at the state Capitol, in Washington, D.C. and even City Hall.

At the federal level, businesses are impacted every day by decisions made on Capitol Hill and at the White House, ranging in scope from immigration to health care to tax policy. Even at a local level, businesses face a seemingly endless list of regulations they’re forced to comply with.

The Arizona business community has come together in big ways and influenced policy for the benefit of all Arizonans. But there’s still work to do. Arizona’s continued economic and social advancement requires a collective effort.

One of the easiest ways to make a difference and influence policy is to know the issues, know the candidates, and vote accordingly. VotaAZ makes this process simple.

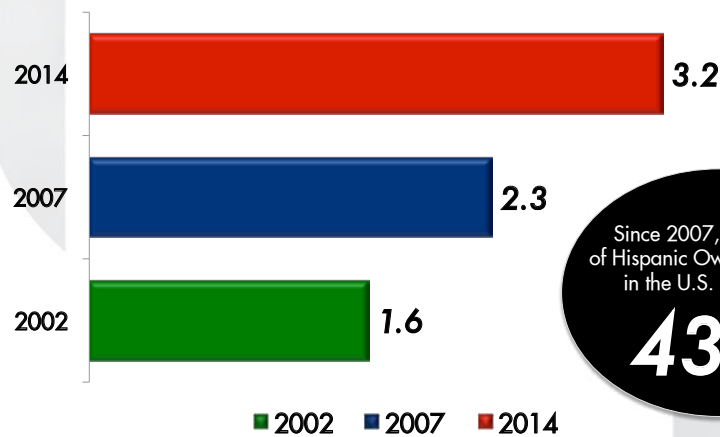
Visitors to VotaAZ.org can register to vote, view objective information about candidates and learn about the issues. Users can access a list of the candidates specific to their Election Day ballot and view voting records and questionnaires for most candidates in their area.

In addition, VotaAZ.org provides a hub of information on important business issues and related activities at the state capitol. This easy-to-use resource provides the non-partisan facts needed to make informed decisions on Election Day and beyond. VotaAZ.org has been created by the Tucson Hispanic Chamber and the Arizona Chamber of Commerce and Industry with support by BIPAC.

SMALL BUSINESS OWNERS

The Number of Hispanic Owned Businesses in the U.S. Has Grown

Number of Hispanic Owned Businesses in the U.S. (in Millions)



Since 2007, the Number of Hispanic Owned Businesses in the U.S. Has Grown

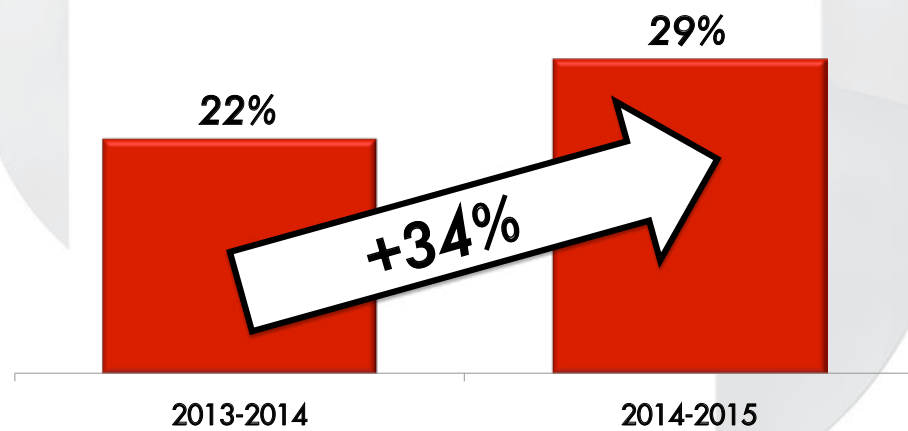
43%

Source: Geoscape, Hispanic Businesses & Entrepreneurs Drive Growth in the New Economy, 2014 Annual Report



Hispanic Owned Small Businesses in the *Tucson Area* Have Grown

Hispanic (18+) Share of Small Business Owners in the Tucson Area



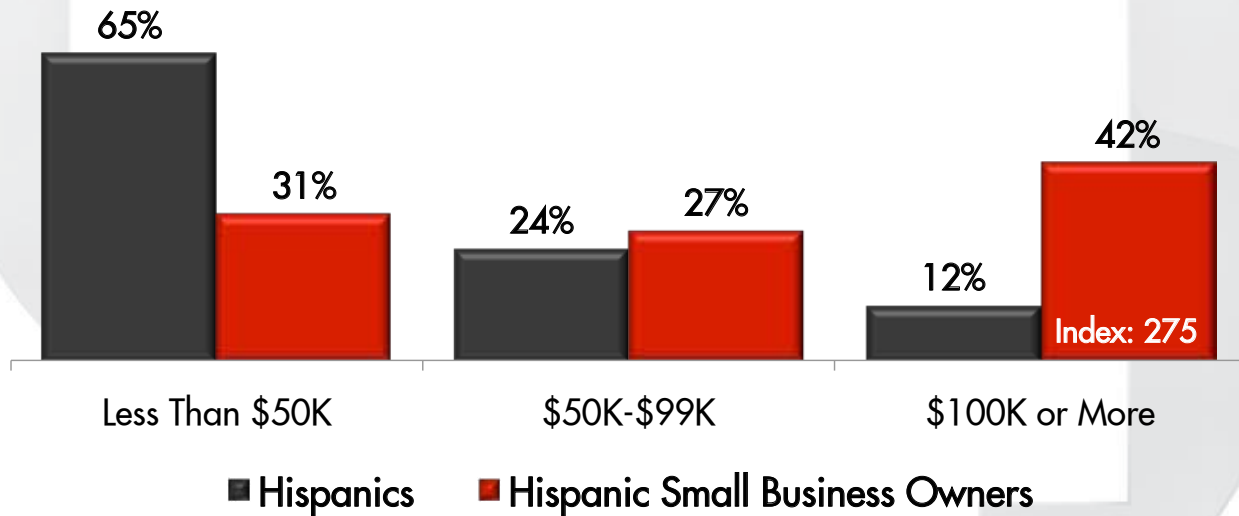
Source: Scarborough, 2014 Release 1 (Feb 2013 -Jan 2014) & 2015 Release 1 (Feb 2014 -Jan 2015) Tucson DMA.



SMALL BUSINESS OWNERS

Hispanic Small Business Owners in the Tucson Area Make More Money

Household Income Level of Hispanic (18+) Small Business Owners



Hispanic (18+) Small Business Owners Are Above the Market Average When it Comes to Having a Household Income of \$100,000 or More

Source: Scarborough, 2014 Release 1 (Feb 2013 -Jan 2014) & 2015 Release 1 (Feb 2014 -Jan 2015) Combined Studies, Tucson DMA. (Scarborough respondent level for Hispanic Small Business Owners [27] under suggested threshold of 70)

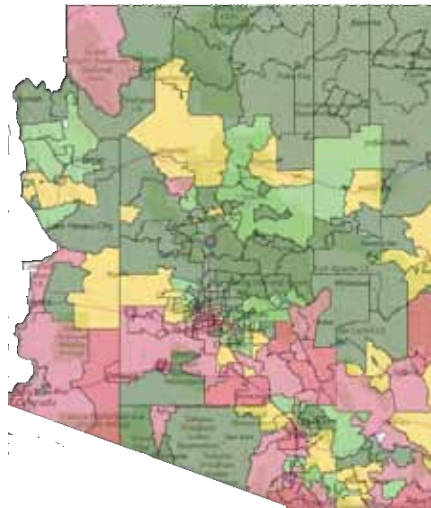
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SEGMENTATION

The *Hispanic* population is concentrated in Southern Arizona

Hispanic Density by Zip Code

- % Pen (49.76%~98.93%)
- % Pen (28.80%~49.37%)
- % Pen (18.79%~28.67%)
- % Pen (12.61%~18.73%)
- % Pen (0.00%~12.45%)



Source: Nielsen Segmentation & Market Solutions (SMS), Pop-Facts 2015

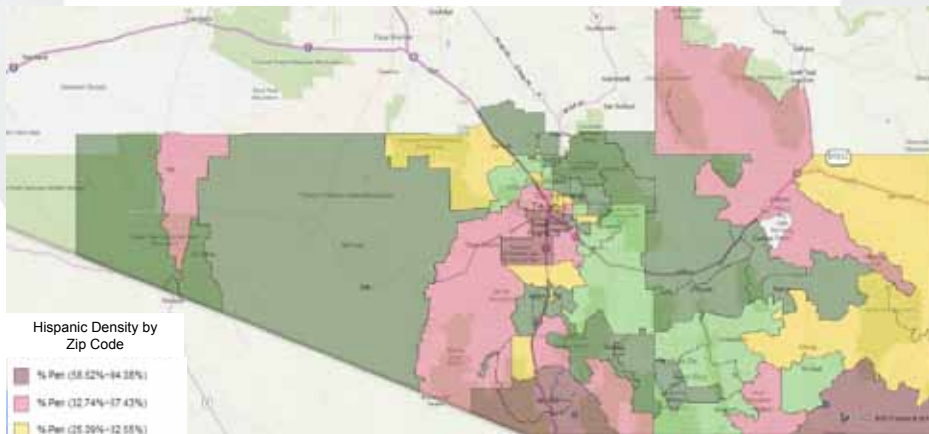


**PEN is Penetration

The *Tucson Area* is a Densely Populated Hispanic Market!

Hispanic Density by Zip Code

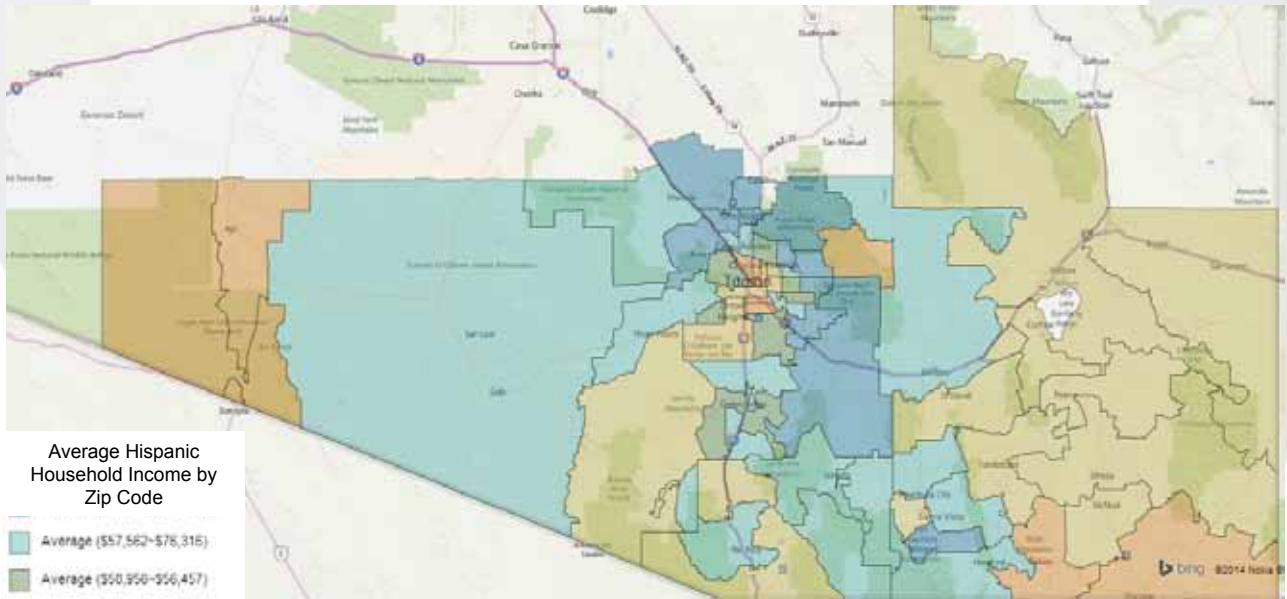
- % Pen (58.52%~94.38%)
- % Pen (32.74%~57.43%)
- % Pen (25.59%~32.55%)
- % Pen (18.33%~24.39%)
- % Pen (2.02%~18.32%)



**PEN is Penetration

SEGMENTATION

Average Hispanic Household Income higher in northern *Tucson Area*



Source: Nielsen Segmentation & Market Solutions (SMS), Pop-Facts 2015



**PEN is Penetration



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