



D A T O S

THE STATE OF ARIZONA'S HISPANIC MARKET

T U C S O N

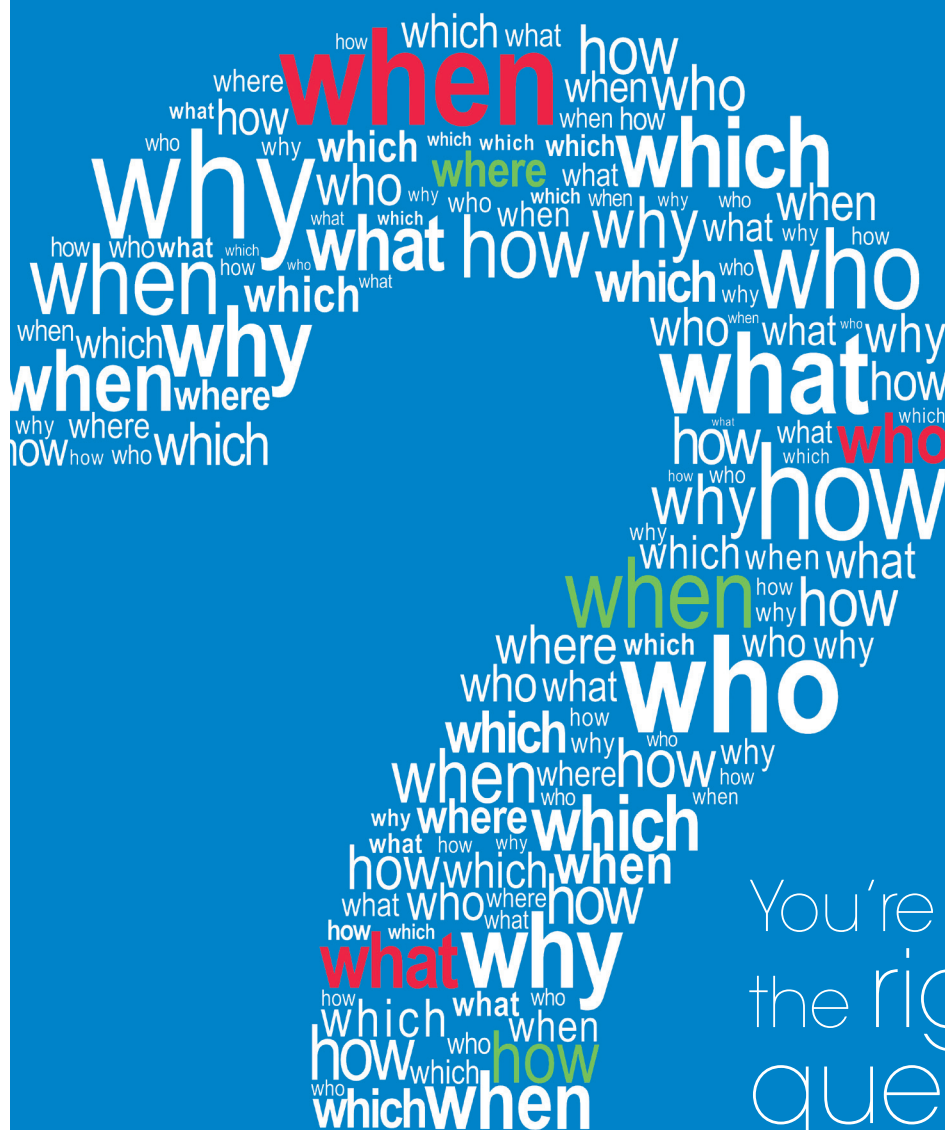
2015

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WELCOME TO DATOS SOUTHERN ARIZONA REGIONAL OVERVIEW 2015



"Numbers tell a story. When it comes to Arizona's health coverage, they tell a powerful one. Just two years ago, Arizona was listed as one of 10 states with the lowest number of insured Hispanics. By coming together as a community, today the number of Hispanics with health insurance has more than doubled, thanks in part to the organizations who worked to help thousands of individuals and families understand the role health insurance can play in their lives. Together with community partners including the Arizona Hispanic Chamber of Commerce, Chicanos Por La Causa and Univision, we are making a difference in the health of our state. As the largest local health insurer, Blue Cross Blue Shield of Arizona will continue in our pursuit to improve the quality of life for Arizonans. We look forward to how all of our combined efforts will improve the numbers in the coming years."

—Rich L. Boals, President & CEO, Blue Cross Blue Shield of Arizona

The Growing Economic Influence Of Arizona Latinos

Arizona's Latino population has nearly tripled in the past 25 years to just over 2 million people, and experts say it could double again by the end of the next generation.

Not since the arrival of the railroad and a wave of white settlers into the Arizona territory in the late 1800s has the state undergone such a far-reaching demographic and cultural transformation.

For 19 years, the Arizona Hispanic Chamber of Commerce has been documenting this historic demographic shift and the growing economic influence of the Arizona's Latino community in a comprehensive report called DATOS: The State of the Hispanic Market.

For the past four years, we have published a related publication called DATOS Tucson shared at the Southern AZ Regional Overview. Among this year's findings: Hispanic consumers statewide will spend about \$40.3 billion on goods and services in 2015; the average Hispanic household in Tucson was \$54,072; and 86 percent of Tucson's Hispanic residents speak at least some Spanish at home. Incidentally, a recent study published by the Cervantes Institute found the United States is now home to 52 million Spanish speakers, more than any other country on earth except Mexico.

As Arizona's economic engine starts to rev up again, Hispanic-owned firms are poised to play a critical role in expanding our state's increasingly diverse business environment.

Consider that from 2007 to 2012, according to a recent U.S. Census report, Hispanic-owned businesses overall grew an astonishing 70 percent from 52,667 to 89,673. During that same period, the total number of all businesses statewide grew 2 percent from 491,529 to 499,927 companies. Perhaps even more impressive, Census data shows that companies owned by Hispanic women skyrocketed by 116 percent from 19,367 in 2007 to 41,843 firms in 2012.

DATOS also forecasts that based on the compounded annual

growth rate of Hispanic-owned businesses statewide from 2007 and 2012, Arizona in 2015 is home to an estimated 123,406 Hispanic companies overall, a majority of which (66,429 businesses, or 54 percent) are owned by Hispanic women.

On behalf of the entire Chamber Board and its staff, we congratulate Latina entrepreneurs in Tucson and the estimated more than 66,000-plus other Latinas statewide leading the way in Hispanic business growth.

The DATOS reports were created to serve as a comprehensive and reliable source of fact-based information about the state's Hispanic market that could be utilized by not only Arizona Hispanics but all public and private industry officials tasked with crafting our state's economic agenda—an agenda that must include the state's Latino community.

The Arizona Hispanic Chamber knows that while it's important to talk about the intrinsic value of an inclusive society, it is imperative that we make that argument grounded in the type of well-researched data we proudly bring to you every year.

We thank you for welcoming us to Tucson. In addition, we extend a special thanks to Humberto S. Lopez, the 2015 AZHCC Man of the Year, and HSL Properties for the generous support of DATOS Tucson. We are proud to showcase the elegant Hilton Tucson El Conquistador.

We also invite you to attend our Fourth Annual Business Diversity Summit on November 13, 2015 in Phoenix where we will gather state and national business leaders to discuss the intersection between a strong environment and vibrant economy. Please www.azhcc.com for details about that and all of our events.

The Arizona Hispanic Chamber of Commerce is committed to serve as the state's leading advocate for Hispanic consumers and business owners as part of a wider effort to promote Arizona's economic development and global competitiveness.

Respectfully,

GONZALO A. DE LA MELENA, JR.
President & CEO
Arizona Hispanic Chamber of Commerce



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The Economic and Business Research Center marked its 65th anniversary in 2014. EBRC continues its proud record of service to the citizens of Arizona by providing vital research and information to decision makers in both the public and private sectors. EBRC's publications and websites deliver a wealth of local information to the public and have received national recognition on multiple occasions.

KEEP UP WITH THE LATEST DATA AND ANALYSIS FROM THE ECONOMIC AND BUSINESS RESEARCH CENTER!



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ebr.eller.arizona.edu



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Benefits of membership include:

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- > Four meetings per year with Eller College economists, other sponsors, and invited speakers.
- > Quarterly report containing analysis and tables/charts of hundreds of state and local indicators.
- > Access to the Forecasting Project website for easy downloading of data, reports, presentations, and real-time analysis.
- > Extensive national, state, and local datasets and cloud-based data management systems to better use and visualize information for your organization.
- > Consulting on issues related to corporate economics and forecasting.

ACKNOWLEDGEMENTS 2015

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In *DATOS 2015*, the terms Hispanic and Latino are used synonymously, as are Native American and American Indian and African-American and black. White, Non-Hispanic is sometimes referred to as Non-Hispanic white. Hispanics may be of any race.

The information presented here was selected from standard secondary sources. However, data changes quickly and is not always collected annually. Data often offers a static picture of an ever-changing situation. The numbers calculated for any statistic depend on the definitions and assumptions used to produce them.

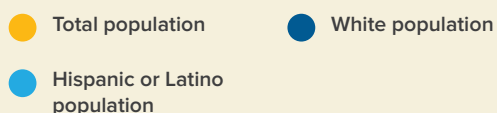
Latino Student Success

“As the **largest, fastest-growing population group** in the state and nation, Latino children and students are our future. We must put a stake in the ground to ensure that we are addressing the changing face of education. It’s time to take bold and decisive action.”

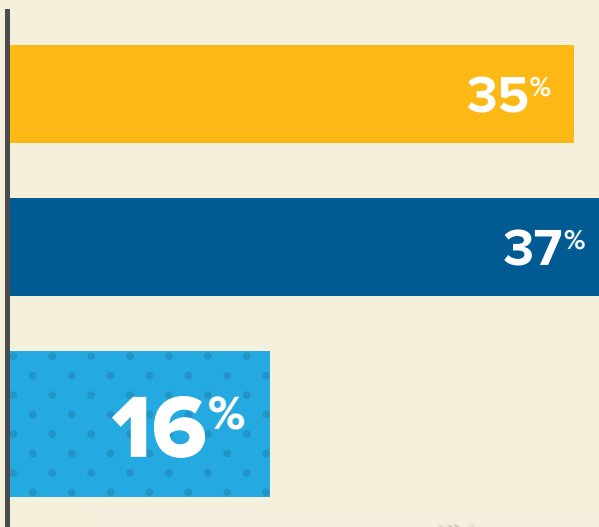
— Paul J. Luna

President and CEO,
Helios Education Foundation

Understanding the demographic, economic, and social impact of Latinos in Arizona illuminates how the choice between prosperity and peril is before us. Arizona’s economic future is best solidified by closing the **Latino postsecondary completion gap** and preparing the largest proportion of our population to be competitive in a global economy.



ASSOCIATE'S DEGREE & HIGHER*



Visit: Helios.org/LSS to learn more about Latino Student Success and view a presentation by Dr. Michael Crow entitled, “Arizona’s Economic Imperative: Leading the Nation in Latino Student Success”

Helios
Education Foundation

Helios.org













* Data from the US Census Bureau, using the 2011–2013 American Community Survey 3-year estimate data (<http://www.census.gov/acs/>)





TABLE OF CONTENTS

	CHAPTER	PAGE
	HIGHLIGHTS	7
	SECTION I CONSUMER BEHAVIOR	 1 PURCHASING POWER 9  2 CONSUMER 35  3 LANGUAGE & MEDIA 99
	SECTION II CONSUMER DEMOGRAPHICS	 4 POPULATION 117  5 IMMIGRATION 143  6 TRADE WITH MEXICO 165
	RESOURCES	182

NOTE: This is a comprehensive compilation of secondary research made available to the AZHCC from various sources. It is either public information or used with permission from those sources.

For more information or any questions, please contact the Arizona Hispanic Chamber of Commerce (AZHCC) at info@azhcc.com or 602-279-1800.

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DATOS SOUTHERN ARIZONA REGIONAL OVERVIEW 2015 **HIGHLIGHTS**



- Hispanic purchasing power in Arizona is an estimated \$40.3 billion in 2015. (Earlier estimates indicated that it would reach \$50 billion this year but were revised downward by the University of Georgia's Selig Center for Economic Growth based on the state's economic crash and a dramatic drop in net immigration to the state, particularly between Arizona and Mexico.)
- Hispanic purchasing power nationwide is an estimated \$1.5 trillion in 2015, roughly equivalent to the GDP of Australia.
- There are more than 55 million Hispanics in the United States, 17 percent of the country's population.
- There are nearly 2.1 million Hispanics in Arizona, 30.3 percent of the total population.
- The Hispanic population in Arizona tripled between 1990 and 2015 and is predicted to reach majority status by the end of the next generation.
- The number of Hispanic-owned businesses soared 70 percent from 52,667 to 89,673 between 2007 and 2012. Based on the compounded growth trend for that period, there are now estimated to be more than 123,000 Hispanic-owned firms in Arizona.
- The number of businesses owned by Hispanic women in Arizona more than doubled between 2007 and 2012 from 19,367 to 41,843. Based on the compounded growth trend for that period, women now own 54 percent of Hispanic-owned businesses in Arizona.
- Hispanic children are now a majority of K-8 students and will be a majority of all school children in Arizona by 2020.
- A Hispanic baby is born in the United States every 1.68 minutes.
- The median age in Arizona is 25 for Latinos and 45 for non-minorities.
- 92.7 percent of Hispanic children in the United States are U.S. citizens.
- Phoenix Hispanics spent nearly \$1 billion on health care in 2012.
- The percentage of U.S. Hispanics without health insurance dropped from 41 percent to 34 percent between 2013 and 2014.
- The United States now has 55 million Spanish speakers, more than any country in the world except Mexico. Eight million people in the United States are studying Spanish.
- In 2015, trade between Arizona and Mexico reached \$16 billion in 2014.
- Between 2005 and 2010, 1.4 million Mexicans moved to the United States. During that same period, 1.4 million Mexicans moved from the United States to Mexico.
- In 2014, U.S. Census figures show that, of the more than 1.2 million new immigrants to the United States in 2013 (documented or undocumented), China (147,000) and India (129,000) led Mexico (125,000).



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CONSUMER
BEHAVIORPURCHASING
POWER

"DATOS has been an exceptional resource in helping us build the foundation for our Hispanic market outreach, and we will continue to turn to this valuable tool as we expand our efforts to better serve this important and growing segment."

—Robert D. Ramirez, President/CEO, Vantage West Credit Union

Selig Research Revises Downward Hispanic Purchasing Power Figures In Arizona

The growth of Latino consumer purchasing power in Arizona slowed between 2010 and 2014, due to the effects of the recession and a drop in the state's immigrant population, according to revised estimates from the Selig Center for Economic Growth at the University of Georgia.

The Selig Center had previously predicted that Hispanic purchasing power in Arizona would grow 48 percent from 2010 to 2015 and reach \$50 billion. But in its June 2014 report, Selig revised its calculations downward and now puts Hispanic purchasing power in Arizona at about \$40.3 billion, while estimating growth of 28 percent between 2014 and 2019.

Nationally, Hispanic purchasing power is expected to reach \$1.5 trillion this year, roughly equivalent to the economy of Australia in 2015.

Arizona Hispanics are 30 percent of the state's population and account for 16.7 percent of total purchasing power in the state. In only three states, Hispanic account for a larger proportion of total spending power: New Mexico (32 percent), Texas (22 percent) and California (19 percent). Hispanics make up 10 percent of total consumer purchasing power nationwide, Selig reports.

Purchasing power among Hispanics nationwide is forecast to grow 32 percent from 2014 to 2019, or about 12 percent higher than the purchasing power of Non-Hispanics. In Arizona, during that same period, the growth in buying power among Hispanics is expected to increase by 28.2 percent, while non-Hispanic buying power will grow 23.6 percent.

Daily spending, on average, was higher among Hispanics than whites and other minorities in the United States, according to a 2014 Gallup survey. Gallup found Hispanic adults spent \$96, while U.S. adults overall spent an average of \$90 per day. One reason for the higher daily spending by Hispanics may involve the fact that they tend to have more children.

"Half of Hispanics report having children younger than 18," Gallup reported, "compared with 29% of whites, 39% of blacks and 36% of Asians. Previously, Gallup has found that having children is associated with higher daily spending."

In Phoenix, the average Hispanic household income grew 14 percent from 2009 to 2014 to \$56,709, according to IHS Global Insight's Hispanic Market Monitor. In Tucson, the average Hispanic household income was \$54,072.

Total consumer spending by Hispanic households in Phoenix is expected to more than double from \$23.5 billion in 2014 to nearly \$52 billion by 2024.

Hispanics in Phoenix are driving spending growth in a wide range of categories, including medical services, automobile purchases, food, recreational services, furniture and household equipment and clothing.

In a 2014 survey by Prudential Research of the top five financial priorities among U.S. Hispanics, survey respondents said they were most interested in saving for retirement, reducing debt, building an emergency savings fund, saving for their children's education and protecting their existing investments.



Hispanic Purchasing Power Is Expected To **Reach 1.5 Trillion U.S. Dollars In 2015.**

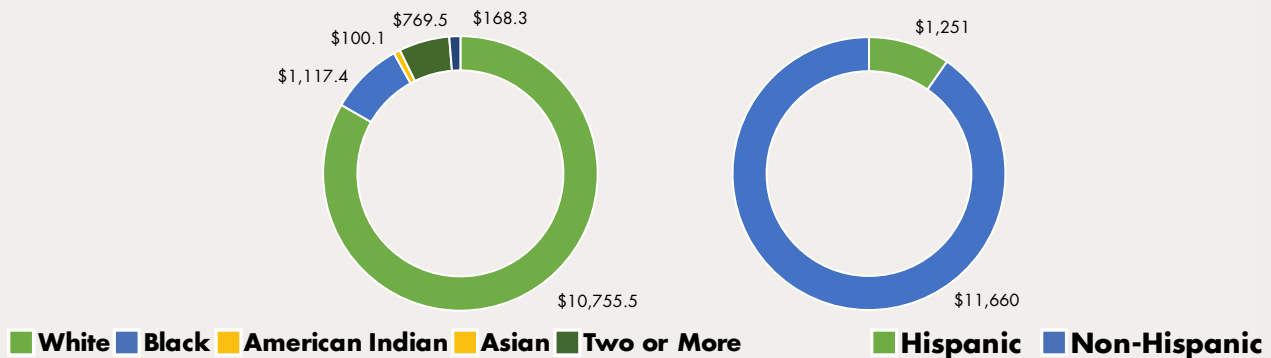
That Figure Is Expected to **Increase to 1.7 Trillion In 2017.**

Source: Statista, 2015.

www.statista.com/statistics/251438/hispanics-buying-power-in-the-us/

U.S. Hispanics Accounted For **Nearly 10%** Of The National U.S. Buying Power In 2014

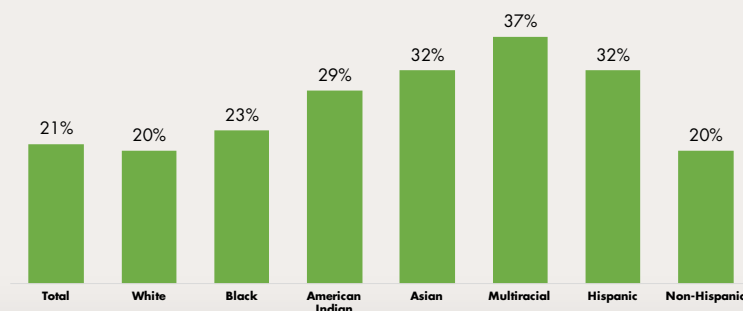
BUYING POWER BY RACE AND HISPANIC ORIGIN, UNITED STATES, 2014
(BILLIONS OF DOLLARS)



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

U.S. Hispanics And Asians Are Projected To **Drive The Largest Growth Of Buying Power** For Single Minorities

PROJECTED CHANGE IN BUYING POWER, BY RACE AND HISPANIC ORIGIN, UNITED STATES
2014-2019

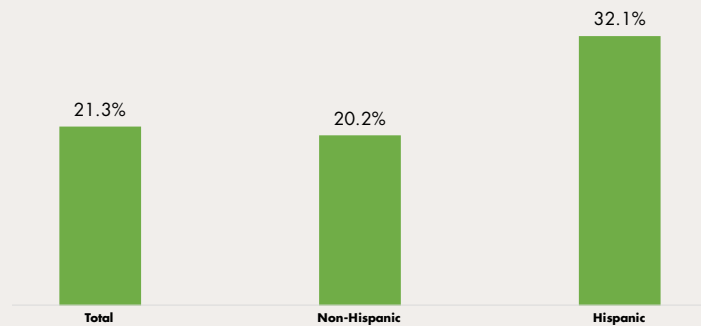


Source: Selig Center for Economic Growth, Terry College of Business, The University of Georgia, June 2014.



U.S. Hispanic Projected Percentage Change In **Buying Power Is Nearly 12% Higher Than Non-Hispanics**

PROJECTED PERCENTAGE CHANGE IN BUYING POWER FOR U.S.
2014-2019



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

Latinas Are Economic Decision Makers

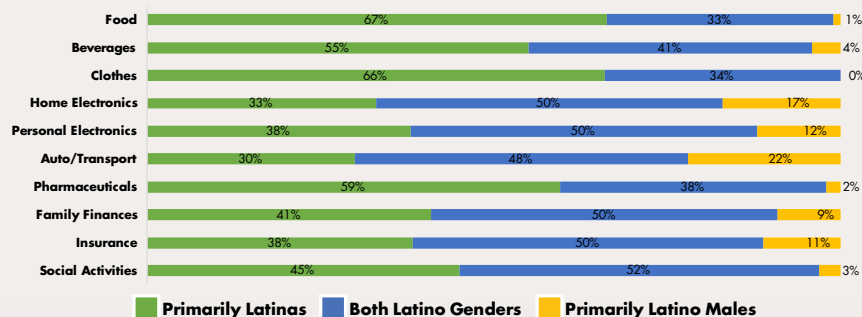
With 19.3 Million Latina Shoppers In The U.S.,
They Command The Bulk Of The \$1.2 Trillion
In Hispanic Purchasing Power—A Number That Is
Estimated To Climb To \$1.7 Trillion By 2017.

Source: Latin Post, Young, Passionate and Tech-Savvy Latina Shoppers Command Bulk of \$1 Trillion in Latino Buying Power, 2014

www.latinpost.com/articles/27098/20141224/the-significance-of-latina-shopping-trends-19-3-million-latina-shoppers-command-the-bulk-of-the-1-trillion-in-hispanic-purchasing-power.htm

Latinas Are The Primary Or Joint Decision Maker In Every Household Category

LATINA PERCEIVED DECISION-MAKING BY GENDER



Source: Nielsen Women of Tomorrow Report, 2011.

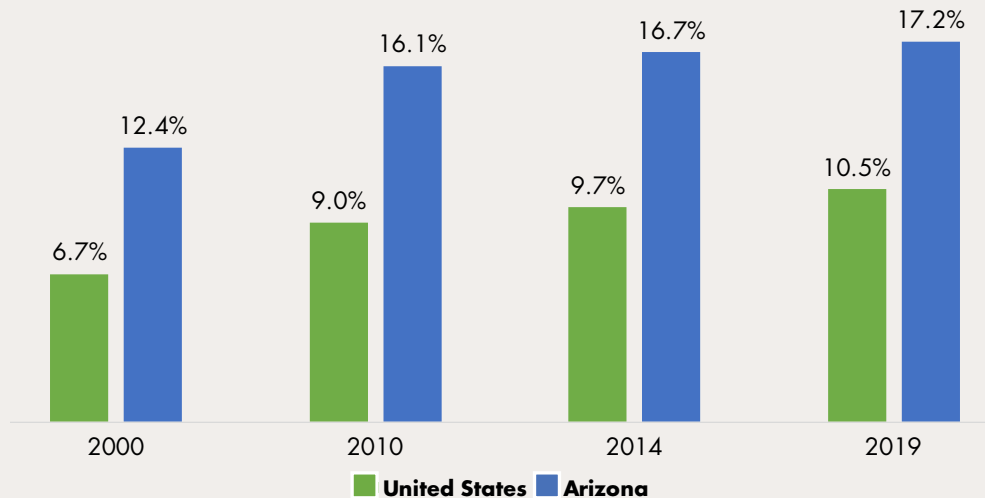
www.fronterasdesk.org/sites/default/files/field/docs/2013/08/Nielsen_Latina_Report_2013_.pdf





The Arizona Hispanic Share Of Buying Power **Continues To Outpace** The National U.S. Hispanic Share of Buying Power

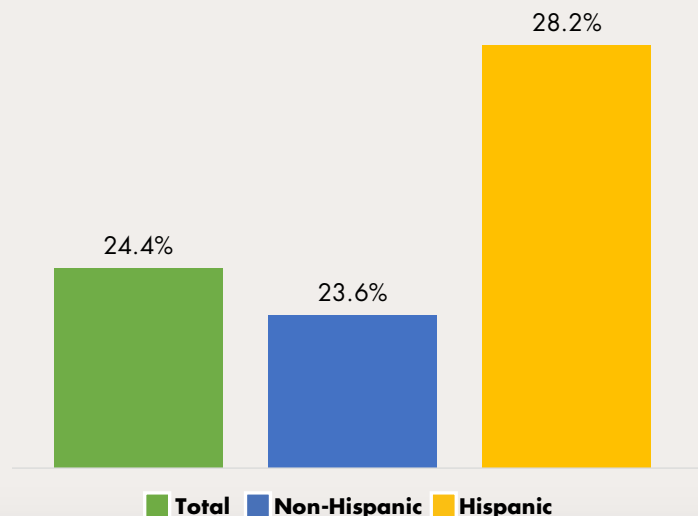
PERCENT HISPANIC SHARE OF BUYING POWER, FOR U.S. AND ARIZONA
2000, 2010, 2014, AND 2019



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

The Projected Percentage Change Of Arizona Hispanic' Buying Power Is **Almost 5% Higher** **Than Non-Hispanics**

PROJECTED PERCENTAGE CHANGE IN TOTAL, HISPANIC, AND NON-HISPANIC BUYING POWER FOR ARIZONA
2014-2019



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



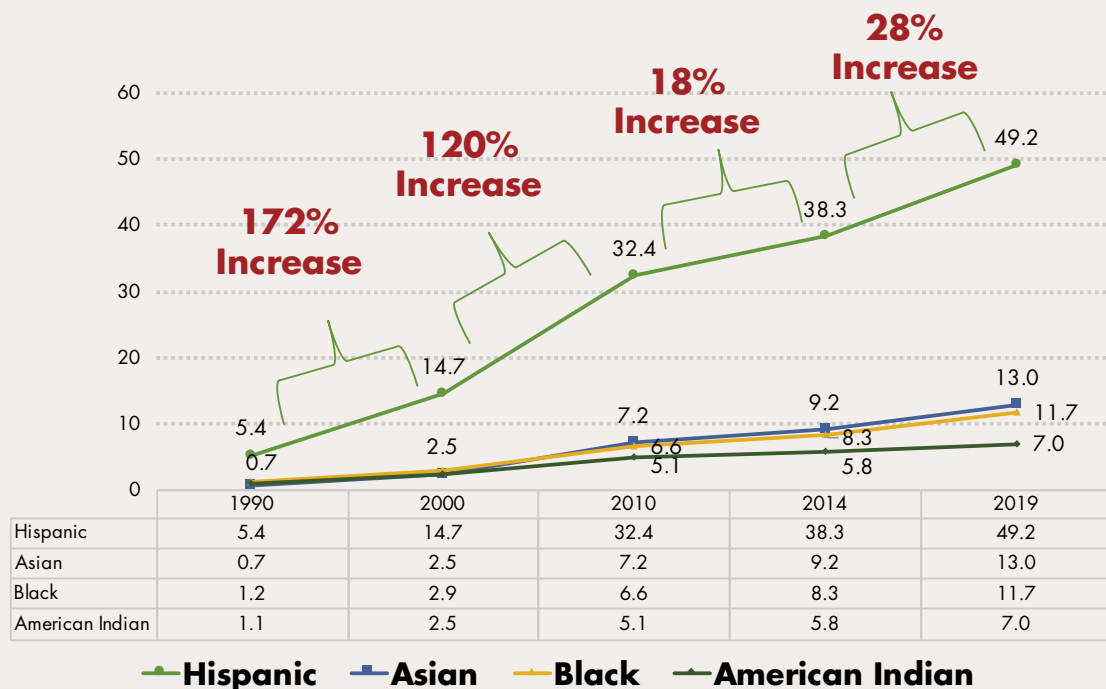
In 2014, Arizona Was The **4th Most Concentrated** Hispanic Buying Power Market

RANKED STATE	HISPANIC SHARE OF TOTAL BUYING POWER
1. NEW MEXICO	32.4%
2. TEXAS	22.0%
3. CALIFORNIA	19.6%
4. ARIZONA	16.7%
5. FLORIDA	16.6%
6. NEVADA	15.4%
7. COLORADO	10.6%
8. NEW JERSEY	10.3%
9. NEW YORK	10.2%
10. ILLINOIS	8.7%

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

From 2014 To 2019 Arizona's Hispanic Purchasing Power Is **Projected To Grow By 28%**

BUYING POWER BY RACE/ETHNICITY -1990-2019
(BILLIONS OF DOLLARS)

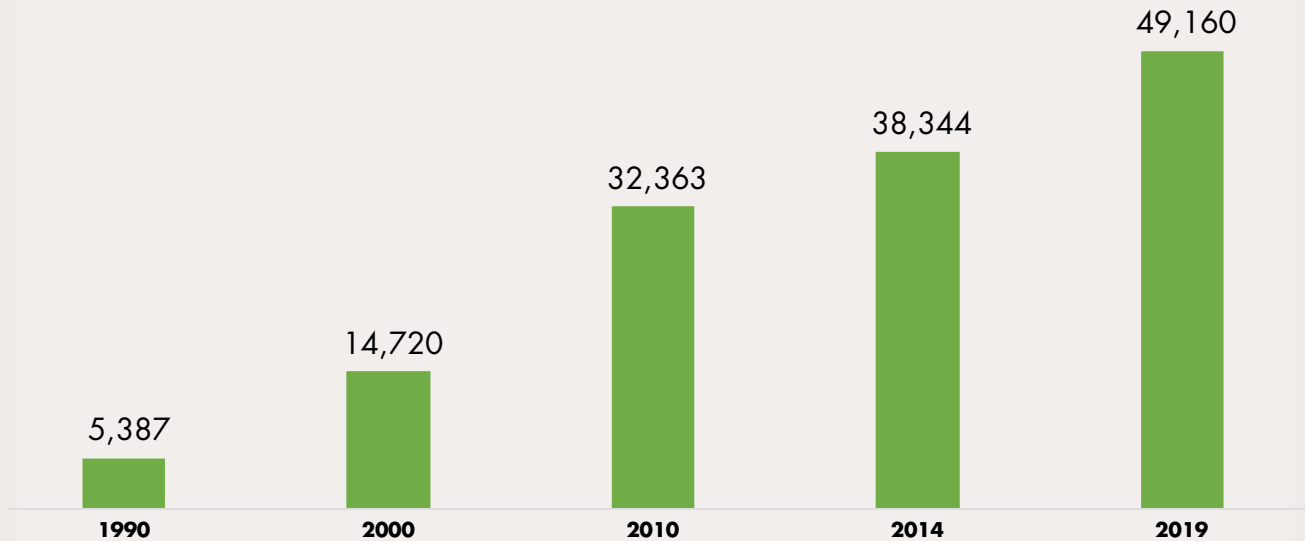


Source: Selig Center for Economic Growth, Terry College of Business, The University of Georgia, June 2014.



From 2010 To 2014 **Arizona Hispanic Buying Power Increased By 18%**, And Is Projected To Increase **28%** Between 2014 And 2019

HISPANIC BUYING POWER IN ARIZONA
(MILLIONS OF DOLLARS)



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

Top 5 Hispanic Financial Priorities

Are Consistent With The Rest Of The Population
—Except That Hispanics Are More Concerned With Funding Children's Education Than Protecting Investments

	HISPANIC	GENERAL POPULATION
1. Saving For Retirement	53%	62%
2. Reducing Debt	52%	50%
3. Building An Emergency Savings Account	42%	41%
4. Funding Education For Children/Grandchildren	31%	18%
5. Protecting Existing Investments And Savings	25%	47%

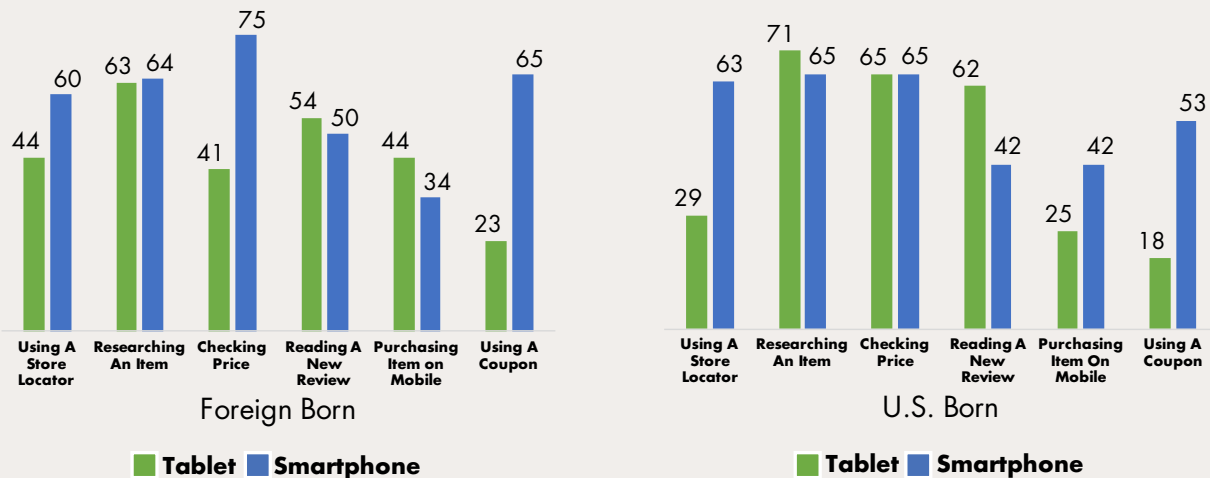
Source: Prudential Research, 2014

www.dropbox.com/home/DATOS%202015/DATOS%20AZ%202015/II.%20Consumer%20Behavior/1.%20Purchasing%20Power?preview=The+Hispanic+American+Financial+Experience.pdf



U.S.-born Hispanic Consumers Are More Likely To Make Purchases Using Smartphones (42%) Than Foreign-born Hispanics (34%)

PERCENT U.S.- AND FOREIGN-BORN HISPANIC THAT ENGAGE IN THE FOLLOWING
SHOPPING ACTIVITIES VIA TABLET/SMARTPHONES

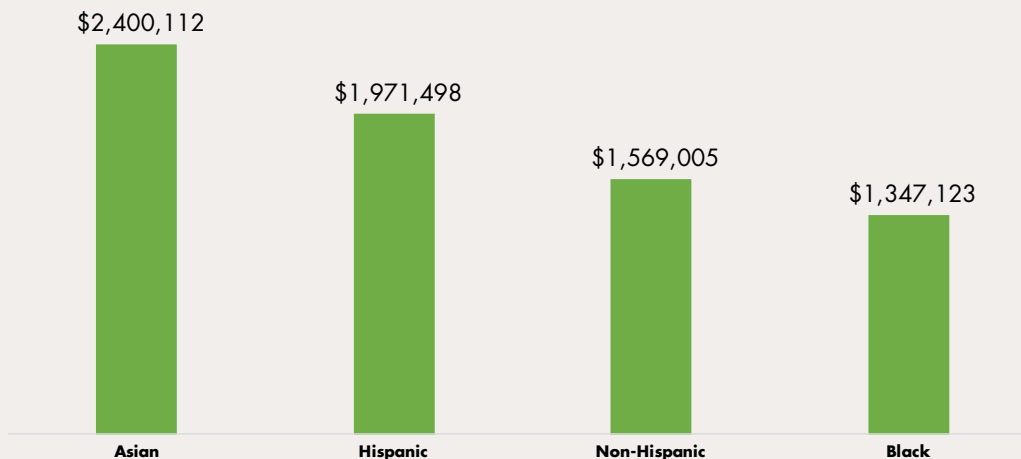


Source: Nielsen Mobile Insights Q1 2014

www.nielsen.com/us/en/insights/news/2014/engaging-the-evolving-hispanic-consumers.html

Hispanic And Asian Households Will Outspend Non-Hispanics **Over** The Remainder Of Their Lives

CUMULATIVE LIFE SPENDING, BY RACE/ETHNICITY
CONSUMER SPENDING POTENTIAL THAT EXISTS FOR THE REMAINING LIFE OF AN AVERAGE US HOUSEHOLD



Source: Geoscape American Marketscape DataStream, April 2013

www.marketingcharts.com/topics/demographics/asian-and-hispanic-households-will-outspend-whites-over-the-remainder-of-their-lives-28440/attachment/geoscape-cumulative-life-spending-by-race-ethnicity-apr2013/

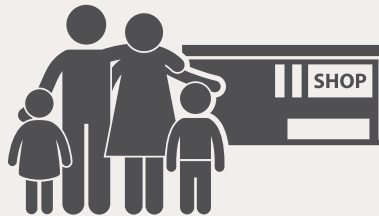




Hispanics Spend More Per Day Than Non-Hispanics And The U.S. Average

	AVERAGE DAILY SPENDING
Hispanics	\$96
Asians	\$95
Non-Hispanic Whites	\$88
Non-Hispanic Blacks	\$87
All U.S. Adults	\$90

Source: Gallup Daily Tracking, January-November 2014
www.gallup.com/poll/180002/hispanics-daily-spending-above-average.aspx



Average Daily Consumer Spending Affected By Having Children Under 18

	% HAVE CHILDREN UNDER 18	AVG DAILY SPENDING, THOSE WITHOUT CHILDREN UNDER 18	AVG DAILY SPENDING, THOSE WITH CHILDREN UNDER 18
Hispanics	50%	\$76	\$116
Asians	36%	\$82	\$119
Non-Hispanic Whites	29%	\$79	\$108
Non-Hispanic Blacks	39%	\$72	\$111
All U.S. Adults	33%	\$79	\$111

Source: Gallup Daily Tracking, January-November 2014
www.gallup.com/poll/180002/hispanics-daily-spending-above-average.aspx



The Average Hispanic Household Income in Phoenix Grew By 14% From 2009-2014

\$57K Average Hispanic Household Income

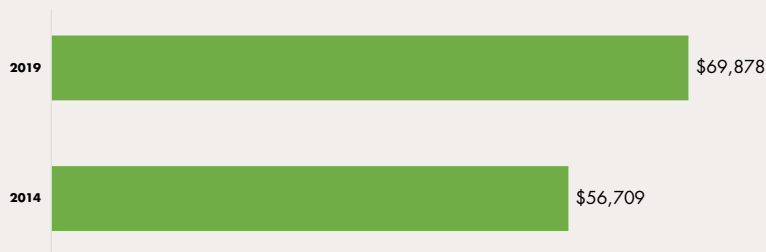
2014	# OF HOUSEHOLDS	AVERAGE HH INCOME
PHOENIX	415,000	\$56,709

Source: IHS Global Insight Hispanic Market Monitor 2015, Average HH income, Phoenix DMA

Courtesy of UNIVISION ARIZONA

The Phoenix Hispanic Average Household Income Is Projected To Increase By 23% In 2019

PHOENIX HISPANIC AVERAGE HOUSEHOLD INCOME

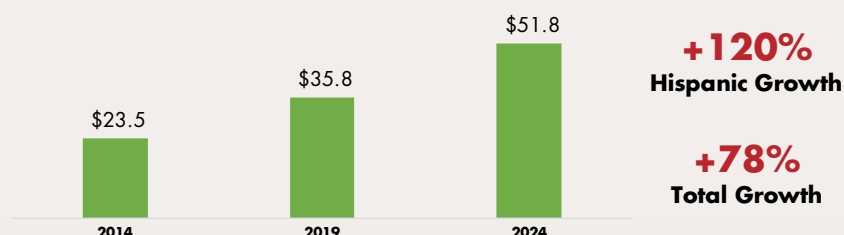


Source: IHS Global Insight, Hispanic Market Monitor, 2015, Phoenix DMA

Courtesy of UNIVISION ARIZONA

Phoenix Hispanic Consumer Spending Is Projected To Continue To Rise

PHOENIX HISPANIC CONSUMER SPENDING PROJECTIONS: 2014-2024 (\$ IN BILLIONS)



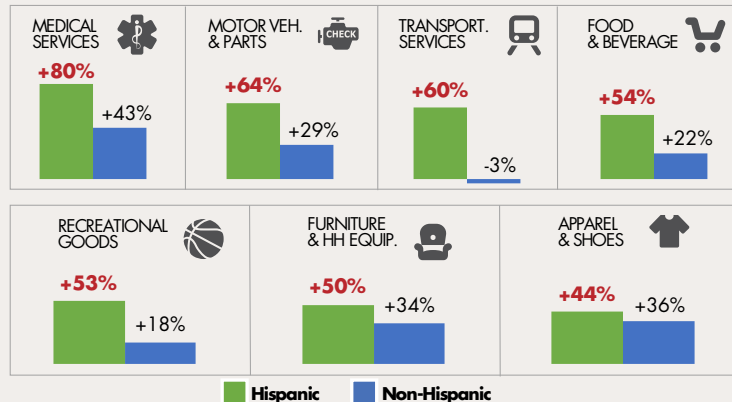
Source: Source: IHS Global Insight 2015 Hispanic Market Monitor Forecast, Phoenix DMA

Courtesy of UNIVISION ARIZONA



Phoenix Hispanic Spending Is Driving Demand Across Major Industries

PHOENIX CONSUMER SPENDING: 2014-2019, % GROWTH FORECAST



Source: IHS Global Insights 2015 Consumer Spending Forecast (2014-2019), Phoenix DMA

Courtesy of **UNIVISION ARIZONA**

\$1.3 Billion

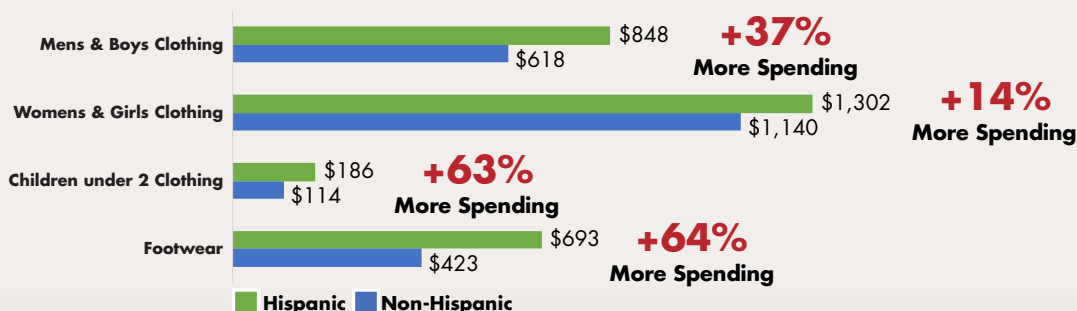
- Spent By Phoenix Hispanics On **Clothing & Footwear** In 2014

- 26%** Of Spending In Phoenix

Source: IHS Global Insight - 2015 Hispanic Market Monitor, Phoenix DMA

Hispanics In Phoenix Tend To Spend More On Clothing And Footwear Than Non-Hispanics

AMOUNT SPENT PER HOUSEHOLD ON CLOTHING & FOOTWEAR IN 2014



Source: IHS Global Insight - 2015 Hispanic Market Monitor, Phoenix DMA Total consumer dollars spending: Clothing & Footwear

Courtesy of **UNIVISION ARIZONA**



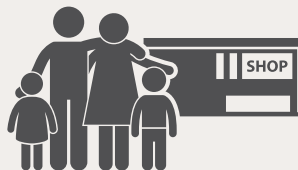
Top Malls & Shopping Centers

RANKED BY PERCENTAGE OF HISPANICS WHO VISITED IN THE PAST 3 MONTHS

MALL/SHOPPING CENTER	HISPANIC RANK	% OF HISPANICS	NON-HISPANIC RANK	% OF NON-HISPANIC
Arizona Mills	#1	33.3%	#4	16.7%
Desert Sky Mall	#2	26.7%	#31	2.5%
Arrowhead Towne Center	#3	17.3%	#2	16.8%
Tempe Marketplace	#4	16.6%	#6	15.7%
Other shopping center or area	#5	16.0%	#2	16.8%
Metrocenter	#6	15.0%	#12	8.3%
Christown Spectrum Mall	#7	13.8%	#13	7.0%
Chandler Fashion Center	#8	13.7%	#4	16.1%
Tanger Outlets Phoenix/Glendale	#9	11.7%	#14	6.9%
Superstition Springs Center	#10	11.6%	#7	13.5%
Westgate City Center	#10	11.6%	#18	4.9%
Scottsdale Fashion Square	#12	9.9%	#6	14.4%
Fiesta Mall	#13	9.5%	#15	6.8%
Arizona Center	#14	9.4%	#32	1.8%
Outlets at Anthem	#15	8.8%	#11	8.3%

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

Courtesy of  **UNIVISION**
ARIZONA



Top Department Stores In Phoenix

RANKED BY PERCENTAGE OF HISPANICS WHO VISITED IN THE PAST 3 MONTHS

DEPARTMENT STORES	HISPANIC RANK	% OF HISPANICS	NON-HISPANIC RANK	% OF NON-HISPANIC
Walmart	#1	85.2%	#1	77.7%
Fry's - Fry's Marketplace	#2	67.9%	#2	65.2%
Target	#3	49.6%	#3	49.4%
Ross Dress For Less	#4	49.1%	#10	26.2%
99 Cents Only Store	#5	48.6%	#7	34.5%
Dollar Tree	#6	40.8%	#8	32.5%
Amazon	#7	38.5%	#5	42.5%
Goodwill	#8	36.6%	#9	26.7%
Costco	#9	35.5%	#4	45.6%
Kmart	#10	28.8%	#18	14.6%
Family Dollar	#11	28.6%	#16	16.3%
Sam's Club	#12	27.7%	#14	21.1%
Big Lots	#13	27.6%	#12	22.5%
Kohl's	#14	25.7%	#6	35.0%
Dollar General	#15	24.6%	#17	15.7%

Projected Percentage Change in Total, Hispanic, and Non-Hispanic Buying Power for U.S., 2012-2017

Courtesy of  **UNIVISION**
ARIZONA



20% Of Hispanics Are "True Foodies"

Simmons Experian definition of "true foodies" segmentation: Passionate about food and spend a lot of time cooking at home. They prefer to buy organic food, want their ingredients fresh and buy environmentally friendly products. True Foodies tend to eat a variety of food, love to experiment with different cuisines and at the same time have adopted a healthy eating lifestyle. They have the most culinary expertise and have a love relationship with food."

Hispanics are
+14% more
likely than
Non-Hispanics

**"I prefer food that
is presented as an
art form".**

Hispanics are
+9% more
likely than
Non-Hispanics

**"I especially
look for organic or
natural foods".**

Hispanics are
+15% more
likely than Non-
Hispanics

**"I try to eat
gourmet food
whenever I can".**

**"I'm usually first among
my friends to try new
food products".**

**"The kitchen is the
most important room
in my home".**

Hispanics are
+24% more
likely than
Non-Hispanics

Hispanics are
+24% more
likely than
Non-Hispanics

Source: Simmons NHCS, Winter 2015 (Feb 2014 – Mar 2015); Base: U.S. Adults 18+ Index compares % of Hispanics who agree vs. Total population

Courtesy of UNIVISION
ARIZONA

Kids Are A Latina's Focus, Even When Shopping

"ANY AGREE" AMONG WOMEN 18+



**I enjoy shopping
with my children**

38%

31%

Hispanic

Non-Hispanic



**I find it hard to resist
my children's requests
for non-essential
purchases.**

21%

19%

Hispanic

Non-Hispanic



**My kids have significant
impact on brands
I choose**

27%

24%

Hispanic

Non-Hispanic

Projected Percentage Change in Total, Hispanic, and Non-Hispanic Buying Power for U.S., 2012-2017

Courtesy of UNIVISION
ARIZONA



Latina Moms

Now Is The Time to Grab Their Attention!

PERCENT HISPANIC MOMS WHO AGREE



32%

Remember advertised products when shopping

34%

Feel respected when a company advertises in Spanish

Source: Simmons NHCS, Winter 2015 (Feb 2014 – Mar 2015); Base: U.S. Women 18+ who are parents

Courtesy of UNIVISION ARIZONA

\$2.3 Billion

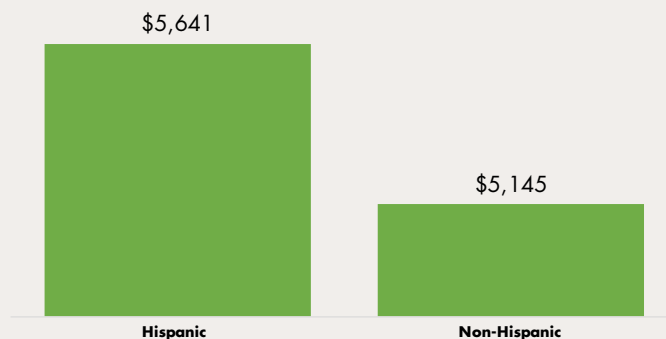
- Spent by Phoenix Hispanics on "Food at Home" in 2014
- 22%** of all "Food at Home" spending in Phoenix

Projected Percentage Change in Total, Hispanic, and Non-Hispanic Buying Power for U.S., 2012-2017

Courtesy of UNIVISION ARIZONA

Phoenix Hispanic Households
Spent 10% More
Than Non-Hispanics
On **Groceries**
In 2014

AVERAGE AMOUNT HOUSEHOLD SPENT ON GROCERIES IN 2014



Source: Global Insight - 2015 Hispanic Market Monitor, Phoenix DMA Total consumer dollars spending: Food at Home

Courtesy of UNIVISION ARIZONA

Hispanic Share of Consumer Spending: **Phoenix**

Food at Home  \$2.3 Billion or 22.2% of the Total	Non-Alcoholic Beverages  \$267 Million or 22.3% of the Total	Cereals  \$146 Million or 23.1% of the Total	Bakery Products  \$237 Million or 20.1% of the Total	Beef  \$143 Million or 26.7% of the Total
Pork  \$91 Million or 24.3% of the Total	Poultry & Eggs  \$239 Million or 27.6% of the Total	Fish & Seafood  \$46 Million or 25.1% of the Total	Dairy Products  \$211 Million or 22.0% of the Total	Fresh Fruits & Vegetables  \$295 Million or 24.2% of the Total
Processed Fruits & Vegetables  \$84 Million or 22.4% of the Total	Sugar and Sweets  \$106 Million or 18.3% of the Total	Fats and Oils  \$54 Million or 23.5% of the Total	Other Food Products  \$422 Million or 19.1% of the Total	Alcoholic Bev. at Home  \$306 Million or 17.2% of the Total

Source: Global Insight - 2015 Hispanic Market Monitor, Phoenix DMA Total consumer dollars spending: Food at Home


UNIVISION
ARIZONA

Courtesy of

Top Grocery Stores In Phoenix
**RANKED BY PERCENTAGE OF HISPANIC ADULTS 18+
THAT SHOPPED FROM EACH GROCERY STORE IN THE LAST 7 DAYS**

HISPANIC RANK	GROCERY STORE SHOPPED LAST 7 DAYS	% OF HISPANIC	% OF NON-HISPANICS	HISPANIC INDEX (VS. TOTAL)
#1	Fry's - Fry's Marketplace	68.5%	66.9%	102
#2	Walmart Supercenter	47.3%	51.0%	94
#3	Food City	43.9%	10.2%	238
#4	Walmart Neighborhood Market	26.7%	14.4%	154
#5	Costco	25.6%	30.5%	88
#6	Safeway	23.6%	36.4%	71
#7	Sam's Club	19.4%	12.8%	134
#8	Pro's Ranch Market	18.0%	2.6%	283
#9	El Super	16.0%	0.4%	378
#10	Target/SuperTarget	14.8%	18.6%	84
#11	Sprouts	13.0%	21.4%	67
#12	Albertsons	10.9%	19.6%	62
#13	Bashas'	9.1%	21.5%	49
#14	Other grocery store	7.3%	10.5%	75
#15	Other Hispanic grocery store	6.5%	0.3%	351
#16	WinCo Foods	6.3%	9.6%	72
#17	Trader Joe's	5.4%	9.2%	65
#18	Whole Foods Market	4.6%	4.3%	105
#19	Smart & Final	3.8%	3.1%	118
#20	Fresh & Easy	3.6%	3.8%	96

Source: Hispanic Scarborough, 2015 Release 1 (Feb 2014 – Jan 2015), Phoenix, Adults 18+


UNIVISION
ARIZONA

Courtesy of



Top Food Products In Phoenix

RANKED BY PERCENTAGE OF HISPANIC ADULTS 18+
THAT USED FOOD PRODUCTS IN THE LAST 7 DAYS

HISPANIC RANK	FOOD PRODUCTS USED LAST 7 DAYS	% OF HISPANIC	% OF NON-HISPANICS	HISPANIC INDEX (VS. TOTAL)
#1	Fresh Meat	72.6%	70.8%	102
#2	Tortillas	66.4%	39.0%	145
#3	Packaged Meat	57.1%	60.9%	95
#4	Coffee	55.2%	62.7%	91
#5	Ice Cream And Frozen Novelties	53.4%	54.0%	99
#6	Ready-To-Eat Cereal	51.6%	48.9%	104
#7	Candy	50.7%	47.9%	104
#8	Yogurt (Not Frozen)	40.0%	44.9%	92
#9	Pretzels, Chips, Popcorn	39.5%	52.3%	80
#10	Soup (Canned Or Dry Mix)	39.2%	39.0%	100
#11	Nuts	38.3%	44.8%	89
#12	Salsa	37.9%	41.8%	93
#13	Any Store Brand Food	31.8%	34.6%	94
#14	Prepared Foods	31.1%	26.6%	112
#15	Frozen Pizza	25.3%	25.8%	98

Source: Hispanic Scarborough, 2015 Release 1 (Feb 2014 – Jan 2015), Phoenix, Adults 18+

Courtesy of UNIVISION ARIZONA

The Average Hispanic **Household Income**
In Tucson Grew By 12% From 2009-2014

\$54K Average
Hispanic
Household
Income

2014	# OF HOUSEHOLDS	AVERAGE HH INCOME
TUCSON	139,000	\$54,072

Source: IHS Global Insight Hispanic Market Monitor 2015, Average HH income, Tucson DMA

Courtesy of UNIVISION ARIZONA

LA ENCANTADA

Tucson, AZ



For more information visit LaEncantadaShoppingCenter.com

THE STATE OF ARIZONA'S HISPANIC MARKET

SECTION I



CONSUMER
BEHAVIOR

CHAPTER 1



NOTES

Notes



LA ENCANTADA



Located at Skyline Drive and Campbell Avenue, La Encantada is an open-air lifestyle center nestled in the foothills of Tucson. Offering a unique mix of national, regional and local retailers, many which are the first and only locations in the Tucson market – Anthropologie, Apple, Tiffany, Michael Kors, Kate Spade, Crate & Barrel, Pottery Barn, Williams-Sonoma - the center caters to the Tucson resident, seasonal visitor and neighboring Mexican national market.

La Encantada means “the enchanted” in Spanish, a name intended to capture the experience people have when they visit the center, as well as the unique outdoor environment, authentic architecture and village-like setting.

With close proximity to the U.S./Mexico border, La Encantada has long recognized the strong connection

the Mexican National has within the Tucson community and strives to be the shopping destination for these visitors as well as their local friends and family. In order to garner awareness in the targeted market, La Encantada launched a partnership with the Tucson Mexico Trade Office (TMTO). Through this partnership, La Encantada regularly participates in trade shows and fashion events in Sonoran cities including Hermosillo, Ciudad Obregon, San Carlos, Sinaloa, and Los Mochis, showcasing the center’s retail brands, dining options and unique shopping experiences.

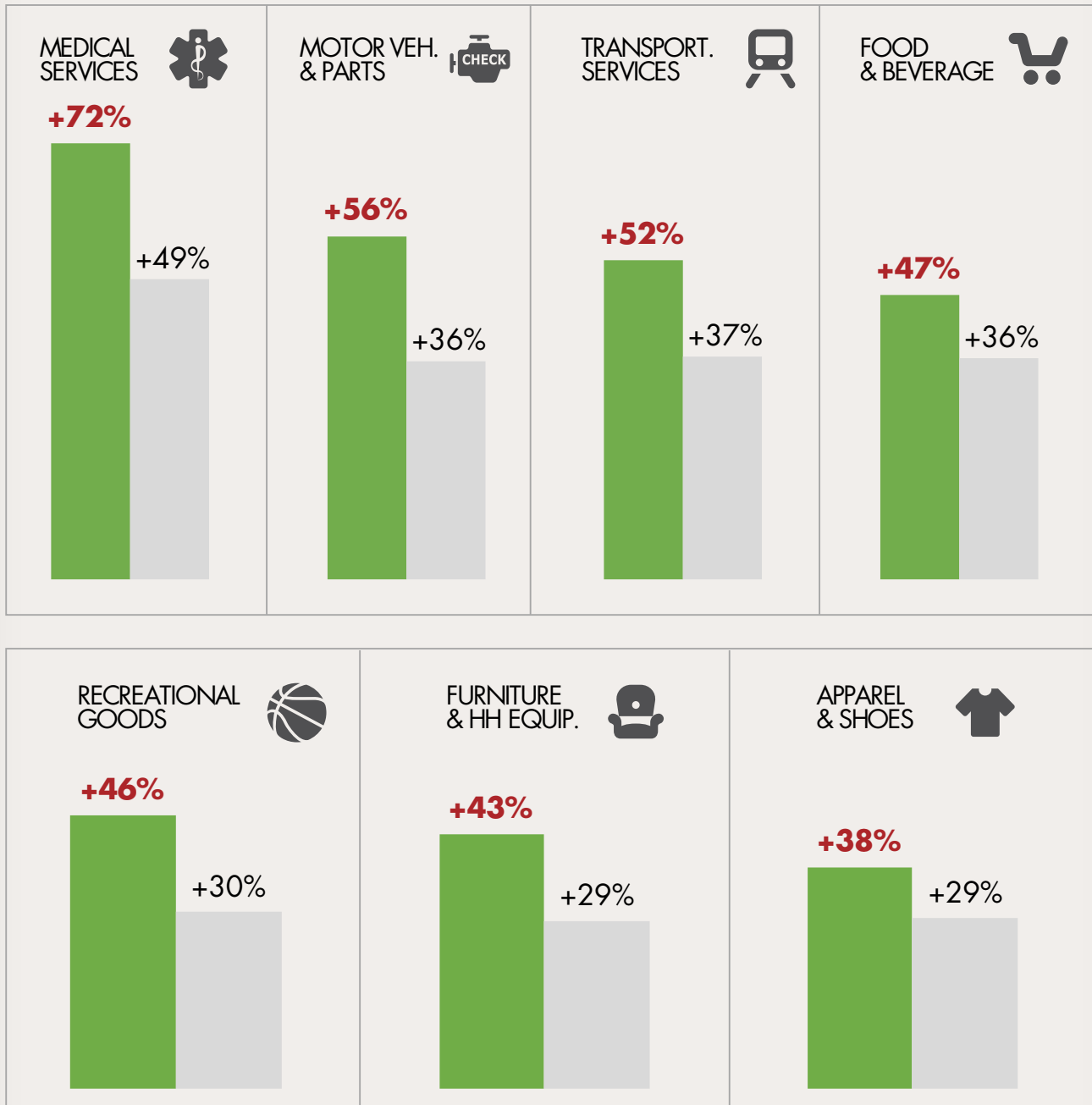
This direct connection to the Mexican National – across the border and in the community – has positioned La Encantada as an essential shopping destination, resulting in notable sales successes at the property.

Photos Courtesy of La Encantada



Tucson Hispanic Spending Is Driving Demand Across Major Industries

TUCSON CONSUMER SPENDING: 2014-2019, % GROWTH FORECAST



Hispanic



Non-Hispanic

Source: IHS Global Insights 2015 Consumer Spending Forecast (2014-2019), Tucson DMA

Courtesy of UNIVISION
ARIZONA



\$203

Million

Spent By **Tucson**
Hispanics On
**Clothing &
Footwear**
In 2014

That's

36%

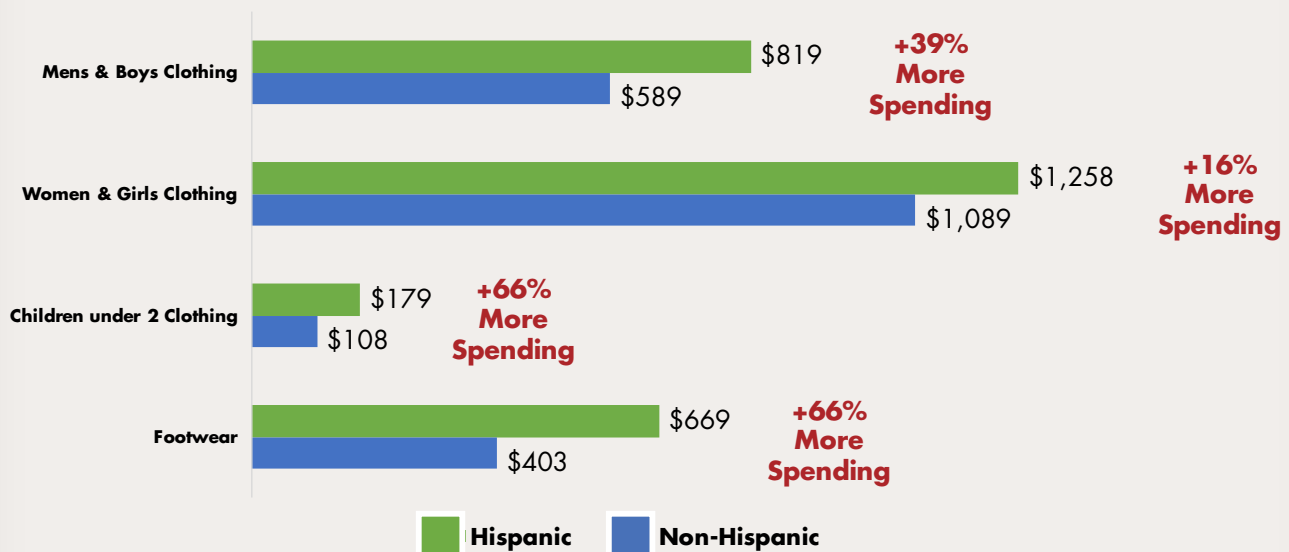
Of Spending In Tucson

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

Courtesy of UNIVISION
ARIZONA

Hispanics In **Tucson** Spent **66% More In Footwear &
Children Under 2 Clothing** Than Non-Hispanics

AMOUNT SPENT PER HOUSEHOLD ON CLOTHING & FOOTWEAR IN 2014



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

Courtesy of UNIVISION
ARIZONA



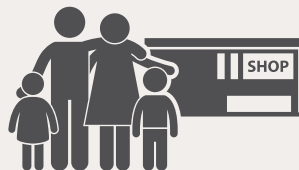
Top Malls & Shopping Centers

RANKED BY PERCENTAGE OF HISPANICS WHO VISITED IN THE PAST 3 MONTHS

MALL/SHOPPING CENTER	HISPANIC RANK	% OF HISPANICS	NON-HISPANIC RANK	% OF NON-HISPANIC
Tucson Mall	#1	53.9%	#1	40.9%
Park Place	#2	39.1%	#2	32.2%
El Con Mall	#3	37.2%	#3	29.6%
Foothills Mall	#4	24.8%	#4	26.3%
Tucson Spectrum	#5	24.4%	#7	10.5%
Other shopping center or area	#6	17.5%	#5	20.8%
VF Outlet	#7	12.2%	#14	3.4%
La Encantada	#8	11.1%	#6	18.9%
Arizona Mills	#9	8.9%	#12	4.6%
The Mall at Sierra Vista	#10	6.5%	#10	5.5%
Crossroads Festival	#11	5.0%	#9	9.8%
Oro Valley Marketplace	#12	4.9%	#7	10.5%
Casas Adobes Plaza	#13	4.1%	#13	4.0%
St. Phillip's Plaza	#14	3.2%	#11	4.8%

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

Courtesy of  **UNIVISION**
ARIZONA



Top Department Stores In Tucson

RANKED BY PERCENTAGE OF HISPANICS WHO VISITED IN THE PAST 3 MONTHS

DEPARTMENT STORES	HISPANIC RANK	% OF HISPANICS	NON-HISPANIC RANK	% OF NON-HISPANIC
Walmart	#1	71.8%	#1	64.9%
99 Cent Only Store	#2	39.8%	#4	24.4%
Family Dollar	#3	36.6%	#5	19.5%
Dollar Tree	#4	36.1%	#4	20.8%
Target	#5	33.0%	#3	36.7%
Costco	#6	31.5%	#3	38.7%
Ross Dress For Less	#7	23.2%	#7	14.2%
Dollar General	#8	21.8%	#7	15.8%
JCPenney	#9	20.6%	#13	10.1%
Amazon	#10	20.3%	#3	28.5%
Best Buy	#11	16.5%	#8	13.1%
Kmart	#12	14.9%	#14	7.5%
Sears	#13	13.2%	#9	10.8%
Big Lots	#14	11.8%	#6	16.0%
Macy's	#15	11.3%	#8	10.5%

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

Courtesy of  **UNIVISION**
ARIZONA



Top Clothing Stores In Tucson

RANKED BY PERCENTAGE OF HISPANICS WHO BOUGHT IN THE PAST 3 MONTHS

CLOTHING STORES	HISPANIC RANK	% OF HISPANICS	NON-HISPANIC RANK	% OF NON-HISPANIC
Walmart	#1	47.8%	#1	38.8%
Ross Dress For Less	#2	27.1%	#5	13.3%
Target	#3	26.0%	#2	24.7%
JCPenney	#4	19.6%	#6	11.9%
Kmart	#5	13.7%	#11	5.5%
Any thrift store	#5	13.7%	#4	16.9%
Burlington Coat Factory	#5	13.7%	#21	2.5%
Victoria's Secret	#8	13.2%	#10	6.2%
Dillard's	#9	12.5%	#8	10.2%
Sears	#10	12.4%	#14	4.6%
Old Navy	#11	10.5%	#11	5.5%
Macy's	#12	9.6%	#9	8.4%
Kohl's	#13	9.2%	#3	17.6%
Other store	#13	9.2%	#7	11.5%
Forever 21	#15	7.1%	#20	2.7%

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

Courtesy of UNIVISION
ARIZONA

\$757 Million

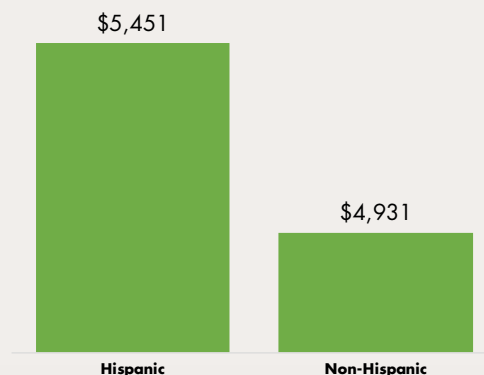
- Spent by **Tucson** Hispanics on "Food at Home" in 2014
- 31%** of all "Food at Home" spending in **Tucson**

Source: IHS Global Insight - 2015 Hispanic Market Monitor, Tucson DMA Total consumer dollars spending: Food at Home

Courtesy of UNIVISION
ARIZONA

Tucson Hispanic
Households
Spent **11% More**
Than Non-Hispanics
On **Groceries**
In 2014

AVERAGE AMOUNT HOUSEHOLD SPENT
ON GROCERIES IN 2014



Source: IHS Global Insight - 2015 Hispanic Market Monitor, Tucson DMA Total consumer dollars spending : Food at Home

Courtesy of UNIVISION
ARIZONA



Hispanic Share of Consumer Spending: Tucson

Food at Home  \$757 Million or 31.3% of the Total	Non Alcoholic Beverages  \$86 Million or 31.5% of the Total	Cereals  \$47 Million or 32.4% of the Total	Bakery Products  \$77 Million or 28.7% of the Total	Beef  \$46 Million or 36.8% of the Total
Pork  \$30 Million or 33.9% of the Total	Poultry & Eggs  \$77 Million or 37.8% of the Total	Fish & Seafood  \$15 Million or 34.9% of the Total	Dairy Products  \$68 Million or 31.1% of the Total	Fresh Fruits & Vegetables  \$95 Million or 33.8% of the Total
Processed Fruits & Vegetables  \$27 Million or 31.6% of the Total	Sugar and Sweets  \$34 Million or 26.3% of the Total	Fats and Oils  \$18 Million or 32.9% of the Total	Other Food Products  \$136 Million or 27.4% of the Total	Alcoholic Bev. at Home  \$99 Million or 24.8% of the Total.

Source: Global Insight - 2015 Hispanic Market Monitor, Phoenix DMA Total consumer dollars spending: Food at Home

Courtesy of  **UNIVISION**
ARIZONA



Top Grocery Stores In Tucson

RANKED BY PERCENTAGE OF HISPANIC ADULTS 18+
THAT SHOPPED FROM EACH GROCERY STORE IN THE LAST 7 DAYS

HISPANIC RANK	GROCERY STORE SHOPPED LAST 7 DAYS	% OF HISPANIC	% OF NON-HISPANICS	HISPANIC INDEX (VS. TOTAL)
#1	Fry's	57.8%	59.8%	98
#2	Walmart Supercenter	52.0%	40.5%	117
#3	Food City	40.0%	10.1%	201
#4	Costco	30.0%	32.7%	94
#5	Safeway	29.7%	41.4%	79
#6	Walmart Neighborhood Market	24.8%	20.1%	115
#7	El Super	17.0%	2.4%	237
#8	Albertsons	15.3%	18.0%	89
#9	Sprouts	8.1%	17.9%	55
#10	Target/SuperTarget	7.0%	15.1%	56
#10	Trader Joe's	7.0%	16.2%	53
#12	Bashas'	6.6%	7.0%	96
#13	Sam's Club	4.9%	5.9%	89
#14	Other grocery store	4.1%	7.7%	63
#15	Other Hispanic grocery store	2.1%	2.5%	89
#16	Whole Foods Market	1.8%	5.4%	43
#17	AJ's Fine Foods	1.5%	3.0%	59
#18	Rincon Market	0.6%	3.0%	26

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

Courtesy of  **UNIVISION**
ARIZONA

Top Food Products In Tucson

RANKED BY PERCENTAGE OF HISPANIC ADULTS 18+
THAT USED FOOD PRODUCTS IN THE LAST 7 DAYS

HISPANIC RANK	FOOD PRODUCTS USED LAST 7 DAYS	% OF HISPANIC	% OF NON-HISPANICS	HISPANIC INDEX (VS. TOTAL)
#1	Coffee	68.3%	61.3%	107
#2	Fresh meat	68.2%	66.4%	102
#3	Tortillas	67.1%	39.9%	137
#4	Packaged meat	63.7%	58.3%	106
#5	Ice cream and frozen novelties	47.8%	50.0%	97
#6	Candy	46.5%	43.0%	105
#7	Ready-to-eat cereal	44.3%	49.9%	92
#8	Pretzels, chips, popcorn	42.7%	50.1%	90
#9	Yogurt (not frozen)	39.3%	43.3%	94
#10	Soup (canned or dry mix)	36.6%	40.8%	93
#11	Nuts	33.3%	43.0%	84
#12	Salsa	32.0%	40.7%	85
#13	Prepared foods	30.3%	28.3%	105
#14	Frozen pizza	15.6%	21.6%	79
#15	Energy bars/nutrition bars	14.9%	13.8%	105
#16	Baby food	3.7%	3.6%	102

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

Courtesy of  **UNIVISION**
ARIZONA



Rancho Feliz Charitable Foundation Helping Agua Prieta Families By Providing 'The Democratic Redistribution Of Opportunity'

Imagine that you have a different kind of life. You are eight years old, one of six children, and you live in a rickety shack riddled with holes that let in the wind and rain. And, last winter, your sister froze to death in her sleep.

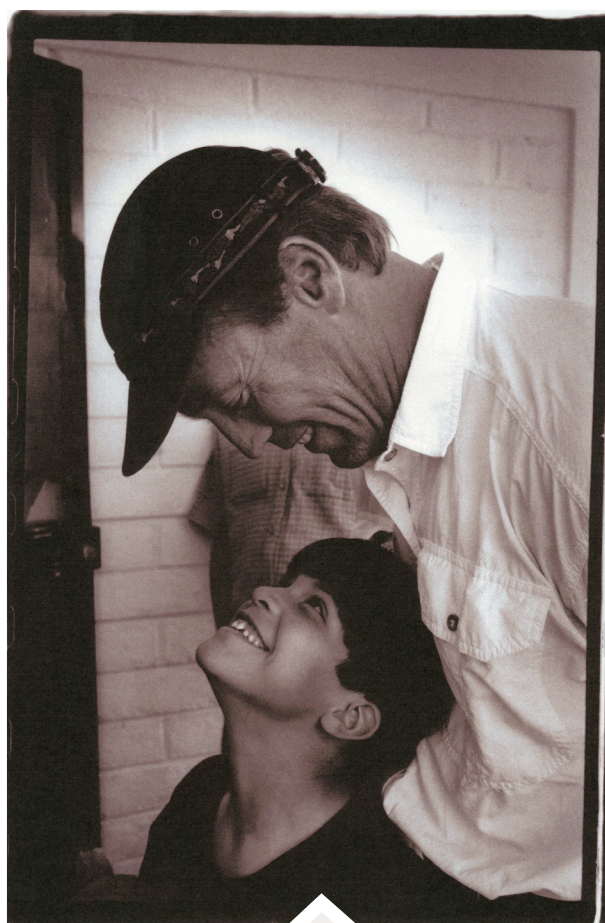
For most Americans, this is impossible scenario to imagine. Yet, only 2-hours south of Tucson it's the reality of so many children in the shantytowns on the outskirts of Agua Prieta, the community just across the border from Douglas, Arizona.

Thanks to the nonprofit Rancho Feliz Charitable Foundation, however, it's a reality hundreds of families and their children have been able to escape.

"It's been our experience in Agua Prieta that if we can provide those [children] the opportunity for education, they can escape their inherited cycles of poverty," said Rancho Feliz Founder Gil Gillenwater of Scottsdale.

Volunteers affiliated with the program have been helping Agua Prieta families and children living in abject poverty since the 1980s, though the charity was officially established as a 501.c3 nonprofit in 1991. Rancho Feliz has raised hundreds of thousands of dollars over the past 20-plus years through a variety of unique sporting events, including Run Across Arizona, the Tour de el Tigre mountain bike ride and Ride the Rez-The Bitahachee 350.

The volunteers who contribute to Rancho Feliz's many initiatives are called "Guardian Warriors". Over the years, Rancho Feliz has built a soup kitchen, a shelter for abandoned seniors, an orphanage and an international exchange dormitory called "Return to Reality" where volunteers staying



on-site in Mexico learn "what it means to be global citizens" helping to build homes and distribute food in Agua Prieta. "We feed their stomachs and they feed our souls," says Gillenwater. This program averages over 1,000 U.S. volunteers per year.

"Education is not preparation for life; education is life itself." — John Dewey



Rancho Feliz's most ambitious project to date has been the establishment of **Vecinos Dignos Sin Fronteras** (Worthy Neighbors Without Borders), a neighborhood with 42 homes, a self-sustaining child care facility, and a recreation and education center with an adult computer literacy program.

"Just when I was preparing to go to the United States in search of a better life, I learned about Vecinos Dignos," said Reyes Zagaste, who lives with his family in the neighborhood. "It's been a miracle, a huge miracle."

As a result of living in the community, Zagaste's children were eligible for Rancho Feliz scholarships. His son, Reyes Zagaste, Jr., graduated from Jacobs University in Bremen, Germany with a degree in global economics and is now working for a solar company in Munich. His daughter, Aylin, is studying medicine in Ensenada, Mexico while his other daughter, Fernanda, is studying law at the same university.

"The truth is I wouldn't have had this opportunity, if it wasn't for Rancho Feliz," said Aylin.

Zagaste said Rancho Feliz made it possible for his family to remain in Mexico and build a life there instead of crossing into the United States undocumented.

"We don't have to go somewhere else to find opportunity. We can do it here," said Reyes. "Rancho Feliz has helped



us stay here, close to our family, close to our culture, and close to our people."

Jim Armstrong, a volunteer who directs the Rancho Feliz education programs, said, "Some people use the term, 'the gift of education' [to describe what Rancho Feliz offers]. I don't really buy into that. I think what we do is empower the children to get their own education."

Gillenwater added, "It's really important to note that at Rancho Feliz we don't believe in welfare. We believe in the democratic redistribution of opportunity." Equally important is the fact that we all volunteer. Having only one paid Administrator and one part time accountant allows us to stretch our donated dollars to the maximum.



Rancho Feliz
Charitable Foundation, Inc.

For more information about Rancho Feliz and how to become a volunteer or contribute to the program, visit ranchofeliz.com or email kim@ranchofeliz.com. To watch a video about Rancho Feliz, go to:
2015 "30 Years on the Border"
vimeo.com/123090993.



Notes

CONSUMER
BEHAVIOR

CONSUMER



"As a business that serves more than 3 million customer relationships in Arizona, the information provided by *DATOS* gives Cox a valuable tool that keeps us better connected to the Hispanic consumer, which helps us to better serve our customers in the way they want to do business with us. Additionally, having access to this research, helps Cox continue to provide services and products that are the most valuable to this growing market."

—John Wolfe, Senior Vice President & General Manager, Southwest region, Cox Communications

Hispanics Now A Bigger And Fast-Evolving Segment Of Every Major Product Category

One of the biggest challenges for retailers is knowing not only what people are buying today, but what they might want to purchase months or even years down the road. Predicting buyers' tastes and needs means retailers have to know and understand their customer base.

In Arizona and nationwide, that customer base is dramatically changing.

Consider that in the past 25 years, the Latino population in Arizona has nearly tripled to about 30 percent of the total population. Between now and 2050, 86 percent of population growth in the United States will be attributed to Hispanics. And U.S. Census figures show that by 2060, about one-third of the U.S. population will be Hispanic and there will be no majority population group.

Even within Hispanic households, cultural and demographic dynamics are shifting. Over the past decade, Hispanic households overall have become more bilingual in nature. That is to say, fewer Hispanics are speaking only English or only Spanish. In the meantime, more Hispanics and Non-Hispanics alike are taking Spanish-language classes, and the U.S. now has 55 million Spanish speakers, the largest number in the world except for Mexico.

Hispanic shoppers, meanwhile, are a fast-growing segment of virtually every major product market.

Nationally, for instance, Hispanics, per capita, outpace Non-Hispanics in the purchase of the top 15 categories of package goods, such as soft drinks, candy, milk, beer, wine, dog food and coffee, according to a 2015 Nielsen survey.

In Phoenix, Hispanics spent \$1.5 billion on food outside of the home in 2014, an average of about \$4,100 per house-

hold as compared to \$3,700 for non-Hispanic households, according to a 2015 Hispanic Market Monitor survey. And while 45 percent of Hispanic households in Phoenix eat out at Mexican food restaurants, almost as many (44 percent) said they dine out on Chinese food. Pizza restaurants are the next highest category at 30 percent.

Phoenix Hispanics are a growing segment of the new car sales market, growing at a rate three times faster than the general market and accounting for \$249.2 million in new automobile purchases, or 17 percent of all spending in the first quarter of 2015 alone. Hispanics are also a big part of the used car sales market. In 2014, Hispanics shoppers spent \$386 million on used cars, or 23 percent of all used car sales in Phoenix.

In the entertainment arena, Hispanics love going to the movies, casinos, theme parks and big name sports.

In Phoenix in 2014, nearly one of every four movie tickets, about \$49 million worth, was sold to Hispanics, a Hispanic Market Monitor survey found. Hispanic moviegoers were 66 percent more likely than Non-Hispanics to see a movie on opening weekend and 41 percent are more likely to go to the movies four times a month. A Phoenix Hispanic Scarborough survey also found that nearly 400,000 Hispanics said they visited a casino in the previous 12 months and nearly one-third of Hispanic adults with children under 18 visited a theme park in 2014.

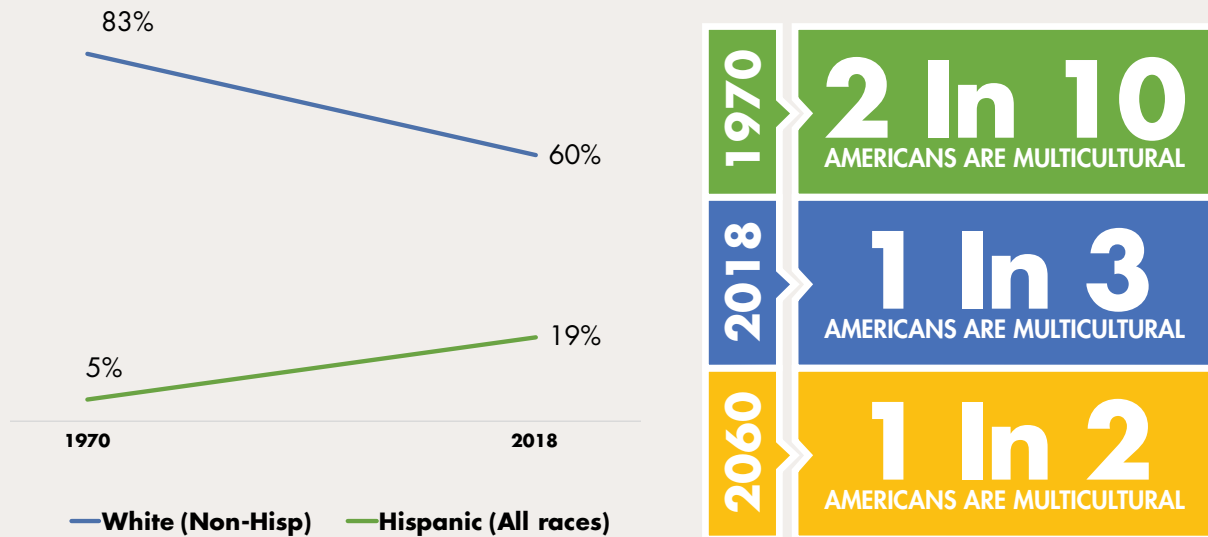
Hispanic men, perhaps to no great surprise, are big professional sports fans. A Hispanic Scarborough survey earlier this year found 86 percent of respondents are interested in professional football, 50 percent enjoy baseball and 50 percent enjoy basketball.





By 2060, **Half Of All Americans** Will Be Multicultural!

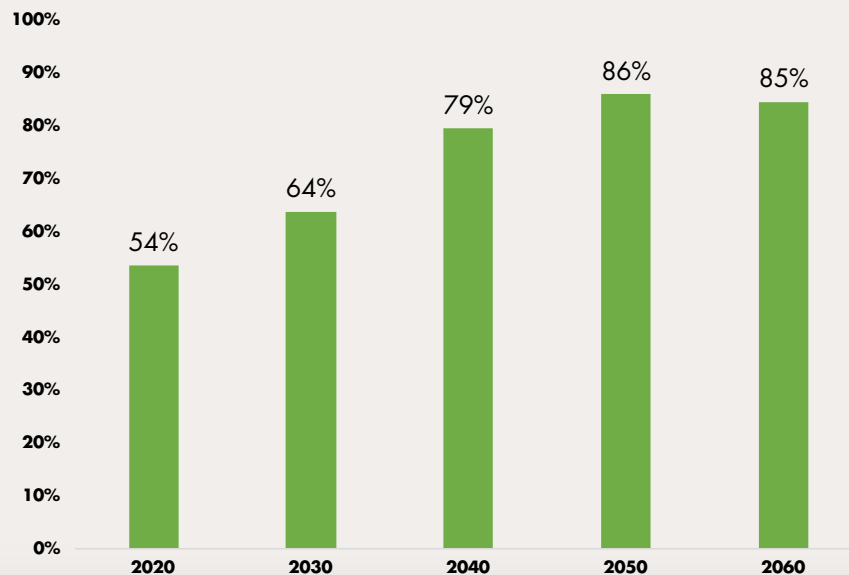
SHARE OF CONSUMERS HISPANICS VS. WHITE NON-HISPANIC



Source: "Beyond Purchasing Power: Multicultural Super Consumers," Nielsen, February 2015.

By 2020, U.S. Hispanics Will Account For **54%** **Of The Population Growth** And **86%** By 2050

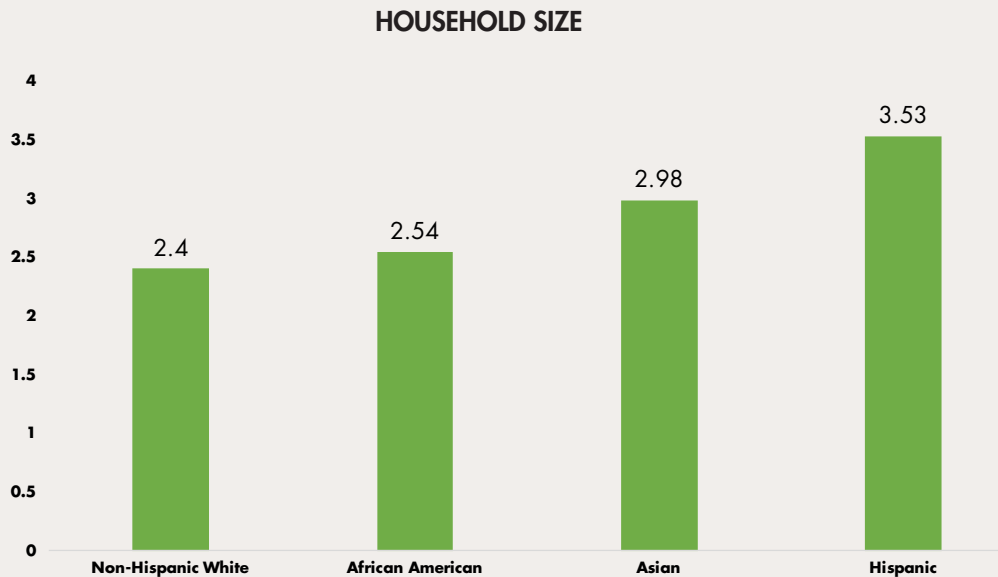
SHARE IN GROWTH IN POPULATION BY HISPANICS



Source: "Beyond Purchasing Power: Multicultural Super Consumers," Nielsen, February 2015.



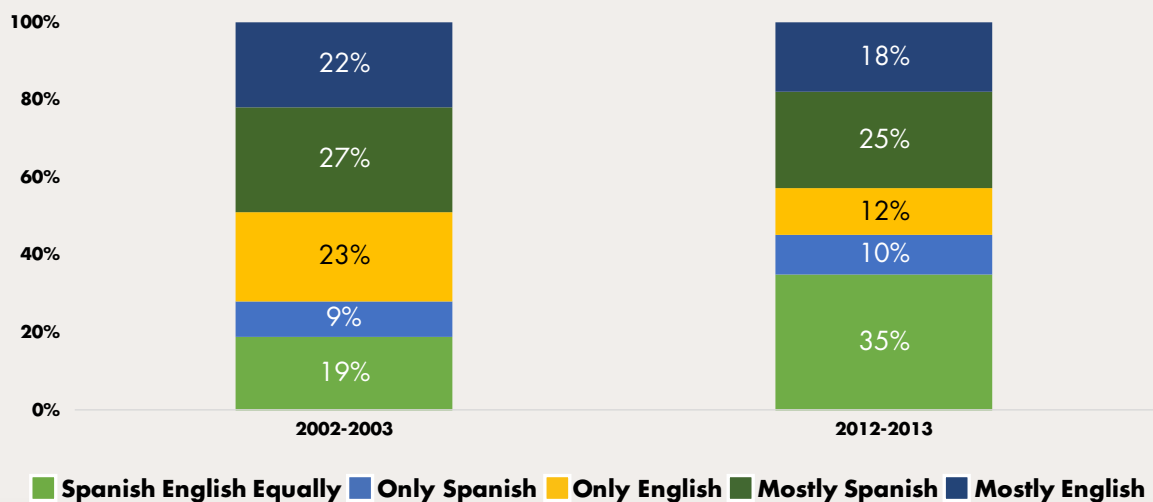
Hispanics Live In Larger Households!



Source: "Beyond Purchasing Power: Multicultural Super Consumers," Nielsen, February 2015.

Homes That Speak Both English And Spanish Are **Growing The Most**

LANGUAGE DISTRIBUTION AMONG HISPANIC HOUSEHOLDS



Source: "Beyond Purchasing Power: Multicultural Super Consumers," Nielsen, February 2015.



Advertising In **Spanish Resonates** With Hispanic Consumers

**Hispanics Recall
Commercials In English
As Well As Non-Hispanics**

Hispanics Like Ads

40%

More When
Viewed In Spanish

Ads Including Spanish Speaking Talent Perform Better

	% LIFT
BRAND RECALL	+27%
MESSAGE RECALL	+33%
LIKEABILITY	+21%

Source: "Beyond Purchasing Power: Multicultural Super Consumers," Nielsen, February 2015.

The Young Urban Hispanic Is, And Will Be,
The **Trendsetter For America** For Many Years To Come!

RANK	MARKET	HISPANIC POP (000'S)	% OF HISPANIC TOTAL POP	HISPANIC POP 21-34	% HISP 21-34 OF TOTAL 21-34
1	LOS ANGELES	8,507	48%	2,871	55%
2	NEW YORK	4,435	21%	1,475	38%
3	MIAMI-FT LAUDERDALE	2,152	49%	619	54%
4	HOUSTON	2,064	35%	729	60%
5	CHICAGO	1,973	20%	700	37%
6	DALLAS-FT WORTH	1,758	26%	653	46%
7	S.FRAN./OAKLAND/SJ	1,712	24%	591	44%
8	PHOENIX	1,378	27%	509	53%
9	SAN ANTONIO	1,259	55%	402	57%
10	HARLINGEN/MCALLEN	1,153	97%	359	90%

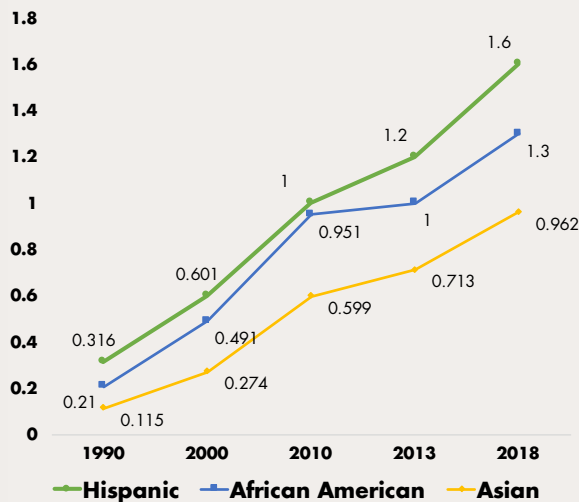
Source: "Beyond Purchasing Power: Multicultural Super Consumers," Nielsen, February 2015.



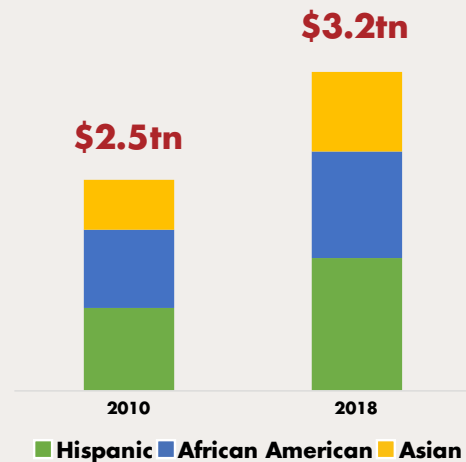


Hispanics Have The **Highest Purchasing Power** Compared To Other Minorities

PURCHASING POWER BY ETHNIC GROUP
(TRILLIONS)



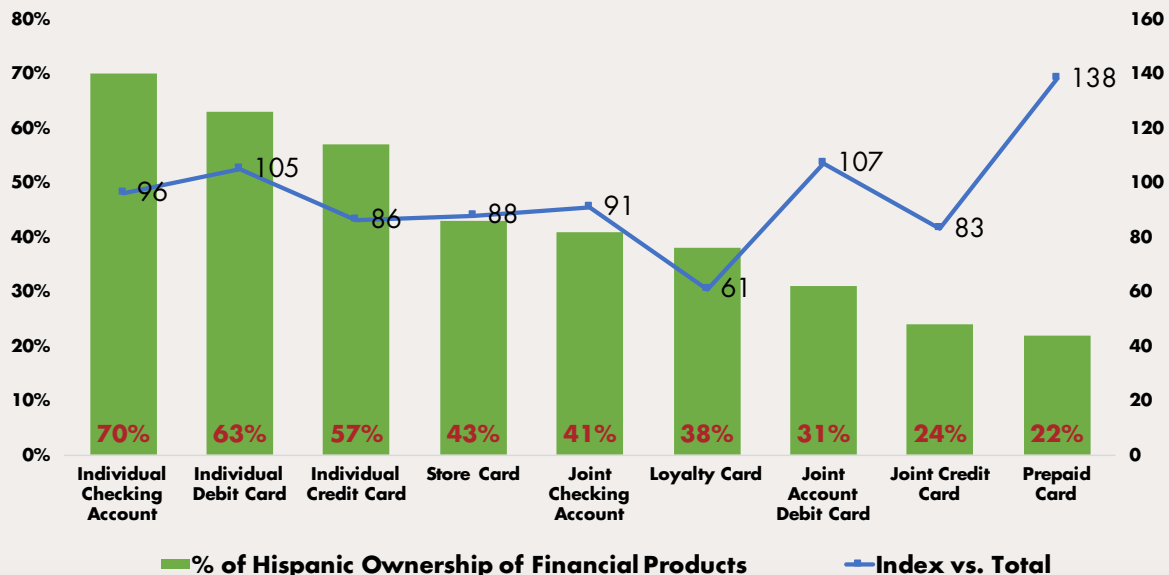
MULTICULTURAL PURCHASING POWER



Source: "Beyond Purchasing Power: Multicultural Super Consumers," Nielsen, February 2015.

Hispanics Are **5x More Likely** To Have An Individual Debit Card And **38x More Likely** To Have A Prepaid Card

FINANCIAL PRODUCTS OWNED BY HISPANICS

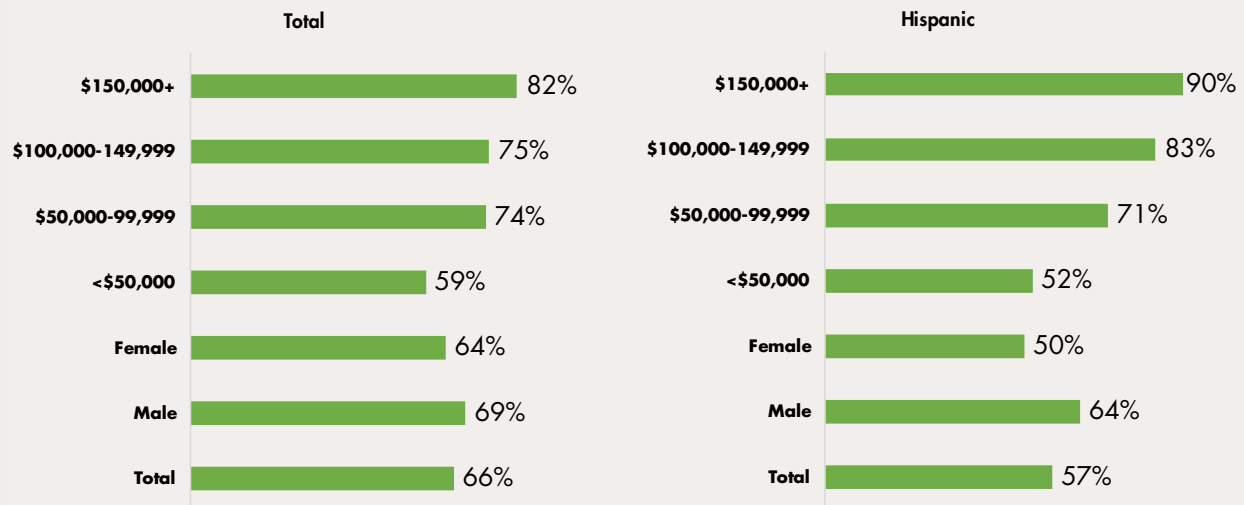


Source: "Nielsen Share of Wallet Lite," Nielsen, March 2015.



Overall, **Credit Card Ownership** Is Lower Than The Total U.S. Share. However, **Higher Income** Hispanics Are **More Likely To Have Credit Cards**

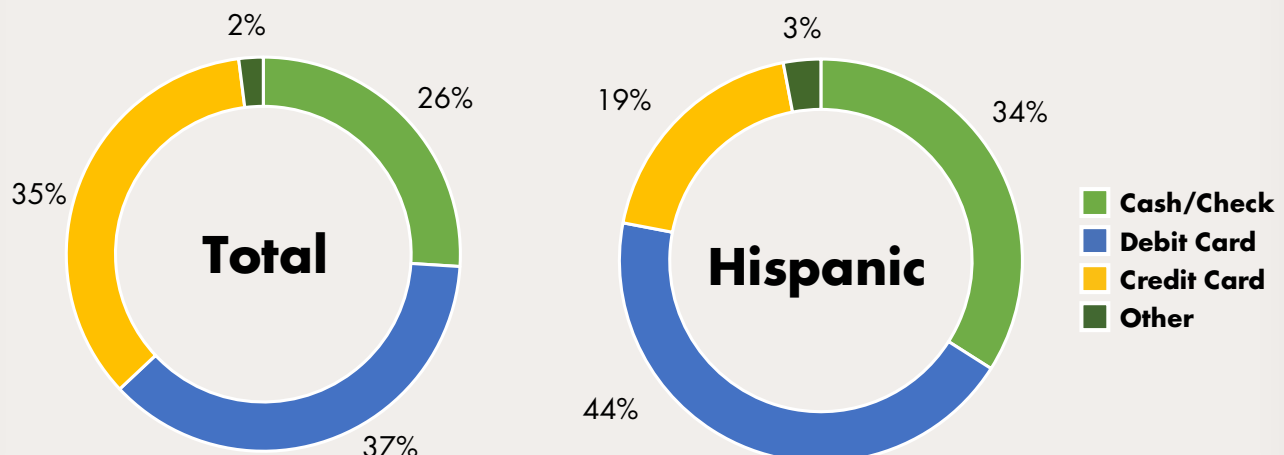
INDIVIDUAL CREDIT CARD OWNERSHIP



Source: "Nielsen Share of Wallet Lite," Nielsen, March 2015.

Hispanics Are **More Likely To Use Cash/Check Or Debit Card** And Less Likely To Use Credit Cards As Their **Preferred Method Of Payment** For All Purchases

PAYMENT USED MOST OFTEN – ALL PURCHASES

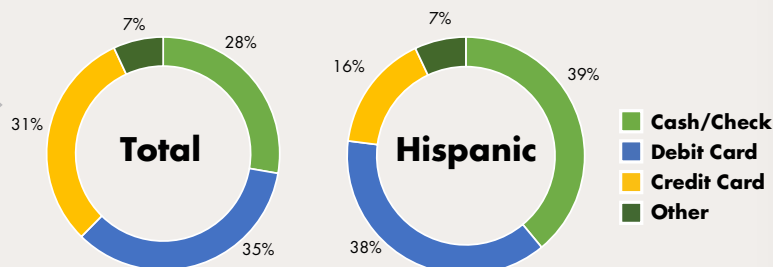


Source: "Nielsen Share of Wallet Lite," Nielsen, March 2015.



When Making
Food Purchases,
Hispanics Are Even
More Reliant On
Cash Or Checks

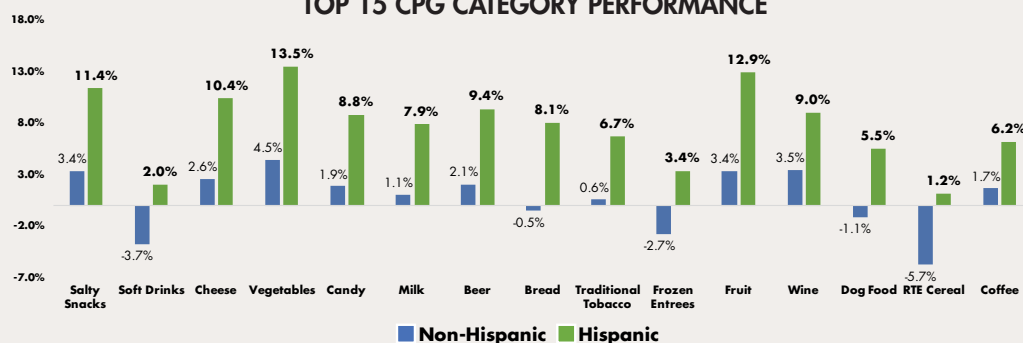
PAYMENT USED MOST OFTEN – FOOD PURCHASES



Source: "Nielsen Share of Wallet Lite," Nielsen, March 2015.

Hispanic Volume Growth Outpaces Non-Hispanic In Top 15 Customer Packaged Goods

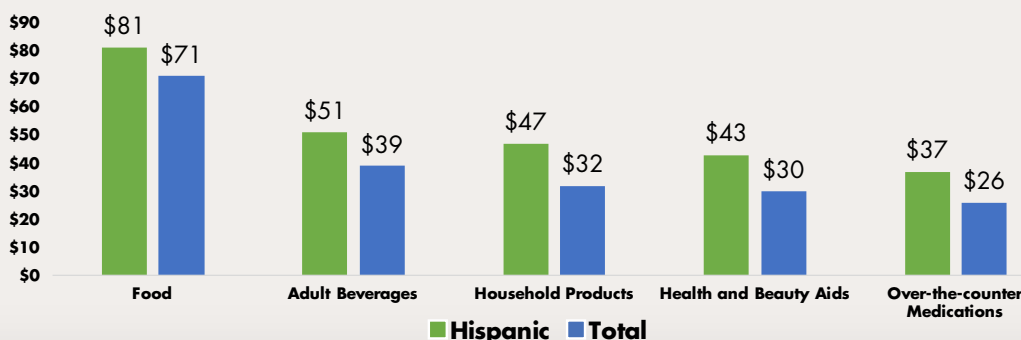
TOP 15 CPG CATEGORY PERFORMANCE



Source: "Beyond Purchasing Power: Multicultural Super Consumers," Nielsen, February 2015.

Hispanic Spending On Consumer Packaged Goods Is **Above Average**

AVERAGE SPENT PER VISIT ON CONSUMER PACKAGED GOODS



Source: "Nielsen Share of Wallet Lite," Nielsen, March 2015.





CUSTOMER SUCCESS STORY



Turbana Takes a Fresh Approach to Multicultural Retail with Geoscape



Geoscape Intelligence System's RetailTarget module helped educate Turbana's retail community to grow a core product line

Challenge: When Tropicals Go North

Turbana is a leading producer, marketer and distributor of high quality tropical fruits and vegetables, with a mission to provide healthy tropical foods that transform people's lives. As a grower-owned company founded in 1970, Turbana is one of the main importers of bananas, plantains and pineapples to the United States, available in hundreds of stores nationwide. Turbana also produces a growing line of packaged products, including plantain chips (otherwise known as mariquitas) along with other healthy snacks.



However, the U.S. fruit and vegetable industry is occupied by several large multinational competitors. To differentiate their produce and attract new retail partners, Turbana introduced a new line of tropical fruits and vegetables, called Turbana Tropicals, to give their retailers an opportunity to attract a new type of consumer.

Turbana realized that the success behind its new product line would come from America's New Mainstream populations, especially the U.S. Hispanic and Asian communities. These populations often over index in the fresh produce category because they are shown to consume more fruits and vegetables, cook from scratch more often and either has larger average households (Hispanics) or greater spending power (Asians) than the general population. By selling new produce that caters to Hispanic and Asian heritage and tradition, Turbana was helping their community of retailers have a more appealing line of products within arm's reach of their multicultural base of consumers.

While Turbana understood the opportunity that tropicals posed to many multicultural groups throughout the United States, many of its local retailers did not. "Our retailers understood that these populations are growing, but they do not understand what these groups are looking for," said Marion Tabard, marketing director for Turbana. "When it comes to many of our products, they were literally clueless. With limited time and knowledge, produce managers have too much on their plate. To them, tropical produce is another headache, not an opportunity."



The Business Issue

In a highly competitive North American produce market, Turbana wanted to gain a competitive advantage by capitalizing on the growing consumption of tropical produce. Yet many of these products were unknown to Turbana's community of retailers, despite demand from a variety of ethnic groups surrounding their stores.

To understand a complex demographic picture, Turbana needed to demonstrate the demand for these foods, including which products are especially relevant to each ethnicity, how they are used and when they are especially popular.

The Solution

By equipping their retailers with a greater understanding of the surrounding multicultural population, Geoscape helped Turbana's retail community to understand the sophisticated demographic makeup of each store's trade area. These powerful insights helped Turbana grow its produce line by 300 percent, by helping its customers understand their products' need and value.

Business Benefits

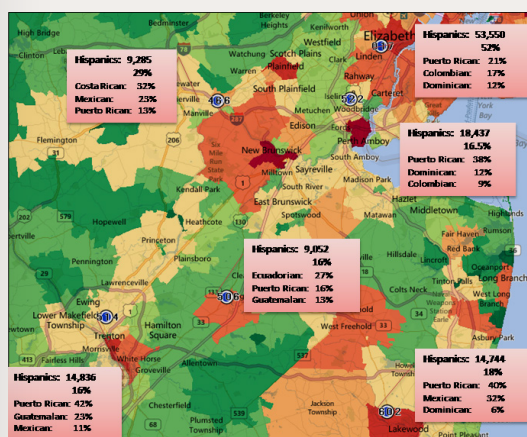
- Increases sales volumes by targeting products at relevant local demographics
- Refines and streamlines inventory
- Improves retailer relationships by assisting in understanding the makeup of their customers



Growing Sales with Demographic Data

To help retailers find the hidden opportunity, Tabard's team introduced a broader educational campaign to demonstrate the revenue that tropicals can bring to their stores. At the heart of the education strategy was Geoscape, who was able to demonstrate the sophisticated ethnic breakdown for all of Turbana's retail partner locations.

Specifically, Geoscape's RetailTarget module allowed produce managers to see the exact ethnic demographic breakdown around their store trade area, then carry the right assortment of tropical produce accordingly. In densely populated states such as New Jersey, for example, one store may have a large number of Mexican Americans, while another store a few miles away may be predominantly Puerto Rican. Each ethnic group uses different fruits and vegetables on different occasions, for distinct dishes, making the need for precise demographic breakdowns essential. "We show our retailers the potential of these markets around their stores, and Geoscape's relevant data makes this opportunity possible," said Tabard.

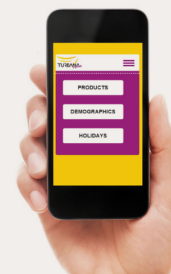


"To us, multicultural means that a high degree of customization is necessary. Geoscape was a natural fit for us, providing us the customization and data that's of real value to our retailers."

Geoscape's micro-local mapping data is embedded directly into a mobile app that Turbana created for its retail community, which includes a "demographics" tab where retailers can see the exact ethnic breakdown of their store. Depending on the ethnic mix, retailers can stock their shelves accordingly. Turbana takes the education process one step further, with detailed pages about each product's usage and characteristics, including potential holidays where certain ethnic groups consume larger amounts of select produce. "To us, multicultural means that a high degree of customization is necessary," said Tabard. "Geoscape was a natural fit for us, providing us the customization and data that's of real value to our retailers."

As Turbana increased its use of Geoscape, it found the technology helpful in launching additional products. By identifying a consumer type that would be interested in smaller, crownless pineapples for example, Turbana was able to target the exact stores with large populations of relevant households for its pilot program.

The end result was a thriving new product line, as Turbana's tropicals business grew by over 300 percent in 2014. As Turbana continues to grow its tropical presence with retail partners, one retailer increased sales 30 percent in under six months. Turbana is delivering quality produce and bringing a fresh approach to multicultural retail through powerful consumer insights from Geoscape's high-quality data.



About Geoscape

Geoscape is an innovator of business intelligence and a provider of data-rich systems, research and analytic services. The Geoscape Intelligence System, an online analytics platform, delivers the most accurate data on an increasingly diverse American and international marketplace. Take a **FREE TEST DRIVE** of GIS at www.geoscape.com/testdrive to capitalize on the tremendous growth of the New Mainstream of culturally-diverse consumers.



P. 1(888)211-9353
E. info@geoscape.com
URL. www.geoscape.com



\$1.7

Billion Spent by **Phoenix** Hispanics on
"Food Away from Home" in 2014



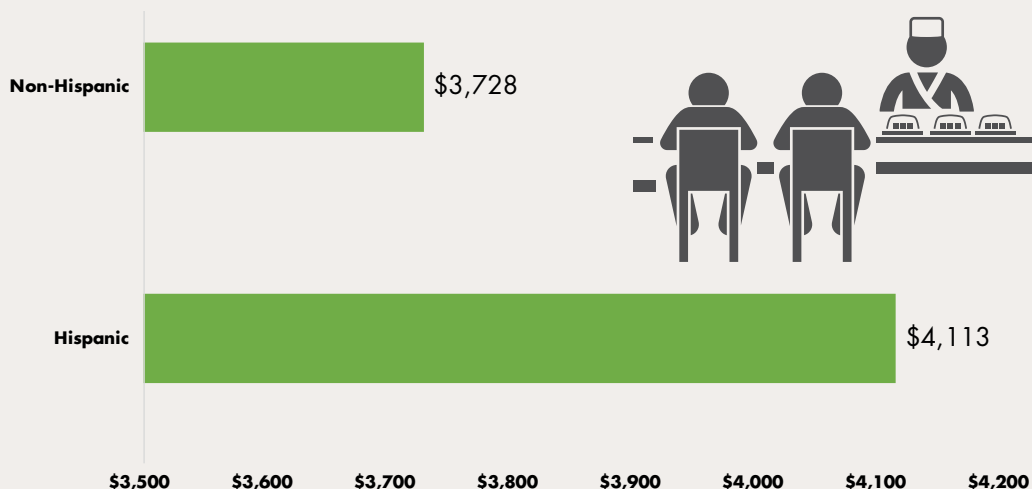
Of Spending In Phoenix

IHS Global Insight - 2015 Hispanic Market Monitor, Phoenix DMA

Courtesy of **UNIVISION**
ARIZONA

Phoenix Hispanics **Spend More** On Eating Out

"FOOD AWAY FROM HOME" AMOUNT SPENT PER HOUSEHOLD IN 2014



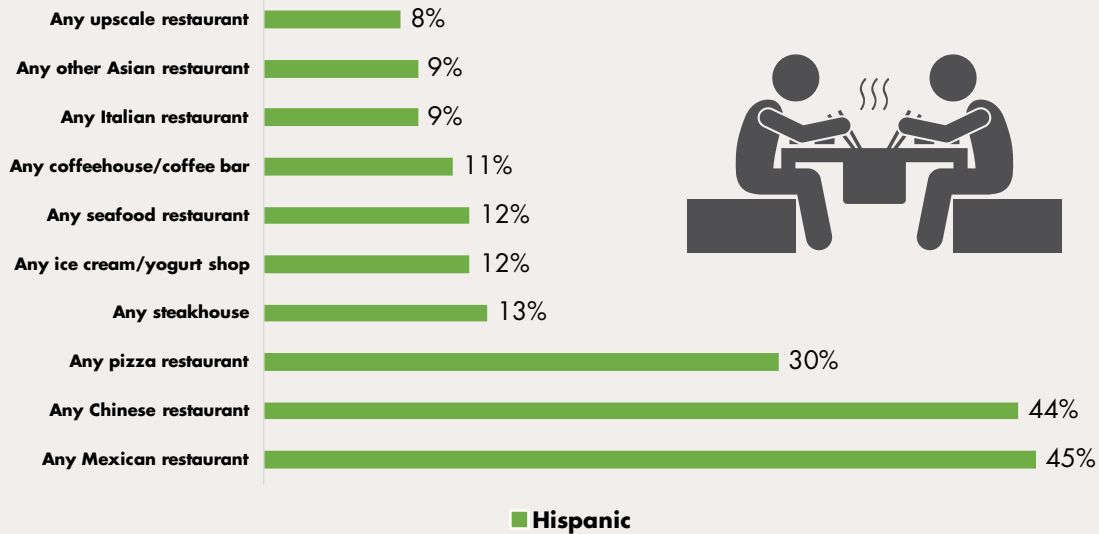
IHS Global Insight - 2015 Hispanic Market Monitor
 Total consumer dollars spending: Quick Service Restaurants

Courtesy of **UNIVISION**
ARIZONA



Hispanics Enjoy A **Variety Of Menu Choices**

RESTAURANT TYPES VISITED IN THE PAST 30 DAYS BY PHOENIX HISPANICS

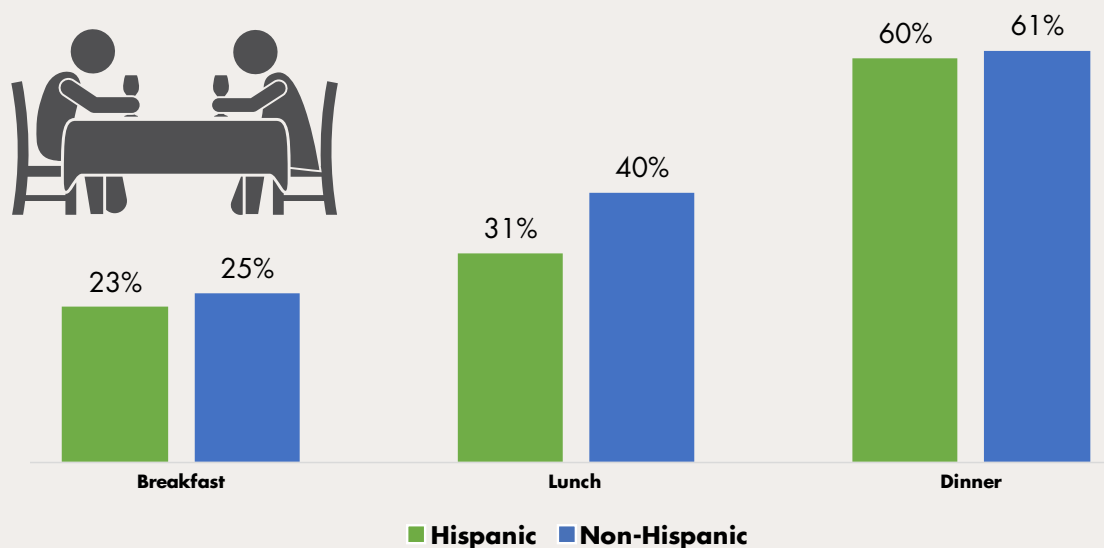


Hispanic Scarborough, 2015 Release 1 (Feb 2014 - Jan 2015), Hispanic Adults 18+, Phoenix DMA
 *Index compares Hispanics vs. the total market

Courtesy of UNIVISION
ARIZONA

Hispanic Diners Are Most Likely To Visit **Sit-Down Restaurants** For Dinner

TYPES OF MEALS AT SIT-DOWN RESTAURANTS IN THE PAST 30 DAYS



Hispanic Scarborough, 2015 Release 1 (Feb 2014 - Jan 2015), Adults 18+, Phoenix DMA

Courtesy of UNIVISION
ARIZONA



Phoenix Hispanics Over Index On 10 Of The Top 15 Casual Dining Restaurants



RANK	SIT-DOWN RESTAURANTS VISITED FOR ANY MEAL	HISPANIC	NON-HISPANIC	HISPANIC INDEX (VS. TOTAL)
#1	Denny's	18.4%	15.5%	113
#2	Olive Garden	14.4%	15.4%	95
#3	IHOP	13.6%	9.9%	126
#4	Applebee's	12.0%	9.8%	116
#5	Golden Corral	11.2%	7.6%	133
#6	Red Lobster	8.2%	9.4%	91
#7	Chili's	7.9%	9.9%	85
#7	Outback Steakhouse	5.4%	5.9%	93
#9	Cracker Barrel	5.3%	7.0%	81
#10	The Cheesecake Factory	4.9%	4.8%	101
#11	Macayo's	4.5%	2.3%	158
#12	Oregano's Pizza Bistro	4.4%	3.9%	110
#13	Garcia's	4.2%	2.3%	151
#14	LongHorn Steakhouse	4.2%	2.0%	163
#15	Sizzler	3.6%	1.3%	197

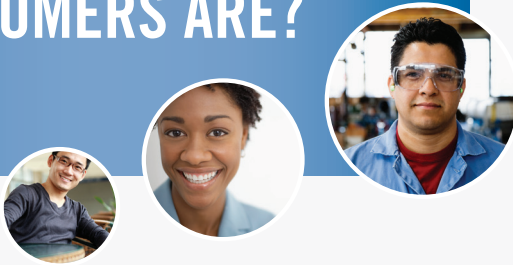
Hispanic Scarborough, 2015 Release 1 (Feb 2014 - Jan 2015), Adults 18+, Phoenix DMA

Courtesy of UNIVISION
ARIZONA

DATOS AZ 2015

46

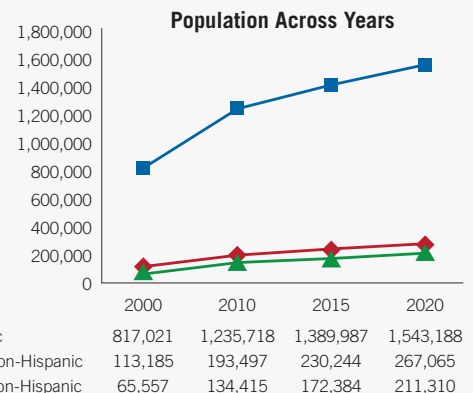
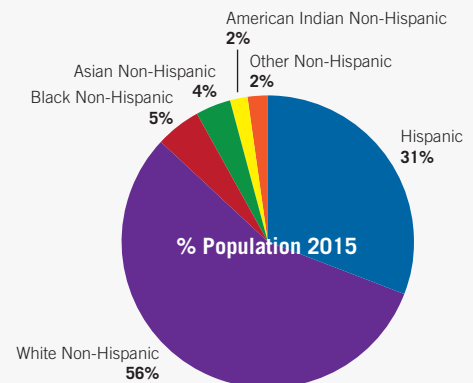
PHOENIX, DO YOU KNOW WHO YOUR CUSTOMERS ARE?



The Phoenix Metro area includes the counties of Pinal and Maricopa. The Hispanic population in Arizona continues to grow at historically high rates, more than tripling in the period between 1990 and 2015. In addition, the Asian population in the Phoenix area has shown significant growth of more than 140% between 2000 and 2015 and is forecasted to grow more than 20% through 2019.

If you are interested in growing your business, you need to be communicating with these high-growth populations in a manner that addresses their cultures and needs directly. The Geoscape Intelligence System (GIS) can help you understand local populations within each of these segments and boost your sales and ROI quickly and easily. For a FREE test drive of the system visit: www.Geoscape.com/testdrive

For more information, contact Geoscape at 1-888-211-9353





Big Spending Power At **Quick Serve Restaurants** (QSRs) In 2014!

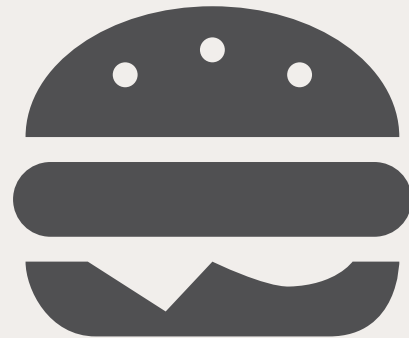
Phoenix Hispanics
Spent

**\$1.05
Billion**

On QSR

25%

of **Phoenix**
Spending

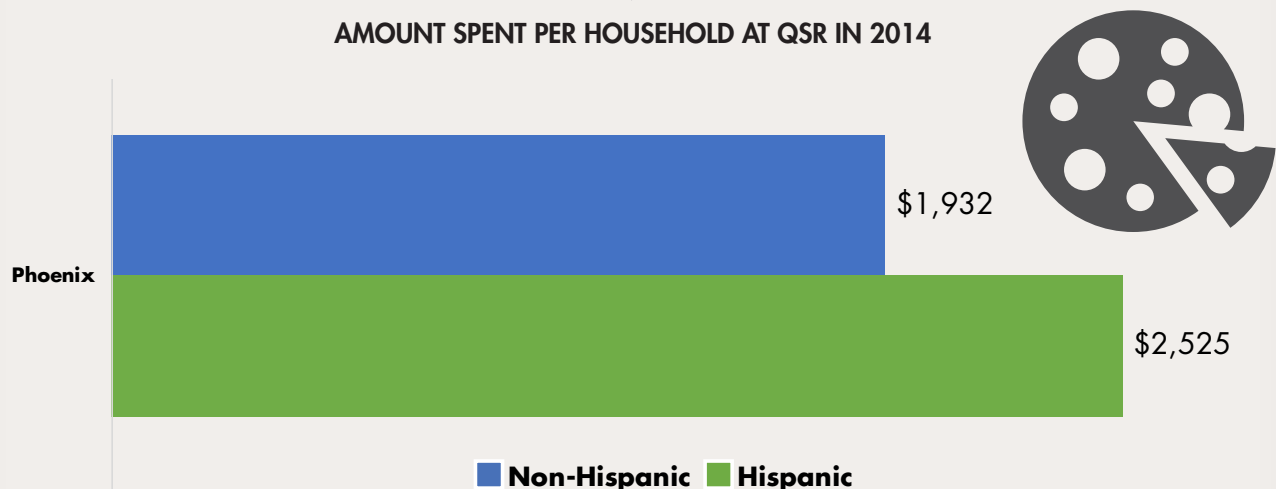


IHS Global Insight - 2015 Hispanic Market Monitor

Courtesy of  **UNIVISION**
ARIZONA

Hispanics Spent Nearly **\$600 More** Than Non-Hispanics at QSRs in 2014

AMOUNT SPENT PER HOUSEHOLD AT QSR IN 2014



IHS Global Insight - 2015 Hispanic Market Monitor
Total consumer dollars spending : Quick Service Restaurants

Courtesy of  **UNIVISION**
ARIZONA



Number Of QSR Visits
In The Last 30 Days

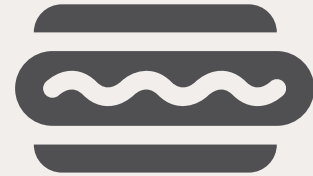
57%

Of Phoenix Hispanics
Have Visited QSRs
5+ Times

VS.

51%

Phoenix
Non-Hispanics



Hispanic Scarborough, 2015 Release 1 (Feb 2014 - Jan 2015), Phoenix DMA, Adults 18+

Courtesy of **UNIVISION**
ARIZONA

DATOS AZ 2015

48

Are you investing in the future of global North America?

The North American Research Partnership is an independent, non-profit "think and do" tank located in Arizona and Southern California exploring how the United States, Mexico and Canada can succeed in the 21st century. We provide a variety of applied research products and services for public, private, and nonprofit organizations.



Tel. 858-449-3798

info@naresearchpartnership.org

naresearchpartnership.org

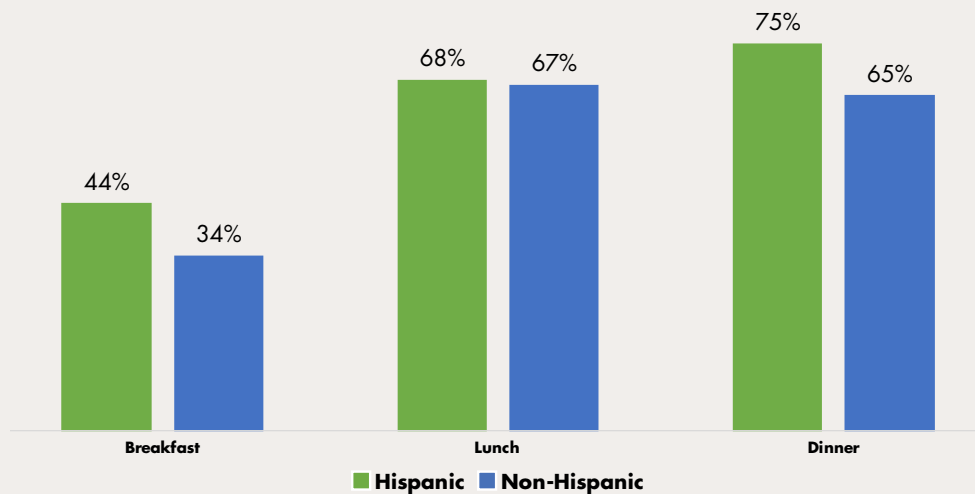
North American
Research Partnership

RESEARCH, OUTREACH & IMPACT ON GLOBAL NORTH AMERICA



Phoenix Hispanics Are More Likely To Visit **QSRs For Lunch & Dinner**

TYPES OF MEALS AT QUICK SERVICE RESTAURANTS IN THE PAST 30 DAYS



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

Courtesy of UNIVISION
ARIZONA

Phoenix Hispanics Over Index At 12 Of The **Top 15 QSR's**



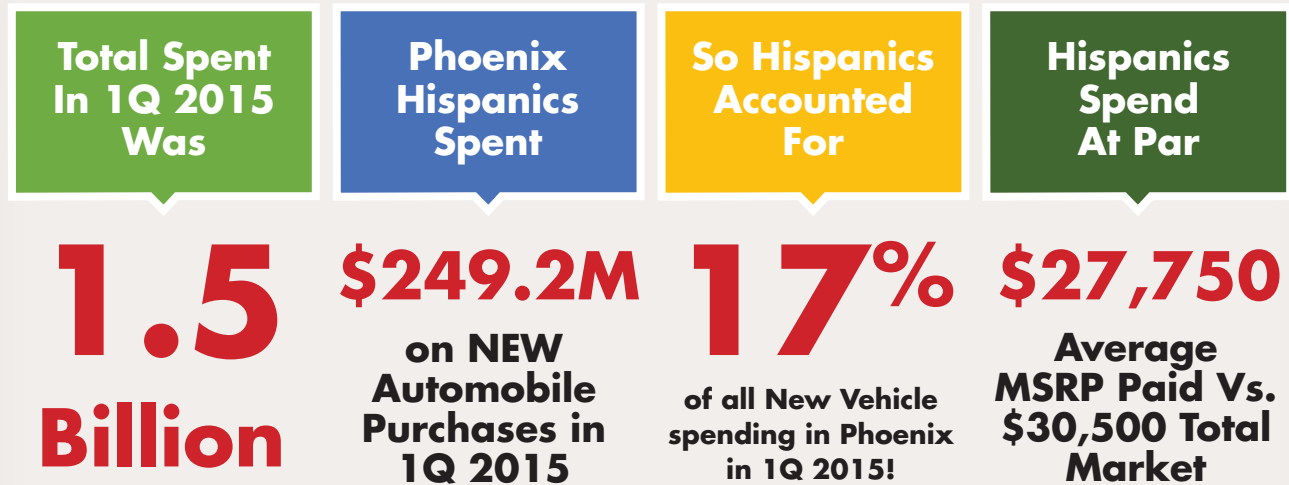
RANK	QSR VISITED FOR ANY MEAL IN PAST 30 DAYS	HISPANIC	NON-HISPANIC	HISPANIC INDEX (VS. TOTAL)
	Any QSR	93%	87%	105
#1	McDonald's	47%	39%	116
#2	Burger King	29%	20%	131
#3	Jack in the Box	28%	17%	143
#4	Little Caesars	28%	11%	183
#5	Taco Bell	25%	25%	101
#6	Subway	24%	21%	113
#7	Panda Express	23%	14%	144
#7	In-N-Out Burger	22%	18%	119
#9	Filiberto's Mexican	21%	7%	203
#10	Starbucks	16%	17%	98
#11	Peter Piper Pizza	15%	3%	265
#12	Other QSR	15%	12%	117
#13	Carl's Jr.	14%	13%	111
#14	Chipotle	14%	14%	104
#15	Wendy's	13%	20%	68

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

Courtesy of UNIVISION
ARIZONA



Hispanics Have A **Strong Purchasing Power** In The **Automotive Industry**

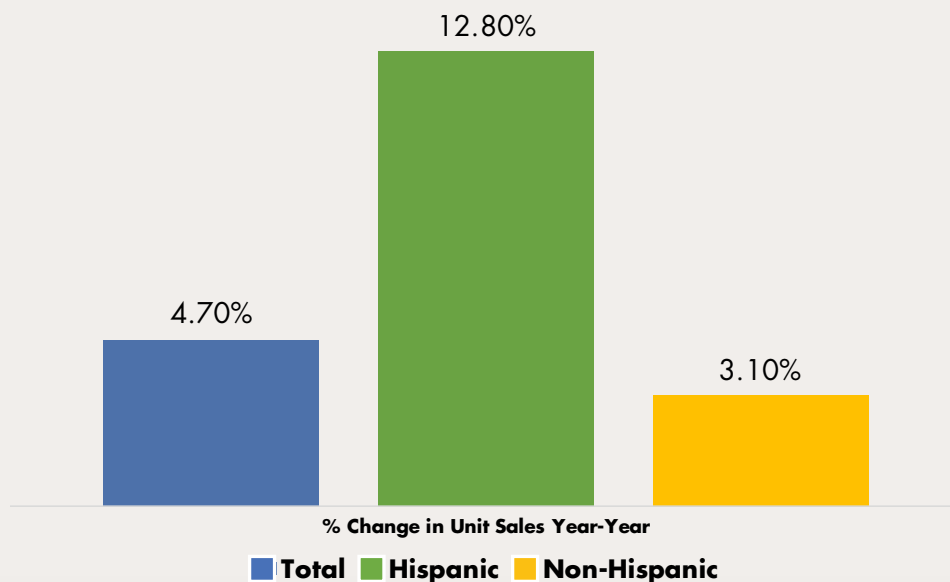


Source: Amount spent based on 2015 MSRP and new Hispanic unit sales; RL Polk & Co. New Vehicle Personal Registrations (includes Leases), Enhanced Ethnic Data, 1Q 2015 CYTD

Courtesy of UNIVISION ARIZONA

Hispanic **NEW Auto Sales Are Growing at 4X** The Rate Of Non-Hispanics In **Phoenix**

% CHANGE IN NEW VEHICLE UNIT SALES YEAR OVER YEAR



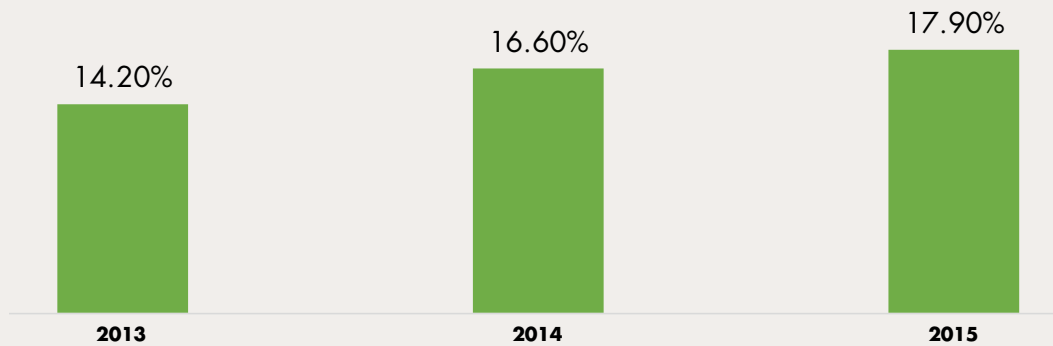
Source: R.L. Polk & Co. New Vehicle Personal Registrations (includes Leases), Enhanced Ethnic Data, May 2015 CYTD (Jan-May15 & Jan-May14), Phoenix DMA.

Courtesy of UNIVISION ARIZONA



Hispanics Account For Growing Percentage of **NEW Total Sales**

SHARE OF NEW TOTAL SALES TO HISPANICS HAS GROWN BY +3.7 POINTS SINCE 2013



Source: R.L. Polk & Co. New Vehicle Personal Registrations (includes Leases), Enhanced Ethnic Data, MAY CYTD (Jan-May13, Jan-May14 & Jan-May15), Phoenix DMA.

Courtesy of **UNIVISION**
ARIZONA

PHOENIX TOTAL			PHOENIX HISPANIC		
BRAND RANKER			BRAND RANKER		
RANK	BRAND	SOM	RANK	BRAND	SOM
#1		14.6%	#1		16.5%
#2		11.0%	#2		15.6%
#3		10.0%	#3		14.3%
#4		9.4%	#4		9.2%
#5		9.2%	#5		8.1%
#6		5.2%	#6		5.4%
#7		5.1%	#7		5.2%
#8		5.0%	#8		4.2%
#9		3.6%	#9		3.9%
#10		2.8%	#10		3.0%

Source: R.L. Polk & Co. New Vehicle Personal Registrations (includes Leases), Enhanced Ethnic Data, May 2015 CYTD (Jan'15-May'15), Phoenix DMA.

Courtesy of **UNIVISION**
ARIZONA



Top 10 Models by Segment

RANKED BY MODEL SALES TO PHOENIX HISPANICS				
RANK	CUV/SUV	FULL/MID-SIZE	COMPACT	PICK-UP
#1	TOYOTA RAV4	NISSAN ALTIMA	TOYOTA COROLLA	CHEVY SILVERADO 150
#2	KIA SOUL	CHEVY MALIBU	HONDA CIVIC	RAM 150
#3	DODGE JOURNEY	TOYOTA CAMRY	NISSAN SENTRA	TOYOTA TUNDRA
#4	JEEP PATRIOT	HONDA ACCORD	CHEVY CRUZE	FORD F150
#5	NISSAN ROGUE	KIA OPTIMA	HYUNDAI ELANTRA SEDAN	TOYOTA TACOMA
#6	CHEVY EQUINOX	FORD FUSION	VW JETTA	GMC SIERRA 150
#7	HONDA CR-V	CHRYSLER 200	DODGE DART	NISSAN FRONTIER
#8	JEEP WRANGLER	HYUNDAI SONATA	FORD FOCUS	RAM 250/350
#9	HONDA PILOT	CHEVY CAMARO	KIA FORTE	CHEVY COLORADO
#10	FORD ESCAPE	FORD MUSTANG	MAZDA 3	CHEVY SILVERADO 250/350
TOP 10 % SHARE OF SEGMENT	46%	81%	86%	95%

Source: Polk, New Vehicle Personal Registrations (Sales & leases) Enhanced Ethnic Data, 2015 CYTD (JAN-MAY); Phoenix (Prescott) DMA;
Note segments include Non-Luxury and Luxury models

Courtesy of UNIVISION
ARIZONA

Phoenix Hispanics Spent **\$386 Million**
on **Used Vehicles** in 2014 (**23%** of the Total Used
Vehicle Sales in Phoenix)

Source: IHS 2015 Global Insight Hispanic Market Monitor

Courtesy of UNIVISION
ARIZONA

Hispanics Generate
28%
Of All **Automotive**
Word-Of-Mouth Activity

Source: 2014 Keller Fay Group, Talk Track® Hispanic Argument

Courtesy of UNIVISION
ARIZONA



Phoenix International Raceway

- Who:** -Phoenix International Raceway in conjunction with NASCAR and NASCAR Mexico Series
- What:** -Increase Hispanic onsite attendance from <5% to >15.5% between 2013 and 2015
- Where:** -Phoenix International Raceway – Avondale, AZ
- Why:** -Hosting the Toyota 120, NASCAR Mexico Series race
-Creating dialog with the Hispanic Community where new comers to the sport feel inclusive to the experience both on and off the race track.
-Providing an open invitation to Hispanics through targeted communications efforts

In the fall of 2012 Phoenix International Raceway announced a commitment to reach the Hispanic Community in a way that had never been done before; in 2013 PIR hosted the Toyota 120, NASCAR Mexico Series (NMS) race. Over past three years the 2013-15 Toyota 120 races were the only NMS races held outside of Mexico.

The NASCAR Mexico Series is a 15-race series where all the drivers, teams, crew, owners and sponsors are from Mexico. Sponsors include Mexican brands such as Telcel, La Costeña, Volaris, Canel's, Jarrito's and Coca-Cola. The winners of the Toyota 120 races at PIR include:

- 2013, Abraham Calderon from Monterrey, Mexico now driving for ARRIS Telcel in the NMS
- 2014, Daniel Suarez from Monterrey, Mexico now driving for ARRIS-Joe Gibbs Racing in the NASCAR XFINITY Series and the NASCAR Camping World Truck Series in the United States
- 2015, Ruben Pardo from Mexico City, Mexico driving for CITIZEN Watches-Potosinos-Toyota in the NMS as well as the IMSA Sports Car Challenge in the United States.

Over the three-year period from 2013 to 2015, PIR has documented an attendance increase among Hispanic fans from less than 5% (reports prior indicated only 3%) to over 15.5% during the past two NASCAR Sprint Cup (NSCS) race weekends, the Quicken Loan Race for Heroes 500 on Nov. 15, 2014 and the Camping World 500 on March 15, 2015.

Promotion and Hispanic outreach for the NMS races as well as the NSCS weekends was focused in the Phoenix area through targeted paid advertising, earned media, community relations and attending festivals and social events. It was conscious of PIR to not create a message "speaking to

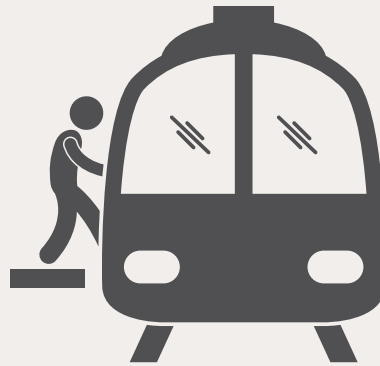
a targeted demographic" but rather to have a conversation with the Hispanic Community where PIR not only invited Hispanics to attend races, but also for PIR to participate with the Hispanic Community. This was done through many avenues; several key organizations include: Arizona Hispanic Chamber of Commerce, Valle del Sol and Fuerza Local. Building relationships with local Hispanic influencers has been instrumental. Regular communications with Hispanic media, media management, business owners and education institutions has been a key factor in creating a loop of communication which has provided feedback, recommendations and support.

As Hispanics are the emerging majority not only Arizona but nationally, PIR recognized the opportunity to make an impact in the development of young Hispanics in Arizona. In February of 2015, PIR partnered with Tolleson Union High School District to initiate a program where 19 year old NMS driver Ruben Garcia Jr. spoke to 2,000 high school students about the value of education. The event was emceed by Jesus Quinones of Univision at La Joya Community High School; between Garcia and Quinonez they engaged the entire student body and delivered a simple but powerful message: 1.) Stay in School, 2.) Graduate and 3.) Pursue higher education. The message was simple in concept but powerful in inspiration. It was not about how to become a race car driver, but rather that the youth could do whatever they want if they had vision, put their mind to it, committed and worked hard.

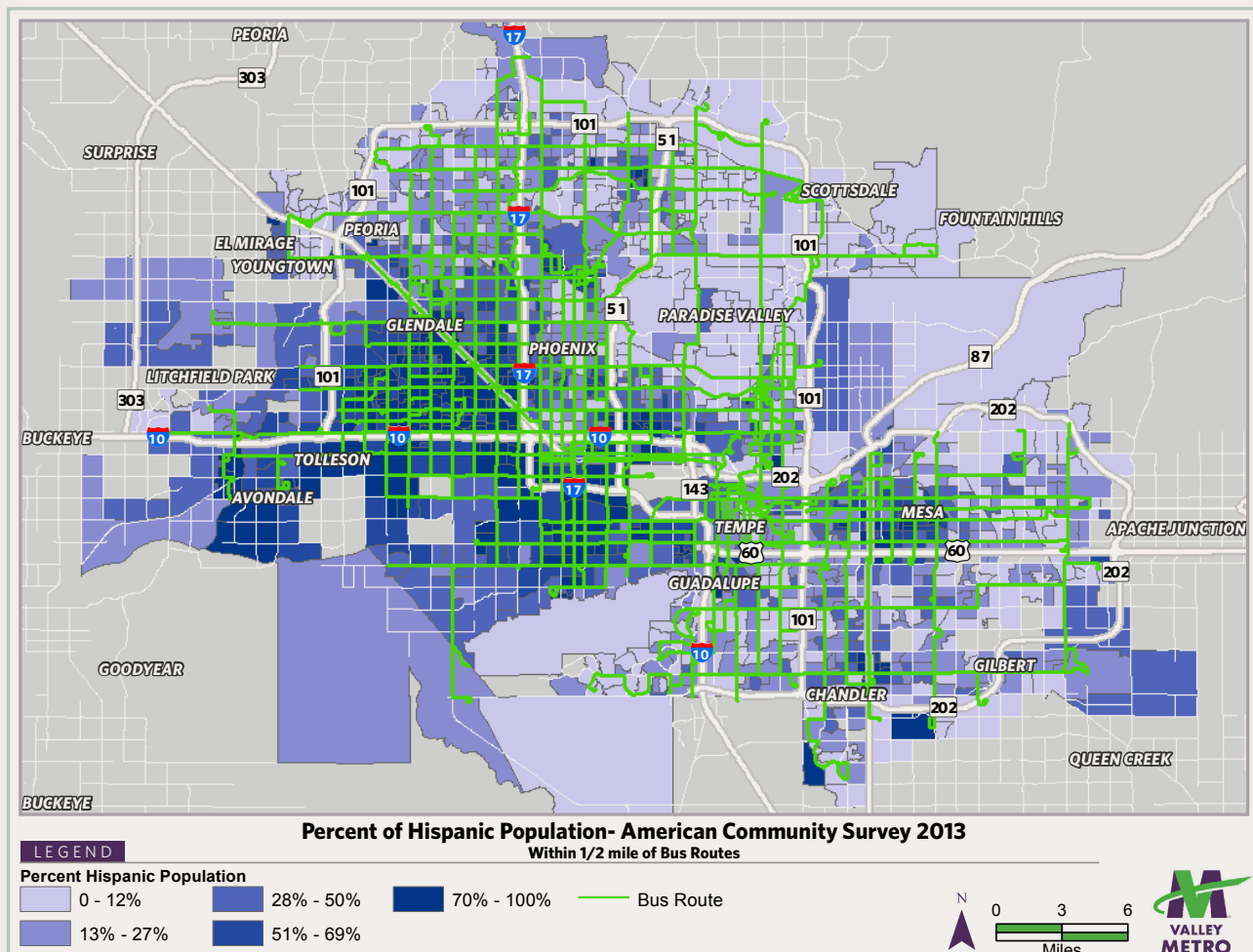
It is with ongoing efforts to provide an authentic experience and constant messages that PIR plans to increase attendance at PIR and exposure to the sport of NASCAR, but additionally to make a positive and lasting positive impact in the Hispanic Community. With the continued vision of PIR and the support of the leadership of the Hispanic Community soon the face of PIR will resemble the community at over 30+% Hispanics in Arizona.



Photos Courtesy of PIR

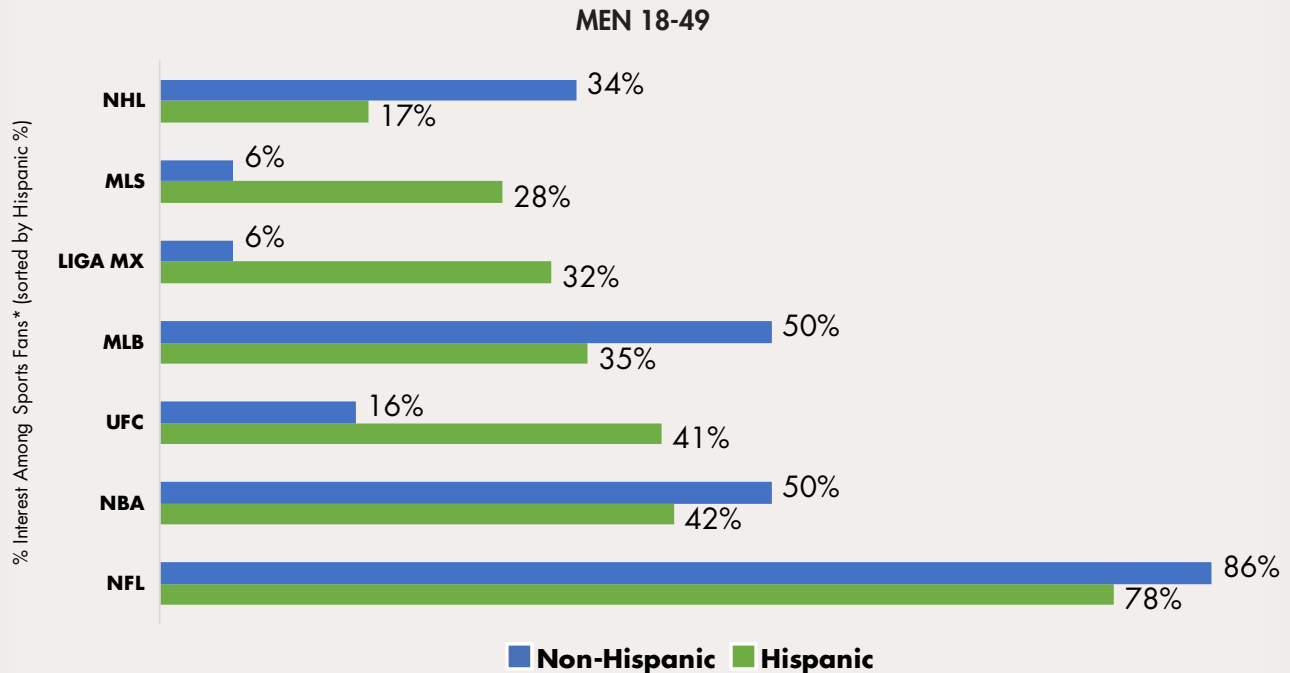


Valley Metro Connects The Hispanic Population With A **Very Accessible Transit Network**





Phoenix Hispanics Are Huge Sports Fans



Source: Phoenix Hispanic Scarborough 2015 Release 1 (Feb14-Jan15), Hispanic Men 18-49;
Base: Sports Fans defined by somewhat/very interested in MLB, NFL, NBA, NHL, MLS

Courtesy of UNIVISION
ARIZONA

Live Sports Attendance Among Phoenix Hispanic Men 18-49 Sports Fans

SPORTS: ATTENDED 1+ GAMES - PAST YEAR	% OF HISPANIC MEN 18-49 SPORTS FANS
National Football League (NFL)	51%
Major League Baseball (MLB)	36%
National Basketball Assoc (NBA)	31%
National Hockey League (NHL)	8%
Mexican League Soccer (LigaMX)	6%
Major League Soccer (MLS)	4%

SPORTS: ATTENDED IN THE PAST YEAR	% OF HISPANIC MEN 18-49 SPORTS FANS
AZ Cardinals Football Game	35%
AZ Diamondbacks Baseball Game	31%
Suns Basketball Game	25%
ASU Football Game	9%
Cactus League Spring Training Baseball Game	8%
Coyotes Hockey Game	6%
NASCAR Auto Race	4%
ASU Baseball Game	2%
AZ Rattlers Indoor Football Game	1%

Source: Phoenix Hispanic Scarborough 2015 Release 1 (Feb14-Jan15), Hispanic Men 18-49;
Base: Sports Fans defined by somewhat/very interested in MLB, NFL, NBA, NHL, MLS

Courtesy of UNIVISION
ARIZONA

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Teamwork
makes it happen.

*By pulling together, we can
accomplish great things.*

*All of us at Anheuser-Busch
proudly support the
Arizona Hispanic Chamber
of Commerce
for leading the way.*



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Phoenix Suns, Univision Arizona & Maricopa County Department of Public Health

Join the Challenge: Dance Workout Video for Kids

The Phoenix Suns and Mercury organizations partnered with the Maricopa County Department of Public Health and Univision Arizona to create the 'Join the Challenge' dance video which was an all-out effort to continue the battle in childhood obesity. The Join the Challenge project encouraged students across the Valley to be active and live a healthy lifestyle.

Why

- 14% of children age 2-4 in low income families in Arizona are obese
- 15% of children age 2-4 in low-income families in Maricopa are obese
- 20% of 10-17 year old children in Arizona are obese
- 41% of Hispanic Boys are obese or overweight compared to 28% of White boys.

Recap

The Join the Challenge: Dance Workout Video for Kids was a collaborative effort between the Maricopa County Department of Public Health, Phoenix Suns, Phoenix Mercury, and Univision to battle childhood obesity for Kids age 8-13. The video was used in classrooms to encourage kids to exercise during break times. The video was 40 minutes long and split into 10 minute low impact routines so that kids can do easily in the classroom, at home or during after school programs. The DVD was released in November 2014 and featured Suns and Mercury mascots, Univision talent as well as kids from Garfield Elementary.

The video was distributed among 24 School Districts in the Maricopa County who participated in the SNAP-Ed Grant Program (Supplemental Nutrition Assistance Program-Education Program). There are 216 schools and approximately 166,000 students all of which are low-income schools (50% or more free and reduced lunches).

Results

- 600 DVD's were distributed through schools, trainings, health events and more.
- Video was distributed among 24 School Districts in the Maricopa County
- 216 participating schools
- 166,000 kids enrolled in participating schools
- 56,000+ Views in YouTube



Media coverage:

univisionarizona.univision.com/salud/videos-de-salud/video/2014-10-21/programa-contrala-obesidad-entre-menores

The Video was is available to download at www.WeArePublicHealth.org

**OYE!**

Hispanic Entertainment Insights

ABOUT OYE!

OYE! is a tool designed to bring a deeper understanding of the Hispanic consumer to brands through analysis of social conversation. OYE! not only identifies U.S. Hispanic conversation, but also analyzes the discussion based in Spanish, English or Spanglish. OYE! then derives meaning from that conversation to deliver insights on overall Hispanic use of social media as well as insights into Hispanic demographics and psychographics.

DATA GATHERED

OYE! is a social data analysis tool. Samples of conversation on Twitter, Facebook and Instagram are pulled according to the privacy and security settings on those platforms. The data reviewed is both independently generated user content as well as comments about and replies to brand/organization content. A large sample size of data is pulled from the full universe of data available to provide statistically relevant samples of the conversation.

IDENTIFYING HISPANICS

While the use of the Spanish language in social media is a significant indicator that someone may be Hispanic, it is not the only identifier. Other factors are leveraged to identify Hispanics: name, images, location, following (who they follow as well as who follows them) all contribute to classifying a social profile as Hispanic. OYE! has created a proprietary technology to analyze and weight these factors to determine the likelihood the creator of a given piece of content is Hispanic.

CONFIDENTIALITY

OYE! leverages data that is available publicly either via purchase from 3rd party vendors and/or directly from the social platforms. OYE! does not violate any individual user's privacy at the time of data collection. All conclusions about any individual's race, gender, language preferences, etc. is kept secure and is not shared with any 3rd party or client.

SAMPLE SIZE

This report covers over 17,000 verified Hispanic conversations about the topics of favorite actors/actresses, movies, video games, cable networks and more engaged with among the Hispanic community. A sample of general market conversations was analyzed as well to provide comparisons between ethnicity. All data was pulled between June 15th –and July 15th of 2015.

SUMMARY

In the entertainment industry Hispanics were found to talk about Latino musicians such as Selena Gomez who owned 29% of the total Hispanic conversation among other artists such as Pitbull and Romeo Santos. Netflix and SoundCloud dominated Hispanic mentions in their respective industries of streaming video and audio. Nintendo, with high affinity for the Mario Bros franchise, dominated video game console conversation while Call of Duty was the individual game most discussed by the Hispanic audience.

The importance of the Hispanic moviegoer is an often mentioned theme and Minions was found to be the most popular movie, pushing 43% of the total movie conversation when evaluating the top 10 movies in theaters from June 15-July 15.

ALL FINDINGS

1. Selena Gomez was the most mentioned artist among Hispanics with 29% of the total conversation. 14% of the time fans expressed their admiration for her, mentioning their "love" for her. Mentions of Selena's new song, "Good for You" drove 10% of total conversation. A final driver noticed was mentions of her recent Pantene sponsorship which drove 3% of the conversation.



OYE!

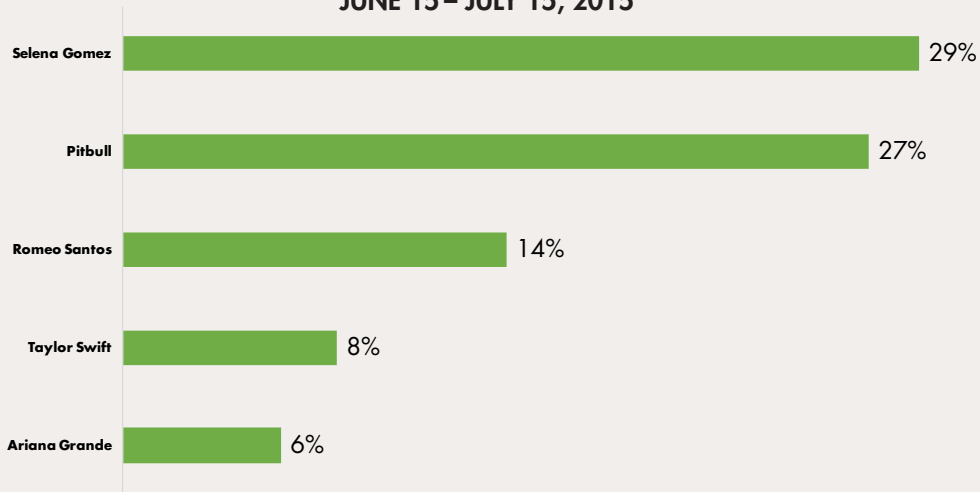
Hispanic Entertainment Insights

2. Netflix was by far the Hispanic favorite as it was the most mentioned online movie platform with 97% of the conversation. Their hit series, "Orange is the New Black" pushed over 40% of the conversation. Mentions of the movie Daredevil (5%) helped drive conversation as well. Platforms Hulu and HBO Go were not mentioned nearly as much by Hispanics making up 3% of the conversation.
3. Nintendo was the most mentioned game console with 61% of the conversation. Games associated with the Mario Brothers franchise propelled over 18% of Nintendo conversation. Smash Brothers was the next highest driver for Nintendo, owning 15% of that brand's conversation. Additionally, the NES and Wii systems helped inspire 11% and 10% of posts respectively. Xbox was the next highest discussed console with 21% of the conversation but was highly varied in topics. The most discussed category among Hispanics was the game Elder Scrolls, driving 3% of Xbox conversation. Finally, PlayStation owned 18% of total conversation with mentions of the video game conference E3 powering 25% of this brand's conversation.
4. Univision was the TV channel driving the highest conversation volume among Hispanics. The novela, "Lo Imperdonable" drove the highest quantity of mentions with 32% of the Univision conversation. Mentions of the hashtag, "Growing up Hispanic" also drove 11% of the Univision volume.
5. SoundCloud (47%) was mentioned the most over iHeartradio (34%) and Spotify (19%). Sound Cloud appears to be a popular music platform for Hispanics as they can create, upload, and share their music themselves. Conversation was very dispersed among users, the biggest topic found was self-promotion of the song "Pour it Up" from a user, Narada Vanegas with 4% of the conversation.
6. The movie Minions drove the most mentions with 43% of the total conversation when evaluating the top 10 movies in theaters from June 15-July 15. On average 9% of movie conversation was confirmed to be from Hispanics while Minions over-indexed with the Latino audience gaining 12% from this demographic. The movie, The Gallows also over indexed with Hispanic mentions making up 10% of its total conversation. The majority of Minions posts were from users expressing their desire to see the movie.
7. The Call of Duty video game was the most mentioned game with 30% of the Hispanic total conversation, 28% of the Call of Duty conversation was sparked by the version Black Ops III, Hispanics also mentioned the version Advance Warfare 6% of the time.
8. When comparing mentions of 'favorite actors' among top entertainers both Hispanic and non-Hispanic, actor Adam Sandler drove 14% of total conversation from Non-Hispanics and 7% from Hispanics. 51% of Non-Hispanic conversation were shares/retweets about Adam Sandler meeting a cancer patient from Australia while 21% of Hispanics mentioned the same conversation.
9. Actress, Scarlet Gruber (Venezuelan) was the most mentioned among Hispanics with 44% of the Hispanic conversation. The largest segment of the Hispanic conversation came from a desperate (yet passionate) fan in Dallas, TX posting over 200 Tweets tagging the actress, asking her to follow her account.
10. The TV channel, BET had mentions that were 3% Hispanic and 97% were non-Hispanic. The BET awards were the highest driver for both Hispanics (84%) and for Non-Hispanics (65%).



Selena Gomez and Pitbull Were The **Most Mentioned Artists** Among Hispanics Driving **Over Half** The Total Conversation

TOP 5 ARTISTS MENTIONED BY HISPANICS
JUNE 15 – JULY 15, 2015

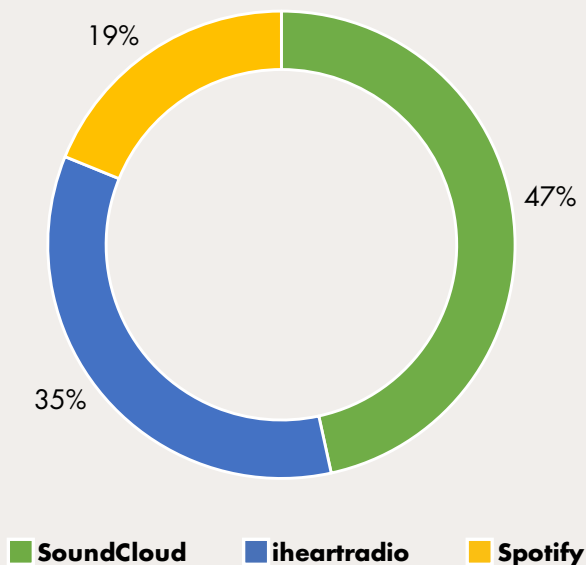


Source: OYE! Business Intelligence, Release 1 - June 15 - July 15 2015, 17,000 social media mentions sample.
Data derived from verified Hispanic conversations nationwide.

Courtesy of

SoundCloud Was The **Most Mentioned** Online Music Platform By Hispanics

TOP ONLINE MUSIC PLATFORMS MENTIONED BY HISPANICS
JUNE 15 – JULY 15, 2015



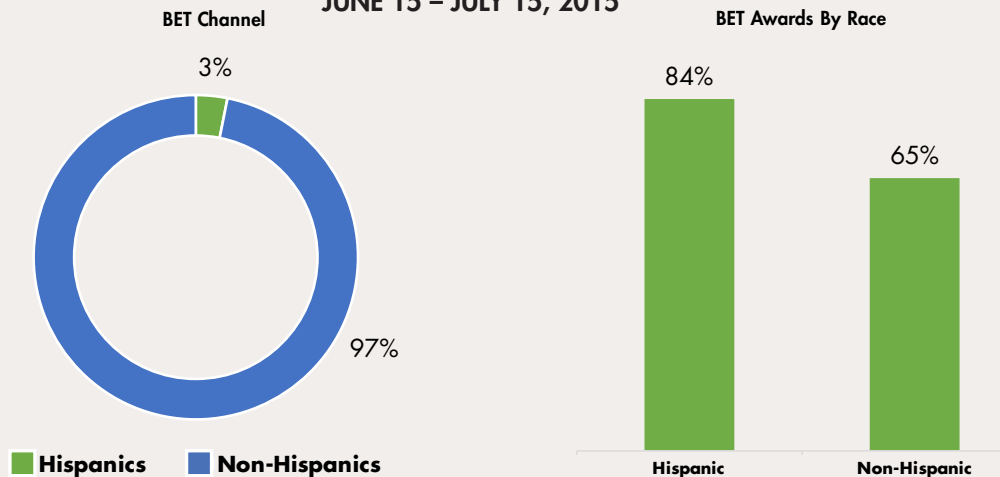
Source: OYE! Business Intelligence, Release 1 - June 15 - July 15 2015, 17,000 social media mentions sample.
Data derived from verified Hispanic conversations nationwide.

Courtesy of



The **BET Awards** Were The **Highest Driver** For Both Hispanics (**84%**) And For Non-Hispanics (**65%**)

TV CHANNEL BET – BET AWARDS BY RACE
JUNE 15 – JULY 15, 2015

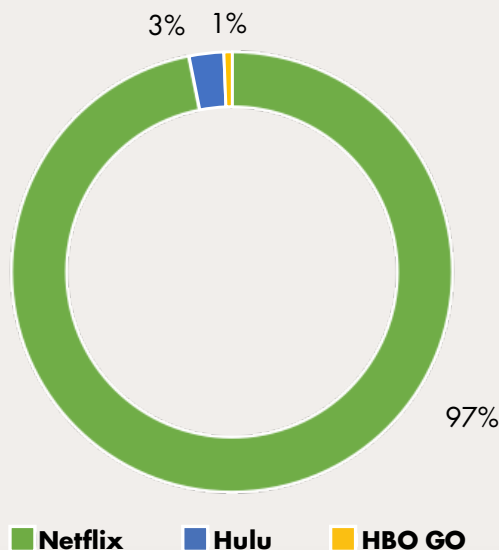


Source: OYE! Business Intelligence, Release 1 - June 15 - July 15 2015, 17,000 social media mentions sample. Data derived from verified Hispanic conversations nationwide.

Courtesy of **OYE!**

Netflix Was By Far The Hispanic Favorite As It Was The **Most Mentioned Online Movie Platform** With **97%** Of The Conversation

TOP ONLINE MOVIE PLATFORMS FOR HISPANICS
JUNE 15 – JULY 15, 2015



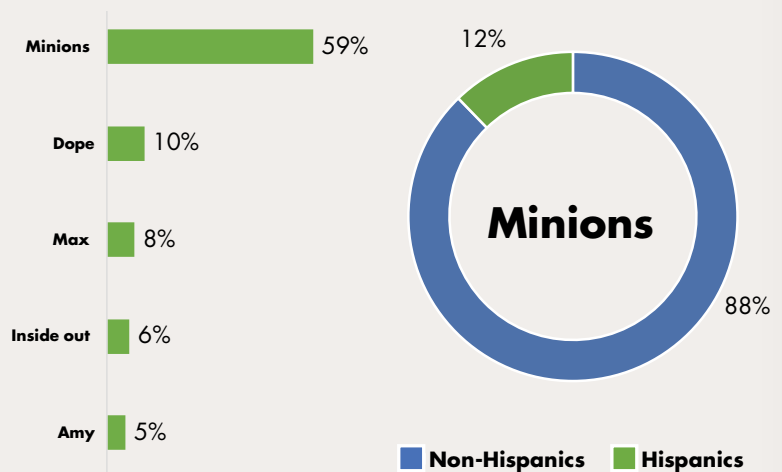
Source: OYE! Business Intelligence, Release 1 - June 15 - July 15 2015, 17,000 social media mentions sample. Data derived from verified Hispanic conversations nationwide.

Courtesy of **OYE!**



The **Movie 'Minions'** Drove
The **Most Hispanic Mentions**,
Which Overall
Accounted For
12%
Of The Total
Conversation

TOP MOVIE MENTIONS – MINIONS MOVIE MENTIONS
BY RACE
JUNE 15 – JULY 15, 2015

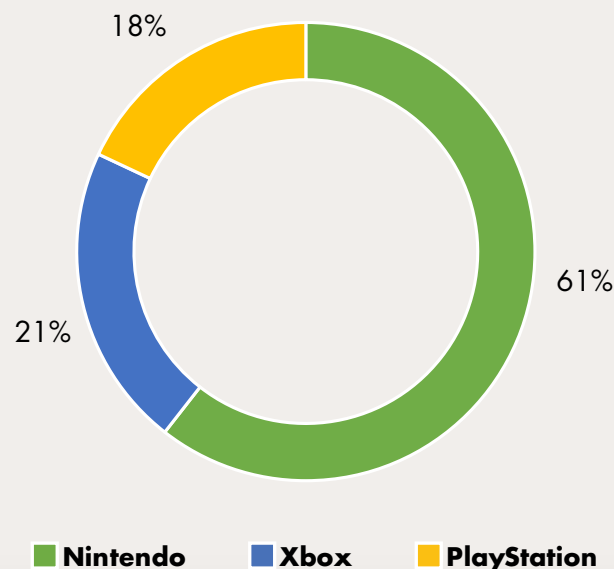


Source: OYE! Business Intelligence, Release 1 - June 15 - July 15 2015, 17,000 social media mentions sample. Data derived from verified Hispanic conversations nationwide.

Courtesy of **OYE!**

Nintendo Was The **Most Mentioned Game Console** By Hispanics, Driving **61%** Of The Conversation

TOP GAME CONSOLES USED BY HISPANICS
JUNE 15 - JULY 15, 2015



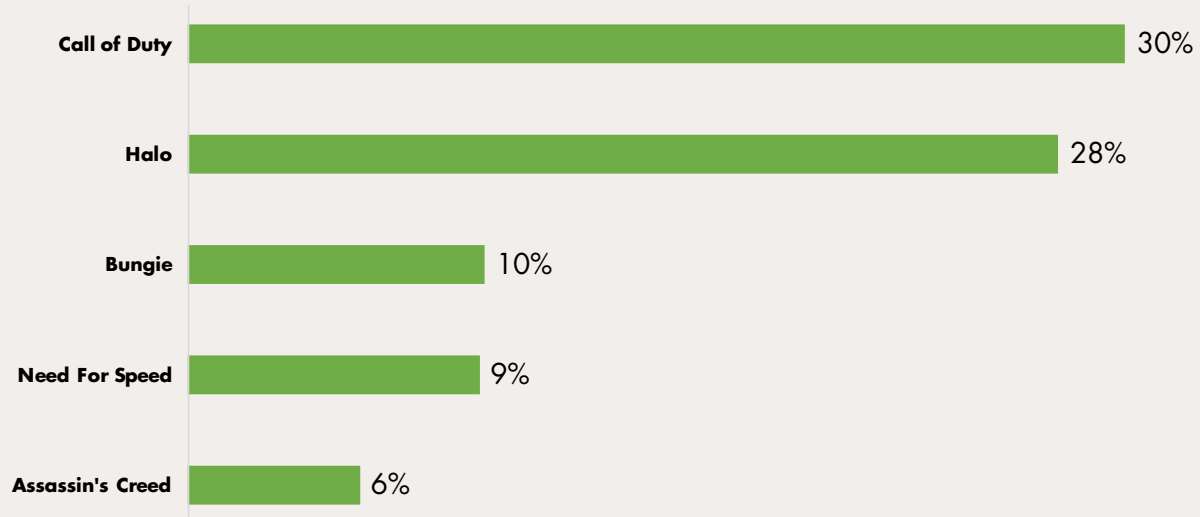
Source: OYE! Business Intelligence, Release 1 - June 15 - July 15 2015, 17,000 social media mentions sample. Data derived from verified Hispanic conversations nationwide.

Courtesy of **OYE!**



The **Call Of Duty** Video Game Was The **Most Mentioned Game** With **30%** Of The Hispanic Total Conversation

TOP VIDEO GAMES MENTIONED BY HISPANICS
JUNE 15 – JULY 15, 2015



Source: OYE! Business Intelligence, Release 1 - June 15 - July 15 2015, 17,000 social media mentions sample. Data derived from verified Hispanic conversations nationwide.

Courtesy of OYE!



Notes



\$49
Million

Spent By **Phoenix**
Hispanics On **Motion**
Picture Admissions
In 2014

That's

22%

Of The Total Spent
On Movie Admissions

Source: Hispanic Market Weekly, Vol. 17, Issue 41, October 21, 2013

Courtesy of  **UNIVISION**
ARIZONA

Phoenix Hispanics Have Influence At The **Movie Theater Cash Register**

66%

More Likely To See
A Movie Opening
Weekend

VS.

22%

Less Likely For
Non-Hispanics

41%

More Likely To Go
To Movies
4+ Times/Month

VS.

13%

Less Likely For
Non-Hispanics

Projected Percentage Change in Total, Hispanic, and Non-Hispanic Buying Power for U.S., 2012-2017

Courtesy of  **UNIVISION**
ARIZONA





395,000

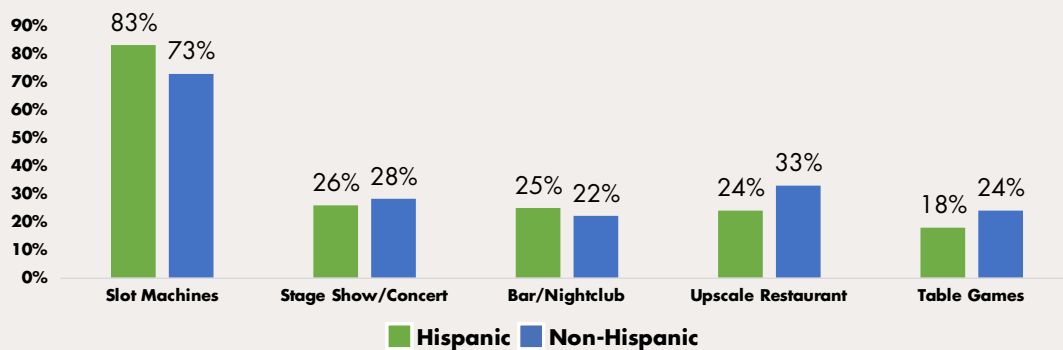
Hispanics **Visited A Casino** In The Past 12 Months

Source: Phoenix Hispanic Scarborough, 2015 Release 1 (Feb14-Jan15), Adults 21+

Courtesy of  **UNIVISION**
ARIZONA

Eighty-Three Percent Of Phoenix Hispanics 21+
Visited A Casino In The Past Year
And Played The Slots Vs. **73%** Of Non-Hispanics

CASINO ACTIVITIES IN THE PAST 12 MONTHS

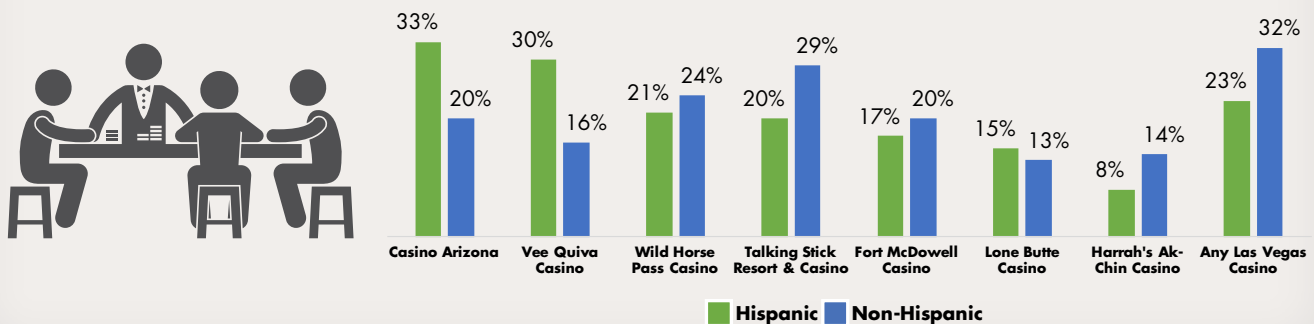


Source: Phoenix Hispanic Scarborough 2015 Release 1 (Feb14-Jan15), Hispanic Adults 21+; base: visited any casino in past year

Courtesy of  **UNIVISION**
ARIZONA

Phoenix Hispanic Casino Patrons **Visit Local Casinos**

CASINOS VISITED IN THE LAST YEAR (AMONG CASINO PATRONS 21+, SORTED BY HISPANIC %)



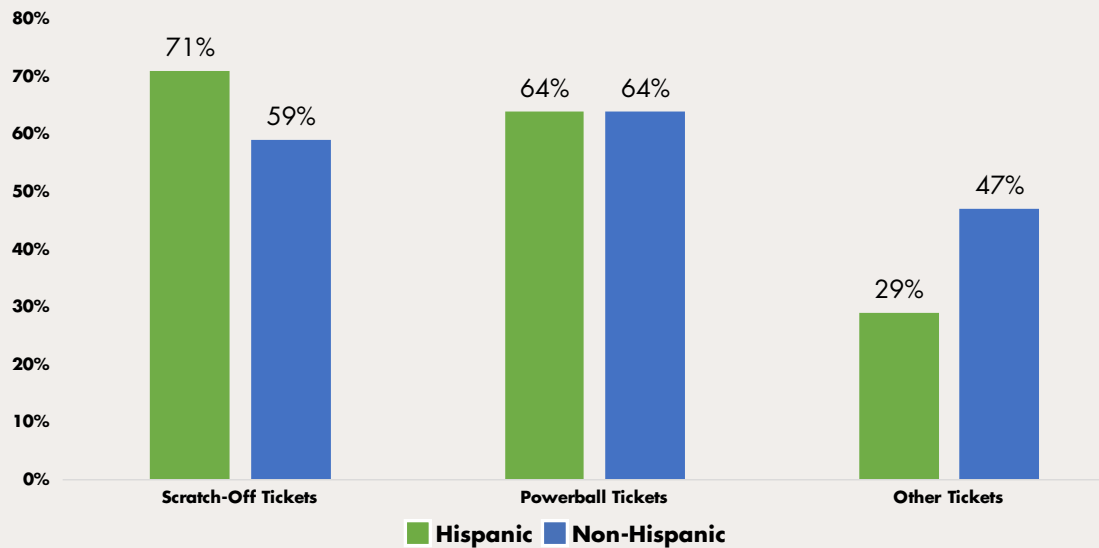
Source: Phoenix Hispanic Scarborough 2015 Release 1 (Feb14-Jan15), Phoenix DMA,
Base: Adults 21+ Who Visited Any Casino in the Past 12 Months

Courtesy of  **UNIVISION**
ARIZONA



Forty-Five Percent Of Phoenix Hispanics Purchase Lottery Tickets And Scratch-Off Tickets Are Their Favorite

TYPES OF LOTTERY TICKETS PURCHASED



Sources: Phoenix Hispanic Scarborough, 2015 Release 1 (Feb14-Jan15), Adults 21+, Phoenix DMA;
Base: Purchased a lottery ticket in the past 30 days

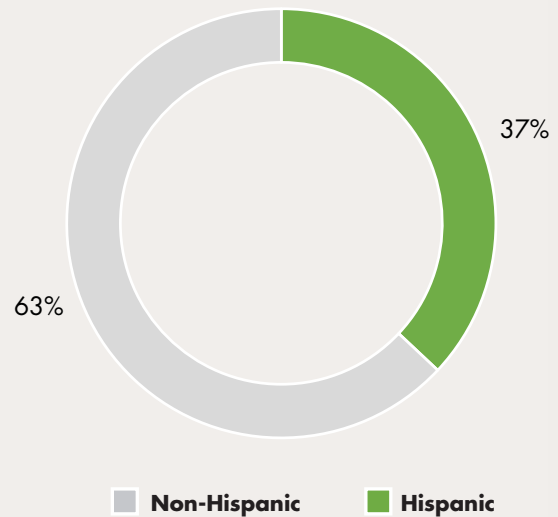
Courtesy of UNIVISION
ARIZONA



Notes



Thirty-Seven Percent Of Phoenix Hispanic Adults 18-49 With Kids Visited A Theme Park Last Year

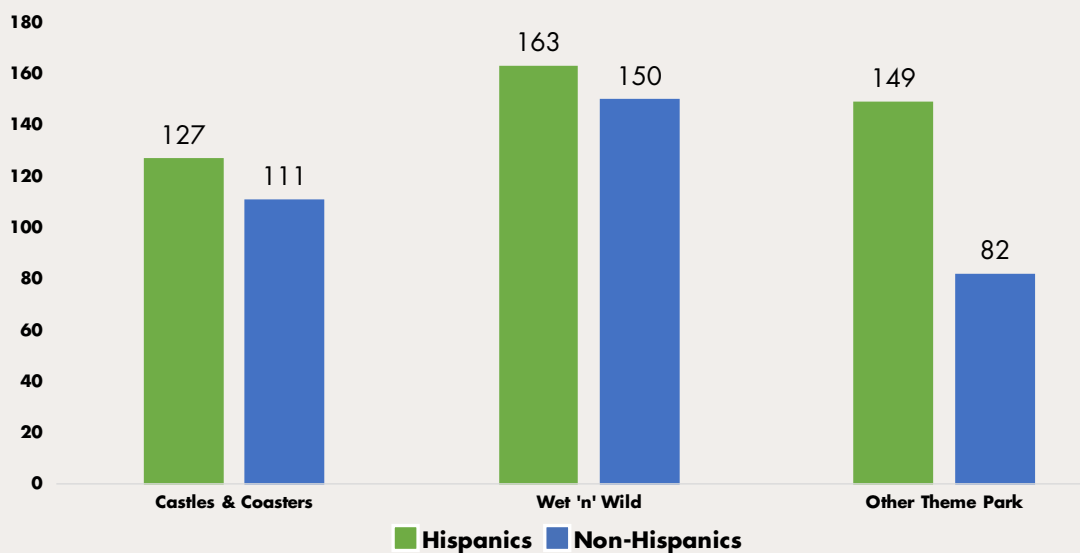


Source: Phoenix Hispanic Scarborough 2015 Release 1 (Feb14-Jan15), Base: Adults 18-49 with 1+ kids under 18

Courtesy of UNIVISION ARIZONA

Phoenix Hispanics Are More Likely To Visit Theme Parks

THEME/WATER PARK VISITED IN THE PAST YEAR - INDEX



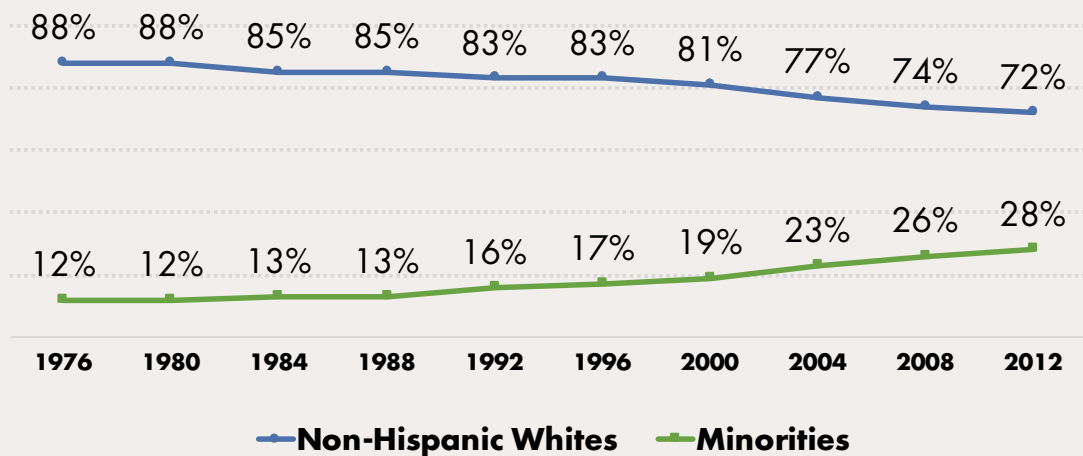
Source: Phoenix Hispanic Scarborough 2015 Release 1 (Feb14-Jan15), Base: Adults 18-49 with 1+ kids under 18

Courtesy of UNIVISION ARIZONA



The **National Electorate** Is Increasingly Diverse

The percentage of the electorate that is white is dramatically declining. Beginning in 1992, white voters made up 2-4% less of the overall electorate than in each previous presidential election.



Source: Resurgent Republic

Advertising Plays Significant Role

PERCENT THAT PREFERS TO RECEIVE CAMPAIGN INFORMATION VIA

TV
Advertising

Radio
Advertising

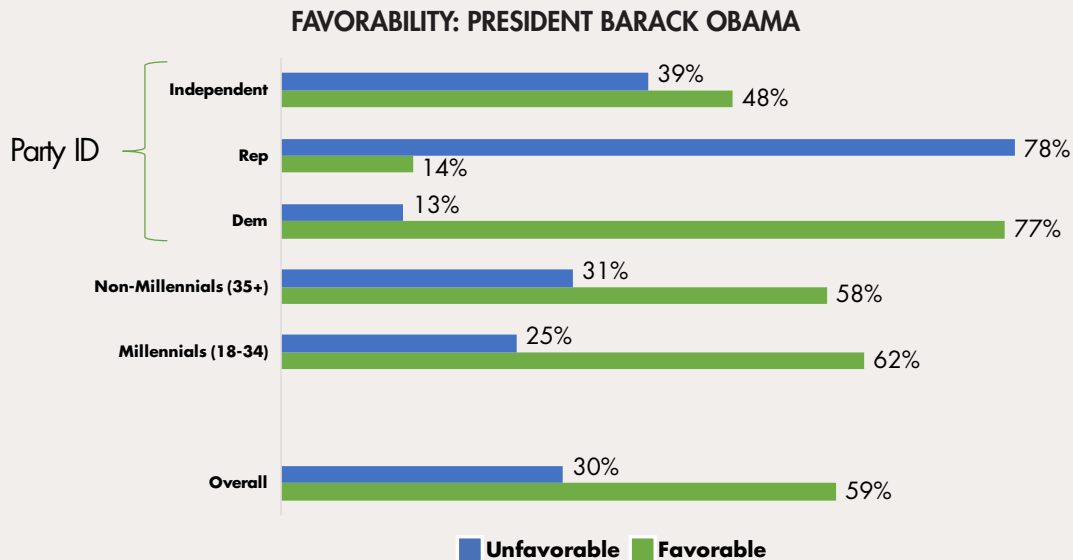
Newspaper
Advertising

40% **26%** **25%**

Sources: Univision's Hispanic/Latino Voter Surveys: California, Texas, Chicago DMA, Phoenix DMA, Miami DMA and Tampa/Orlando DMAs conducted in collaboration with David Binder Research and Moore Information, May 2014.

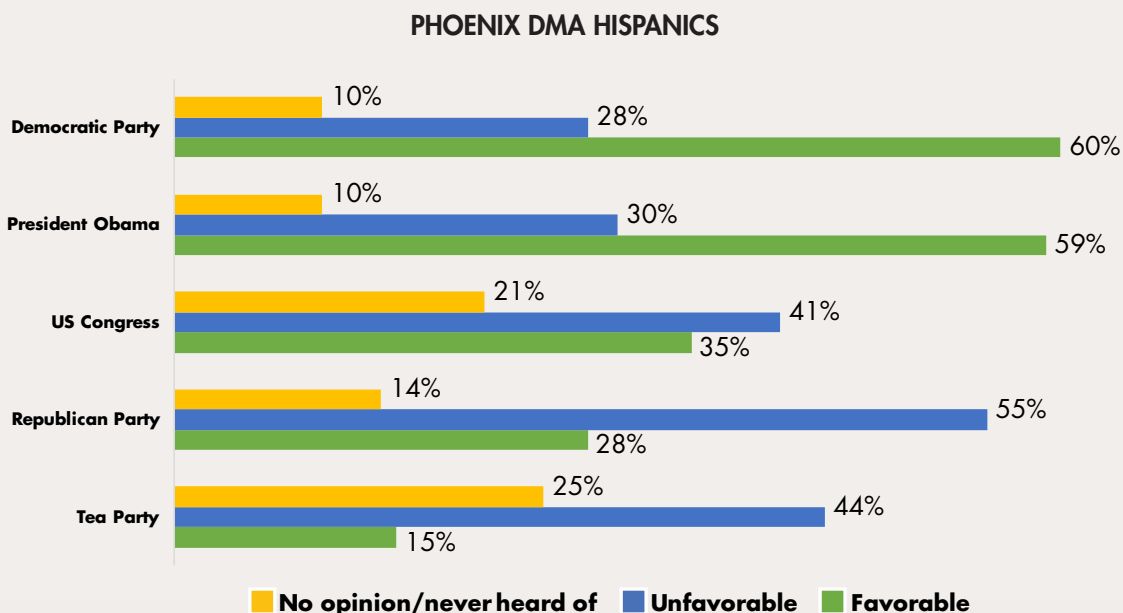


President Obama's Favorability Is High Among Millennials and Democratic Hispanics



Source: Univision's Hispanic/Latino Voter Surveys: California, Texas, Chicago DMA, Phoenix DMA, Miami DMA and Tampa/Orlando DMAs conducted in collaboration with David Binder Research and Moore Information, May 2014.

The Majority Of Hispanic Voters Have **Favorable Opinions** Of President Obama And The Democratic Party

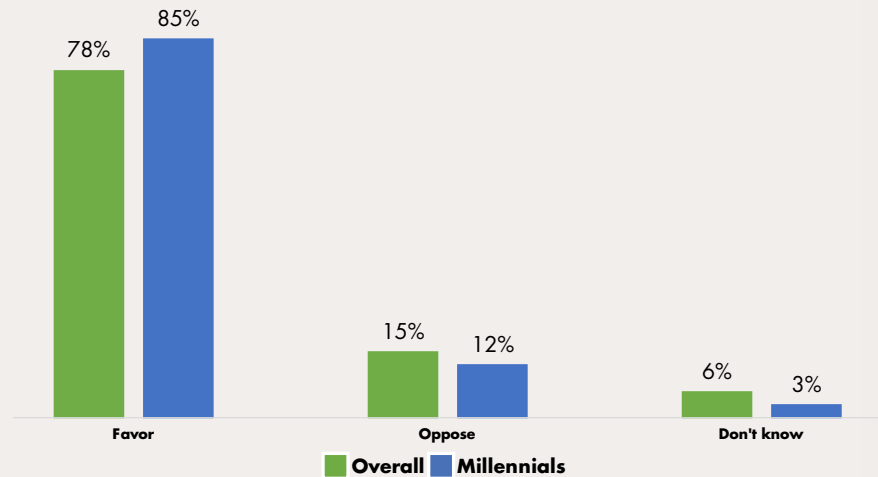


Source: Univision's Hispanic/Latino Voter Surveys: California, Texas, Chicago DMA, Phoenix DMA, Miami DMA and Tampa/Orlando DMAs conducted in collaboration with David Binder Research and Moore Information, May 2014.



Overall, **78%** Of Hispanics Are In Favor Of A Path To Citizenship, **85%** Among Hispanic Millennials

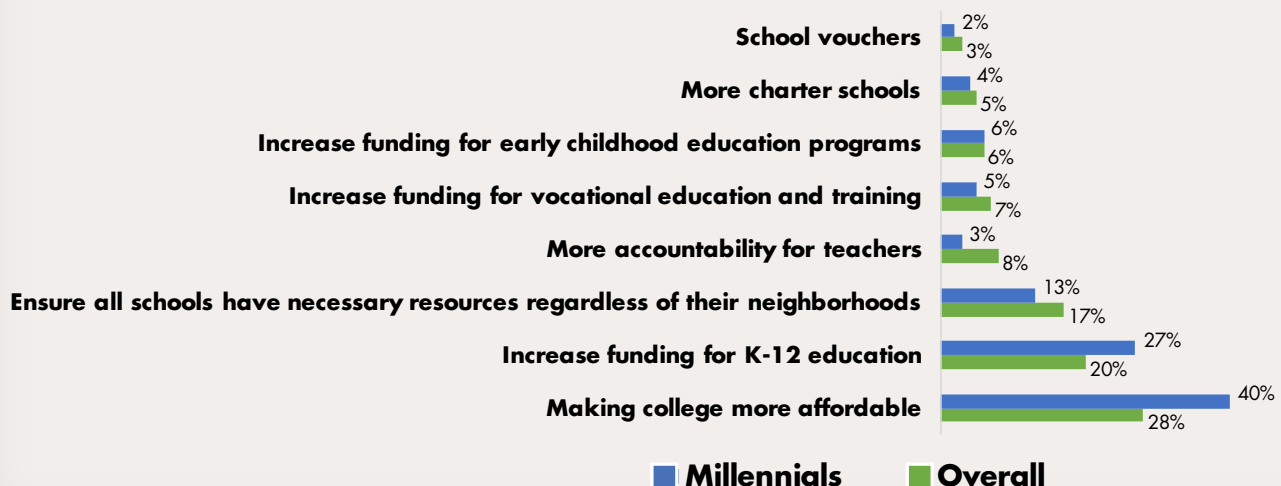
**"GENERALLY
SPEAKING, DO
YOU FAVOR OR
OPPOSE A PATH TO
CITIZENSHIP FOR
UNDOCUMENTED
IMMIGRANTS?"**



Source: Univision's Hispanic/Latino Voter Surveys: California, Texas, Chicago DMA, Phoenix DMA, Miami DMA and Tampa/Orlando DMAs conducted in collaboration with David Binder Research and Moore Information, May 2014.

Making College More Affordable Tops The List For Education Improvement

**"WHICH ONE OF THE FOLLOWING, IN YOUR OPINION, WOULD DO THE MOST
TO IMPROVE EDUCATION IN OUR COUNTRY?"**

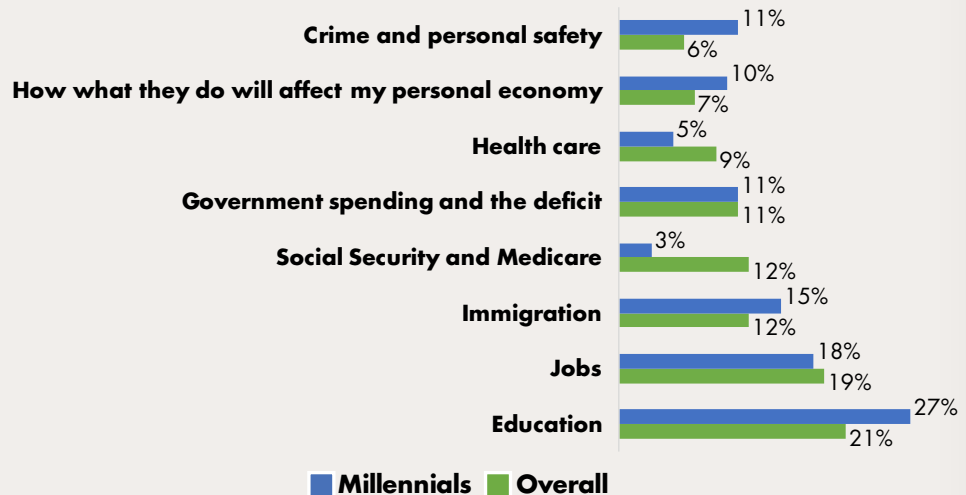


Sources: Hispanic/Latino Voter Surveys: California, Texas, Chicago DMA, Phoenix DMA, Miami DMA and Tampa/Orlando DMAs conducted in collaboration with David Binder Research and Moore Information, May 2014.



When Voting, **Education And Jobs Are The Most Important Issues** For Hispanics. Education Is Significantly More Important For The Younger Generation of Hispanics

"WHICH ONE OF THE FOLLOWING ISSUES IS MOST IMPORTANT IN YOUR VOTE FOR CONGRESS AND U.S. SENATOR, A CANDIDATE'S POSITION ON ..."



Source: Univision's Hispanic/Latino Voter Surveys: California, Texas, Chicago DMA, Phoenix DMA, Miami DMA and Tampa/Orlando DMAs conducted in collaboration with David Binder Research and Moore Information, May 2014.

What Influences Their Vote?

"WHICH ONE OF THE FOLLOWING WOULD YOU SAY HAS THE GREATEST INFLUENCE ON YOUR DECISION TO VOTE IN ELECTIONS?"

ALL		MILLENNIALS	
38%	CANDIDATE DEBATES	43%	CANDIDATE DEBATES
16%	CANDIDATE INTERVIEWS	17%	CANDIDATE INTERVIEWS
13%	LOCAL NEWS COVERAGE	14%	LOCAL NEWS COVERAGE
11%	CAMPAIGN ADVERTISING	13%	CAMPAIGN ADVERTISING
10%	FAMILY AND FRIENDS	13%	FAMILY AND FRIENDS

Source: Univision's Hispanic/Latino Voter Surveys: California, Texas, Chicago DMA, Phoenix DMA, Miami DMA and Tampa/Orlando DMAs conducted in collaboration with David Binder Research and Moore Information, May 2014.



Consistent Communication Is The Most Important Determinant For The Hispanic Vote



**"IF YOU
COULD TELL A
CANDIDATE WHO
WANTS YOUR VOTE
ONE THING THAT
WOULD HELP THEM
GET YOUR VOTE,
WHICH ONE OF THE
FOLLOWING THINGS
WOULD YOU SAY?"**

Source: Univision's Hispanic/Latino Voter Surveys: California, Texas, Chicago DMA, Phoenix DMA, Miami DMA and Tampa/Orlando DMAs conducted in collaboration with David Binder Research and Moore Information, May 2014.

DATOS AZ 2015

72

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For more information about our legal services, please contact
Leonardo Loo at (602) 229-5638 or leonardo.loo@quarles.com.

Quarles & Brady LLP

quarles.com





Arizona Hispanics Represent 18% Of The Total Electorate & 32% Adult 18-24 Voters

REGISTERED VOTERS	TOTAL	HISPANIC	% HISPANIC
ARIZONA	2,886,972	519,212	18%

REGISTERED VOTERS BY AGE	TOTAL	HISPANIC	% HISPANIC
18 TO 24	220,928	70,038	32%
25 TO 34	425,226	107,347	25%
35 TO 49	656,024	137,081	21%
50 TO 64	797,286	120,891	15%
65+	786,165	83,731	11%

ARIZONA HISPANIC REGISTERED VOTER GENDER



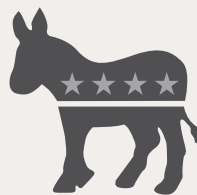
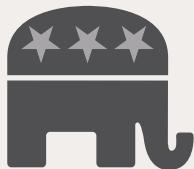
46%



54%

Source: Audience Partners/Labels and Lists, Voter Registration Data, Data Run May 2015, State of Arizona

Arizona Latino Voter Party Affiliation



% Of Total
Registered Voters
By Party

REGISTERED VOTERS	TOTAL	HISPANIC	% HISPANIC
ARIZONA	2,886,972	519,212	18%

REGISTERED VOTERS BY PARTY	TOTAL	HISPANIC	% HISPANIC
DEMOCRAT	845,044	233,177	28%
REPUBLICAN	997,434	78,298	8%
INDEPENDENT	993,425	200,850	20%
OTHER	51,069	6,887	13%

	% TOTAL	% HISPANIC
DEMOCRAT	29%	45%
REPUBLICAN	35%	15%
INDEPENDENT	34%	39%
OTHER	2%	1%

Source: Audience Partners/Labels and Lists, Voter Registration Data, Data Run May 2015, State of Arizona



Phoenix Hispanics Represent 15% Of The Total Electorate & 29% Adult 18-24 Voters

REGISTERED VOTERS	TOTAL	HISPANIC	% HISPANIC
PHOENIX DMA	2,259,668	348,675	15%

REGISTERED VOTERS BY AGE	TOTAL	HISPANIC	% HISPANIC
18 TO 24	170,889	48,751	29%
25 TO 34	332,134	73,031	22%
35 TO 49	526,749	93,714	18%
50 TO 64	624,291	80,069	13%
65+	604,550	53,031	9%

PHOENIX HISPANIC REGISTERED VOTER GENDER



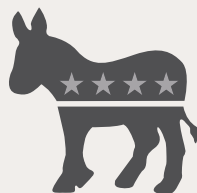
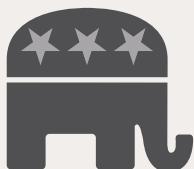
47%



53%

Source: Audience Partners/Labels and Lists, Voter Registration Data, Data Run May 2015, Phoenix (Prescott) DMA

Phoenix Latino Voter Party Affiliation



% Of Total
Registered Voters
By Party

REGISTERED VOTERS	TOTAL	HISPANIC	% HISPANIC
PHOENIX DMA	2,259,668	348,675	15%

REGISTERED VOTERS BY PARTY	TOTAL	HISPANIC	% HISPANIC
DEMOCRAT	616,430	148,751	24%
REPUBLICAN	812,050	54,297	7%
INDEPENDENT	788,263	140,659	18%
OTHER	42,925	4,968	12%

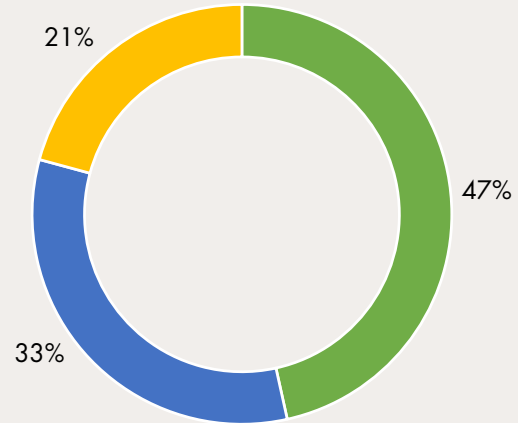
	% TOTAL	% HISPANIC
DEMOCRAT	27%	43%
REPUBLICAN	36%	16%
INDEPENDENT	35%	40%
OTHER	2%	1%

Source: Audience Partners/Labels and Lists, Voter Registration Data, Data Run May 2015, Phoenix DMA



1 In 5
Phoenix DMA
Hispanics Is A
Millennial

PHOENIX DMA HISPANIC ELECTORATE
AGES 18+



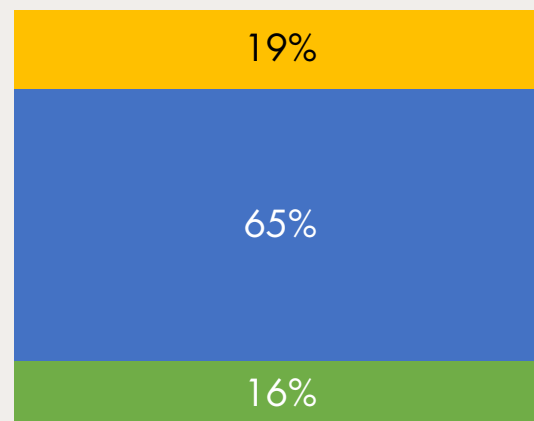
■ 55+ ■ Age 35-54 ■ Age 18-34

Source: Univision's Hispanic/Latino Voter Surveys: California, Texas, Chicago DMA, Phoenix DMA, Miami DMA and Tampa/Orlando DMAs conducted in collaboration with David Binder Research and Moore Information, May 2014.

High Percentage Of The Phoenix DMA Hispanic Electorate Is Bilingual

LANGUAGE USED AT HOME AMONG HISPANIC VOTERS THAT RESIDE IN PHOENIX DMA

*Bilingual includes:
Mostly Spanish
but some English,
Spanish and English
about equally,
Mostly English but
some Spanish.



Phoenix

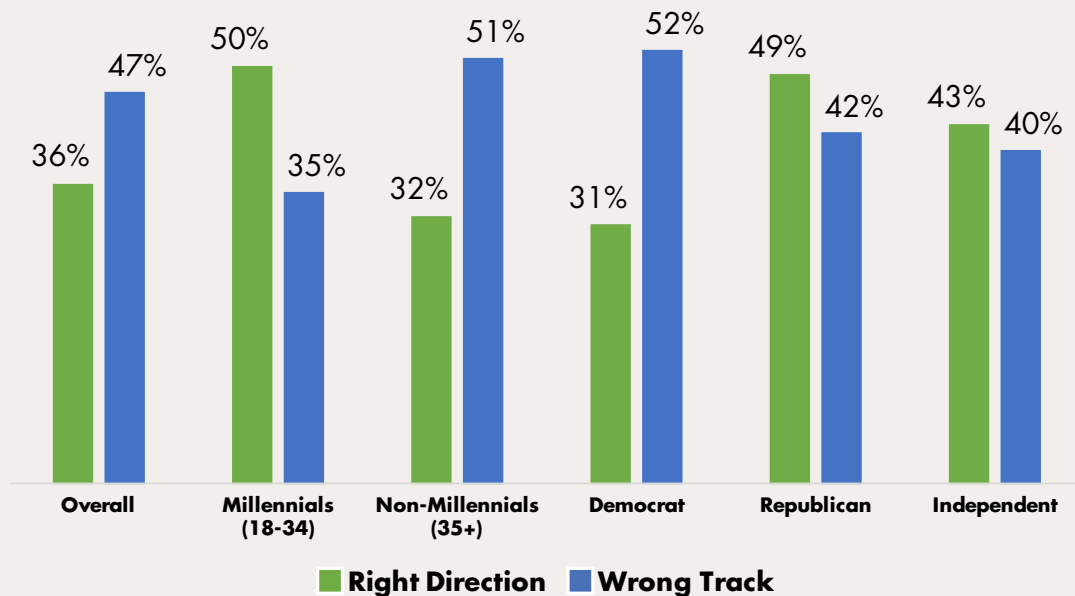
■ Only Spanish ■ Bilingual ■ Only English

Source: Univision's Hispanic/Latino Voter Surveys: California, Texas, Chicago DMA, Phoenix DMA, Miami DMA and Tampa/Orlando DMAs conducted in collaboration with David Binder Research and Moore Information, May 2014.



Except for Millennials, **Phoenix DMA Hispanic Voters** Are **Pessimistic**

**"IN GENERAL, HOW DO YOU THINK THINGS IN THE PHOENIX DMA
ARE GOING? – ARE THINGS MOVING IN THE RIGHT DIRECTION,
OR ARE THINGS OFF ON THE WRONG TRACK?"**



Source: Univision's Hispanic/Latino Voter Surveys: California, Texas, Chicago DMA, Phoenix DMA, Miami DMA and Tampa/Orlando DMAs conducted in collaboration with David Binder Research and Moore Information, May 2014.

Three-Fourths of Hispanic Voters

**Consume
Media in
Spanish**

(TV, RADIO, NEWSPAPERS)

73%

In The Phoenix DMA

Source: Univision's Hispanic/Latino Voter Surveys: California, Texas, Chicago DMA, Phoenix DMA, Miami DMA and Tampa/Orlando DMAs conducted in collaboration with David Binder Research and Moore Information, May 2014.



A **Sense of Duty** Motivates Them to Vote

"I want to do my part. Sometimes we take for granted the possibility we have of voting, and we have to take advantage of that for our future and our kids. If we don't vote, we are leaving the responsibility to others to decide our future." —Older bilingual millennial

Sources: Hispanic/Latino Voter Surveys: California, Texas, Chicago DMA, Phoenix DMA, Miami DMA and Tampa/Orlando DMAs conducted in collaboration with David Binder Research and Moore Information, May 2014.

Tucson Hispanics Represent **25%** Of The Total Electorate & **39%** Adult 18-24 Voters

REGISTERED VOTERS	TOTAL	HISPANIC	% HISPANIC
TUCSON DMA	537,731	134,727	25%
REGISTERED VOTERS BY AGE	TOTAL	HISPANIC	% HISPANIC
18 TO 24	41,000	16,103	39%
25 TO 34	76,628	26,085	34%
35 TO 49	108,476	33,889	31%
50 TO 64	151,245	33,097	22%
65+	160,170	25,518	16%

TUCSON DMA HISPANIC REGISTERED VOTER GENDER

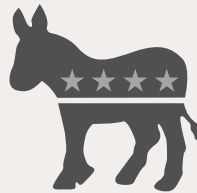
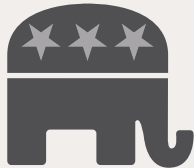


47%



53%

Source: Audience Partners/Labels and Lists, Voter Registration Data, Data Run May 2015, Tucson (Sierra Vista) DMA

**Tucson** Latino Voter
Party Affiliation

% Of Total
Registered Voters
By Party

REGISTERED VOTERS	TOTAL	HISPANIC	% HISPANIC
TUCSON DMA	537,731	134,727	25%

REGISTERED VOTERS BY PARTY	TOTAL	HISPANIC	% HISPANIC
DEMOCRAT	192,707	67,998	35%
REPUBLICAN	164,011	19,681	12%
INDEPENDENT	173,812	45,583	26%
OTHER	7,201	1,465	20%

	% TOTAL	% HISPANIC
DEMOCRAT	36%	50%
REPUBLICAN	31%	15%
INDEPENDENT	32%	34%
OTHER	1%	1%

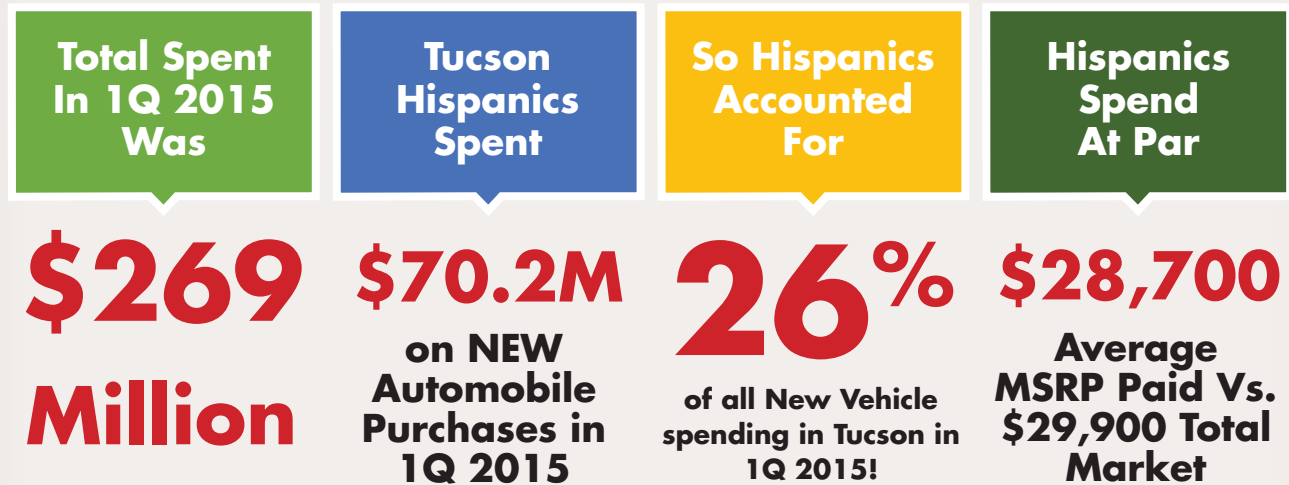
Source: Audience Partners/Labels and Lists, Voter Registration Data, Data Run May 2015, Tucson DMA

Courtesy of **UNIVISION**
ARIZONA

Notes



Hispanics Have A **Strong Consumer** In The **Automotive Industry**

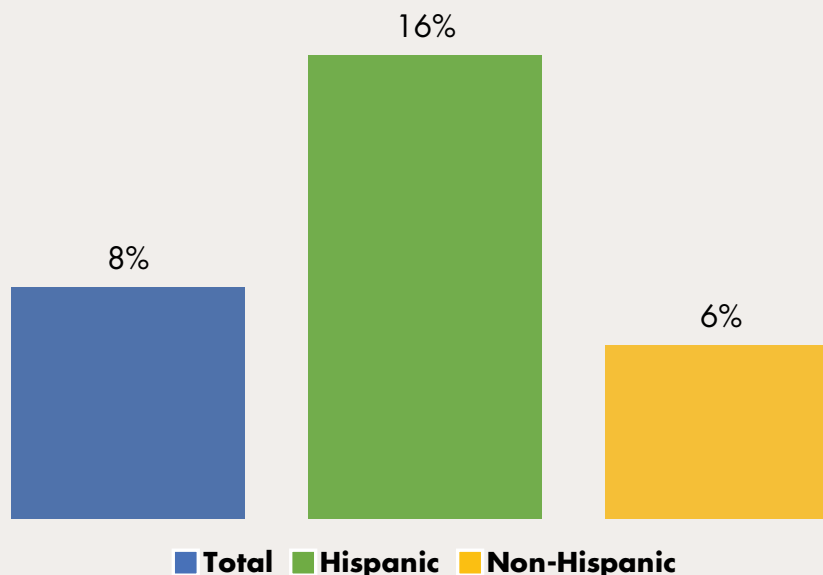


Source: Amount spent based on 2015 MSRP and new Hispanic unit sales; RL Polk & Co. New Vehicle Personal Registrations (includes Leases), Enhanced Ethnic Data, 1Q 2015 CYTD

Courtesy of **UNIVISION ARIZONA**

Hispanic **NEW Auto Sales Are Growing at 3X** The Rate Of Non-Hispanics In **Tucson**

% CHANGE IN NEW VEHICLE UNIT SALES YEAR OVER YEAR



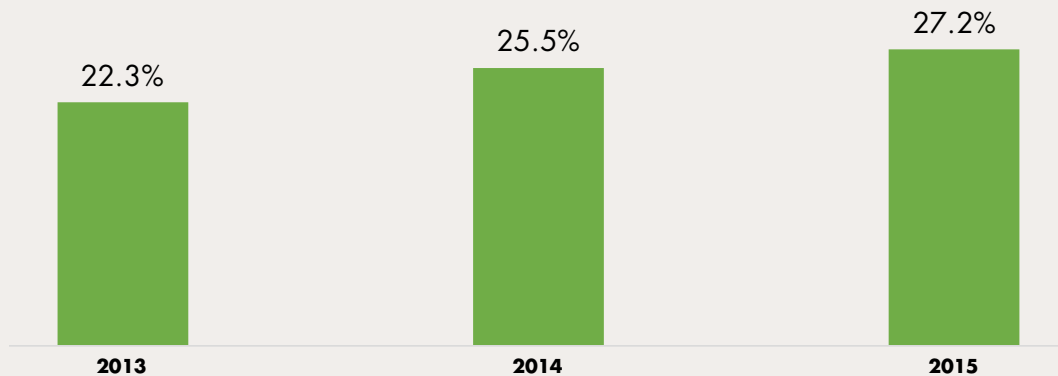
Source: R.L. Polk & Co. New Vehicle Personal Registrations (includes Leases), Enhanced Ethnic Data, May 2015 CYTD (Jan-May15 & Jan-May14), Tucson DMA.

Courtesy of **UNIVISION ARIZONA**



Hispanics Are Comprising A Larger Percentage Of **NEW Total Sales**

SHARE OF NEW TOTAL SALES TO HISPANICS HAS GROWN BY +4.9 POINTS SINCE 2013



Source: R.L. Polk & Co. New Vehicle Personal Registrations (includes Leases), Enhanced Ethnic Data, MAY CYTD (Jan-May13, Jan-May14 & Jan-May15), Tucson DMA.

Courtesy of **UNIVISION**
ARIZONA

TUCSON TOTAL			TUCSON HISPANIC		
BRAND RANKER			BRAND RANKER		
RANK	BRAND	SOM	RANK	BRAND	SOM
#1		13.7%	#1		16.3%
#2		10.6%	#2		14.9%
#3		10.0%	#3		10.3%
#4		9.2%	#4		9.0%
#5		8.2%	#5		8.2%
#6	Jeep	5.4%	#6		6.3%
#7		5.2%	#7	Jeep	6.0%
#8		4.9%	#8		4.7%
#9		4.7%	#9		4.1%
#10		4.4%	#10		4.0%

Source: R.L. Polk & Co. New Vehicle Personal Registrations (includes Leases), Enhanced Ethnic Data, May 2015 CYTD (Jan'15-May'15), Tucson DMA.

Courtesy of **UNIVISION**
ARIZONA



Top 10 Models by Segment

RANKED BY MODEL SALES TO TUCSON HISPANICS				
RANK	CUV/SUV	FULL/MID-SIZE	COMPACT	PICK-UP
#1	DODGE JOURNEY	NISSAN ALTIMA	NISSAN SENTRA	CHEVY SILVERADO 150
#2	JEEP PATRIOT	CHEVY MALIBU	TOYOTA COROLLA	RAM 150
#3	CHEVY EQUINOX	HONDA ACCORD	DODGE DART	FORD F150
#4	HONDA CR-V	FORD FUSION	HYUNDAI ELANTRA SEDAN	TOYOTA TACOMA
#5	JEEP CHEROKEE	TOYOTA CAMRY	CHEVY CRUZE	GMC SIERRA 150
#6	TOYOTA RAV4	CHRYSLER 200	HONDA CIVIC	TOYOTA TUNDRA
#7	KIA SOUL	DODGE CHARGER	FORD FOCUS	CHEVY COLORADO
#8	FORD EXPLORER	HYUNDAI SONATA	VW JETTA	NISSAN FRONTIER
#9	JEEP WRANGLER	KIA OPTIMA	MAZDA 3	RAM 250/350
#10	FORD ESCAPE	DODGE CHALLENGER	BUICK VERANO	CHEVY SILVERADO 250/350
TOP 10 % SHARE OF SEGMENT	45%	80%	84%	94%

Source: Polk, New Vehicle Personal Registrations (Sales & leases) Enhanced Ethnic Data, 2015 CYTD (JAN-MAY); Tucson DMA;
Note segments include Non-Luxury and Luxury models

Courtesy of  **UNIVISION**
ARIZONA

Tucson Hispanics Spent

\$125
Million

On **Used Vehicles** In 2014
(**32%** Of The Total
Used Vehicle Sales In Tucson)

Source: IHS 2015 Global Insight Hispanic Market Monitor

Courtesy of  **UNIVISION**
ARIZONA



\$552

Million Spent by **Tucson** Hispanics on
"Food Away from Home" in 2014



Of Spending In Tucson

IHS Global Insight - 2015 Hispanic Market Monitor, Tucson DMA

Courtesy of UNIVISION
ARIZONA

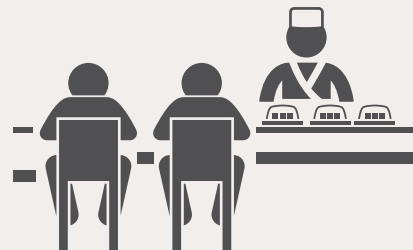
Valuable Consumers Per Household,
Tucson Hispanics **Spend More** On Eating Out

"FOOD AWAY FROM HOME" AMOUNT SPENT PER HOUSEHOLD IN 2014

Non-Hispanic



\$3,572



Hispanic



\$3,974

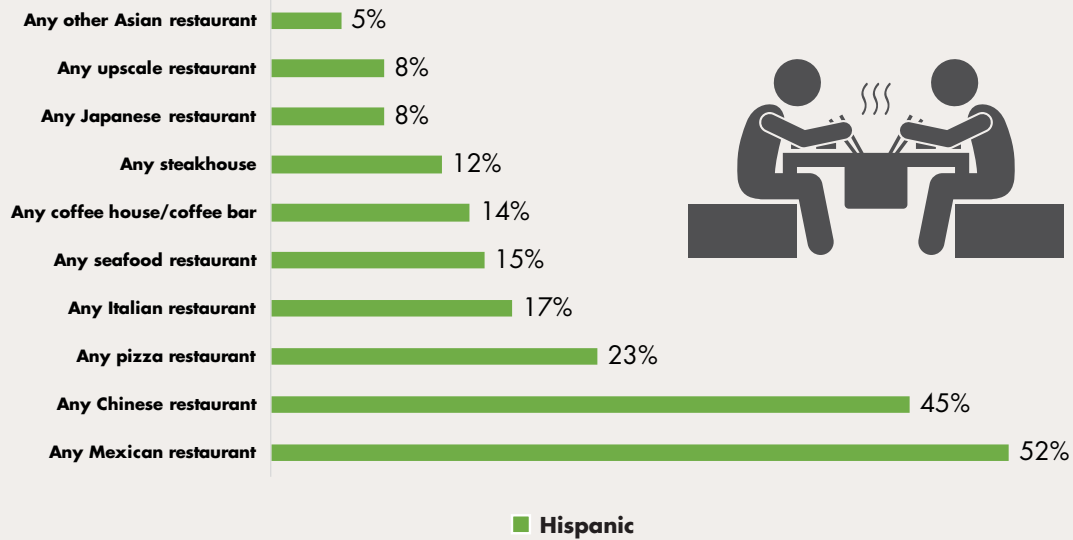
IHS Global Insight - 2015 Hispanic Market Monitor, Tucson DMA
Total consumer dollars spending : Quick Service Restaurants

Courtesy of UNIVISION
ARIZONA



Hispanics Enjoy A **Variety Of Menu Choices**

RESTAURANT TYPES VISITED IN THE PAST 30 DAYS BY TUCSON HISPANICS

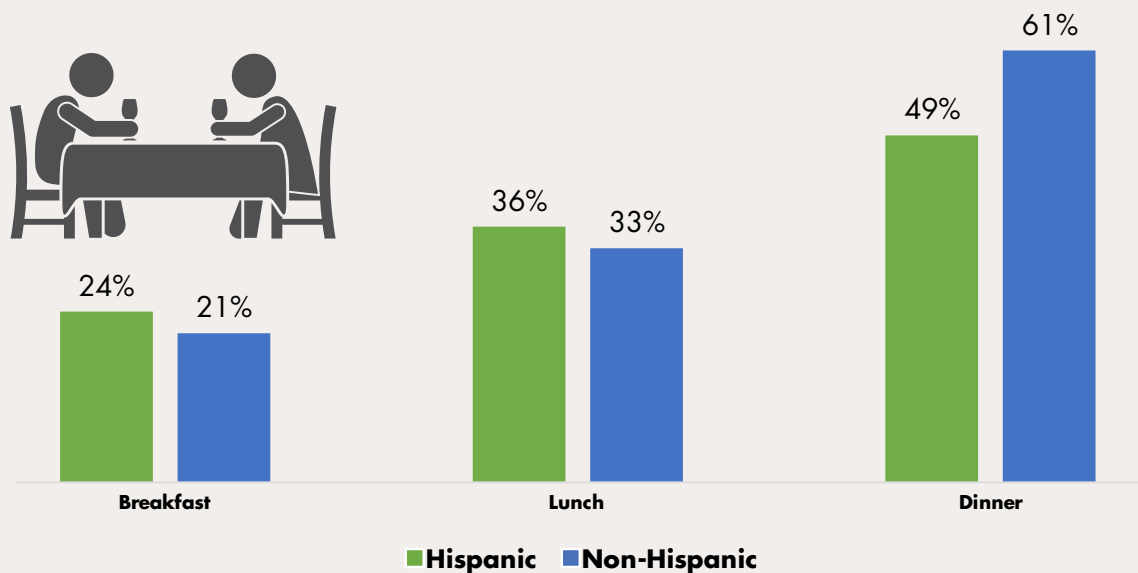


Scarborough, 2015 Release 1 (Feb 2014 - Jan 2015), Hispanic Adults 18+, Tucson DMA
*Index compares Hispanics vs. the total market

Courtesy of UNIVISION
ARIZONA

Tucson Diners Prefer To Visit **Sit-Down Restaurants** At Dinnertime

TYPES OF MEALS AT SIT-DOWN RESTAURANTS IN THE PAST 30 DAYS



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

Courtesy of UNIVISION
ARIZONA



El Charro Cafe's World Famous Cuisine Still Making History Under Chef Carlotta Flores

In 1922, the State of Arizona had barely turned 10 years old; the Mexican Revolution had ended just a year before; and it would be another 52 years before Raul H. Castro, the son of an impoverished midwife and exiled Mexican union leader, would be elected the state's first and only Hispanic governor.

Another bit of Tucson history was made in 1922 as well: an entrepreneur named Monica Flin opened El Charro Café.

Today, El Charro Café is said to be the oldest, continuously operated, family-owned Mexican restaurant in the United States. According to the restaurant's website, Monica Flin's father, Jules Flin, a stone mason, moved to Tucson from France in the late 1800s. He had been commissioned to build St. Augustine Cathedral.

Jules Flin constructed several well-known buildings in Tucson, including the onetime Flin family home that now houses El Charro Café at 311 N. Court Avenue in downtown Tucson.

The restaurant is operated today by Chef Carlotta Flores, the great grandniece of Monica Flin. As unusual as it was for a woman to open her own business in 1920s era Arizona, Monica Flin is among the 66,000-plus Latina entrepreneurs who now make up a majority of the state's estimated 123,00 Hispanic-owned businesses.

El Charro has been featured in *Bon Appétit Magazine*, *Gourmet Magazine*, and the *New York Times*. Locally, El Charro Café is a perennial winner of the Tucson Lifestyle Reader's Poll Gold Medal for Best Mexican Restaurant. El Charro was also named as one of "America's Top 50" restaurants in 2010 by Nation's Restaurant News.

El Charro specializes in Sonoran and Tucson-style Mexican food and may be most famous for its *chimichanga*. Monica Flin is credited with inventing the "chimichanga", a deep-friend burrito.

"Whatever the meal, whatever the season, every meal at El Charro is served with color, music and, whenever possible, good company," said Flores, according to *Arizona Foothills Magazine*.

"El Charro" is named in honor of the skilled Mexican horsemen, called Charros, and known for their distinctive outfits consisting of ruffled shirts, oversized silk bow ties, short studded jackets and wide-brimmed sombreros.

Flores' family, known for its charitable giving, now own five Tucson-area eateries, a catering service and El Charro is the Official Mexican Food Restaurant of the University of Arizona Wildcats. The company's president is Flores' son, Ray.

El Charro moved into its Court Avenue location in the Presidio District in 1968. The building once served as the Flin's family's home and is listed on the National Registrar of Historic Places.



To learn more about El Charro Café, visit www.elcharrocafe.com.



Tucson Hispanics Over Index On 10 Of The Top 16 Casual Dining Restaurants



RANK	SIT-DOWN RESTAURANTS VISITED FOR ANY MEAL	HISPANIC	NON-HISPANIC	HISPANIC INDEX (VS. TOTAL)
#1	Denny's	14.0%	11.9%	111
#1	Olive Garden	14.0%	16.3%	90
#3	Golden Corral	12.5%	9.2%	121
#4	Applebee's	12.0%	8.9%	121
#5	IHOP	11.6%	8.3%	123
#6	Red Lobster	8.8%	7.9%	107
#7	Village Inn	8.2%	4.4%	146
#8	Chili's	8.0%	5.9%	122
#8	Texas Roadhouse	8.0%	8.1%	99
#10	Hooters	2.9%	0.9%	187
#11	Outback Steakhouse	2.6%	6.3%	50
#12	Famous Sams	2.3%	1.7%	123
#13	The Cheesecake Factory	2.1%	4.2%	60
#14	Cracker Barrel	1.4%	5.5%	34
#15	California Pizza Kitchen	1.2%	0.3%	200
#15	Chuck E Cheese's	1.2%	1.5%	88

Hispanic Scarborough, 2015 Release 1 (Feb 2014 - Jan 2015), Adults 18+, Phoenix DMA

Courtesy of  **UNIVISION**
ARIZONA

Big Spending Power! Hispanic Spending on Quick Serve Restaurants In 2014

Tucson Hispanics Spent
\$339 Million
On QSR

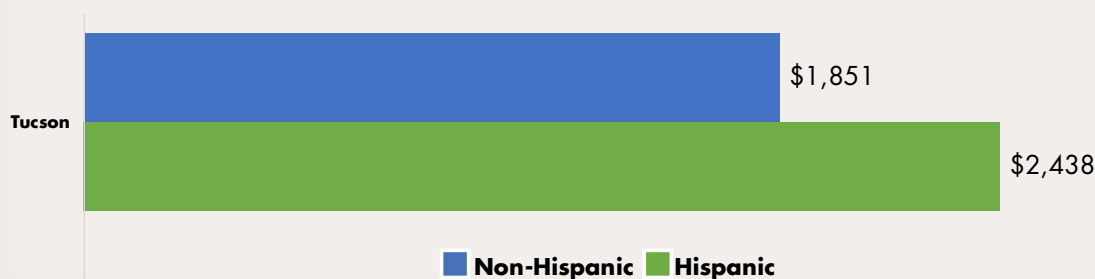
35%
of Tucson
Spending

IHS Global Insight - 2015 Hispanic Market Monitor, Tucson DMA

Courtesy of  **UNIVISION**
ARIZONA

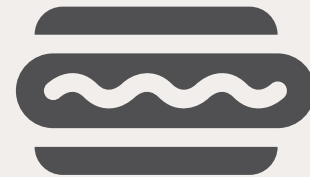
Valuable Consumers

AMOUNT SPENT PER HOUSEHOLD AT QSR IN 2014



IHS Global Insight - 2015 Hispanic Market Monitor, Tucson DMA
Total consumer dollars spending: Quick Service Restaurants

Courtesy of  **UNIVISION**
ARIZONA

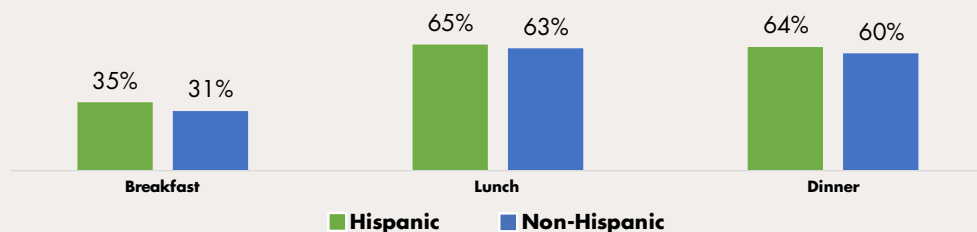
**48%****Of Tucson Hispanics
Have Visited QSRs
5+ Times****VS.****44%****Of Tucson
Non-Hispanics****Note:** Number of QSR
Visits in the last 30
Days

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

Courtesy of **UNIVISION
ARIZONA**

Tucson Hispanics Are More Likely To Visit **QSRs For Lunch & Dinner**

TYPES OF MEALS AT QUICK SERVICE RESTAURANTS IN THE PAST 30 DAYS



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

Courtesy of **UNIVISION
ARIZONA**

Tucson Hispanics Over Index At The **Top 15** Quick Service Restaurants

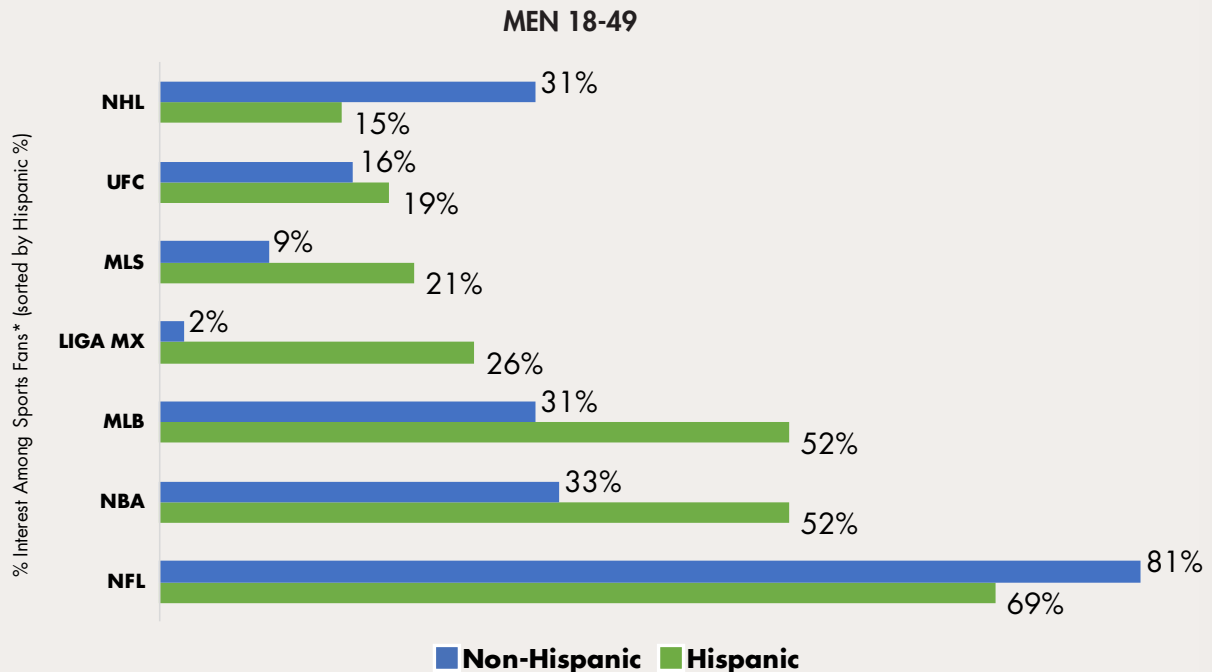
RANK	QSR VISITED FOR ANY MEAL IN PAST 30 DAYS	HISPANIC	NON-HISPANIC	HISPANIC INDEX (VS. TOTAL)
	Any QSR	90%	83%	105
#1	McDonald's	50%	33%	130
#2	Little Caesars	31%	9%	189
#3	Jack in the box	28%	14%	153
#4	Burger King	27%	16%	136
#5	Eegee's	26%	21%	114
#6	Carl's Jr.	25%	14%	142
#7	Subway	24%	24%	101
#8	Taco Bell	22%	18%	114
#9	In-N-Out Burger	19%	16%	111
#10	Starbucks	18%	12%	133
#11	Peter Piper Pizza	18%	6%	186
#12	Wendy's	16%	10%	131
#13	Pizza Hut	16%	12%	117
#14	Dairy Queen	15%	13%	111
#15	Whataburger	13%	9%	127

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

Courtesy of **UNIVISION
ARIZONA**



Tucson Hispanics Are Huge Sports Fans



Source: Tucson Scarborough 2015 Release 1 (Feb14-Jan15), Hispanic Men 18-49;
Base: Sports Fans defined by somewhat/very interested in MLB, NFL, NBA, NHL, MLS

Courtesy of **UNIVISION**
ARIZONA

Live Sports Attendance Among Tucson Hispanic Men 18-49 Sports Fans

SPORTS: ATTENDED 1+ GAMES - PAST YEAR	% OF HISPANIC MEN 18-49 SPORTS FANS
Major League Baseball (MLB)	22%
National Basketball Assoc (NBA)	15%
National Football League (NFL)	12%
Mexican League Soccer (LigaMX)	11%
National Hockey League (NHL)	10%
Major League Soccer (MLS)	7%

SPORTS: ATTENDED IN THE PAST YEAR	% OF HISPANIC MEN 18-49 SPORTS FANS
Az Diamondbacks Baseball Game	9%
Az Cardinals Football Game	8%
Az Coyotes Hockey Game	7%
Cactus League Spring Training Baseball Game	7%
Phoenix Suns Basketball Game	7%
Nascar Auto Race	1%

Source: Tucson Scarborough 2015 Release 1 (Feb14-Jan15), Hispanic Men 18-49;
Base: Sports Fans defined by somewhat/very interested in MLB, NFL, NBA, NHL, MLS

Courtesy of **UNIVISION**
ARIZONA



126,200

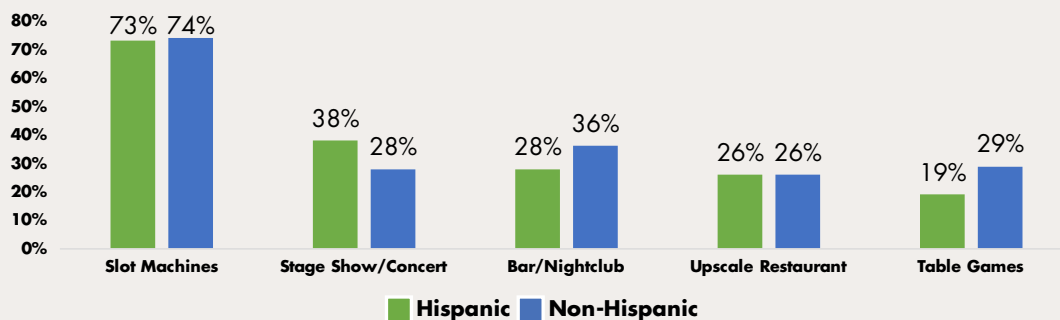
Hispanics **Visited A Casino** In The Past 12 Months

Source: Tucson Scarborough, 2015 Release 1 (Feb 14-Jan 15), Adults 21+

Courtesy of  **UNIVISION**
ARIZONA

Seventy-Three Percent Of Tucson Hispanics 21+ Who Visited A **Casino** In The Past Year **Played The Slots!**

CASINO ACTIVITIES IN THE PAST 12 MONTHS

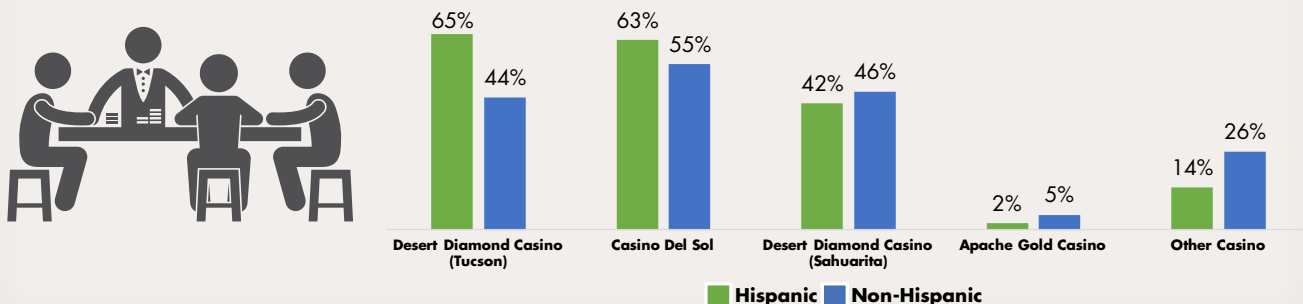


Source: Tucson Scarborough 2015 Release 1 (Feb 14-Jan 15), Hispanic Adults 21+; base: visited any casino in past year

Courtesy of  **UNIVISION**
ARIZONA

Tucson Hispanic Casino Patrons **Visit Local Casinos**

CASINOS VISITED IN THE LAST YEAR (AMONG CASINO PATRONS 21+, SORTED BY HISPANIC %)



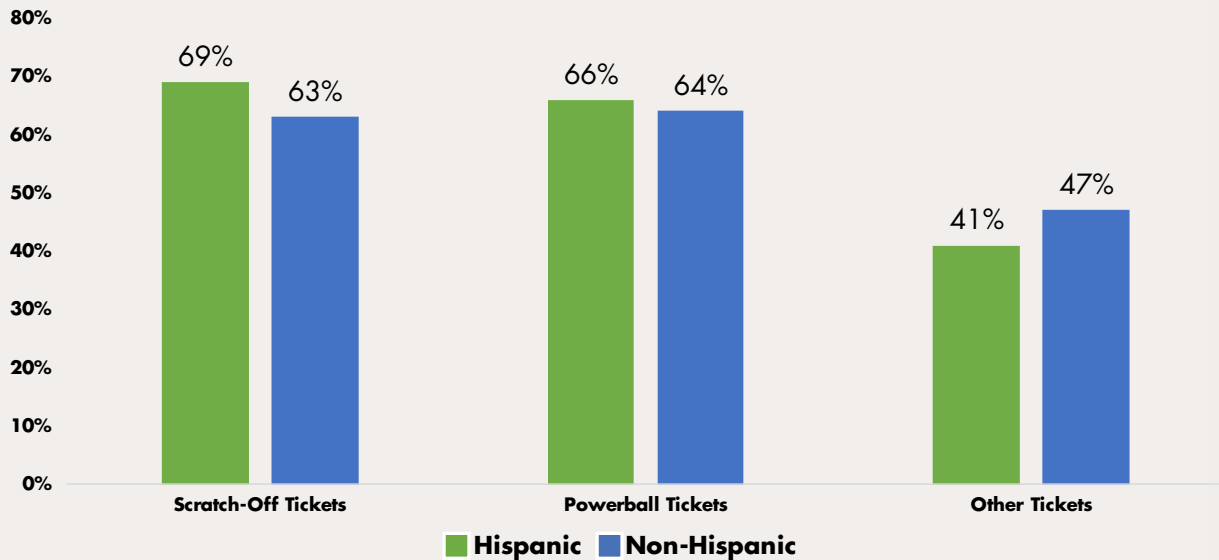
Source: Tucson Scarborough 2015 Release 1 (Feb 14-Jan 15), Tucson DMA,
Base: Adults 21+ Who Visited Any Casino in the Past 12 Months

Courtesy of  **UNIVISION**
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Forty-Three Percent Of Tucson Hispanics Purchase Lottery Tickets, Scratch-Off Tickets Being Their Favorite

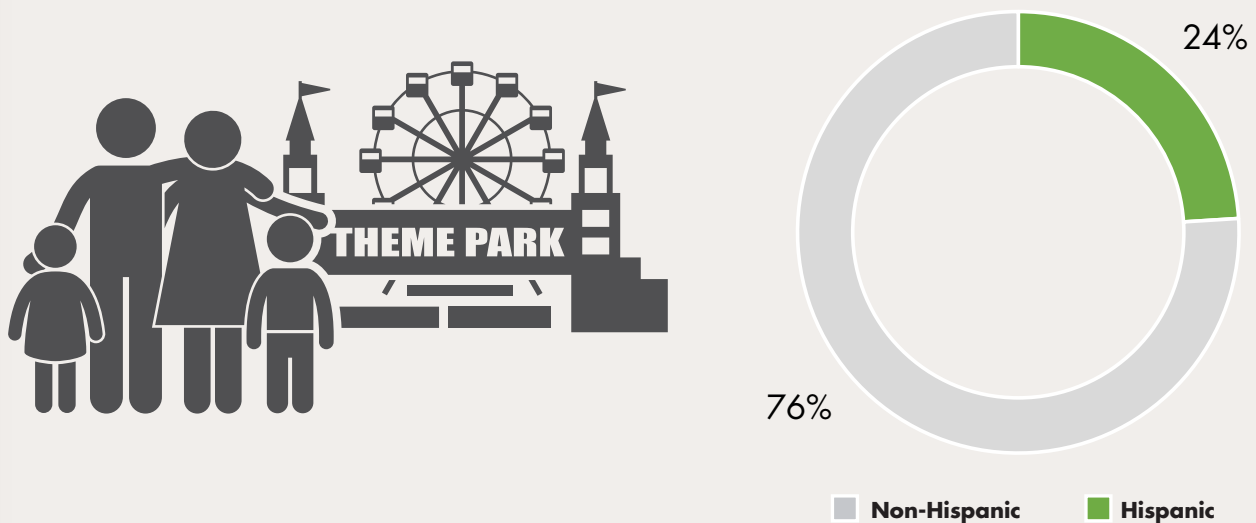
TYPES OF LOTTERY TICKETS PURCHASED



Sources: Tucson Scarborough, 2015 Release 1 (Feb14-Jan15), Adults 21+, Tucson DMA;
Base: Purchased a lottery ticket in the past 30 days

Courtesy of UNIVISION
ARIZONA

Twenty-Four Percent Of Tucson Hispanic Adults 18-49 With Kids Visited A Theme Park Last Year



Source: Tucson Scarborough 2015 Release 1 (Feb14-Jan15), Base: Adults 18-49 with 1+ kids under 18

Courtesy of UNIVISION
ARIZONA



Hispanics Are Strong Consumers Of Movies!

\$16
Million

Are Spent By **Tucson**
Hispanics On **Motion**
Picture Admissions
In 2014

That's

32%

Of The Total Spent
On Movie Admissions

Source: IHS Global Insight Hispanic Market Report, 2015, Tucson DMA

Courtesy of **UNIVISION**
ARIZONA

Tucson Hispanics Have Influence At The **Movie Theater Cash Register**

85%

More Likely To See
A Movie Opening
Weekend

VS.

42%

Less Likely For
Non-Hispanics

11%

More Likely To Go
To Movies
4+ Times/Month

VS.

6%

Less Likely For
Non-Hispanics

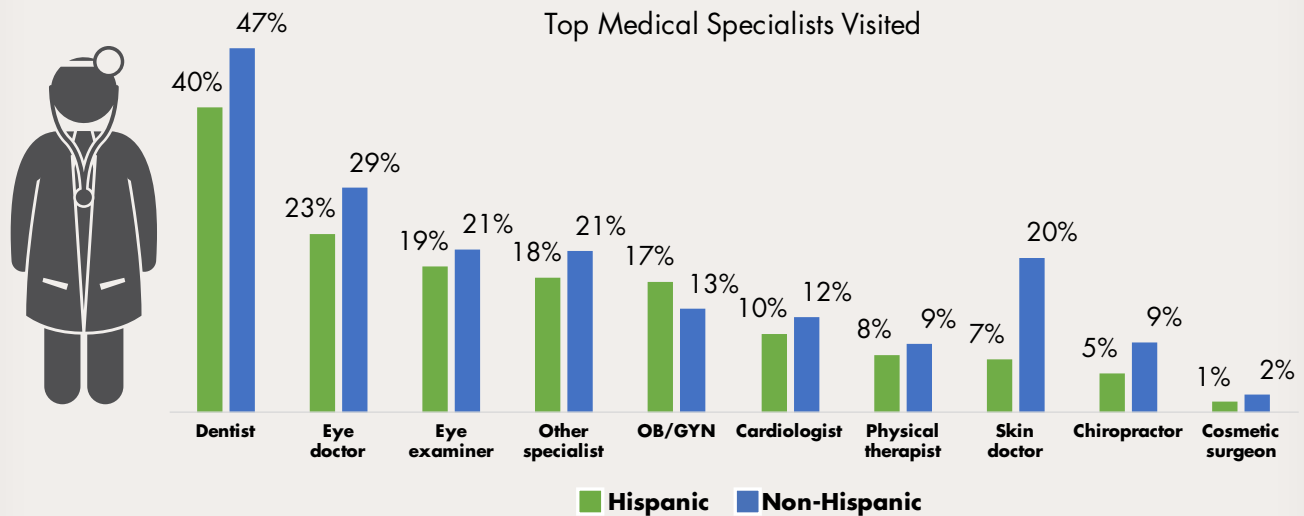
Source: Tucson Scarborough 2015 Release 1 (Feb14-Jan15), Base: Adults 18+

Courtesy of **UNIVISION**
ARIZONA



Hispanics Are Visiting **Fewer Specialists** Than Non-Hispanics With The **Exception** Of **Obstetricians/Gynecologists**

RANKED BY PERCENTAGE OF HISPANICS USING MEDICAL SPECIALISTS IN THE PAST 12 MONTHS



Source: Scarborough Study 2015 Release 1 (Feb '14 – Jan '15), Tucson DMA, Base: Adults 18+

Courtesy of UNIVISION
ARIZONA



Notes



Top Medical Services Used In Tucson



RANKED BY PERCENTAGE OF HISPANICS USING MEDICAL
SERVICES IN PAST 3 YEARS

MEDICAL SERVICE	HISPANIC RANK	% OF HISPANICS	NON-HISPANIC RANK	% OF NON-HISPANIC
Hospital Emergency Room	#1	36.6%	#2	32.2%
Urgent Care Facility	#2	29.7%	#3	27.5%
Other Medical Service	#3	29.5%	#1	35.8%
Pediatrics	#4	18.0%	#8	7.9%
Any Overnight Stay Procedure	#5	13.8%	#4	14.9%
Maternity Care	#6	13.2%	#11	5.6%
Orthopedics	#7	11.9%	#5	11.1%
Neurology	#8	10.0%	#10	6.6%
Cardiac Care	#9	8.3%	#6	10.7%
Cancer/Oncology	#10	5.8%	#7	9.6%
Teeth Whitening, Veneers, Etc.	#11	5.7%	#13	2.0%
Corrective Eye Surgery	#12	5.2%	#9	7.6%
Mental Healthcare	#13	5.0%	#12	4.1%

Source: Scarborough Study 2015 Release 1 (Feb '14 – Jan '15), Tucson DMA, Base: Adults 18+

Courtesy of  **UNIVISION**
ARIZONA



Top Hospitals Used In Tucson

RANKED BY PERCENTAGE OF HISPANICS
USING HOSPITALS IN PAST 3 YEARS

HOSPITAL	HISPANIC RANK	% OF HISPANICS	NON-HISPANIC RANK	% OF NON-HISPANIC
Any Hospital Used		80.7%		70.4%
Tucson Medical Center	#1	35.4%	#1	25.7%
St. Mary's Hospital	#2	19.2%	#5	11.8%
St. Joseph's Hospital	#3	16.5%	#3	18.4%
University Of Arizona Medical Center - University Campus	#4	15.2%	#4	14.7%
Carondelet Heart & Vascular Institute	#5	11.9%	#9	5.8%
Other Hospital	#6	11.3%	#6	9.1%
University Of Arizona Medical Center - South Campus	#7	11.1%	#8	5.9%
University Of Arizona Medical Center - Diamond Children's	#8	10.9%	#11	2.2%
Northwest Medical Center	#9	9.6%	#2	18.9%
Va Medical Center	#10	5.1%	#7	8.5%
Oro Valley Hospital	#11	0.7%	#10	4.5%

Source: Scarborough Study 2015 Release 1 (Feb '14 – Jan '15), Tucson DMA, Base: Adults 18+

Courtesy of  **UNIVISION**
ARIZONA



Tucson Has...

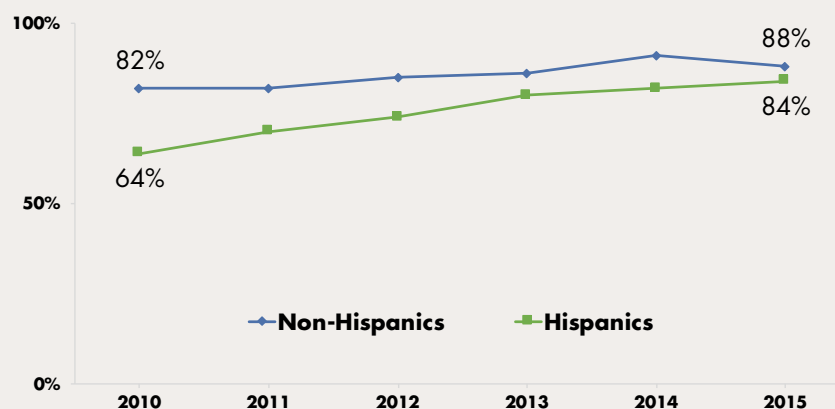
298,000Hispanic Adults
IN THE TUCSON DMA**249,000**
Hispanic Adults
THAT ARE ONLINE**84%****236,000**
Hispanic Adults
WITH A MOBILE DEVICE**79%****179,000**
Hispanic Adults
ON SOCIAL MEDIA**60%**

Source: Scarborough, Tucson, 2015 Release 1 (Feb14-Jan15), Hispanics 18+

Courtesy of UNIVISION
ARIZONA

Since 2010, Internet Use By Hispanics Grew By **20 Percentage Points** Vs. Non-Hispanics **6 Percentage Points**

INTERNET PENETRATION IN TUCSON



Source: Scarborough 2010-2015 Release 1, Tucson; "Internet Use" defined as any Internet Access.

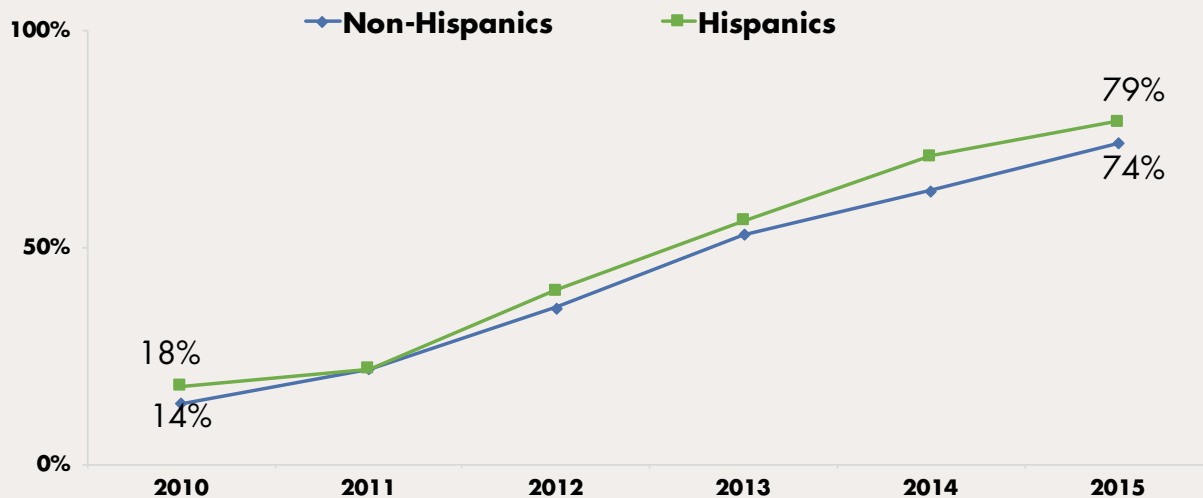
Courtesy of UNIVISION
ARIZONA



Mobile Device Ownership By Hispanics Has **Now Surpassed** Mobile Device Ownership By Non-Hispanics



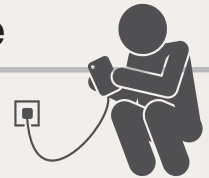
MOBILE DEVICE PENETRATION IN TUCSON



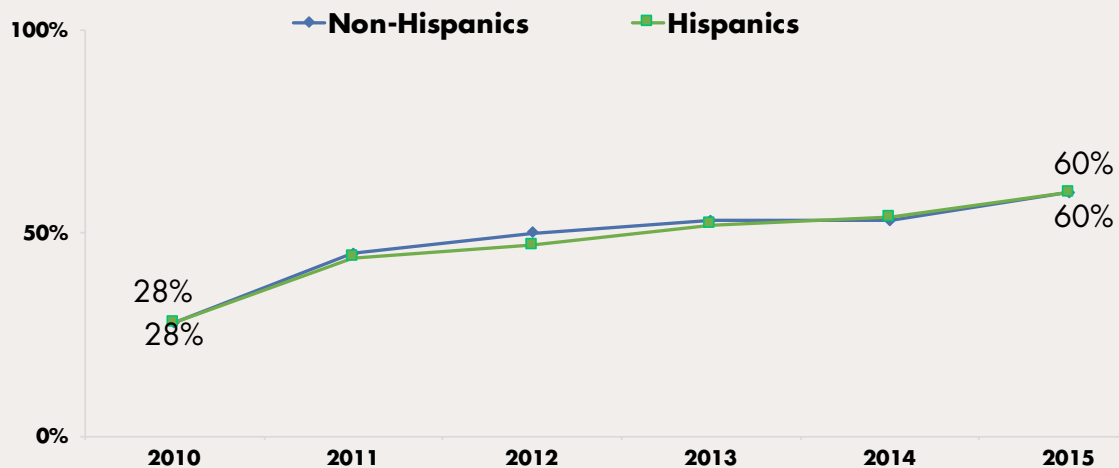
Source: Scarborough 2010-2015 Release 1, Tucson; "Mobile Device" defined as a Tablet or Smartphone.

Courtesy of UNIVISION
ARIZONA

Since 2010, Tucson Hispanics **Have Increased** **At A Rate** That Is On Par With Non-Hispanics When It Comes To **Social Media Usage**



SOCIAL MEDIA PENETRATION IN TUCSON



Source: Scarborough 2010-2015 Release 1, Tucson; "Social Media" defined as having spent any time on social media websites in the past 30 days.

Courtesy of UNIVISION
ARIZONA



Tucson Online Hispanics Top Website/Apps Visited Past Month



AMONG TUCSON HISPANIC ONLINE ADULTS 18+
(SORTED BY HISPANIC %)

WEBSITE/APP VISITED (PAST MONTH)	TUCSON HISPANIC % COMPOSITION	INDEX	WEBSITE/APP VISITED (PAST MONTH)	TUCSON HISPANIC % COMPOSITION	INDEX
1. Google	71%	110	11. Instagram	20%	178
2. Facebook	69%	124	12. ESPN	19%	137
3. You Tube	54%	125	13. Bing	17%	110
4. Pandora	39%	152	14. NFL	17%	167
5. Yahoo!	35%	123	15. iHeartRadio	17%	200
6. Netflix	31%	104	16. Google+	16%	123
7. Amazon	29%	80	17. Wikipedia	16%	71
8. Cox	23%	116	18. Pinterest	15%	122
9. Craigslist	23%	87	19. CNN	15%	106
10. MSN	21%	130	20. Twitter	15%	160

Source: Tucson Scarborough 2015 Release 1 (Feb 14-Jan 15), Hispanic Adults 18+; Base: access Internet
Index: % more or less likely than market's average person

Courtesy of UNIVISION
ARIZONA

Tucson Online Hispanics Top Media Websites Visited During Past Month

AMONG TUCSON ONLINE HISPANIC ADULTS 18+
(SORTED BY HISPANIC %)

MEDIA WEBSITE VISITED (PAST MONTH)	TUCSON HISPANIC % COMPOSITION	TUCSON SPANISH-DOMINANT HISPANIC % COMPOSITION
1. Arizona Daily Star/AZStarNet.com	20%	16%
2. KVOA.com	17%	12%
3. Cox.com	17%	15%
4. KGUN9.com	14%	11%
5. TucsonNewsNow.com	14%	14%
6. Krq.com (KRQQ-FM)	10%	13%
7. Univision.com	10%	20%
8. Telemundo.com	8%	12%
9. TucsonCitizen.com	7%	2%
10. XFINITY.com/comcast.net	4%	1%

Source: Tucson Scarborough 2015 Release 1 (Feb 14-Jan 15), Hispanic Adults 18+; Span Dom Hispanic Adults 18+; sorted by Hisp %

Courtesy of UNIVISION
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Tucson Hispanic Smartphone/Tablet Ownership And Usage

74%

of Tucson Hispanic
HH's own Smartphones



50%

of Tucson Hispanic
HH's own Tablets



INDEX- VARIOUS WAYS HISPANICS USE INTERNET/APPS ON SMARTPHONE VS TABLET

	LISTEN LOCAL OR INTERNET RADIO	DOWNLOAD/ WATCH MOVIES	WATCH ONLINE SUBSCRIPTION SERVICE (NETFLIX, ETC)	INSTANT MESSAGING	SOCIAL MEDIA	DOWNLOAD/ LISTEN MUSIC (ITUNES, ETC)	WATCH VIDEO (YOUTUBE, ETC)	DOWNLOAD/ PLAY GAMES
Smartphone	191	158	154	128	126	116	115	98
Tablet	73	87	81	106	82	97	105	91

Source: Tucson Scarborough 2015 Release 1 (Feb14-Jan15), Hispanic Adults 18+; Index: % more or less likely than market's average person; sorted by Smartphone

Courtesy of UNIVISION
ARIZONA

Tucson Hispanic Social Media Users

AMONG TUCSON HISPANIC ADULTS 18+

60% USE SOCIAL MEDIA APPS

TIME SPENT USING SOCIAL MEDIA



TIME SPENT/AVG DAY	TUCSON HISPANICS % COMPOSITION	TUCSON NON-HISPANICS % COMPOSITION	HISPANIC INDEX TO TOTAL
< 1 hour	34%	45%	125
1-2 hours	33%	27%	171
3-4 hours	13%	9%	186
5+ hours	8%	5%	201

Source: Tucson Scarborough 2015 Release 1 (Feb14-Jan15), Hispanic Adults 18+ ;
Base: visited Social Media site last month
less likely than market's average person

Index: % more or

Courtesy of UNIVISION
ARIZONA

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& MEDIA

"Univision Local Media-Arizona is delighted to partner with *DATOS* to supply data that is critical to businesses in Arizona. As the #1 Spanish local media company we realize the importance of quality research and take pride in providing actionable insights that empowers the Arizona business community."

—Roberto Yañez, Vice President and General Manager, Univision Local Media Arizona

U.S. Now Home To Second-Largest Population Of Spanish Speakers In The World, As Advertising Dollars Aimed At Hispanics Grows Rapidly

There are now more Spanish speakers in the United States than any other country in the world except Mexico, according to a 2015 study by Instituto Cervantes, a prestigious international think tank.

More than 52 million people in the U.S. are either native Spanish speakers or bilingual. That is larger than the population of Spain and Colombia, as well as all other countries in Central and South America. Only Mexico, with 121 million people, has a larger Spanish-speaking population. Instituto Cervantes further estimates that by 2050, the U.S. will be home to 138 million Spanish speakers, the largest number of Spanish speakers on earth.

While it's important to note that all Spanish speakers in the United States are not of Hispanic origin (millions today are enrolled in Spanish-language classes), Spanish has become the second most spoken language in all but six U.S. states—illustrating the growing presence of Latinos in virtually every region of the nation.

The Nielsen Company reports that a growing proportion of U.S. Hispanics, 58 percent, are now bilingual, even though population growth in the Latino community is coming far more as a result of native births versus immigration. Immigration, has slowed substantially overall since the Great Recession, though the rebound in the economy has fueled a recent uptick in newcomers to the United States.

To those worried about the "balkanization" or "cultural segregation" of America, fully 93 percent of Latinos speak at least some English at home, according to Pew Hispanic Research, while 26 percent of Latinos speak only English at home.

Our evolving language landscape can make navigating the U.S. marketplace tough.

In Arizona, for instance, the Latino population has nearly tripled in the past 25 years, according to U.S. Census figures. As a result, knowing what language to use when advertising

to Latinos requires a constant, close analysis of the market's increasingly nuanced data trends.

In Phoenix today, for instance, 81 percent of Hispanics speak at least some Spanish at home, according to Nielsen. A Hispanic Scarborough Study released earlier this year, meanwhile, found that 93 percent of Spanish-language television viewers speak Spanish at home while for 79 percent of that same group English is the preferred language outside of the home.

Plug "New Media" in the equation and the exploding demand for digital video devices and the market's dynamics grow even more complicated. Among the coveted 18-34 age group, Hispanics are spending more time watching digital video than any other age group among Hispanics. Those in the 18-34 age category spend about 30 percent more time watching digital video than viewers in the 50 to 64 age group.

Traditional television watching, however, remains by far the biggest draw for Hispanics in any age group. Among 18-34 year olds, Hispanics spend about 35 minutes daily watching digital video devices, but nearly four hours watching video programming on a television screen. Older viewers spend more than five hours a day watching TV. Radio is another strong medium reaching 93% of Hispanics 6 years or older on a weekly basis, which is higher than the national average or total market in Phoenix.

Overall, the Hispanic marketplace is quickly growing more lucrative for advertisers. Between 2013 and 2014, according to Advertising Age's Hispanic Facts Pack, ad spending nationwide aimed at the U.S. Hispanic community grew by 12 percent.

According to a report issued in April by the American Association of Hispanic Advertisers, "Over the past five years, the top 500 advertisers boosted their spending in Hispanic targeted media by 63 percent from \$4.3 billion in 2010 to \$7.1 billion."



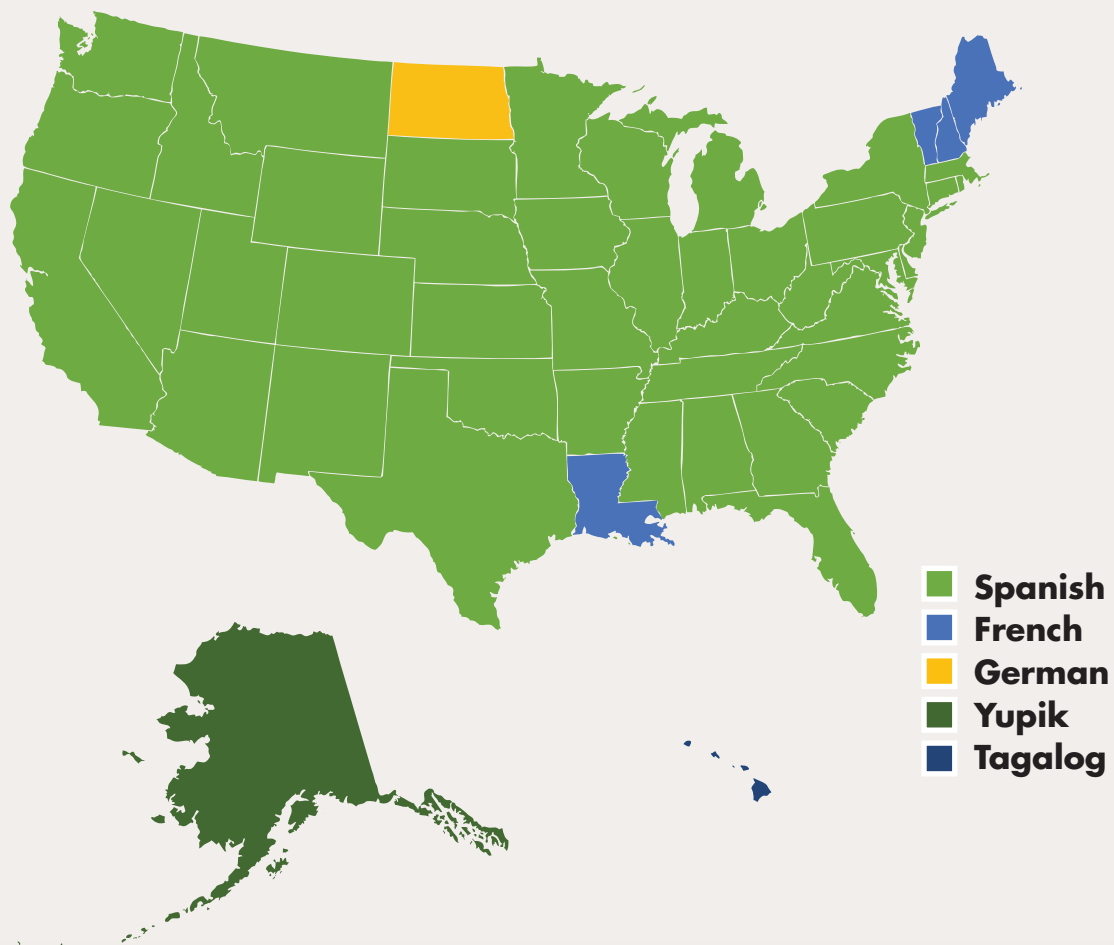


The United States now has the **second-largest group of Spanish speakers in the world**. More than Spain, more than any other Spanish-speaking country in Latin America except Mexico, there are the **52 million people who speak Spanish in the United States**.

There are nearly **8 million Americans studying the Spanish language**.

Source: The Instituto Cervantes, 2015.
eldiae.es/wp-content/uploads/2015/06/espanol_lengua-viva_20151.pdf

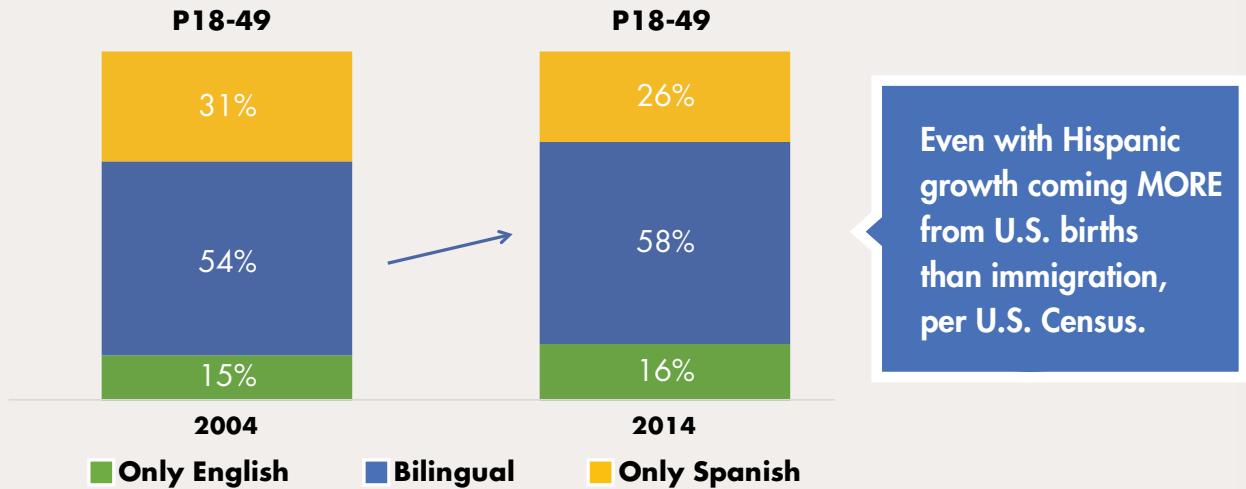
The **Most Commonly Spoken Language** Other Than English In The United States Is **Spanish**



Source: GIZMODO, *The Most Common Languages Spoken in the U.S. After English and Spanish*, 2014.
gizmodo.com/the-most-common-languages-spoken-in-the-u-s-state-by-1575719698

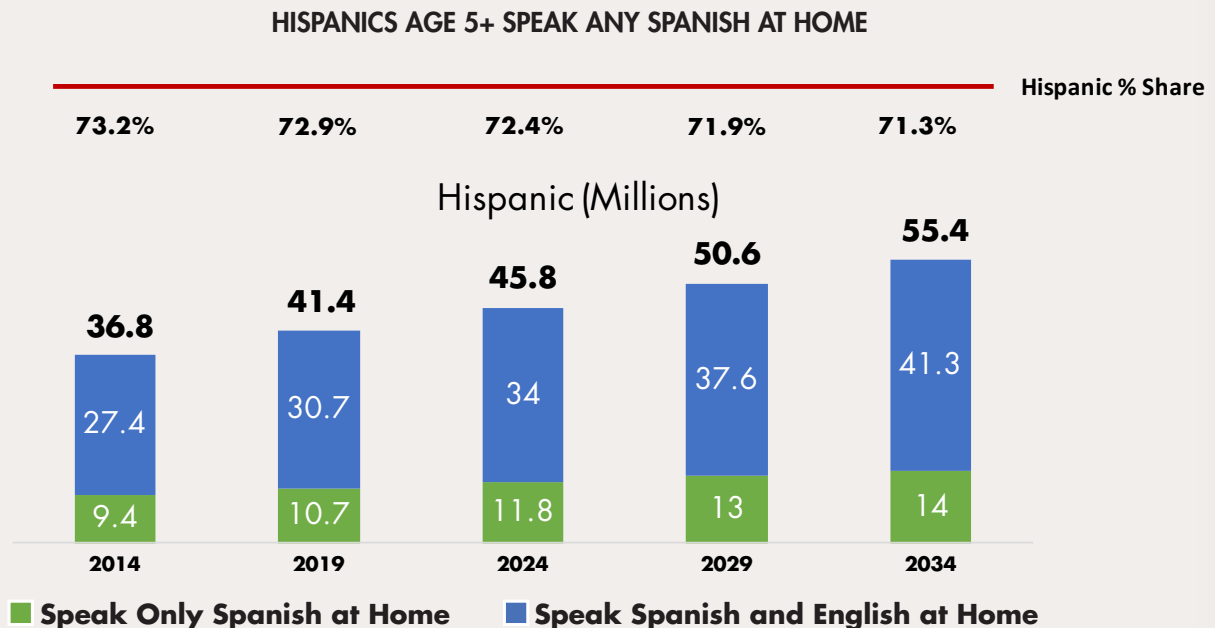


Number Of Hispanics Speaking English And Spanish Is Increasing



Source: The Nielsen Company, 2010 and 2014 Television Universe Estimates. Based on Language Spoken by the Person (Hispanic Adults 18-49) in the home.

Spanish Language Is Here To Stay. More Than **70%** Of Hispanics Will Speak Spanish At Home In 2034



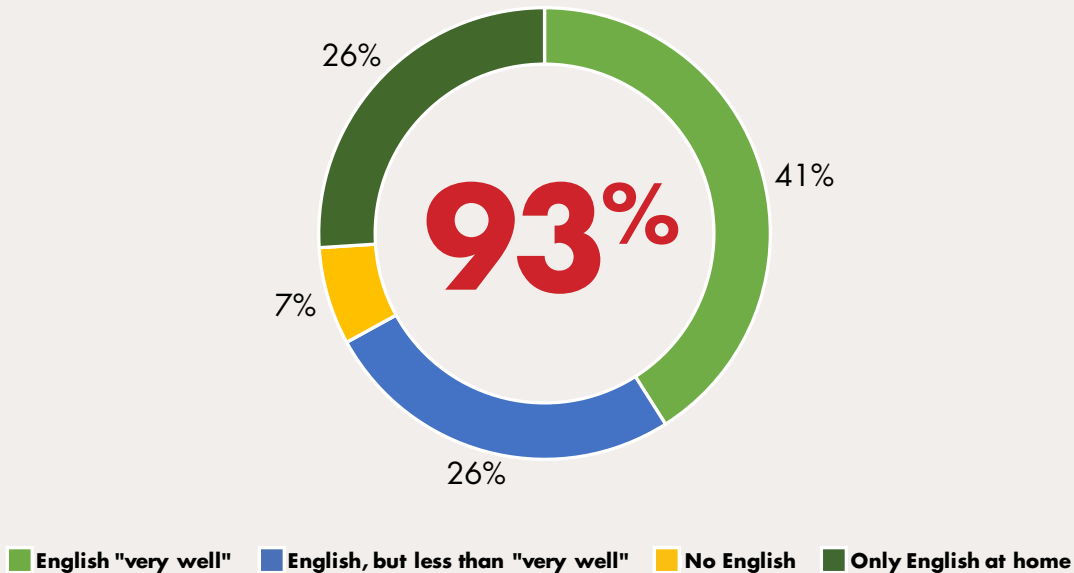
Source: IHS Economics. Hispanic immigration and US Economic Growth, February 2015.

Courtesy of **UNIVISION**
ARIZONA



Ninety-Three Percent Of U.S. Hispanics Speak Some Level Of English At Home

PERCENT OF ALL HISPANICS AGES 5 AND OLDER WHO SPEAK...

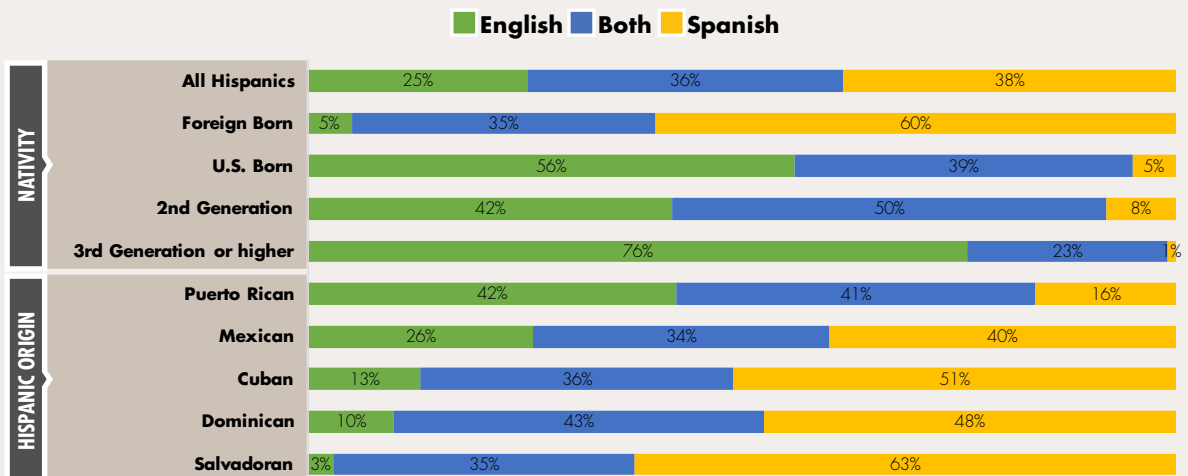


Source: Pew Research Center Tabulations of 2013 American Community Surveys (1% IPUMS).

www.pewhispanic.org/2015/05/12/english-proficiency-on-the-rise-among-latinos/

Thirty-Nine Percent Of U.S.-born Hispanics Are Bilingual

% OF HISPANIC ADULTS WHO MAINLY USE ENGLISH, SPANISH OR BOTH



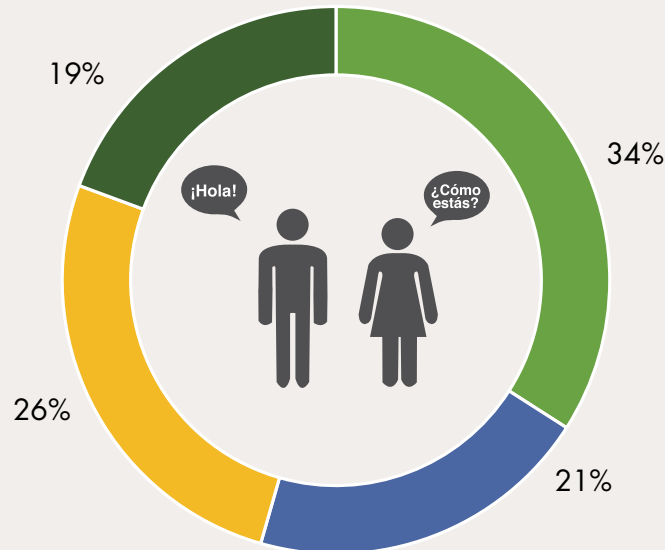
Source: Pew Research Center 2013 National Survey of Latinos.

www.pewresearch.org/fact-tank/2015/03/24/a-majority-of-english-speaking-hispanics-in-the-u-s-are-bilingual/



81% of Hispanics In **Phoenix** Speak **Some Spanish** At Home

PHOENIX DMA



■ Only/Mostly Spanish ■ English/Spanish Equally ■ Mostly English ■ English Only

2015 Nielsen Phoenix Universe Estimates, Hispanic TV Household Language Strata based on People 2+

Courtesy of UNIVISION
ARIZONA

Did You Know



93%

Of Spanish-language television
viewers in PHOENIX speak Spanish
inside the home.

However,



79%

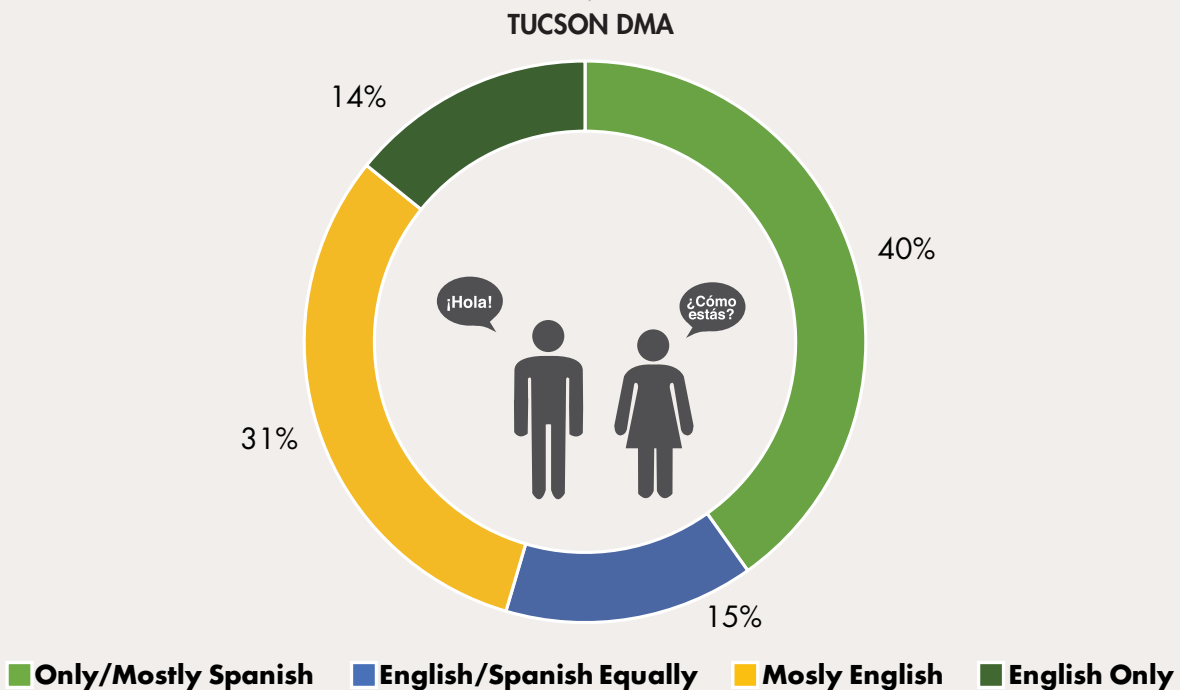
of this group, English is
their language of choice
outside the home.

Hispanic Scarborough Study 2015 Release 1 (Feb14 – Jan15) , Phoenix DMA,
(Base: Hispanic Adults 18+); KTVW/KFPH+/KTAZ M-Su 4a-2a cume audience

Courtesy of UNIVISION
ARIZONA



86% Percent Of Tucson Hispanics Speak **Some Spanish** At Home



2015 Nielsen Tucson Universe Estimates, Hispanic TV Household Language Strata based on People 2+

Courtesy of UNIVISION
ARIZONA

Did You Know



97%

Of Spanish-language television
viewers in TUCSON speak Spanish
inside the home.

However,



86%

of this group, English is
their language of choice
outside the home.

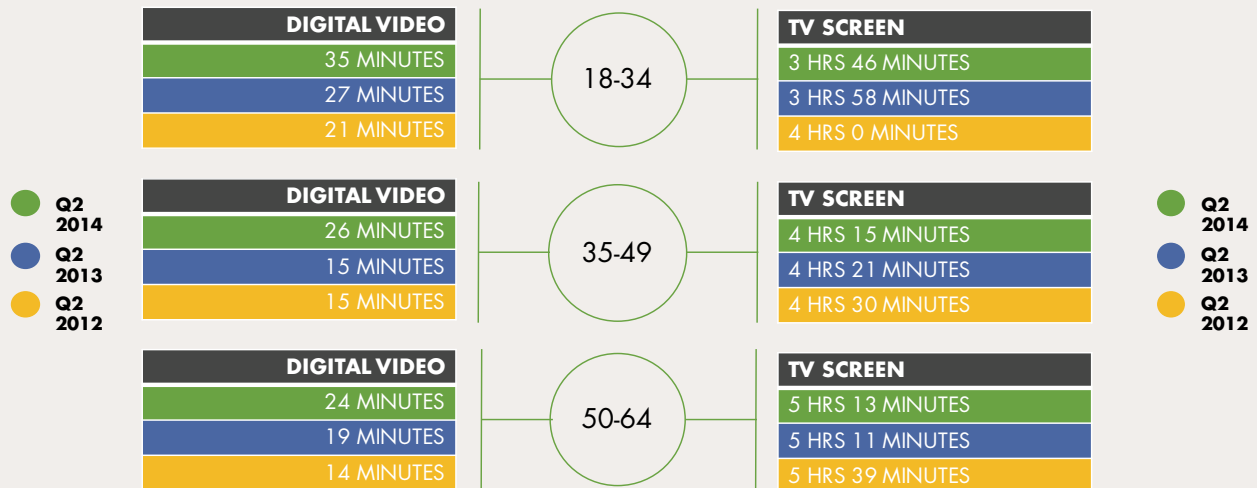
Hispanic Scarborough Study 2015 Release 1 (Feb14 – Jan15) , Phoenix DMA,
(Base: Hispanic Adults 18+); KTVW/KFPH+/KTAZ M-Su 4a-2a cume audience

Courtesy of UNIVISION
ARIZONA



Hispanics Aged 18-34 Spent The **Most** Time On **Digital Video** Than Any Other Age Group And Spent The **Least** Amount Of Time **In Front Of A TV Screen**

HISPANIC DAILY TIME SPENT ON DIGITAL VIDEO AND TV SCREEN BY AGE AND YEAR



Source: The Nielsen Company, THE CROSS-PLATFORM REPORT | Q2 2014, p6.

www.nielsen.com/content/dam/corporate/us/en/reports-downloads/2014%20Reports/q2-2014-cross-platform-report-shifts-in-viewing.pdf

Hispanic **Major-Media Ad-Spending In 2014** By Medium

GROSS U.S. AD SPENDING DOLLARS IN MILLIONS

MEDIUM	U.S. ADVERTISING SPENDING IN HISPANIC MEDIA			PERCENT OF TOTAL	
	2014	2013	% CHANGE	2014	2013
Network TV	\$5,569	\$4,769	16.8	58.7%	56.2%
Spot TV	1,386	1,297	6.8	14.6	15.3
Cable TV Networks	252	216	16.9	2.7	2.5
Subtotal TV	7,207	6,281	14.7	75.9	74.1
Newspaper	790	779	1.4	8.3	9.2
Magazine	331	333	-0.6	3.5	3.9
Other Print	43	40	7.5	0.5	0.5
Subtotal Print	1,165	1,153	1.0	12.3	13.6
Spot Radio	435	465	-6.5	4.6	5.5
Internet	686	580	18.3	7.2	6.8
TOTAL	\$9,493	\$8,480	12.0	100.0	100.0

Source: AdvertisingAge, Hispanic Fact Pack, 2015.



15 Largest Spenders in Hispanic Media

COMPANIES RANKED BY U.S. MEASURED-MEDIA SPENDING

RANK	MARKETER	U.S. MEASURED-MEDIA SPENDING (\$ IN THOUSANDS)	
		2014	% CHANGE
1	Procter & Gamble Co.	\$ 371,599	12.0
2	Genomma Lab Internacional	\$ 351,961	185.0
3	Dish Network Corp.	\$ 146,599	51.3
4	McDonald's Corp.	\$ 130,954	17.6
5	L'Oréal	\$ 114,968	-6.2
6	AT&T	\$ 109,555	-12.2
7	Deutsche Telekom (T-Mobile)	\$ 105,145	6.5
8	Verizon Communications	\$ 101,964	43.0
9	Guthy-Renker Corp.	\$ 99,170	-19.3
10	General Motors Co.	\$ 98,567	7.9
11	Walmart Stores	\$ 94,397	2.4
12	Nissan Motor Co.	\$ 92,503	37.5
13	State Farm Mutual Auto Insurance Co.	\$ 87,035	-6.4
14	Mars Inc.	\$ 85,858	7.0
15	Toyota Motor Corp.	\$ 83,014	1.3

Source: AdvertisingAge, Hispanic Fact Pack, 2015.



Hispanic Language Preferences – Media

BY MEDIA TYPE FOR AGES 18 AND UP

RESPONSES BY PERCENT	READING	WATCHING TV	LISTENING TO RADIO	WHEN ONLINE
Only in English	38.9%	33.8%	31.8%	52.0%
Mostly in English, but some in Spanish	25.7	32.3	30.3	21.7
Mostly in Spanish, but some in English	14.4	20.0	18.3	11.7
Only in Spanish	20.5	13.4	19.4	14.1
In some other language	0.5	0.5	0.3	0.5

Source: Experian Marketing Services (Experian.com/consumerinsights). Data based on Experian Marketing Services' Simmons National Hispanic Consumer Study, Winter 2015, for the dates of Feb. 4, 2014, through March 11, 2015. Base: Hispanic adults who indicated a language preference.





Hispanics In 2014 **Spent The Most Time** On **Traditional TV Per Month** And Spent The Least Amount Of Time **Using A Multimedia Device**

MONTHLY TIME SPENT BY MEDIUM USERS 2+ IN HOURS: MINUTES

	COMPOSITE		BLACK		HISPANIC		ASIAN	
	Q2 14	Q2 13	Q2 14	Q2 13	Q2 13	Q2 13	Q2 14	Q2 13
On Traditional TV	142:38	146:37	206:03	206:47	117:58	121:28	83:02	86:37
Watching Time-shifted TV	14:13	12:35	12:54	9:23	9:39	8:45	9:38	9:00
Using a DVD/Blu-Ray Device	5:00	5:10	5:35	6:05	4:38	4:54	3:51	4:20
Using a Game Console	7:24	6:27	8:21	7:22	7:44	7:12	4:35	4:46
Using a Multimedia Device	1:42	N/A	0:55	N/A	1:02	N/A	5:00	N/A
Using the Internet on a Computer	30:07	27:21	33:23	28:37	26:26	22:46	43:54	35:13
Watching Video on Internet	10:35	6:28	13:59	9:00	11:43	8:17	17:14	12:23
Using any App/Web on a Smartphone	43:31	32:48	52:40	38:36	49:09	38:54	42:43	32:48
Watching Video on a Smartphone	1:41	1:09	2:30	1:30	2:20	1:45	1:53	1:25
Listening to AM/FM Radio	59:19	60:59	61:42	63:22	58:45	60:07	N/A	N/A

Source: The Nielsen Company, THE CROSS-PLATFORM REPORT | Q2 2014

www.nielsen.com/content/dam/corporate/us/en/reports-downloads/2014%20Reports/q2-2014-cross-platform-report-shifts-in-viewing.pdf

Hispanics **Spent The Most Time Using Any App/Web** **On A Smartphone** Between The Ages 25-34

MONTHLY TIME SPENT BY MEDIUM IN HOURS: MINUTES AMONG HISPANICS

	K 2-11	T 12-17	A 18-24	A 25-34	A 35-49	A 50-64	A 65+	P 2+
On Traditional TV	106:55	79:09	87:45	106:37	119:54	153:50	217:13	117:58
Watching Time-shifted TV	9:56	6:38	6:37	10:26	10:25	11:18	11:30	9:39
Using a DVD/Blu-Ray Device	7:13	4:27	3:51	4:35	4:25	3:13	2:33	4:38
Using a Game Console	10:27	18:10	12:51	8:04	3:18	1:07	0:35	7:44
Using a Multimedia Device	1:20	1:19	1:09	1:06	1:04	0:23	0:28	1:02
Using the Internet on a Computer	3:46	6:42	27:49	32:09	37:12	29:47	20:30	26:26
Watching Video on Internet	6:44	6:10	17:19	13:45	11:55	11:54	3:39	11:43
Using any App/Web on a Smartphone	N/A	N/A	49:45	56:08	50:09	32:26	31:33	49:09
Watching Video on a Smartphone	N/A	N/A	3:11	2:33	1:59	0:51	-	2:20
Listening to AM/FM Radio	N/A	37:14	51:27	58:27	66:50	69:21	62:17	58:45

Source: The Nielsen Company, THE CROSS-PLATFORM REPORT | Q2 2014

www.nielsen.com/content/dam/corporate/us/en/reports-downloads/2014%20Reports/q2-2014-cross-platform-report-shifts-in-viewing.pdf



Phoenix Continues To **Rank 9th** In Nielsen's **Top 10 Hispanic DMAs** For The 2014-2015 **Television Season**











DESIGNATED MARKET AREA (DMA)	HISPANIC TV HOMES	% OF U.S. TOTAL
1. Los Angeles	1,927,420	13.252
2. New York	1,433,400	9.856
3. Miami-Ft. Lauderdale	732,020	5.033
4. Houston	647,700	4.453
5. Chicago	528,290	3.632
6. Dallas-Ft.	525,250	3.611
7. San Antonio	444,430	3.056
8. San Francisco-Oak-San Jose	425,850	2.928
9. Phoenix (Prescott)	373,470	2.568
10. Harlingen-Wslco-Brnsvl-McA	315,520	2.169

Source: The Nielsen Company, 2014

www.tvb.org/media/file/Nielsen_2014-2015_DMA_RANKS_Hispanic.pdf

Phoenix **TV Landscape**

4 BOOK AVERAGE – ADULTS 18-49 – REGARDLESS OF LANGUAGE

TOTAL DAY AVERAGE AUDIENCE					
#1	 UNIVISION ARIZONA	15,000	#6		8,000
#1		15,000	#7		6,000
#3		14,000	#8		5,000
#4		12,000	#8		5,000
#5		10,000	#10		3,000

Source: Nielsen, Nielsen Local Television View Ratings Cutback, NSI, Live+SD, 4 Book Average (Jul'14/Nov'14/Feb'15/May'15), Adults 18-49, Phoenix DMA. Total Day M-Su 6a-2a.

Courtesy of  **UNIVISION**
ARIZONA

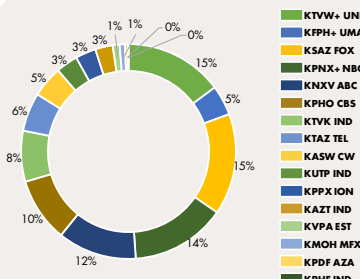


Phoenix TV Landscape Share of Broadcast Viewing

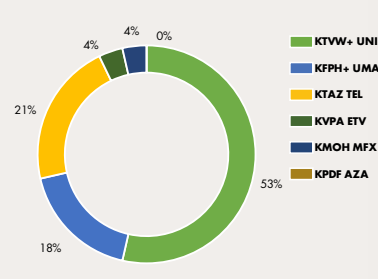
28% of All Adult 18-49 Broadcast
TV Viewing in Total Week Is to
Spanish Language TV Stations

**4 BOOK AVERAGE • ADULTS 18-49 • REGARDLESS OF
LANGUAGE • M-SU 6AM TO 2AM**

All Broadcast



Spanish-Language

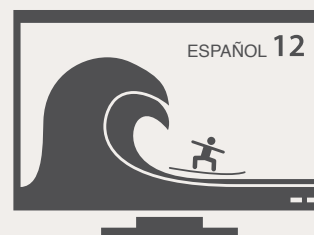
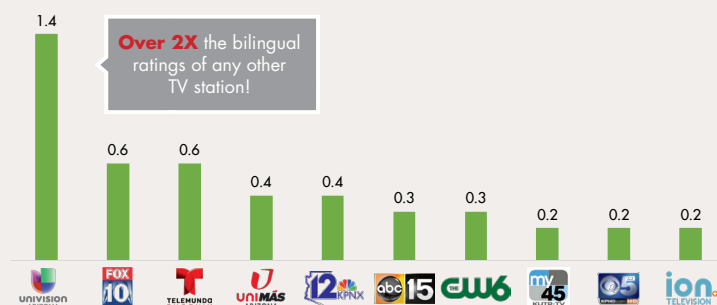


Source: Nielsen, Nielsen Local Television View Ratings Cutback, NSI, Live+SD, 4 Book Average (Jul'14/Nov'14/Feb'15/May'15), Adults 18-49, Phoenix DMA. Total Day M-Su 6a-2a. Percentages based on Average Impressions.

Courtesy of **UNIVISION
ARIZONA**

Bilingual Adults Choose Spanish-Language TV

M-SU 6A-2A – BILINGUAL ADULTS 18-49 - TUCSON



Source: Nielsen, Nielsen Local Television View Ratings Cut back, NSI, Live+SD, 4 Book Average (Jul'14/Nov'14/Feb'15/May'15), Time Period Data, Adults 18-49, Phoenix DMA. Bilingual is defined as Adults 18-49 Speaking Mostly Spanish, Spanish / English Equally or Mostly English in the Home. Total Day: M-Su 6a-2a. Top 10 stations shown.

Courtesy of **UNIVISION
ARIZONA**

Top 20 Spanish TV Advertisers In Phoenix 2014 And Jan-June 2015 YTD

TOP ADVERTISERS ON SPANISH TV, 2014

1. Cox Communications	11. Lerner & Rowe
2. Century Link	12. American Family Insurance
3. Law Offices of Alcock & Associates	13. AutoAmigo
4. Curacao	14. Midway Nissan
5. U.S. Dept of Transportation	15. MasterCard
6. Food City	16. Nissan Dealer Association
7. Dish Network	17. Girl Scouts of America
8. Mor Furniture For Less	18. Chevrolet Dealer Association
9. McDonald's	19. Tio Rico Auto Financial Services
10. Western Dental	20. TitleMax

TOP ADVERTISERS ON SPANISH TV, JAN-JUNE 2015

1. Cox Communications	11. Western Dental
2. MasterCard	12. U.S. Dept of Health & Human Services
3. Hastings & Hastings Attorney	13. Chevrolet Dealer Association
4. Honda Dealer Association	14. Ford Dealer Association
5. Nissan Dealer Association	15. Law Offices of Joel W Black
6. Law Offices of Alcock & Associates	16. Food City
7. Century Link	17. Hidden Valley Food Products
8. Curacao	18. Mor Furniture For Less
9. McDonald's	19. Courtesy Chevrolet
10. Emergency Chiropractic	20. U.S. Dept of Transportation

Source: Media Monitors, 2014 full year and 2015 YTD (Jan-June 2015), based on # of total spots; among qualifying Spanish stations only (Univision KTVW+, UniMás KFPH+, Telemundo KTAZ, TV Azteca KPDF)

Courtesy of **UNIVISION
ARIZONA**



Phoenix Hispanics Are **Very Engaged** With **Spanish Radio**



More Than 2X Spent With Spanish Radio

Phoenix Hispanics Spend **121% More Time**
Listening to Spanish-Language Radio!

TIME SPENT WITH ENGLISH-LANGUAGE RADIO	TIME SPENT WITH SPANISH-LANGUAGE RADIO	% MORE WITH SPANISH-LANGUAGE
3:30	7:45	121%

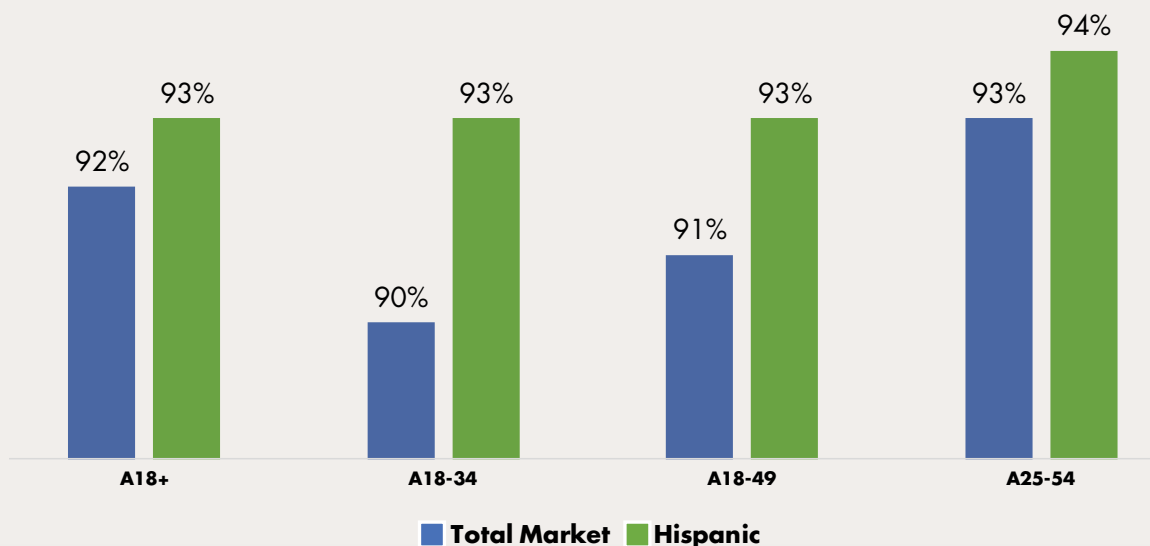
Source: Phoenix Nielsen Audio PPM Jan-June 2015 YTD, Hispanic A18-49, TSL Total Week
(Top 5 SL Stations vs. Top 5 EL Stations among A1849)

Courtesy of UNIVISION
ARIZONA

Radio Reaches Over 93% Of Phoenix Hispanics



RADIO REACHES MORE THAN 9 IN EVERY 10 PHOENIX HISPANIC ADULTS EVERY WEEK



Source: Phoenix Nielsen Audio PPM, Jan-June 2015 YTD; Total and Hispanic Adults; Mon-Sun 6a-mid; Weekly Cume Estimates, / % Reach across demos

Courtesy of UNIVISION
ARIZONA



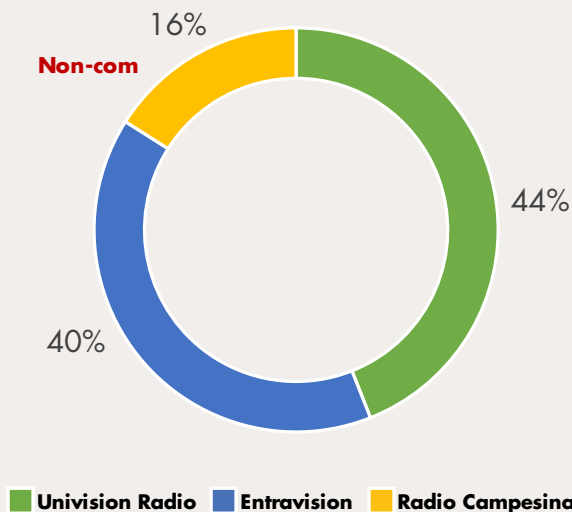
Spanish Radio Connects With Phoenix Hispanics

SPANISH PREFERRED HISPANICS		BILINGUAL HISPANICS		ENGLISH PREFERRED HISPANICS	
#1		#1		#1	
Regional Mexican	76%	Regional Mexican	60%	Pop CHR	61%
#2		#2		#2	
Spanish Adult Hits	52%	Pop CHR	52%	Rhythmic CHR	52%
#3		#3		#3	
Spanish Contemporary	33%	Spanish Adult Hits	37%	Regional Mexican	35%
#4		#4		#4	
Pop CHR	24%	Rhythmic Adult Contemporary	37%	Hot Adult Contemporary	31%

Source: Phoenix Hispanic Scarborough 2015 Release 1 (Feb 14-Jan 15), Hispanic Adults 18-49
Based on Language Personally Spoken Most Away From Home

Courtesy of UNIVISION
ARIZONA

Phoenix Spanish-Language Radio Share Of Voice



*NOTE

Univision Radio = KHOT-FM, KOMR-FM, KQMR-FM;
Entravision = KLNZ-FM, KVA/KDVA-FM, KBMB-AM;
United Farmworkers = KNAI-FM (Campesina)

Source: Phoenix Nielsen Audio PPM, Jan-June 2015 YTD, Adults 18-49 / Total Week / Share of Spanish Average Quarter Hour listening
by Group Owner

Courtesy of UNIVISION
ARIZONA





Top 20 Spanish Radio Advertisers In Phoenix 2014 And Jan-June 2015 YTD

TOP ADVERTISERS ON SPANISH TV, 2014		TOP ADVERTISERS ON SPANISH TV, JAN-JUNE 2015	
1. Cox Communications	11. Lerner & Rowe	1. Cox Communications	11. Western Dental
2. Century Link	12. American Family Insurance	2. MasterCard	12. U.S. Dept of Health & Human Services
3. Law Offices of Alcock & Associates	13. AutoAmigo	3. Hastings & Hastings Attorney	13. Chevrolet Dealer Association
4. Curacao	14. Midway Nissan	4. Honda Dealer Association	14. Ford Dealer Association
5. U.S. Dept of Transportation	15. MasterCard	5. Nissan Dealer Association	15. Law Offices of Joel W Black
6. Food City	16. Nissan Dealer Association	6. Law Offices of Alcock & Associates	16. Food City
7. Dish Network	17. Girl Scouts of America	7. Century Link	17. Hidden Valley Food Products
8. Mor Furniture For Less	18. Chevrolet Dealer Association	8. Curacao	18. Mor Furniture For Less
9. McDonald's	19. Tio Rico Auto Financial Services	9. McDonald's	19. Courtesy Chevrolet
10. Western Dental	20. TitleMax	10. Emergency Chiropractic	20. U.S. Dept of Transportation

Source: Media Monitors, 2014 full year and 2015 YTD (Jan-June 2015), based on # of total spots; among qualifying Spanish stations only (KHOT-FM, KOMR-FM, KLNZ-FM, KVVA-FM)

Courtesy of UNIVISION
ARIZONA

Spanish Radio Formats

These styles are regionalized very much like C&W - and are derived from various parts of Mexico.



- Banda
- Ranchero
- Norteño
- Tejano
- Grupero
- Mariachi
- Corridos

Total Market Equivalent:
Country Music

This format encompasses music from romantic to rock and boasts smooth, danceable beats.



- Reggaeton
- Spanish AC
- Romantic
- Ballads
- Intl Pop Hits
- Spanish Rock

Total Market Equivalent:
Rhythmic Contemporary

Broad mix of Spanish classic hits from the 60s, 70s, 80s.



- Mexican Adult Hits
- Pop Adult Hits

Total Market Equivalent:
Adult Hits

Tropical

With Cuban and Puerto Rican origins, this format has heavy layers of blaring horns, percussion and exhilarating dance rhythms.



- Salsa
- Cumbia
- Bachata
- Merengue
- Reggaeton

News/Talk

This format is meant to inform, help and entertain.



- News you can use
- Talk Shows
- Commentary

Hear the Difference

Hover over the icon below and push play for a sound perspective of the differences by genre.

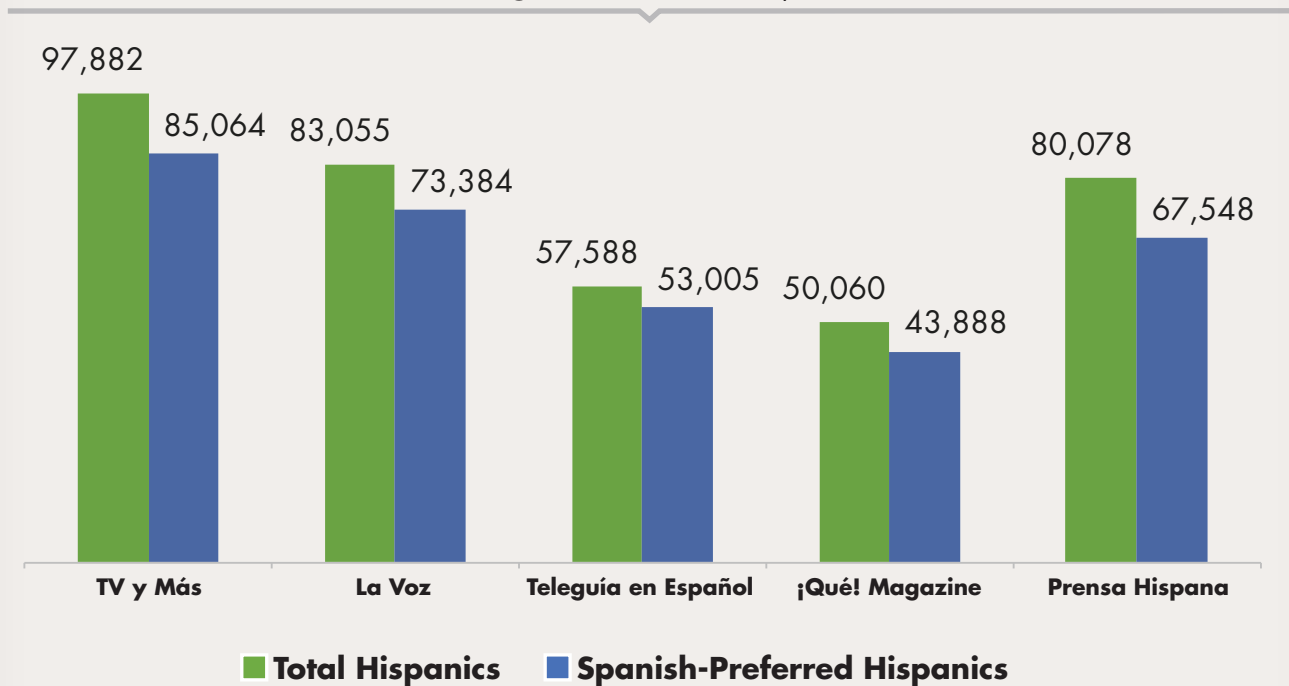


Projected Percentage Change in Total, Hispanic, and Non-Hispanic Buying Power for U.S., 2012-2017

Courtesy of UNIVISION
ARIZONA



Newspaper Readership Among Phoenix Hispanics



Source: 2015 Phoenix Scarborough R1 (Feb 14 – Jan 15)

Courtesy of REPUBLIC MEDIA
Delivering customers. Driving results.



Notes

Tucson **TV Landscape**

4 BOOK AVERAGE – ADULTS 18-49

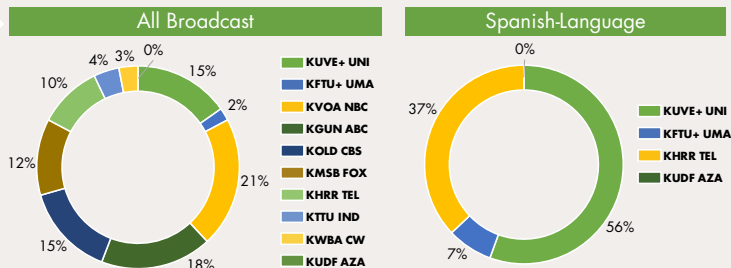
TOTAL DAY AVERAGE AUDIENCE		
#1		4,100
#2		3,500
#3		3,000
#4		2,900
#5		2,400
#6		2,000
#7		800
#8		600
#9		400

Source: Nielsen, Nielsen Local Television View Ratings Cutback, NSI, 4 Book Average (Jul'14/Nov'14/Feb'15/May'15), Adults 18-49, Tucson DMA. Total Day M-Su 6a-2a.

Courtesy of **UNIVISION**
ARIZONA

Tucson TV Landscape Share of Broadcast Viewing

27% of All Adult 18-49 Broadcast
TV Viewing in Total Week Is to
Spanish Language TV Stations

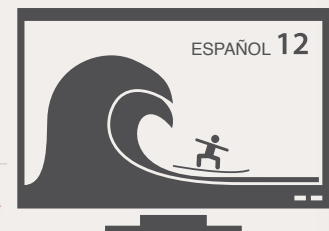
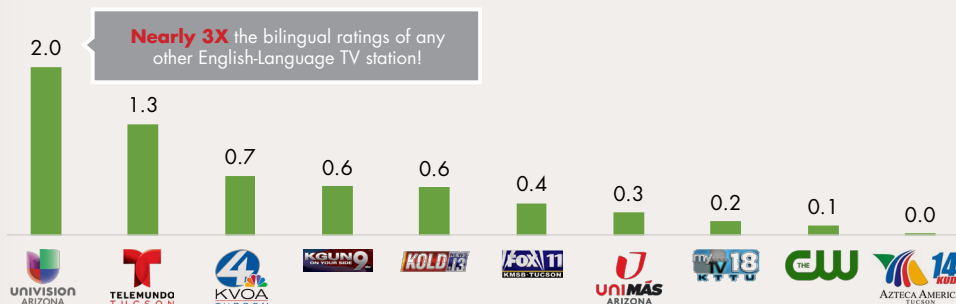
4 BOOK AVERAGE • ADULTS 18-49 • REGARDLESS OF
LANGUAGE • M-SU 6AM TO 2AM

Source: Nielsen, Nielsen Local Television View Ratings Cutback, NSI, 4 Book Average (Jul'14/Nov'14/Feb'15/May'15), Adults 18-49, Tucson DMA. Total Day M-Su 6a-2a. Percentages based on Average Impressions.

Courtesy of **UNIVISION**
ARIZONA

Bilingual Adults In Tucson Choose **Spanish-Language TV**

M-SU 6A-2A – BILINGUAL ADULTS 18-49 - TUCSON



Source: Nielsen, Nielsen Local Television View Ratings Cut back, NSI, Live+SD, 4 Book Average (Jul'14/Nov'14/Feb'15/May'15), Time Period Data, Adults 18-49, Phoenix DMA. Bilingual is defined as Adults 18-49 Speaking Mostly Spanish, Spanish / English Equally or Mostly English in the Home. Total Day: M-Su 6a-2a. Top 10 stations shown.

Courtesy of **UNIVISION**
ARIZONA

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- Show others what your business offers and find ways to collaborate.
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- Conéctese con compañías a través de Arizona, México y Canadá.
- Muestre lo que ofrece su negocio e identifique maneras de colaborar.
- Use la extensa red de BIEN para buscar negocios.

www.CONNECTBIEN.com

For more information, please contact the Maricopa Association of Governments at (602) 254-6300 or connectbien@azmag.gov
Para más información por favor ponerse en contacto con la Asociación de Gobiernos de Maricopa al (602) 254-6300 o enviar un email a connectbien@azmag.gov

THE STATE OF ARIZONA'S HISPANIC MARKET

SECTION I



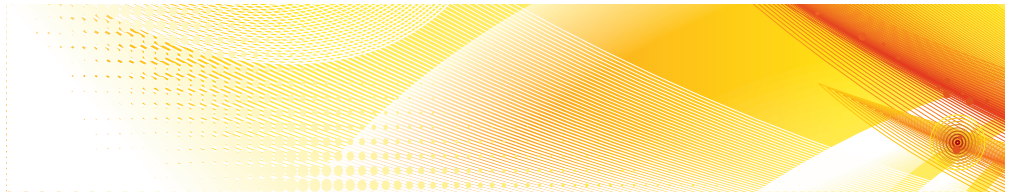
CONSUMER
BEHAVIOR

CHAPTER 3



NOTES

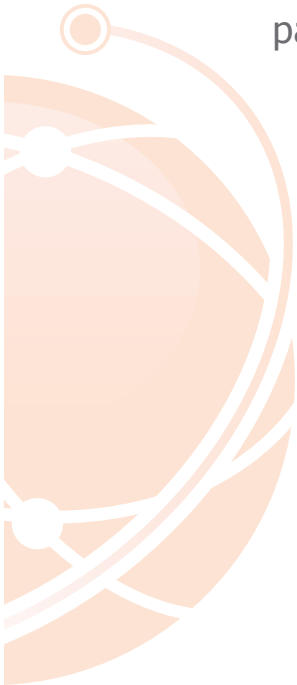
Notes



connect + grow

We exist to help science and technology companies
of all sizes and stages succeed.

By serving as the principal point of connection, the
Arizona Technology Council can help you build global
partnerships to grow locally, get your innovations
noticed and stay ahead of the curve.



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aztechcouncil

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CONSUMER
DEMOGRAPHICS

POPULATION



"DATOS is an essential tool for the Diocese of Phoenix as we seek to serve the Latino population. The information provided helps us to better understand our demographic population as we develop our pastoral plans."

—Maria R. Chavira, Ph.D., Chancellor, The Roman Catholic Diocese of Phoenix

Now 30 Percent Of Arizona's Population, Latinos Will Reach That Mark Nationwide By 2060

The U.S. Latino population could more than double to more than 119 million people, or 29 percent of people in the U.S., between now and 2060.

That's a long time from now, but anyone who wants a sneak peek into our nation's demographic future only need spend time in Arizona. Latinos already make up at least 30 percent of the state's population and are predicted to be a majority of Arizonans by 2035, according to the U.S. Census Bureau.

Some call this demographic shift the "browning of America." Steve Martin, a senior researcher at the nonpartisan Urban Institute, describes it this way: *"Pretty much the entire United States is becoming at least a little less white. Not only are white shares decreasing nationwide, but they are decreasing everywhere—in the Midwest and the Southeast, in big cities and in rural areas, in places where whites are leaving and in places where whites are moving to."*

Driving the nation's seismic demographic shift is the fast-growing Latino community, and the primary drivers behind Latino population growth are the relative age of Latinos and higher fertility rates.

Nationally, the median age of Hispanics is 27, compared to 37 for Non-Hispanics. The median age of Latinos of Mexican origin in the U.S. is 25. Latinos not only skew younger, but they have more children than non-Latinos: 2.2 children per Hispanic household versus 1.9 for whites.

According to the federal Centers for Disease Control and Prevention, 1.68 Hispanic babies were born every minute in the United States in 2013. Put another way, in the time that it took to fly from Phoenix to Las Vegas, 100 Hispanic babies were born in America—assuming, of course, the typically hour-long flight was not delayed.

While immigration remains an important factor in overall Hispanic population growth, native-born Latinos make up about two-thirds of the U.S. Hispanic community and the rate of immigration from Mexico and Latin America has decreased.

In 2012, immigration from Mexico reached "net zero," meaning as many Mexicans immigrated to the United States as left that year. This trend is worth noting because for most of the past 50 years Mexico has accounted for the largest total influx of immigrants to the United States.

The decrease in Mexican immigration is tied to several factors: the poor state of the U.S. economy, stepped up border enforcement, increased deportations, and a steady drop in Mexico's fertility rates since the 1960s.

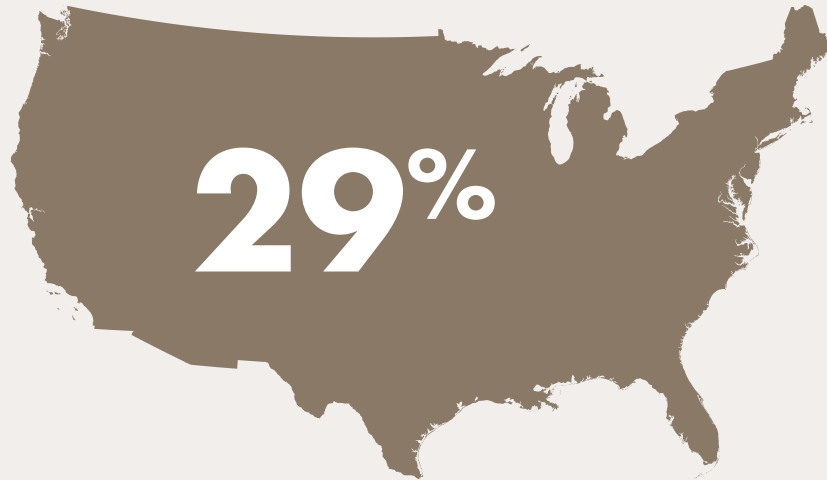
More recently, Mexico has been experiencing robust economic growth, which is convincing more Mexicans to build their futures in their homeland. Today, Mexico is the 13th largest economy in the world, on par with Spain, but it is predicted to be the world's fifth largest economy by 2050.



Population Growth

By 2060, the U.S. Hispanic population is estimated to reach

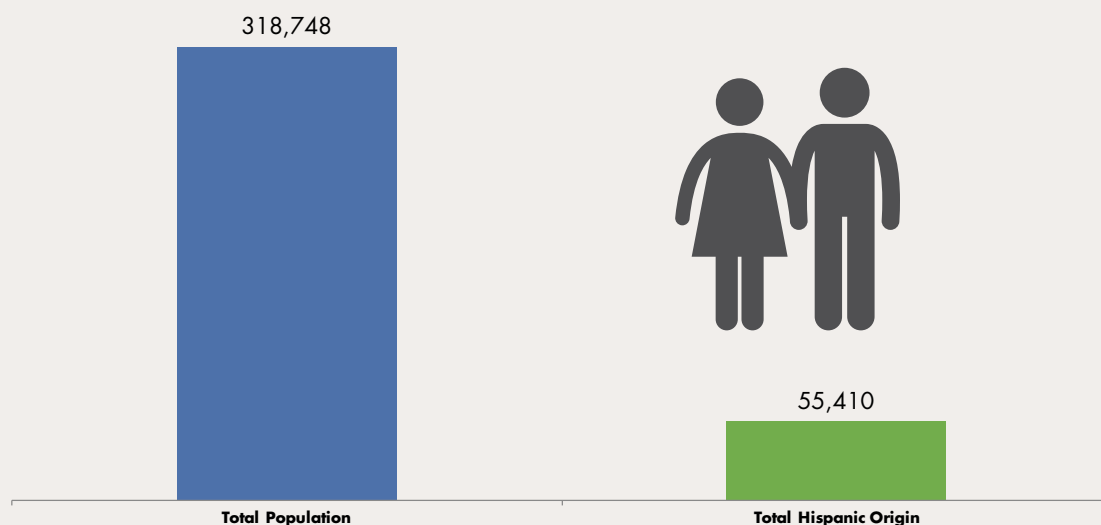
119 million,
approximately 29% of the U.S.[†]



Source: U.S. Census Bureau, Current Population Reports, 2015
www.census.gov/content/dam/Census/library/publications/2015/demo/p25-1143.pdf

Today, **17%** Of The Total
U.S. Population Is Hispanic

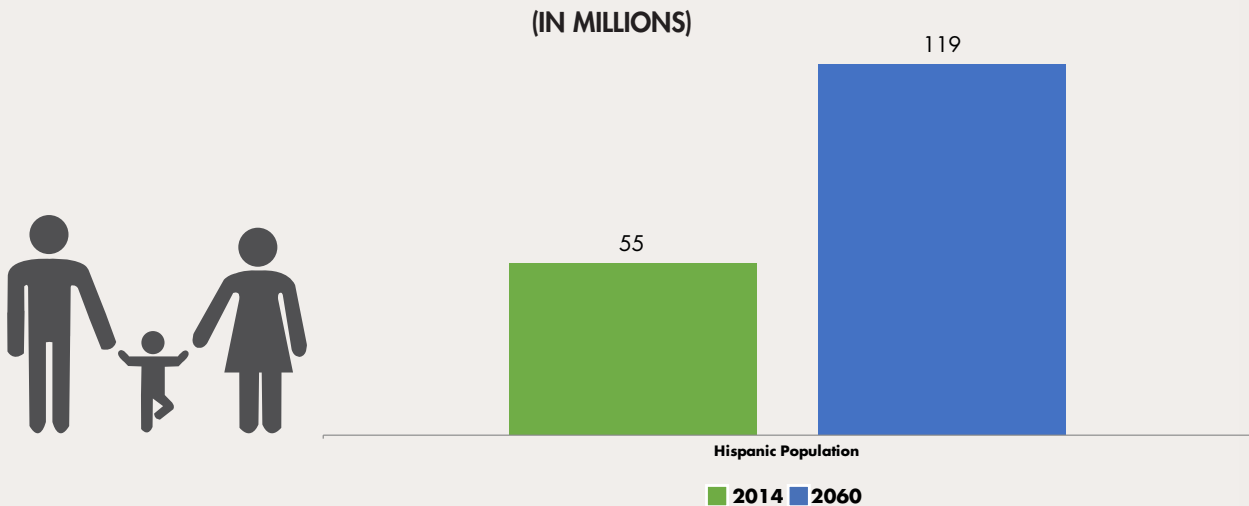
(IN THOUSANDS)



Source: U.S. Census Bureau, Current Population Reports, 2015
www.census.gov/content/dam/Census/library/publications/2015/demo/p25-1143.pdf



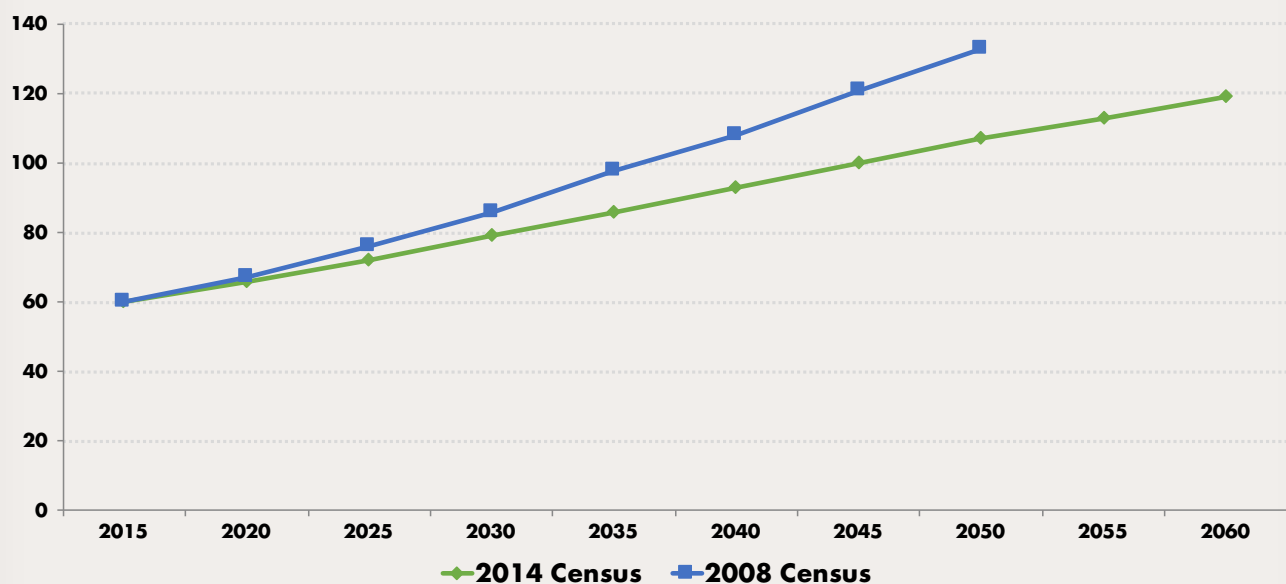
In 2060, The Hispanic Population Is Projected
To Increase By 115%



Source: U.S. Census Bureau, Current Population Reports, 2015
www.census.gov/content/dam/Census/library/publications/2015/demo/p25-1143.pdf

New 2014 Census Hispanic Population
Growth Estimate Is **Lower Than** 2008 projections,
But Still Has **Upward** Trajectory

U.S. HISPANIC POPULATION 2015-2060 PROJECTION

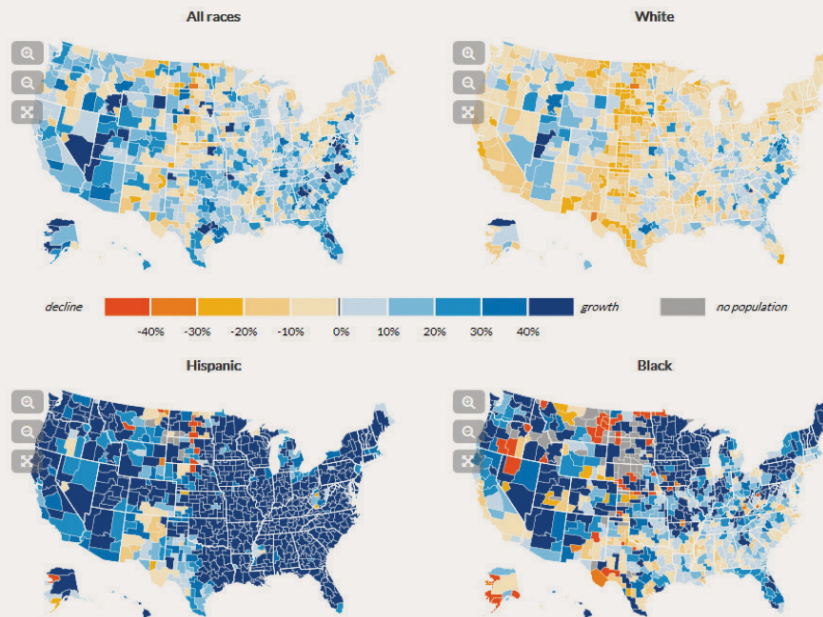


Source: U.S. Census Bureau population projections, 2000, 2008 and 2014.
www.pewresearch.org/fact-tank/2014/12/16/with-fewer-new-arrivals-census-lowers-hispanic-population-projections-2/



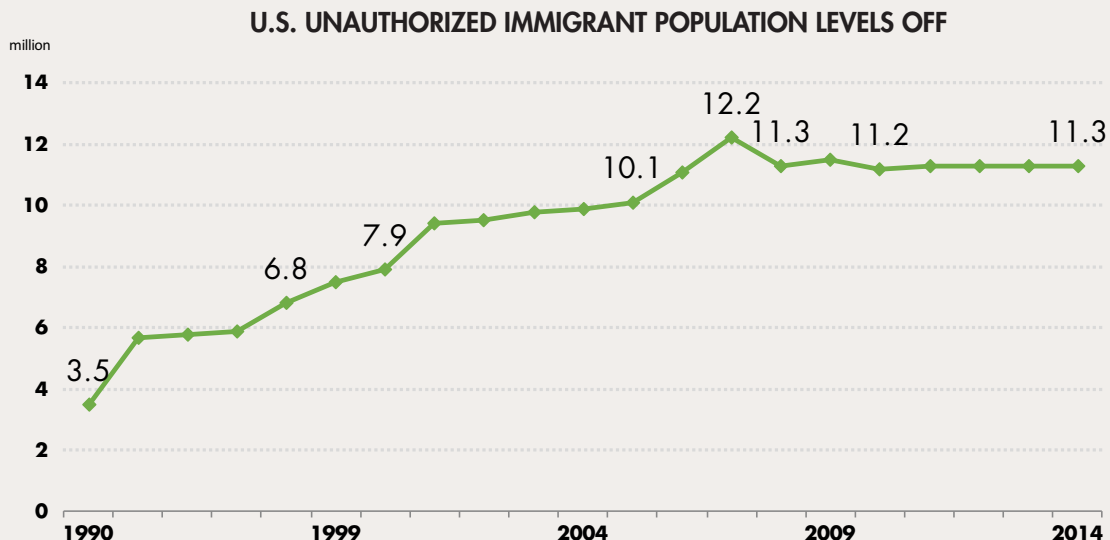
The Hispanic share of the population is expected to increase almost everywhere, especially in the South, by 2030. Hispanic women have had higher birthrates than other ethnic groups, but those rates have come down and might come down more in the future.

PERCENT CHANGE BY RACE, 2010-2030
ASSUMES AVERAGE BIRTH, AVERAGE DEATH AND AVERAGE MIGRATION



Source: datatools.urban.org/features/mapping-americas-futures/#feature

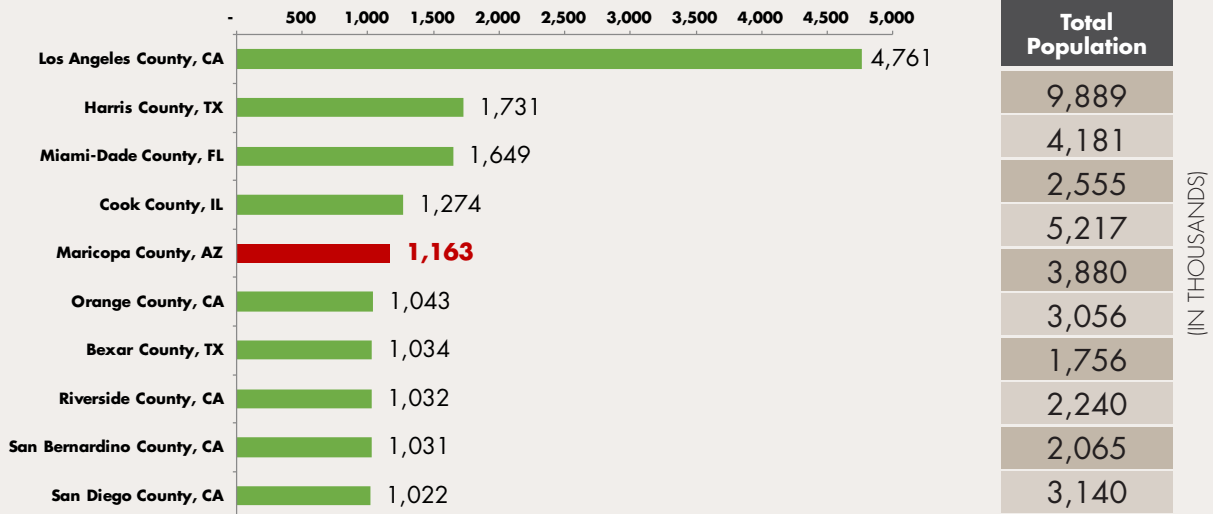
The Estimated Figure Of **11.3 Millions** Unauthorized Immigrants Living In The U.S. Has Levelled Off Over The Past 5 Years



Source: Pew Research Center, FactTank, "Unauthorized immigrant population stable for half a decade," 7/22/15
www.pewresearch.org/facttank/2015/07/22/unauthorized-immigrant-population-stable-for-half-a-decade/?utm_source=Pew+Research+Center&utm_campaign=c49831806d-Hispanic-newsletter+7+10+2015&utm_medium=email&utm_term=0_3e953b9b70-c49831806d-400043297



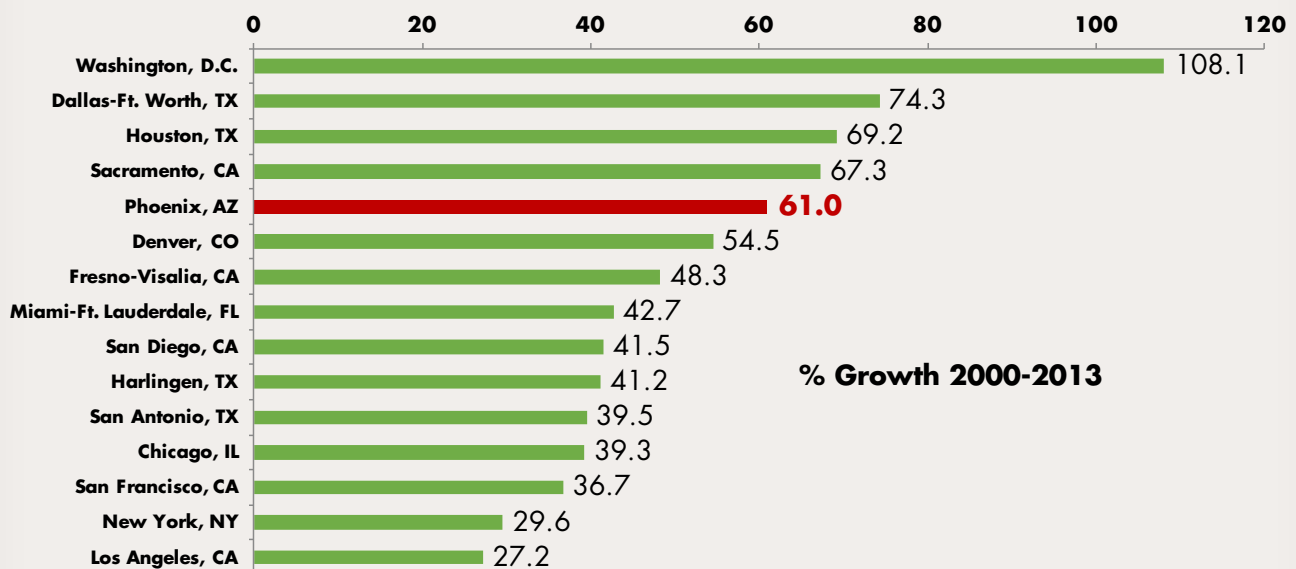
These **10 Counties** Together Account For Almost **One-third (30%)** Of The U.S. Hispanic Population



Source: Pew Research Center tabulations of the 2011 American Community Survey (1% IPUMS)
www.pewhispanic.org/2013/08/29/iii-ranking-latino-populations-in-the-nations-counties/

Phoenix Ranks As The **5th Fastest Growing Hispanic City**

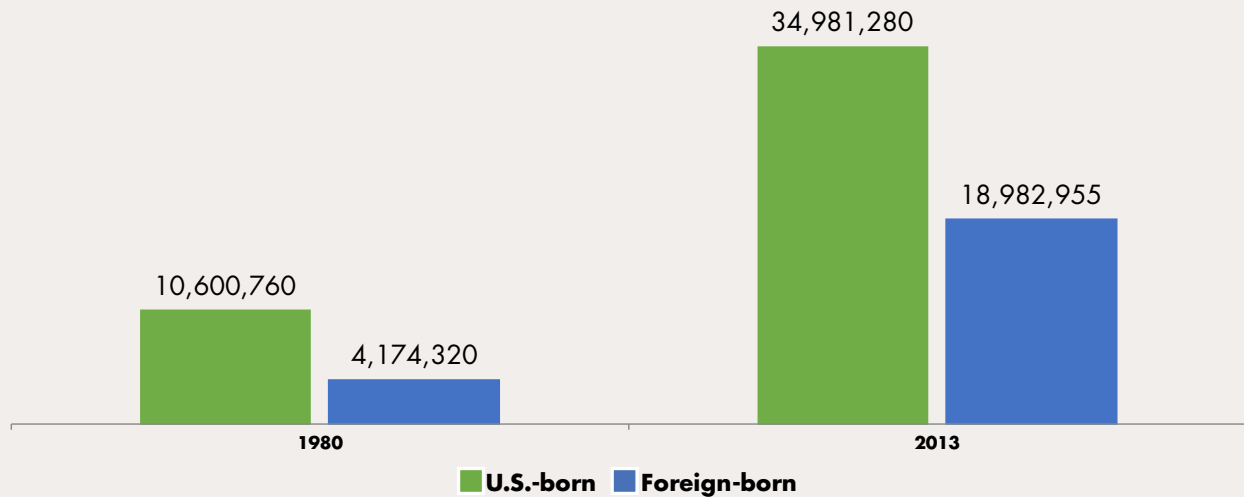
TOP 15 FASTEST GROWING CITIES BY HISPANIC POPULATION
2000-2013



Source: Nielsen *Latino Populations Are Growing Fastest Where We Aren't Looking*, 2013.
www.nielsen.com/us/en/insights/news/2013/latino-populations-are-growing-fastest-where-we-arent-looking.html



In 2013, **U.S.-born Hispanics**
Accounted For **65%** of Hispanics In The U.S.

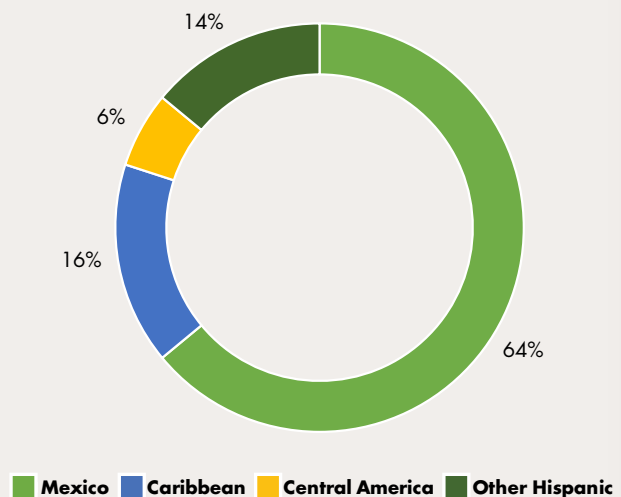


Source: Pew Research Center tabulations of 2013 American Community Survey (1% IPUMS)
www.pewhispanic.org/2015/05/12/statistical-portrait-of-hispanics-in-the-united-states-1980-2013-trends/

In 2013, **Five Hispanic Countries/Regions**
Accounted for **84%** Of
Total U.S. Hispanics

COUNTRY OF ORIGIN	2013	Percent
Mexica	34,582,182	64.1%
Puerto Rico	5,121,921	9.5%
Cuba	1,985,959	3.7%
El Salvador	1,975,099	3.7%
Dominican Republic	1,788,050	3.3%
Guatemala	1,304,378	2.4%
Colombia	1,072,946	2.0%
Honduras	790,729	1.5%
Spain	746,215	1.4%
All Other	4,596,756	8.4%

In 2013, **64%** Of
Total U.S. Hispanics
Were From Mexico



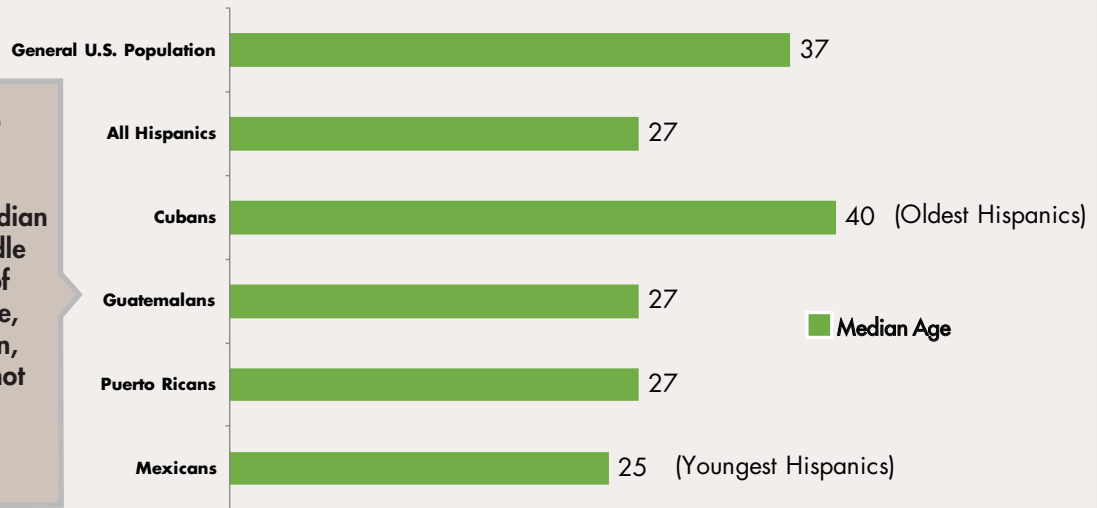
Source: Pew Research Center tabulations of 2013 American Community Survey (1% IPUMS)
www.pewhispanic.org/2015/05/12/statistical-portrait-of-hispanics-in-the-united-states-1980-2013/

Source: Pew Research Center Tabulations of 2010 and 2013 American Community Surveys (1% IPUMS)
www.pewhispanic.org/2015/05/12/statistical-portrait-of-hispanics-in-the-united-states-1980-2013-trends/



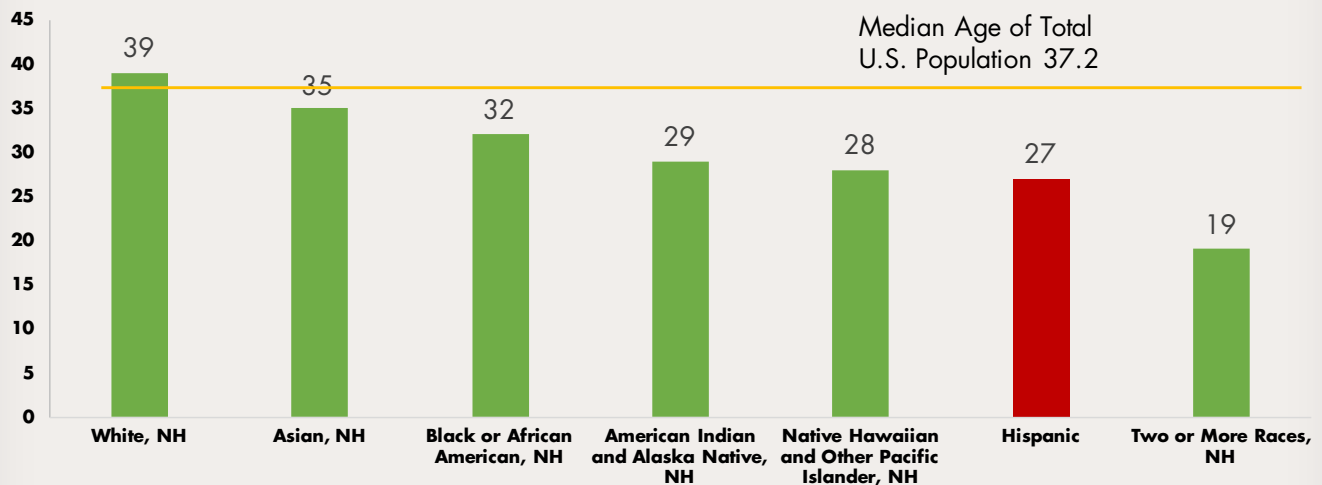
Hispanics Are **10 Years Younger** Than The General Population With A **Median Age Of 27**

Research Tip
Median vs.
Average (or
Mean): The median
is the true middle
value in a set of
data. Therefore,
unlike the mean,
the median is not
skewed by
outliers in the
data.



Source: Pew Hispanic Center tabulations of the 2010 ACS (1% IPUMS) and the 2000 Census (5% IPUMS)
www.pewresearch.org/daily-number/median-age-for-hispanics-is-lower-than-median-age-for-total-u-s-population/

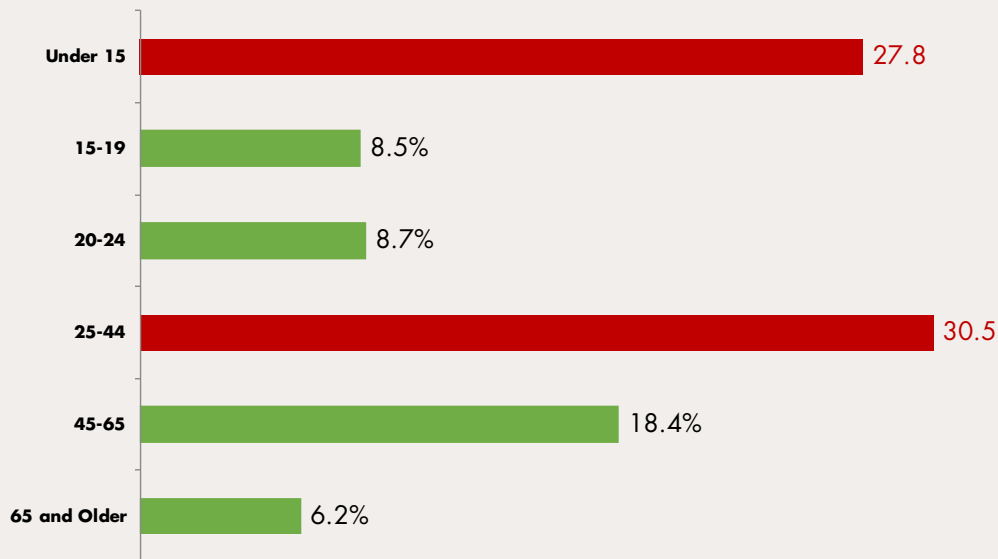
Hispanics Are The **Youngest Minority Group** By **Median Age And 12 Years Younger** Than Non-Hispanic Whites



Source: U.S. Census Bureau, 2013 Population Estimates & Pew Research Center, July 2012
factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=bkmk

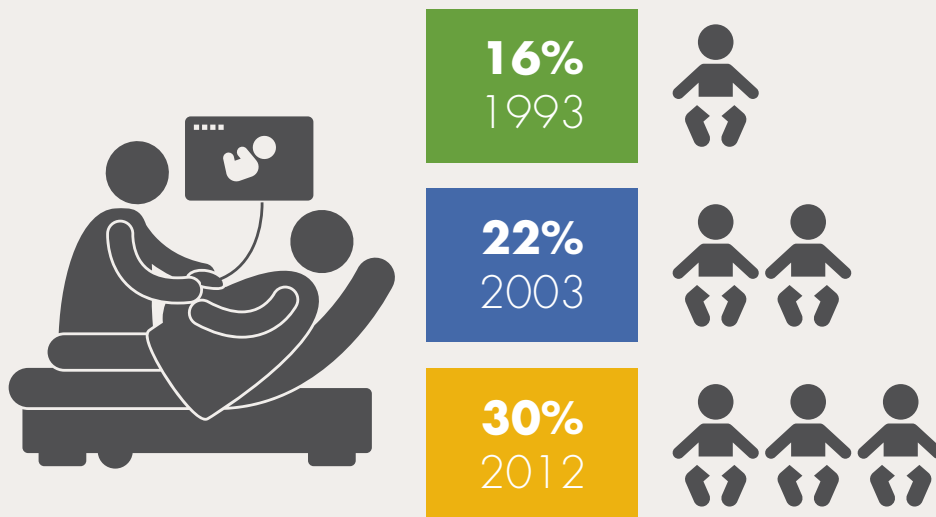


Nearly A **Third** Of Hispanics
Are **Under Age 15** And Another **30%**
Are In The **Major Life Stage Change Range**



Source: Pew Research Center Tabulations of 2013 American Community Survey (1% IPUMS)
www.pewhispanic.org/2015/05/12/statistical-portrait-of-hispanics-in-the-united-states-1980-2013/

From 1993 To 2012, The Percentage Of **Babies Born**
To Hispanic Mothers **Nearly Doubled**



Source: U.S. Bureau of Census, 2013



In The Hour It Takes To Fly
From Phoenix To Las Vegas,
100 Hispanic Babies Are Born In The U.S.

THE U.S. HISPANIC POPULATION IS GROWING AT A RATE OF...



901,033

Per Year



75,086

Per Month



2,422

Per Day



100

Per Hour

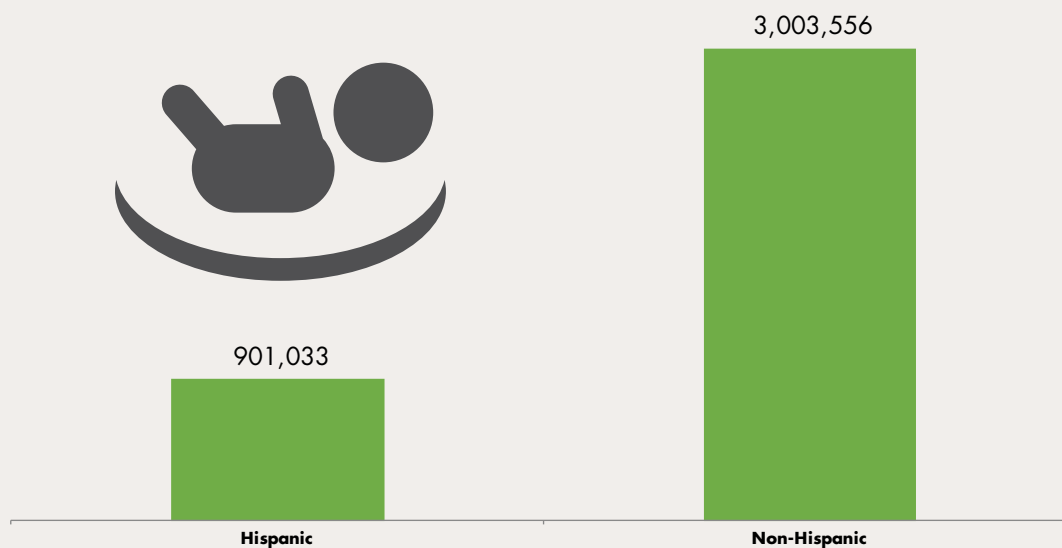


1.68

Per Minute

Source: National Vital Statistics Reports, Vol. 64, No. 1, January 15, 2015
[www.cdc.gov/nchs/data/nvsr/nvsr64_01.pdf](http://www.cdc.gov/nchs/data/nvsr/nvsr64/nvsr64_01.pdf)

In 2013, **One In 4 Births**
Were Hispanic In The United States



Source: National Vital Statistics Reports, Vol. 64, No. 1, January 15, 2015
[www.cdc.gov/nchs/data/nvsr/nvsr64_01.pdf](http://www.cdc.gov/nchs/data/nvsr/nvsr64/nvsr64_01.pdf)

SECTION II

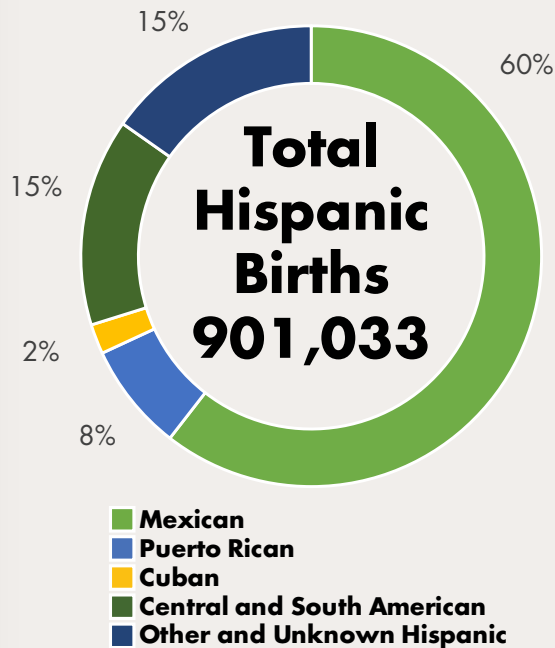
CONSUMER
DEMOGRAPHICS

CHAPTER 4



POPULATION

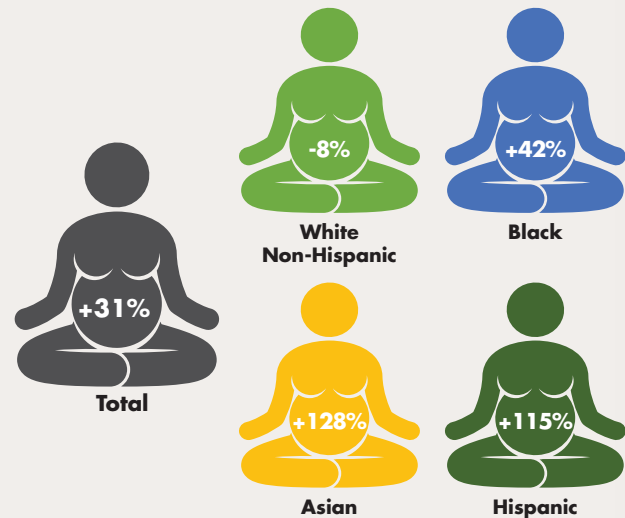
Mexican Births Alone Accounted For **60%** Of All Hispanic Births In 2013



Source: National Vital Statistics Reports, Vol. 64, No. 1, January 15, 2015
www.cdc.gov/nchs/data/nvsr/nvsr64/nvsr64_01.pdf

Hispanics Are Projected To
Increase In Population By
Over **63 Million** By 2060
Projected U.S. Population Growth
2010-2060 (Percentage Change)

2060 PROJECTIONS

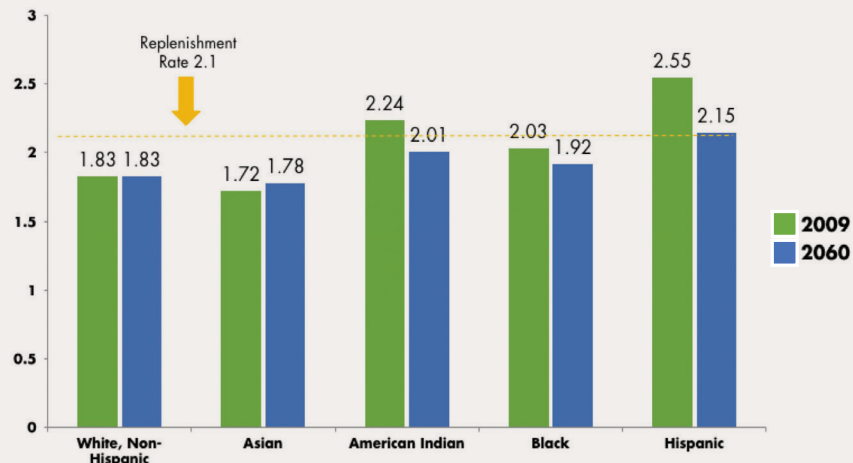


Source: U.S. Census Bureau Population Projections, March 2015
www.census.gov/content/dam/Census/library/publications/2015/demo/p25-1143.pdf
NOTE: Projections are lower than reported in 2010 through 2050

Hispanics Continue to Represent The **Highest Fertility Rates**

Research Tip
Birth rate is how many live births there were in an area per 1000 of the population in a year. Fertility rate is the average number of children born to each woman over the course of her life.

U.S. TOTAL FERTILITY PROJECTIONS

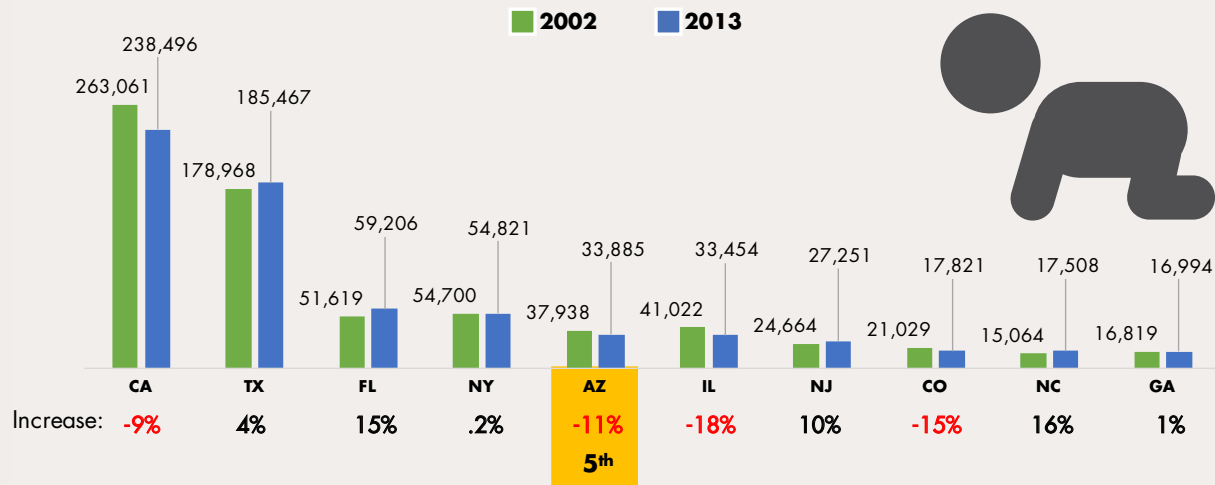


Source: U.S. Population Projections: 2012 to 2060, Population Division, U.S. Census, 2013
www.gwu.edu/~forcpgm/Ortman.pdf



Arizona Was Ranked **5th** In **Top States For Hispanic Births** In 2013, Up From **6th** In 2012

TOTAL HISPANIC BIRTHS FOR TOP 10 STATES (2002 – 2013)



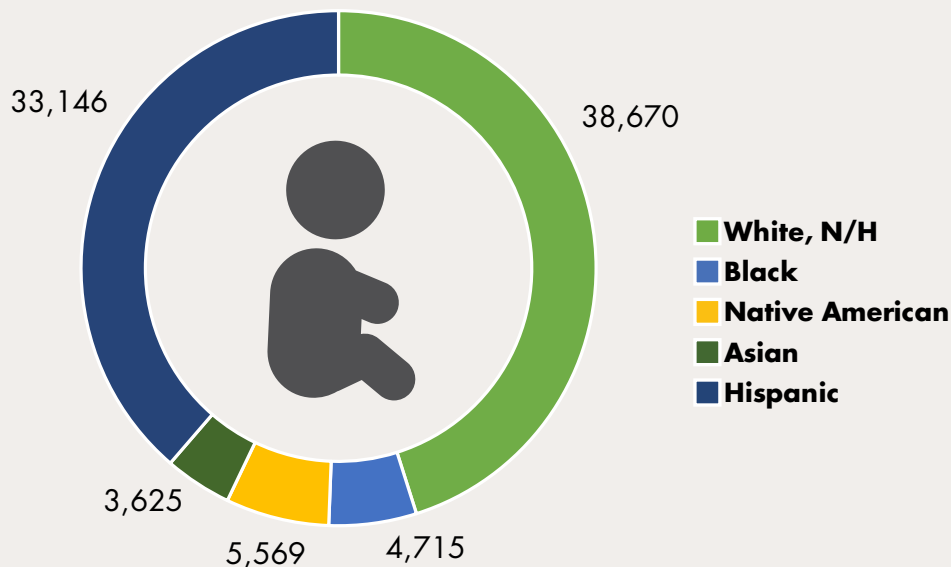
Source: National Vital Statistics Reports, Vol. 64, No. 1, 2015 & National Vital Statistics Reports, Vol. 52, No. 10, 2003.

www.cdc.gov/nchs/data/nvsr/nvsr64/nvsr64_01.pdf

www.cdc.gov/nchs/data/nvsr/nvsr52/nvsr52_10.pdf

There Were **85,725 Births** In Arizona In 2012, **47,055** Of Which Were **Minority Births**

HISPANIC BIRTHS ACCOUNTED FOR 70% OF MINORITY BIRTHS AND
APPROXIMATELY 39% OF TOTAL BIRTHS IN ARIZONA.

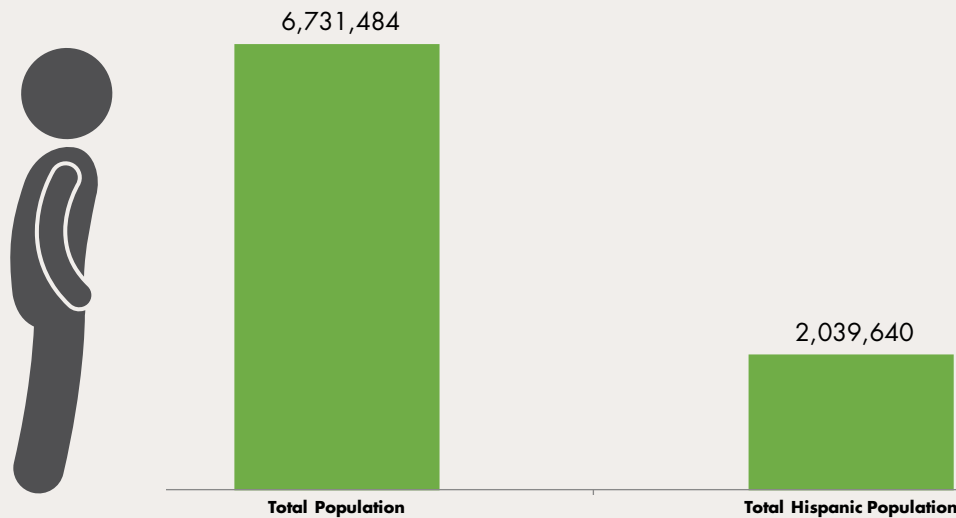


Source: Arizona Department of Health Services, 2012

www.azdhs.gov/plan/report/ahs/ahs2012/pdf/1b22.pdf

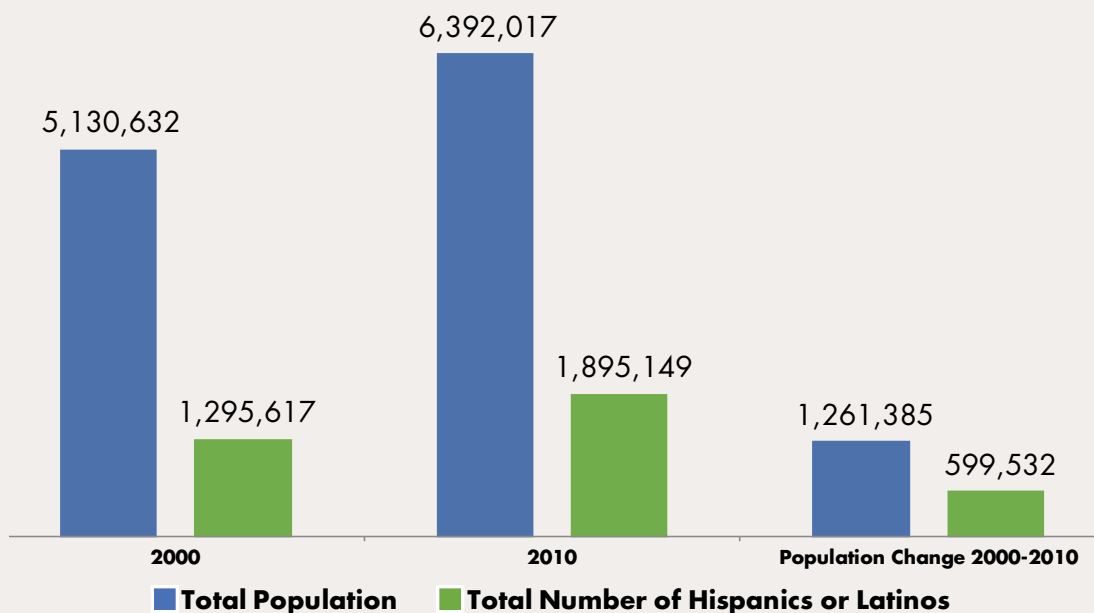


In 2014, **One-third** of Arizona's
Population Was Hispanic



Source: U.S. Census Bureau, QuickFacts 2015.
quickfacts.census.gov/qfd/states/04000.html

The Hispanic Population In **Arizona Grew**
By **46%** In One Decade Compared
To A **25%** Increase In The **Total Population**

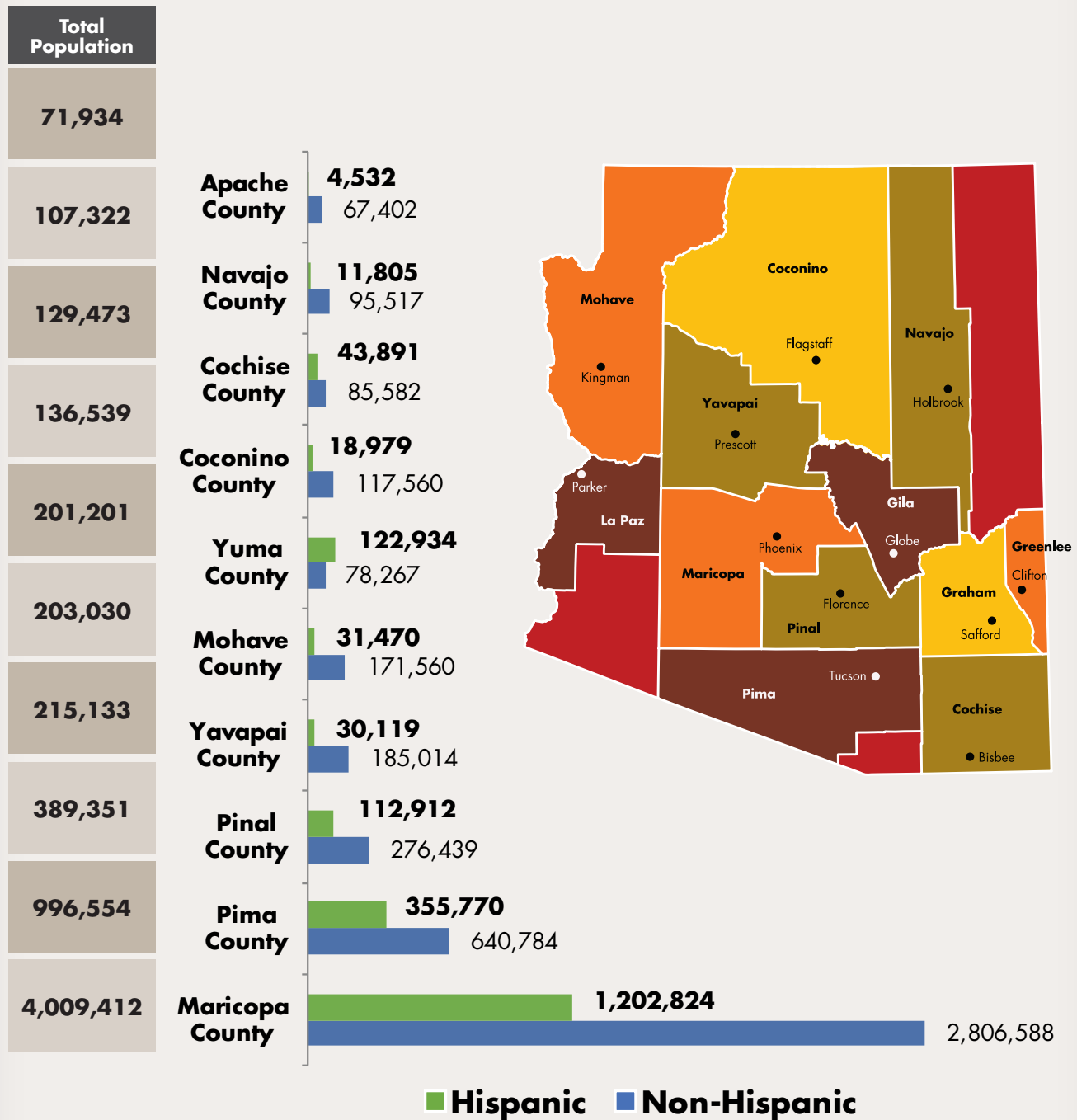


Source: U.S. Census Bureau, Census 2000 Summary File 1 and 2010 Census Summary File 1



Hispanics Account For **30%** Of The Total Population In **Maricopa County**

ARIZONA HISPANIC POPULATION IN TOP 10 COUNTIES 2013



Source: U.S. Bureau of Census, QuickFacts 2013



Notes

Cultivating Spaces of Opportunity

Nic de la Fuente

People's health is tied to the wellness of their community.

The overall wellness of a community, meanwhile, depends on a variety of factors: environmental protections, public safety, affordable housing, parks and recreational activities, and education and job opportunities.

Nic de la Fuente's vision of community wellness takes into account all of the above and more, but he knows growing that idea means someone has to plant the first seed.



That's the inspiration behind Cultivate South Phoenix, or CUSP, a coalition of grassroots nonprofits in South Phoenix working to develop a new 18-acre community garden. The project, called Spaces of Opportunity, is located at 15th Avenue and Vineyard. Initial funding for the project was provided through a \$125,000 grant from St. Luke's Health Initiative award to CUSP.

De la Fuente serves as the initiative's "convener," but he is quick to point out that most of the day-to-day work on the project is being done by people who live and work in the neighborhood, including CUSP's steering committee members and hundreds of other volunteers. All told, de la Fuente said about 20 community-based organizations have signed on to support Cultivate South Phoenix, groups like the Tiger Mountain Foundation (which already operates several community gardens in South Phoenix), Unlimited Potential, the Cactus Pine Girls Scouts Chapter and the Orchard Community Learning Center.

De la Fuente works for the world-renowned Desert Botanical Garden in Phoenix, where he managed an on-site community garden for volunteers and staff. He now directs the Spaces of Opportunity initiative full time. How did the Botanical Gardens get involved in the development of a community garden in South Phoenix?

"I brought a proposal to them and they climbed on board," said de la Fuente, who said his bosses at DBG are fully supportive of CUSP's vision for the South Phoenix project.

De la Fuente's own interest in community gardens, food quality

and health goes back many years. He worked six years for the Arizona Workers Rights Center in Phoenix, but de la Fuente said prior to that, "I've always been around a lot of big gardens. I was in the Peace Corp in Guatemala and I worked in California in the grape fields making sure farm workers were getting paid for their work."

De la Fuente explains that South Phoenix residents do not have easy access to quality fresh fruit and vegetables, public health facilities and other basic "quality of life" amenities readily available in most other communities. He says the lack

of these resources can have a negative influence on health and overall wellness in the area.

"South Phoenix doesn't have a farmers market, but that may be because there's a misconception that low income families don't buy vegetables...People are now working with gardens all over the place and developing farmers markets."

The 18-acre lot being used to develop the community garden in South Phoenix has been vacant for 20 years. De la Fuente hopes to negotiate a long-term lease on the property and raise several hundred thousand more dollars in grants to expand the project.

"The property we're developing was basically a dump before," he said. "We surveyed people in the neighborhood and they're thrilled to see what we're doing. We haven't received one negative response from the homes we've canvassed."

Community food gardens as a means for build local pride is a nationwide movement. De la Fuente said the DBG and CUSP's hundreds of volunteers are bringing that movement to South Phoenix.



Photos Courtesy of Nic de la Fuente



Arizona

MARKET SNAPSHOT

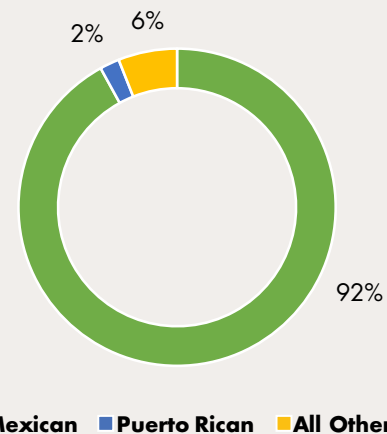
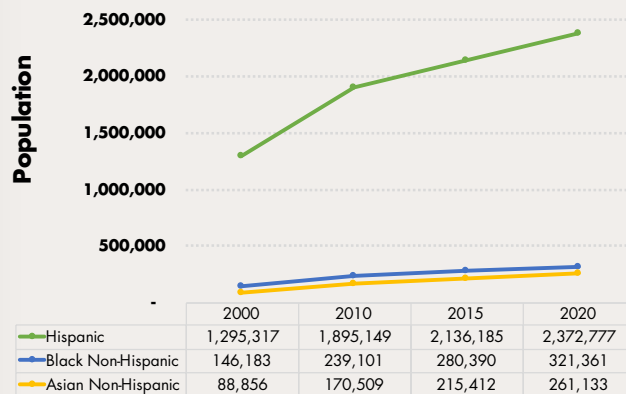
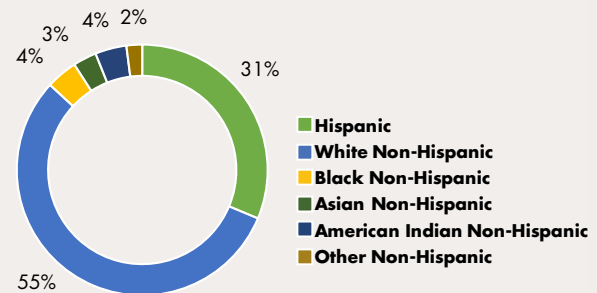
The Arizona Hispanic population continues to represent a substantial portion of the local population, accounting for close to one-third of Arizona residents. The 2015 statewide Hispanic population exceeds 2 million individuals.

Arizona Hispanics are primarily of Mexican ancestry. A total of 52% of all Hispanics may be considered bicultural or less acculturated.

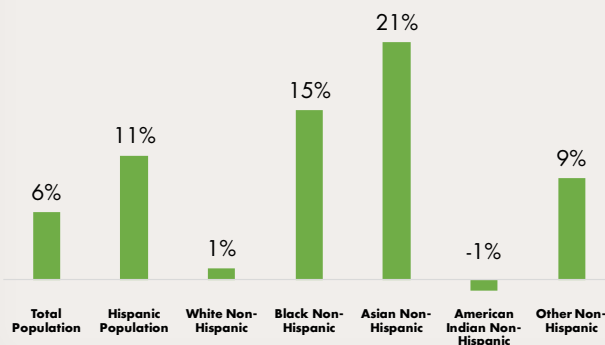
Aggregate household expenditures among Hispanic households (all consumer products and categories) exceeds \$25 billion annually, 19% of total.

POPULATION	% OF POPULATION	2015 POPULATION
Total	100%	6,796,459
Hispanic	31%	2,136,185
White Non-Hispanic	55%	3,757,632
Black Non-Hispanic	4%	280,390
Asian Non-Hispanic	3%	215,412
American Indian Non-Hispanic	4%	259,226
Other Non-Hispanic	2%	147,614

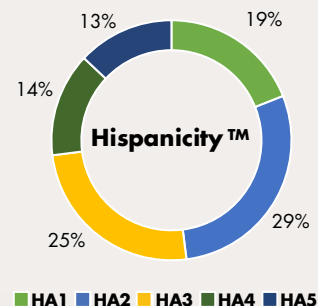
HISPANICS REPRESENT THE SECOND-LARGEST POPULATION GROUP IN THE STATE AT CLOSE TO ONE-THIRD OF TOTAL.



PROJECTED PERCENT CHANGE 2015 V. 2020



1 out of 4 Hispanics in Arizona are Bicultural, ranked as HA3 of the Hispanicity™ segments. However, 27% of the Hispanic population fall into the HA4 and HA5 Hispanicity™ segments.





Arizona

HISPANICITY

HA1: Americanizado

- English dominant (nearly no Spanish)
- Born in U.S.; 3rd+ generation
- Few Hispanic cultural practices

HA2: Nueva Latina

- English preferred (some Spanish)
- Born in U.S.; 2nd generation
- Some Hispanic cultural practices
- often “retro-acculturate”

HA3: Bicultural

- Bilingual (equal or nearly)
- Immigrant as child or young adult
- Many Hispanic cultural practices

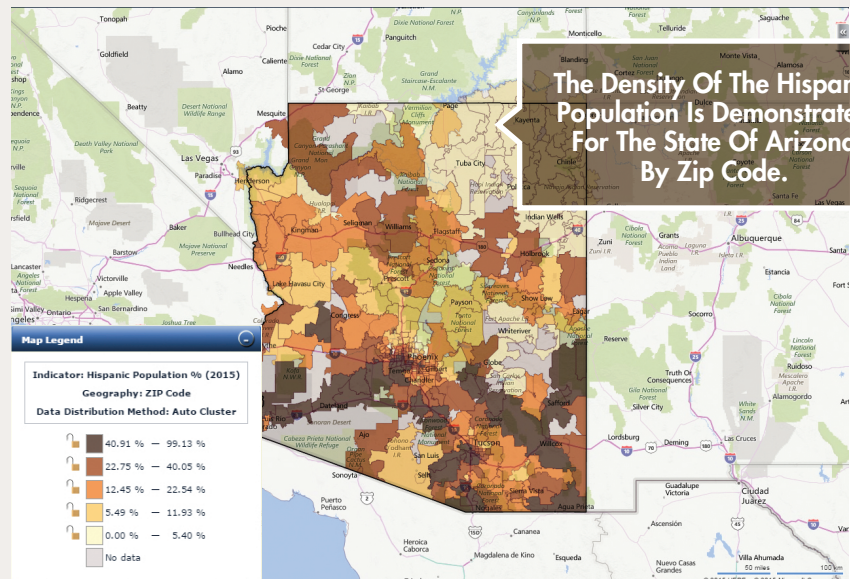
HA4: Hispano

- Spanish preferred (some English)
- Immigrant as adult, in U.S. 10+ years
- Pre-dominant Hispanic cultural practices

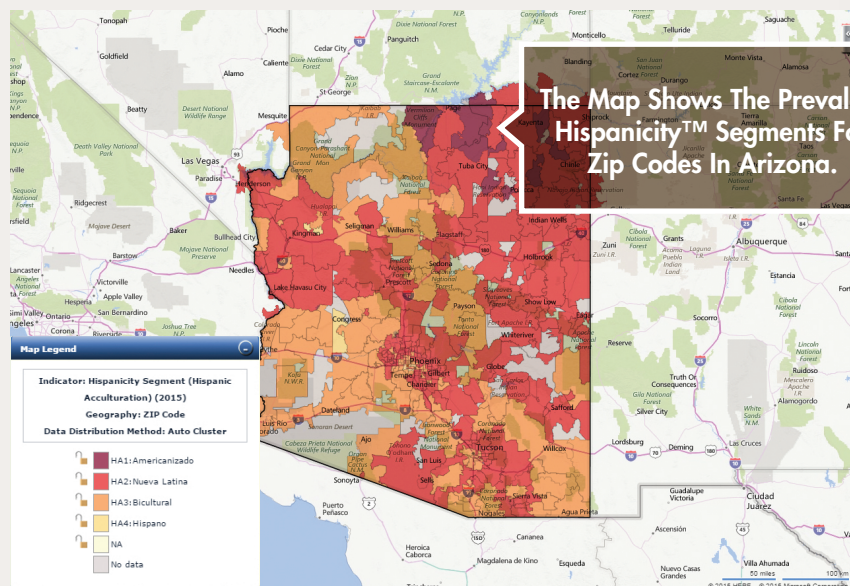
HA5: Latinoamericana

- Spanish dominant (nearly no English)
- Recent immigrant as adult (less than 10 years ago)
- Primarily Hispanic cultural practices
- Identify with home country more so than U.S.

HISPANIC POPULATION % BY ZIP CODE



HA4 AND HA5 HISPANICITY™ SEGMENTS BY ZIP CODE



P. 888.211.9353 | E. geoscape@geoscape.com | URL. www.geoscape.com

Source: Geoscape American Marketplace DataStream™ and/or Consumer Spending Dynamix™ Series 2015



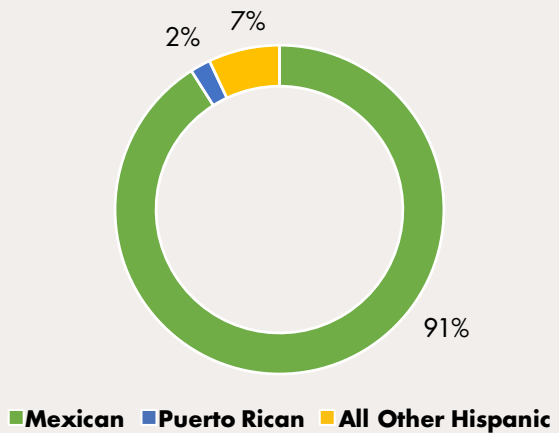
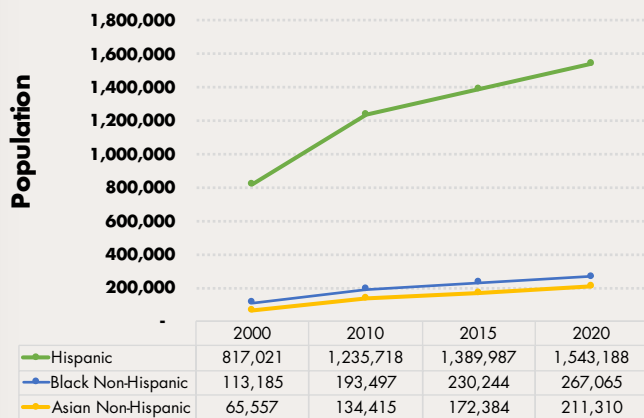
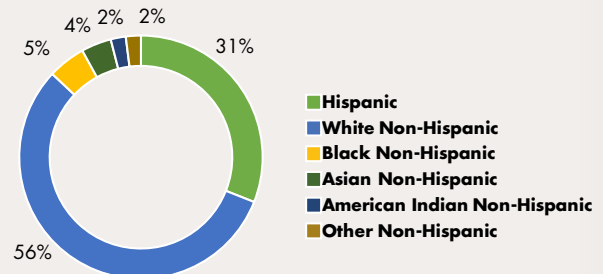
Phoenix, AZ

MARKET SNAPSHOT

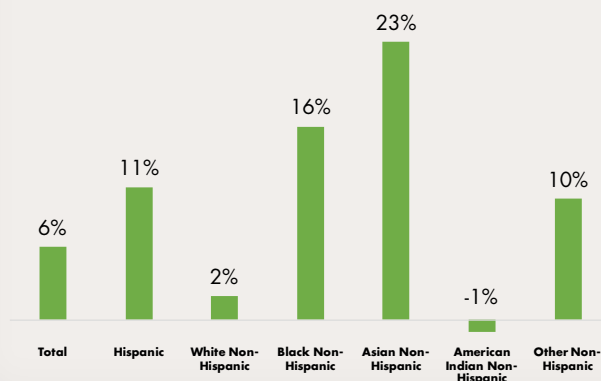
The population in the Phoenix metropolitan area has a strong Hispanic influence accounting for one out of every three residents for a total of close to 1.4 million individuals. Roughly 29% of the 1.4 million Hispanics in Phoenix area fall into the HA4 and HA5 Hispanicity™ segments accounting for more than 400,000 individuals. Approximately \$17.2 billion is spent by Hispanics on household expenditures (all consumer products and categories), accounting for a total of 18% of total household expenditures.

POPULATION	% OF POPULATION	2015 POPULATION
Total	100%	4,471,779
Hispanic	31%	1,389,987
White Non-Hispanic	56%	2,500,712
Black Non-Hispanic	5%	230,244
Asian Non-Hispanic	4%	172,384
American Indian Non-Hispanic	2%	76,254
Other Non-Hispanic	2%	102,198

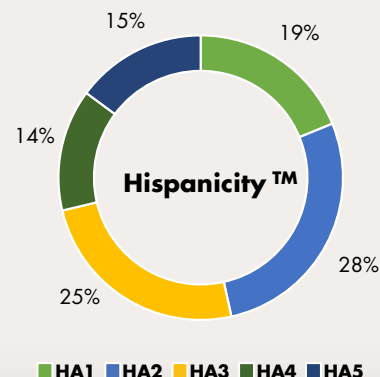
HISPANICS REPRESENT THE SECOND-LARGEST POPULATION GROUP IN THE PHOENIX METROPOLITAN AREA AT CLOSE TO ONE-THIRD OF TOTAL.



PROJECTED PERCENT CHANGE 2015 V. 2020



Over half of Hispanics in the Phoenix metropolitan area fall into the H3 to HA5 Hispanicity™ Segments





Phoenix, AZ

HISPANICITY**HA1: Americanizado**

- English dominant (nearly no Spanish)
- Born in U.S.; 3rd+ generation
- Few Hispanic cultural practices

HA2: Nueva Latina

- English preferred (some Spanish)
- Born in U.S.; 2nd generation
- Some Hispanic cultural practices
- often “retro-acculturate”

HA3: Bicultural

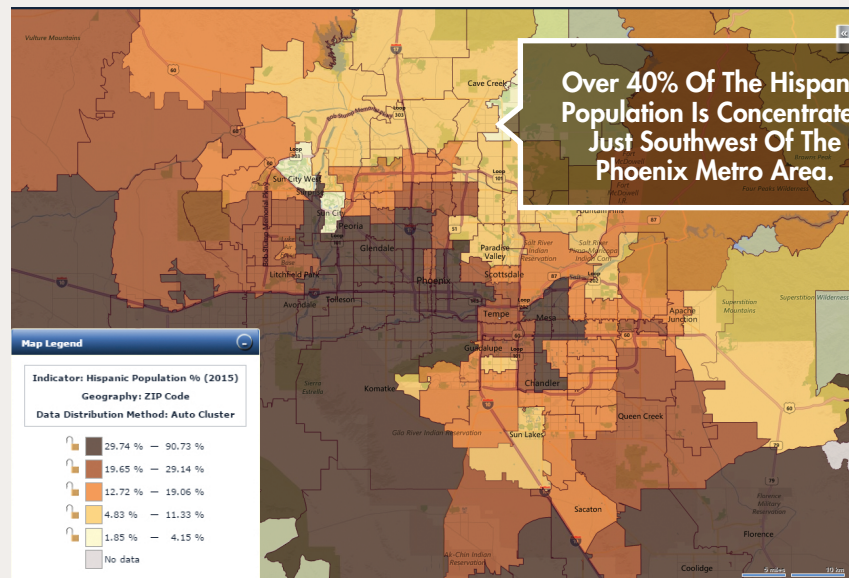
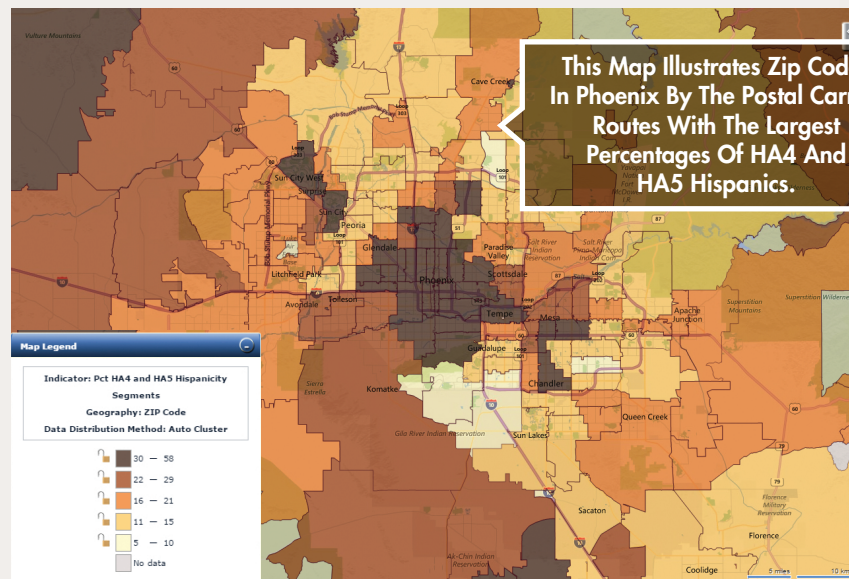
- Bilingual (equal or nearly)
- Immigrant as child or young adult
- Many Hispanic cultural practices

HA4: Hispano

- Spanish preferred (some English)
- Immigrant as adult, in U.S. 10+ years
- Pre-dominant Hispanic cultural practices

HA5: Latinoamericana

- Spanish dominant (nearly no English)
- Recent immigrant as adult (less than 10 years ago)
- Primarily Hispanic cultural practices
- Identify with home country more so than U.S.

**HISPANIC POPULATION %
ZIP CODES BY CARRIER ROUTE****HA4 AND HA5 HISPANICITY™ SEGMENTS
ZIP CODES BY CARRIER ROUTE**



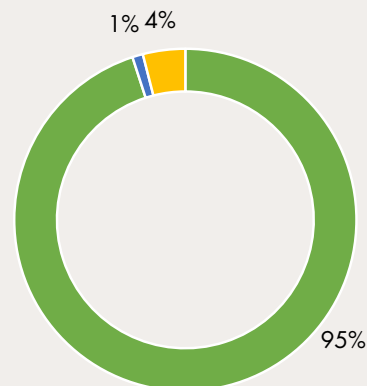
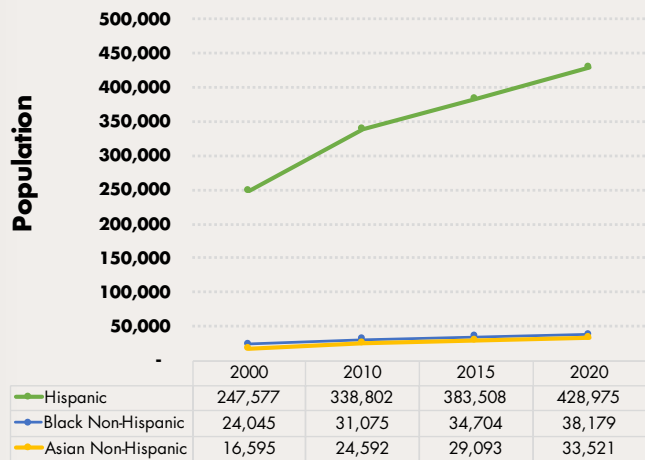
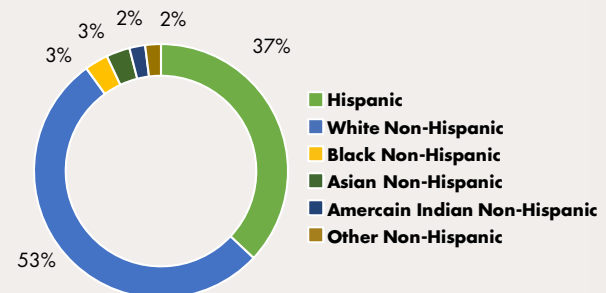
Tucson, AZ

MARKET SNAPSHOT

The Hispanic population in Tucson continues to represent a substantial portion of the local population, accounting for more than 37% of Tucson residents. More than 300,000 Hispanics call Tucson home and it is a figure that has been increasing and expected to continue to grow in the next 5 years. The Tucson Hispanic population is primarily Bi-cultural accounting for 1 out of 3 individuals. However, over 20% of the Hispanic population in the Tucson metropolitan area falls into the HA4 and HA5 Hispanicity™ segments. Aggregate household expenditures (all consumer products and categories) among Tucson households exceeds \$4.7 billion annually, with Hispanics accounting for more than 1 out of every 5 dollars spent.

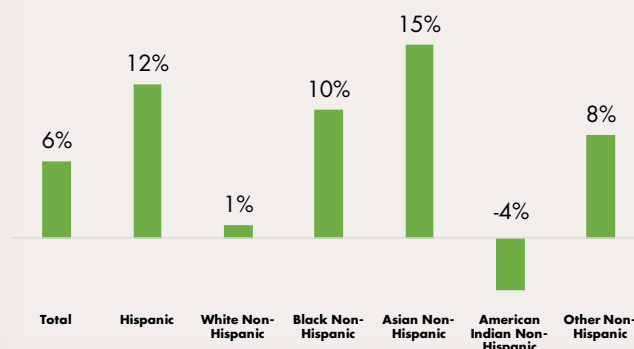
POPULATION	% OF POPULATION	2015 POPULATION
Total	100%	1,039,345
Hispanic	37%	383,508
White Non-Hispanic	53%	546,738
Black Non-Hispanic	3%	34,704
Asian Non-Hispanic	3%	29,093
American Indian Non-Hispanic	2%	23,036
Other Non-Hispanic	2%	22,266

HISPANICS REPRESENT THE SECOND-LARGEST POPULATION GROUP IN THE TUCSON METROPOLITAN.

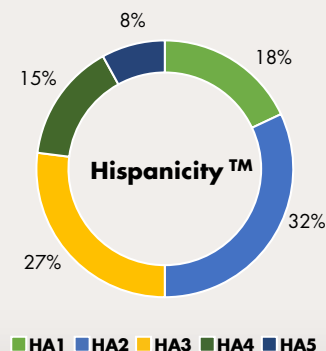


■ Mexican ■ Puerto Rican ■ All other Hispanic

PROJECTED PERCENT CHANGE 2015 V. 2020



1 out of 3 of Hispanics in the Tucson metropolitan area fall into the **HA3** Hispanicity™ Segment. However, 1 out of 5 Hispanics fall into the **HA4** to **HA5** unacculturated segments.



■ HA1 ■ HA2 ■ HA3 ■ HA4 ■ HA5



Tucson, AZ

HISPANICITY**HA1: Americanizado**

- English dominant (nearly no Spanish)
- Born in U.S.; 3rd+ generation
- Few Hispanic cultural practices

HA2: Nueva Latina

- English preferred (some Spanish)
- Born in U.S.; 2nd generation
- Some Hispanic cultural practices
- often “retro-acculturate”

HA3: Bicultural

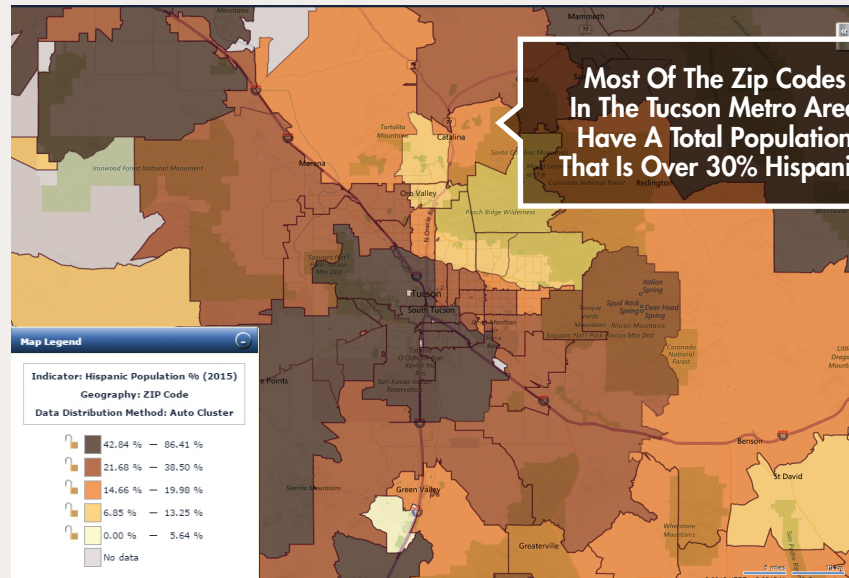
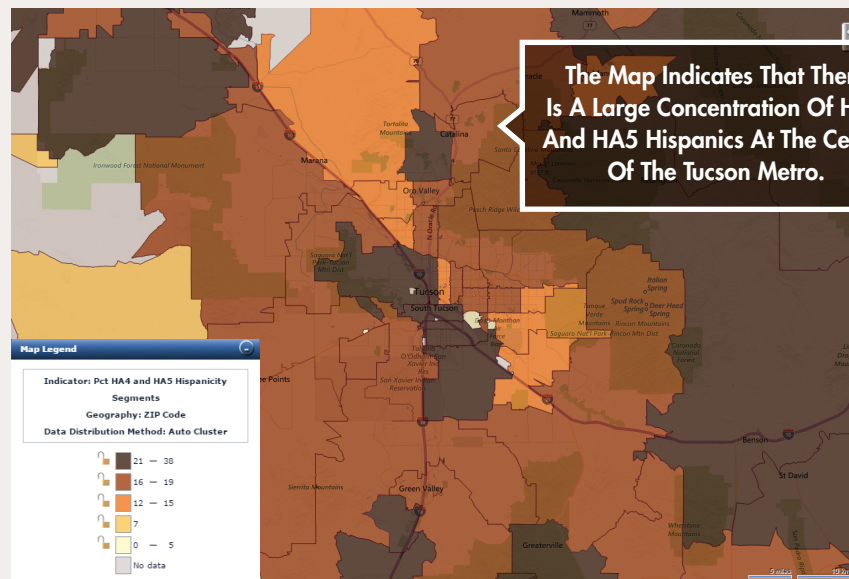
- Bilingual (equal or nearly)
- Immigrant as child or young adult
- Many Hispanic cultural practices

HA4: Hispano

- Spanish preferred (some English)
- Immigrant as adult, in U.S. 10+ years
- Pre-dominant Hispanic cultural practices

HA5: Latinoamericana

- Spanish dominant (nearly no English)
- Recent immigrant as adult (less than 10 years ago)
- Primarily Hispanic cultural practices
- Identify with home country more so than U.S.

**HISPANIC POPULATION %
ZIP CODES BY CARRIER ROUTES****HA4 AND HA5 HISPANICITY™ SEGMENTS
ZIP CODES BY CARRIER ROUTE**



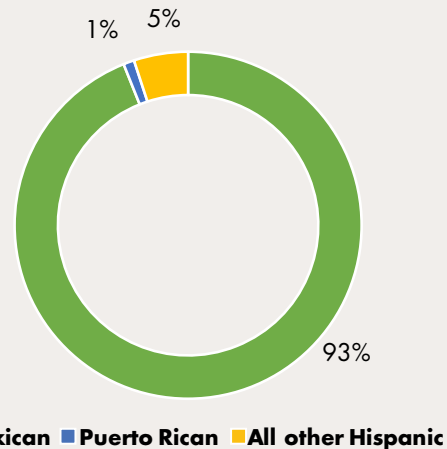
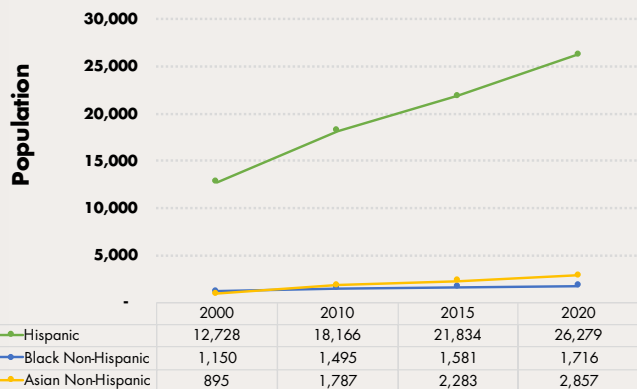
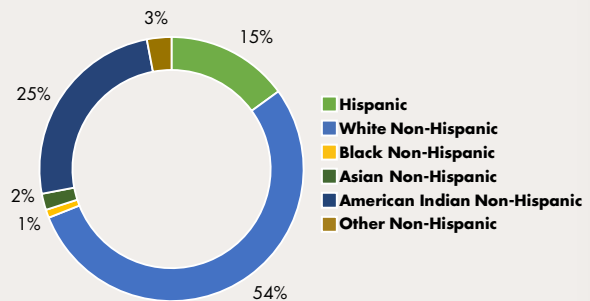
Flagstaff, AZ

MARKET SNAPSHOT

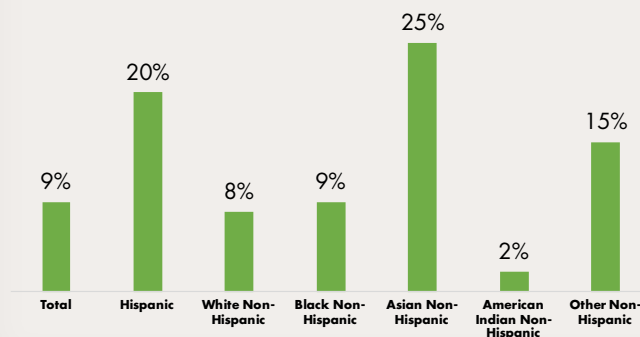
The population in Flagstaff has a modest Hispanic influence, accounting for 15% of the metro's 140,000 residents and is second fast growing population behind Asians. Over half of the Hispanic population in the Flagstaff metropolitan area are acculturated falling into the HA1 and HA2 Hispanicity™ segments accounting for just over 10,000 residents. Hispanics in Flagstaff spend more than \$240 million on household expenditures accounting for roughly 10% of total household spending.

POPULATION	% OF POPULATION	2015 POPULATION
Total	100%	143,710
Hispanic	15%	21,834
White Non-Hispanic	54%	78,296
Black Non-Hispanic	1%	1,581
Asian Non-Hispanic	2%	2,283
American Indian Non-Hispanic	25%	36,094
Other Non-Hispanic	3%	3,622

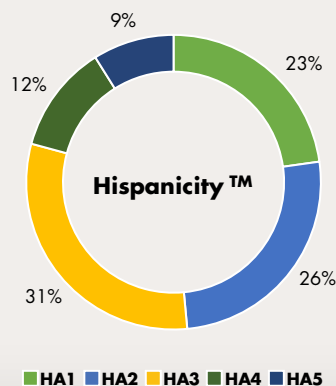
HISPANICS REPRESENT THE THIRD-LARGEST POPULATION GROUP IN THE FLAGSTAFF METROPOLITAN AREA.



PROJECTED PERCENT CHANGE 2015 V. 2020



Close to **50%** of Hispanics in the Flagstaff metropolitan area fall into the **HA1** and **HA2** Hispanicity™ Segment.





Flagstaff, AZ

HISPANICITY**HA1: Americanizado**

- English dominant (nearly no Spanish)
- Born in U.S.; 3rd+ generation
- Few Hispanic cultural practices

HA2: Nueva Latina

- English preferred (some Spanish)
- Born in U.S.; 2nd generation
- Some Hispanic cultural practices
- often “retro-acculturate”

HA3: Bicultural

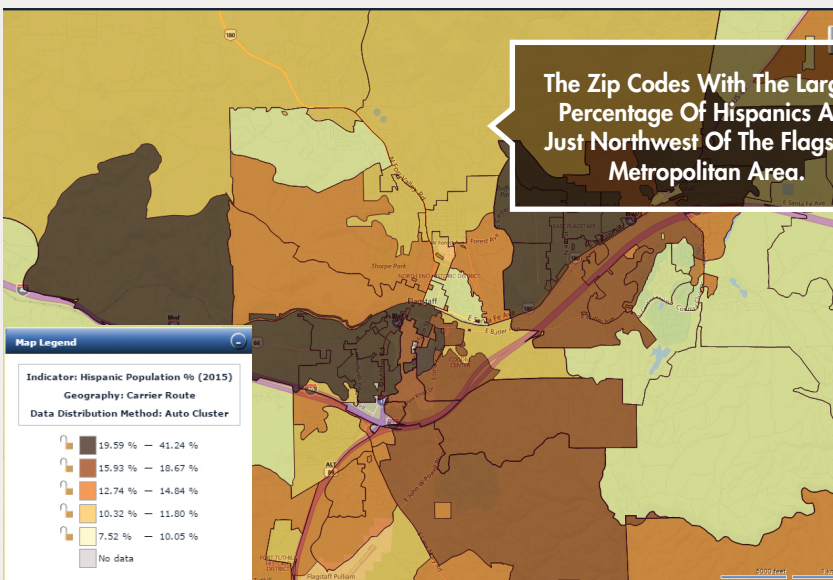
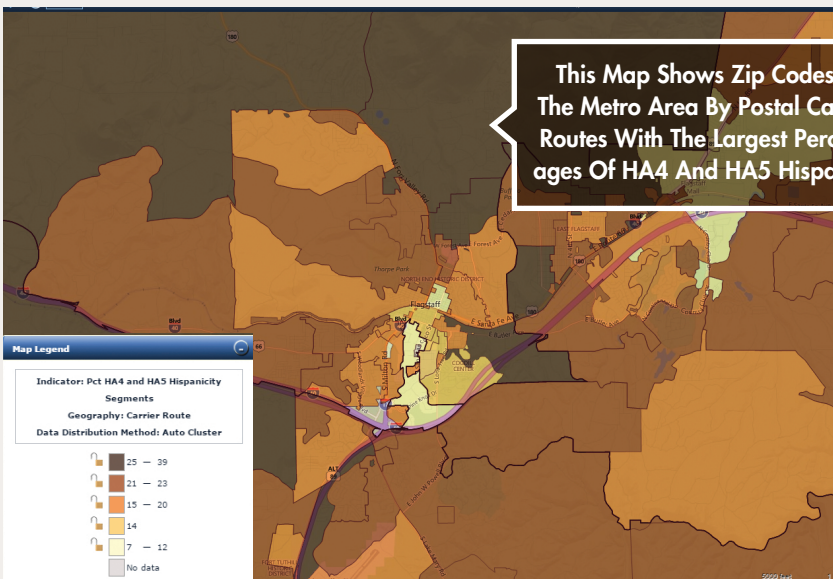
- Bilingual (equal or nearly)
- Immigrant as child or young adult
- Many Hispanic cultural practices

HA4: Hispano

- Spanish preferred (some English)
- Immigrant as adult, in U.S. 10+ years
- Pre-dominant Hispanic cultural practices

HA5: Latinoamericana

- Spanish dominant (nearly no English)
- Recent immigrant as adult (less than 10 years ago)
- Primarily Hispanic cultural practices
- Identify with home country more so than U.S.

**HISPANIC POPULATION %
ZIP CODES BY CARRIER ROUTE****HA4 AND HA5 HISPANICITY™ SEGMENTS
ZIP CODES BY CARRIER ROUTE**



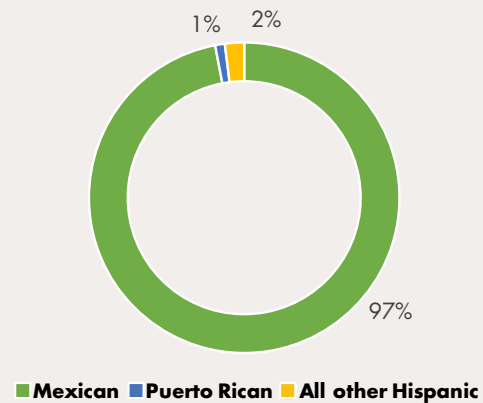
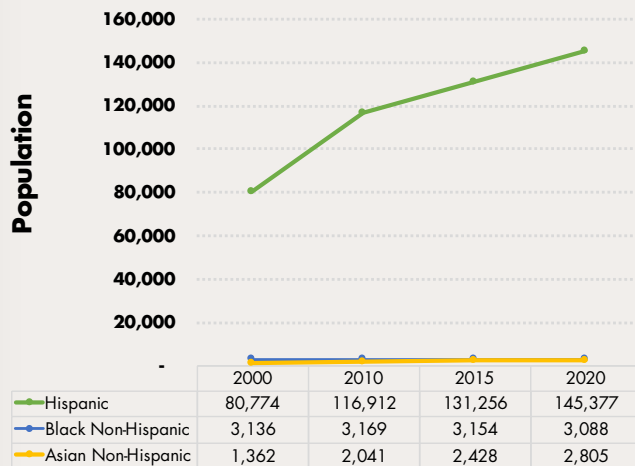
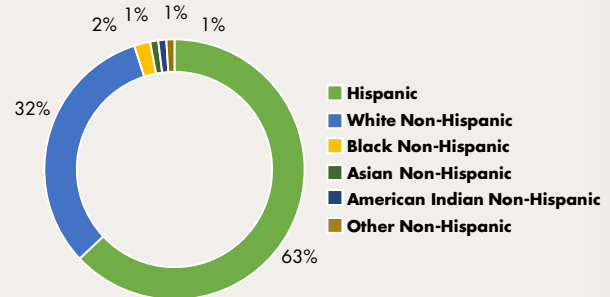
Yuma, AZ

MARKET SNAPSHOT

Roughly 6 out of 10 residents in the Yuma Metropolitan area are Hispanic presence, accounting for over 130,000 individuals. The Hispanic population is projected to increase by over 14,000 individuals or 11% by 2020. Yuma Hispanics are primarily of Mexican ancestry. 1 out of 3 Hispanics in the Yuma metropolitan area fall into the HA4 and HA5 Hispanicity™ segments. Aggregate household expenditures (all consumer products and categories) among Yuma's Hispanics exceeds \$1.3 billion annually, or 45% of total households.

POPULATION	% OF POPULATION	2015 POPULATION
Total	100%	207,527
Hispanic	63%	131,256
White Non-Hispanic	32%	65,915
Black Non-Hispanic	2%	3,154
Asian Non-Hispanic	1%	2,428
American Indian Non-Hispanic	1%	1,862
Other Non-Hispanic	1%	2,912

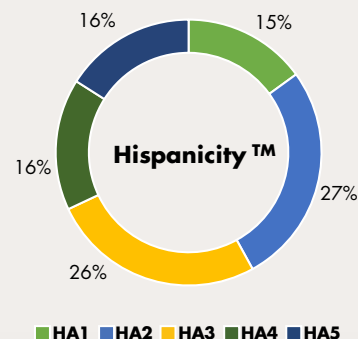
HISPANICS REPRESENT THE LARGEST POPULATION GROUP IN THE YUMA METROPOLITAN AREA.



PROJECTED PERCENT CHANGE 2015 V. 2020



Close to **30%** of Hispanics in the Yuma metropolitan area fall into the **HA4** and **HA5** Hispanicity™ Segment.





Yuma, AZ

HISPANICITY**HA1: Americanizado**

- English dominant (nearly no Spanish)
- Born in U.S.; 3rd+ generation
- Few Hispanic cultural practices

HA2: Nueva Latina

- English preferred (some Spanish)
- Born in U.S.; 2nd generation
- Some Hispanic cultural practices
- often “retro-acculturate”

HA3: Bicultural

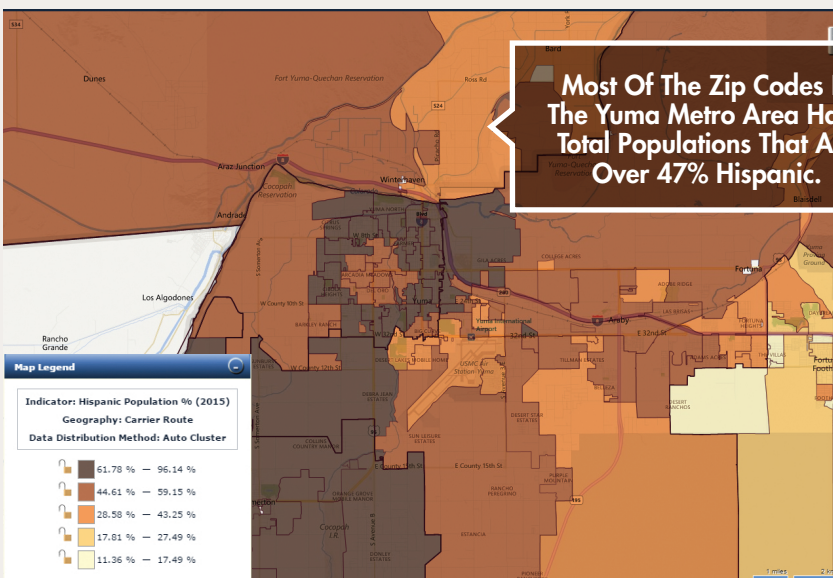
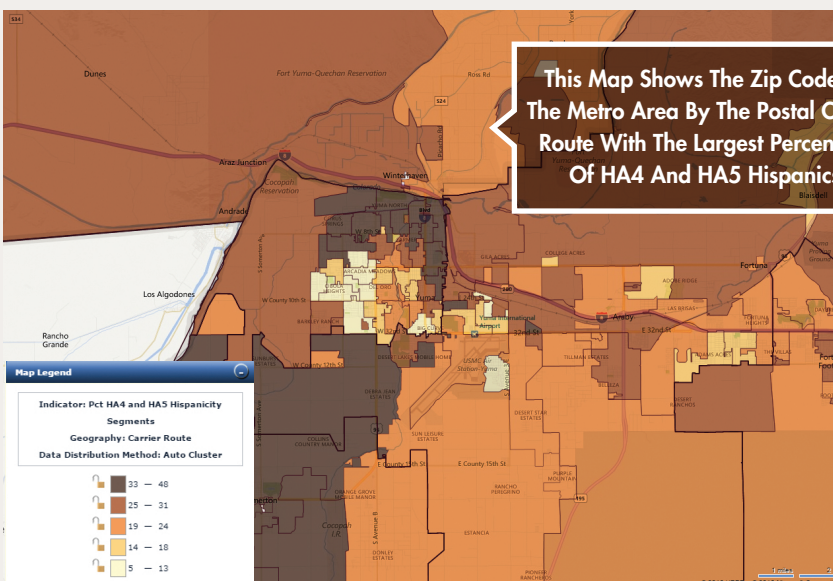
- Bilingual (equal or nearly)
- Immigrant as child or young adult
- Many Hispanic cultural practices

HA4: Hispano

- Spanish preferred (some English)
- Immigrant as adult, in U.S. 10+ years
- Pre-dominant Hispanic cultural practices

HA5: Latinoamericana

- Spanish dominant (nearly no English)
- Recent immigrant as adult (less than 10 years ago)
- Primarily Hispanic cultural practices
- Identify with home country more so than U.S.

**HISPANIC POPULATION %
ZIP CODES BY CARRIER ROUTE****HA4 AND HA5 HISPANICITY™ SEGMENTS
ZIP CODES BY CARRIER ROUTE**

Llamadas a México. Gratis.

Requiere un plan que califique.

Larga distancia ilimitada a México desde EE.UU.

Incluye llamadas a teléfonos fijos y móviles.

Unlimited calls and texts to Mexico from the U.S.

On qualified plans. Including calls to landlines and mobile phones.

verizon✓

Roaming en México. Gratis.

Requiere un plan que califique.

Cuando visitas México, 1GB de datos, 500 minutos & 500 textos.

Exceso de uso: \$20 por cada GB, 5¢ por cada mensaje, 5¢ por cada minuto.

1 GB of data, 500 minutes, and 500 texts while you visit Mexico.

500 minutes to U.S. numbers and to local numbers while in Mexico and Canada. 4G LTE, where available. Overage \$20/GB, 5¢/msg, 5¢/min.

Available to customers for 2 years with eligible mobile numbers with area codes originally affiliated with AZ, NM, and select markets in CA, NV and TX. Taxes and fees apply. Our surcharges (incl. Fed. Univ. Svc. of 17.1% of interstate and int'l telecom charges are not taxes (details: 1-888-684-1888); gov't taxes & our surcharges could add 6% - 44% to your bill. Activation/upgrade fee/line: \$40. IMPORTANT CONSUMER INFORMATION: Subject to Cust Agmt, Calling Plan & credit approval. Coverage, varying by svc, not available everywhere.; see vzw.com. Offers available 9/3-11/30 2015. ©2015 Verizon Wireless.

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FEATURED CLIENTS



CONSUMER
DEMOGRAPHICS

IMMIGRATION



"The Sun Corridor's Hispanic/Latino population presents not only significant new marketing and customer opportunities in our economy, but also a growing bi-lingual workforce critically needed by many clients looking to relocate and expand in Southern Arizona. We have to know the key attributes and aspects of this population and for that, we turn to *DATOS*."

—Joe Snell, President & CEO, Sun Corridor Inc.

Five Years Later, Arizona Still Struggling To Heal Scars Of SB 1070

The 2014 "State of the Latino Family" nationwide survey by the W.K. Kellogg Foundation asked 1,000 respondents: "Where do you think Latinos encounter racism the most?"

While most people might have provided an answer like "on the job" or "at school" or "in encounters with police," the single largest group of survey participants, 21 percent, offered this unsolicited response: "Arizona."

While the great majority of people who live here, including Latinos, are unlikely to characterize Arizona as blatantly racist, it would be disingenuous at best to deny that the fallout of Gov. Jan Brewer's decision in 2010 to sign Senate Bill 1070 into law was that it painted the state as "the new Alabama"—an unflattering reference to that state's scarred legacy of racism against African Americans and other minorities.

At the time of its passage, SB 1070 was considered the toughest, state-based legislative effort to crackdown on illegal immigration in the nation, though, ironically, Alabama quickly passed an even tougher immigration bill. In the years since, proponents of Arizona's anti-immigrant agenda have faced major setbacks. Nearly every major provision of SB 1070 was overturned in the federal courts. Sheriff Joe Arpaio, who is running for reelection, and his deputies were found guilty of racially profiling Latinos during traffic stops. The author of SB 1070 in the Arizona Legislature, then Sen. President Russell Pearce, was recalled from office, and then defeated in his bid for reelection. Gov. Brewer, who left office in January, was replaced by Gov. Doug Ducey, who is working to rebuild economic ties with Mexico, home to most of Arizona's immigrant population.

Despite these developments, immigration remains a controversial topic in the state, primarily because the question of how to address the presence of the nation's 11.5 million undocumented immigrants—about 350,000 live in Arizona—remains unresolved. The U.S. Senate passed a far-reaching immigration bill with bipartisan support in 2013, but efforts to put together companion legislation in the House were killed by Tea Party Republicans.

High-profile court cases have also kept immigration in the media spotlight.

At the federal level, Sheriff Arpaio has faced contempt of court

charges for failing to implement a judge's plan to prevent his deputies from racially profiling Latinos. President Obama's effort to provide legal status for about 6 million more undocumented immigrants drew a lawsuit from 26 Republican attorneys general. Arizona Attorney General Mark Brnovich has challenged a federal court ruling that allows young undocumented immigrants awarded a temporary reprieve from deportation by presidential executive order to acquire driver's licenses. Brnovich, a Republican elected last fall, has also appealed a state court ruling allowing the same category of undocumented immigrants involved in the federal driver's license case to pay in-state tuition at public colleges and universities as long as they can show proof of residency in the state.

The immigration debate has again become a hot topic in the presidential campaign.

GOP candidate Donald Trump, a billionaire businessman from New York, has labeled undocumented immigrants from Mexico "rapists" and called for the mass deportation of the nation's 11 million undocumented immigrants, while pledging to let "the good ones" back into the United States.

Trump's comments about Mexicans drew strong condemnation from fellow Republicans, Jeff Flake and John McCain, Arizona's U.S. Senators, while a campaign stop in the state by Trump managed to draw about 4,500 ardent supporters to the Phoenix Convention Center. Sheriff Arpaio, despite his trouble with the courts, introduced Trump, and former Sen. Pearce applauded the billionaire's speech from the front row during the rally.

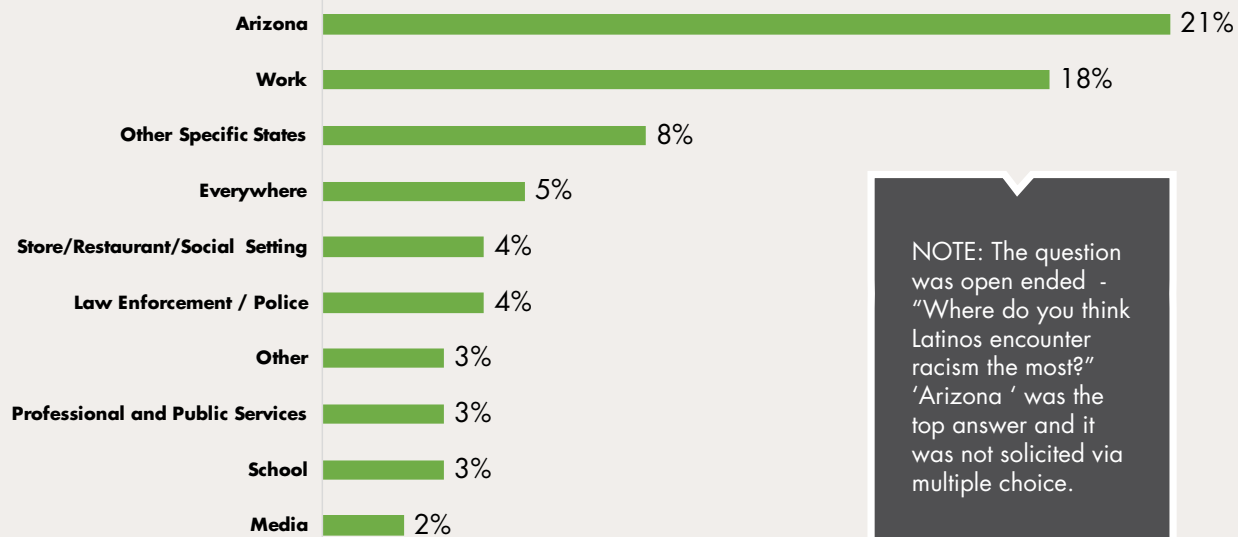
Outside of the convention center, hundreds of protesters chanted "Dump Trump" and labeled his comments about Mexican immigrants as openly racist, while a national survey conducted soon after the rally found Mr. Trump leading in the race for the GOP presidential nomination.

Responding to another question in the 2014 Kellogg Foundation survey of Latino families, 73 percent of the participants said "anti-Latino" and "anti-immigrant" attitudes had either stayed "about the same" or were "getting worse" in the previous five years.

The Kellogg survey was conducted long before Mr. Trump announced his bid for the presidency.



"Arizona Is Where Hispanics Encounter Racism The Most" According To A 2014 National Kellogg Foundation Survey Of Hispanics

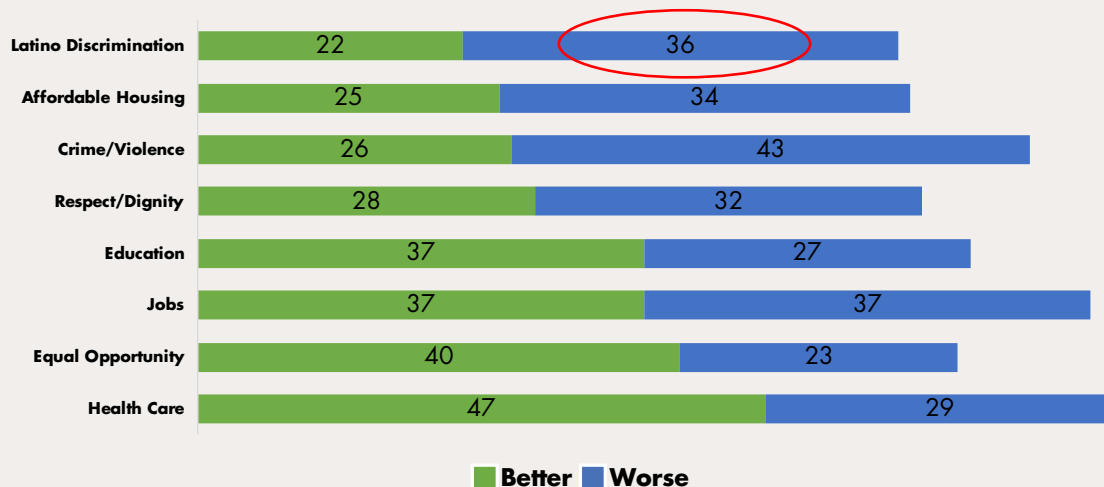


NOTE: The question was open ended - "Where do you think Latinos encounter racism the most?" 'Arizona' was the top answer and it was not solicited via multiple choice.

Source: WKKF State Of The Latino Family (2014), N=1000 (MOE +/- 3.1%), 2014
s3.amazonaws.com/s3.documentcloud.org/documents/1357155/wkkf-state-of-latino-family-2014.pdf

More Latinos Believe That **Latino Discrimination Is Getting Worse** From What It Was Five Years Ago

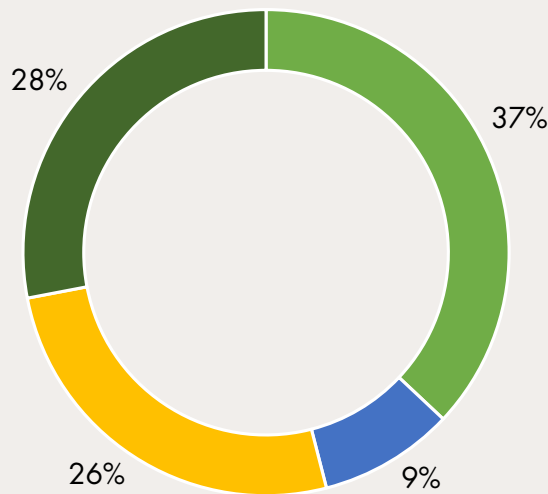
DO YOU BELIEVE THE COUNTRY IS GETTING BETTER, WORSE, OR ABOUT SAME AS IT WAS FIVE YEARS AGO IN.....



Source: WKKF State Of The Latino Family (2014), N=1000 (MOE +/- 3.1%), 2014
s3.amazonaws.com/s3.documentcloud.org/documents/1357155/wkkf-state-of-latino-family-2014.pdf



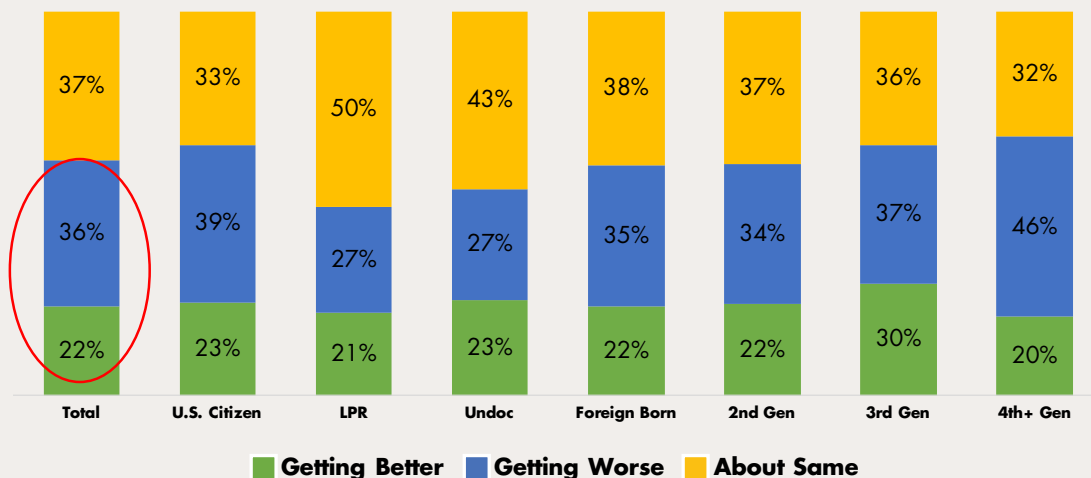
Thirty-Seven Percent Of Hispanics Believe Local Police, Border Patrol, And Other Law Enforcement Authorities Usually **Treat Hispanics Unfairly**



■ Usually Treated Unfairly ■ Don't Know ■ Usually Treated Fairly ■ Sometimes Treated Fairly

Source: WKCF State Of The Latino Family (2014), N=1000 (MOE +/- 3.1%), 2014
s3.amazonaws.com/s3.documentcloud.org/documents/1357155/wkcf-state-of-latino-family-2014.pdf

Only **22%** Of Total Hispanics Surveyed Believe **Anti-Latino And Anti-Immigrant Attitudes** Have **Improved** In The Past Five Years And **36%** Think It Is Getting **Worse**

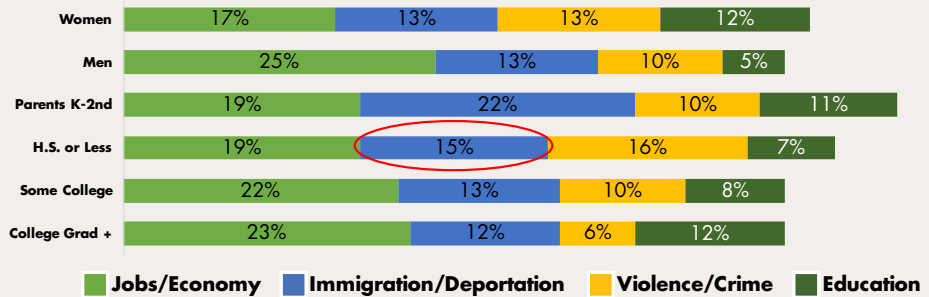


Source: WKCF State Of The Latino Family (2014), N=1000 (MOE +/- 3.1%), 2014
s3.amazonaws.com/s3.documentcloud.org/documents/1357155/wkcf-state-of-latino-family-2014.pdf



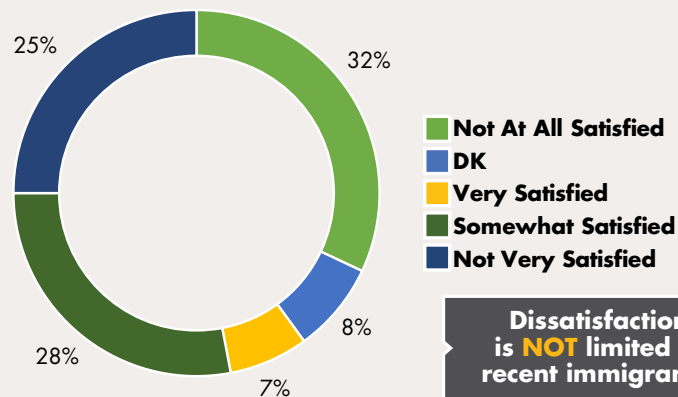
Immigration/Deportation Is A Significant Concern To Hispanics Across **All Educational Levels**

IN YOUR
OWN WORDS,
WHAT ISSUE
CONCERNS
YOU THE
MOST?



Source: WKCF State Of The Latino Family (2014), N=1000 (MOE +/- 3.1%), 2014
s3.amazonaws.com/s3.documentcloud.org/documents/1357155/wkcf-state-of-latino-family-2014.pdf

Only **7%** Of
Hispanics Are Either
Very Satisfied
Satisfied With
The **Federal**
Government's
Performance
On Immigration
Policy



Dissatisfaction is NOT limited to recent immigrants:

56%
of 3+ Gen
U.S. Citizens

59%
of 2nd Gen
Citizen

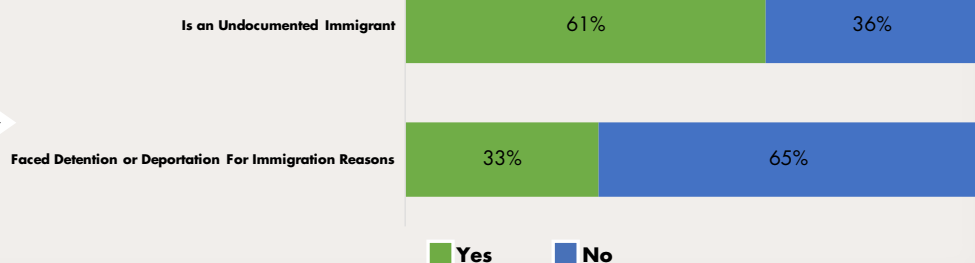
55%
of English
Dominant

Source: WKKF State Of The Latino Family (2014), N=1000 (MOE +/- 3.1%), 2014
s3.amazonaws.com/s3.documentcloud.org/documents/1357155/wkkf-state-of-latino-family-2014.pdf

Sixty-One Percent Of Hispanics Indicate They Know Someone Who Is An Undocumented Immigrant In The U.S.

LAWFUL PERMANENT RESIDENT FLOW BY REGION

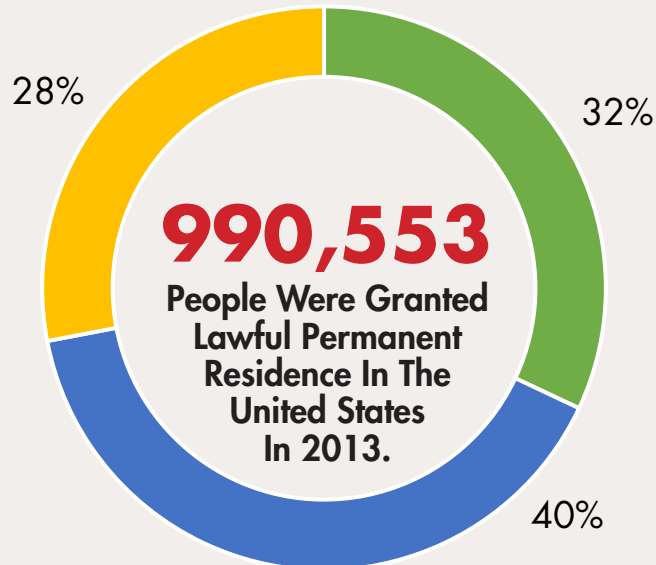
HISPANICS
WERE ASKED,
Do you
PERSONALLY
KNOW SOMEONE
WHO...



Source: WKKF State Of The Latino Family (2014), N=1000 (MOE +/- 3.1%), 2014
s3.amazonaws.com/s3.documentcloud.org/documents/1357155/wkkf-state-of-latino-family-2014.pdf



Legal Immigration Statistics

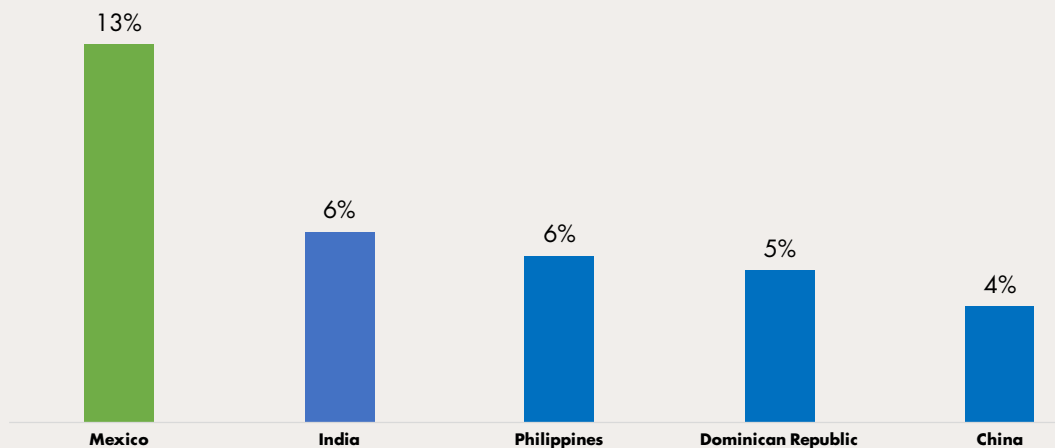


■ North America ■ Asia ■ Other Regions

Source: U.S. Department of Homeland Security, Annual Flow Report, *U.S. Lawful permanent Residents: 2013, 2014*
www.dhs.gov/sites/default/files/publications/ois_lpr_fr_2013.pdf

Mexico Is The Leading Country Of Origin For New Lawful Permanent Residents

TOP COUNTRIES OF BIRTH

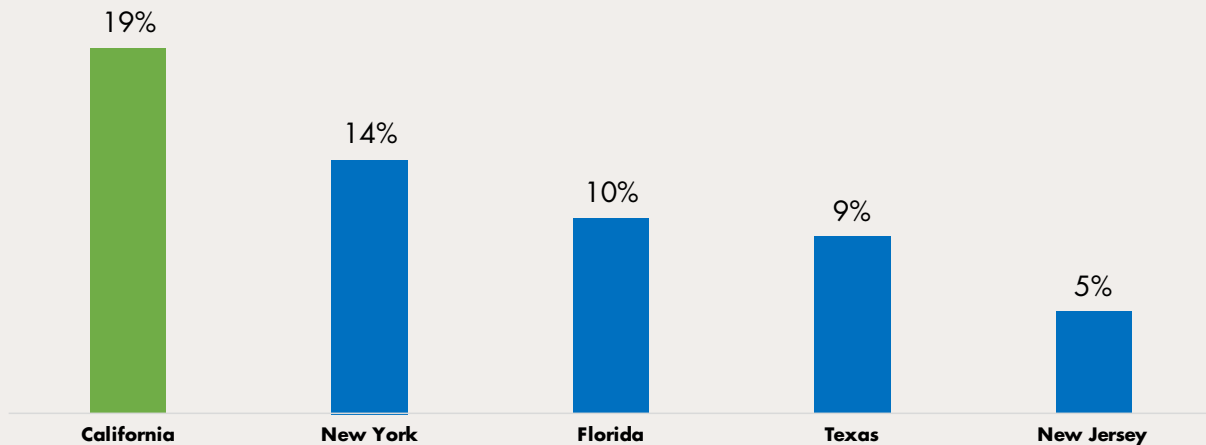


Source: U.S. Department of Homeland Security, Annual Flow Report, *U.S. Lawful permanent Residents: 2013, 2014*
www.dhs.gov/sites/default/files/publications/ois_lpr_fr_2013.pdf



California Is The State With The Greatest Share Of New Lawful Residents

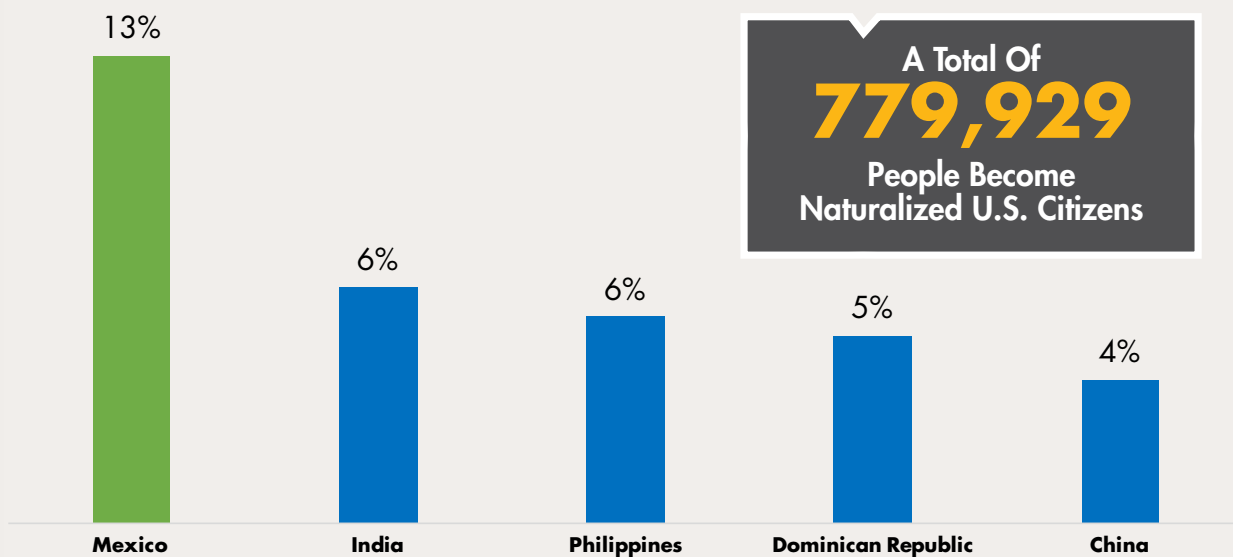
TOP U.S. STATES WHERE NEW LAWFUL RESIDENTS SETTLE



Source: U.S. Department of Homeland Security, Annual Flow Report, *U.S. Lawful permanent Residents: 2013, 2014*
www.dhs.gov/sites/default/files/publications/ois_lpr_fr_2013.pdf

Mexico Is The Leading Country Of Birth For New Naturalized U.S. Citizens

TOP COUNTRIES OF BIRTH FOR NEW NATURALIZED U.S. CITIZENS



Source: U.S. Department of Homeland Security, Annual Flow Report, *U.S. Naturalizations: 2013, 2014*
www.dhs.gov/sites/default/files/publications/ois_natiz_fr_2013.pdf



From 2010-2013, Hispanic Naturalized
U.S. Citizenship Increased By **12%**

HISPANIC CITIZENSHIP (IN THOUSANDS)



Source: U.S. Census Bureau, 2010 & 2013 American Community Surveys 1-Year

The Share Of Mexican-Born Immigrants Has **Continuously Grown** Since 1850, With Slight Declines After 2010



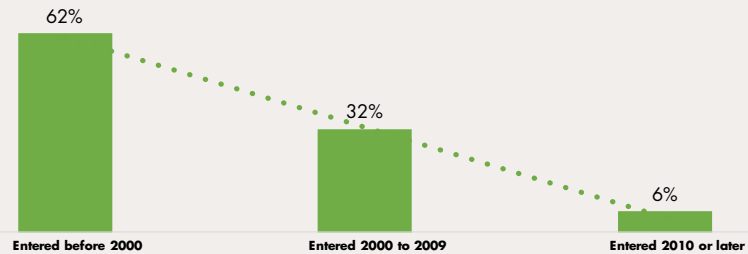
YEAR	MEXICAN BORN	TOTAL IMMIGRANTS	MEXICAN BORN AS A SHARE OF ALL IMMIGRANTS
1850	13,300	2,244,600	0.6%
1860	27,500	4,138,700	0.7%
1870	42,400	5,567,200	0.8%
1880	68,400	6,679,900	1.0%
1890	77,900	9,249,500	0.8%
1900	103,400	10,341,300	1.0%
1910	221,900	13,515,900	1.6%
1920	486,400	13,920,700	3.5%
1930	641,500	14,204,100	4.5%
1940	357,800	11,494,100	3.1%
1950	451,400	11,454,900	3.9%
1960	575,900	9,738,100	5.9%
1970	759,700	9,619,300	7.9%
1980	2,199,200	14,079,900	15.6%
1990	4,298,000	19,767,300	21.7%
2000	9,177,500	31,107,900	29.5%
2010	11,711,100	39,955,700	29.3%
2011	11,672,600	40,377,800	28.9%
2012	11,563,400	40,824,600	28.3%
2013	11,585,000	41,348,000	28.0%

Source: MPI Data Hub



Hispanic Population
Born Outside
The U.S. Has
Decreased By
Approximately
90%
Since 2000

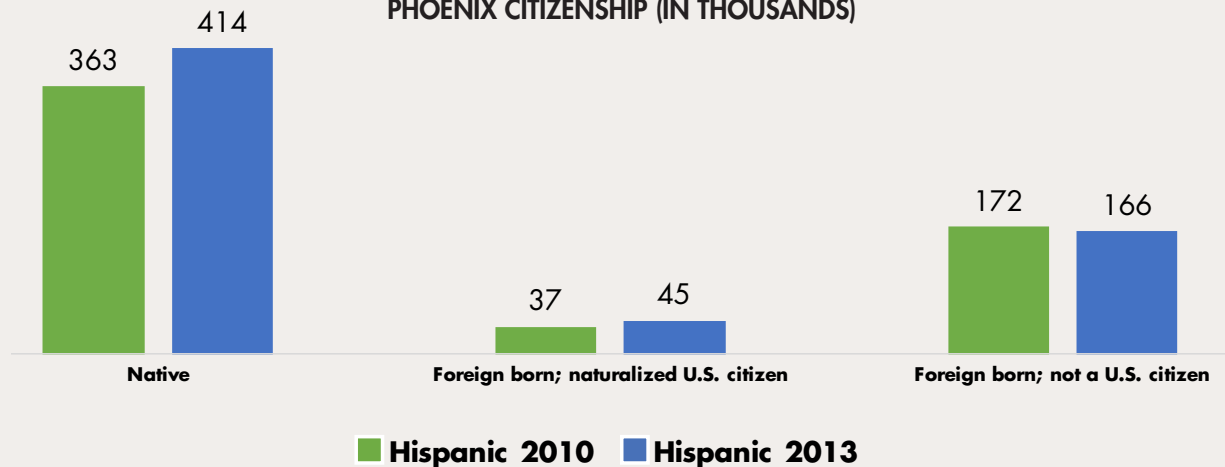
% OF HISPANIC POPULATION BORN OUTSIDE THE U.S.



Source: U.S. Census Bureau, 2013 American Community Survey 1-Year, 201

From 2010 To 2013, **Naturalized U.S. Citizenship**
In **Phoenix** Increased By Nearly **22%**

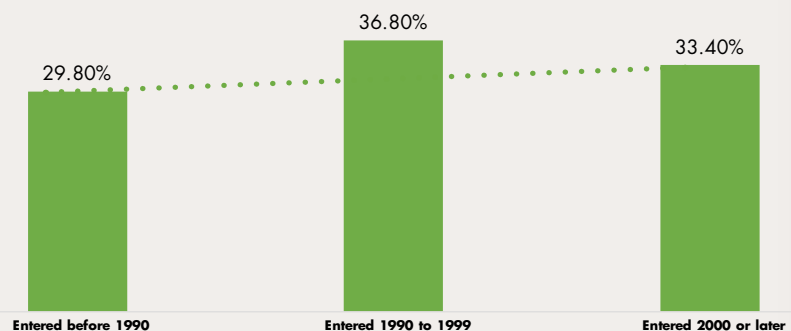
PHOENIX CITIZENSHIP (IN THOUSANDS)



Source: U.S. Census Bureau, 2010 & 2013 American Community Surveys 1-Year

Since 2000,
One-Third
Of Hispanics
In Phoenix **Were**
Born Outside
The U.S.

PHOENIX POPULATION BORN OUTSIDE THE U.S.

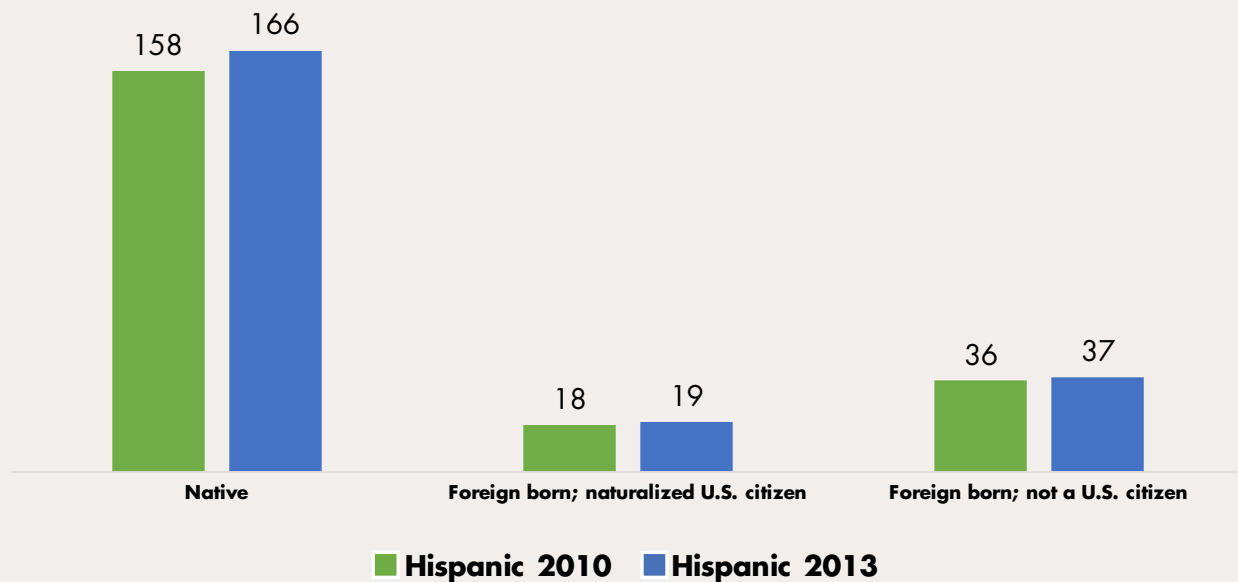


Source: U.S. Census Bureau, 2013 American Community Survey 1-Year, 2014



From 2010 To 2013 **Native Hispanic Citizenship** In **Tucson** Increased By **5%**

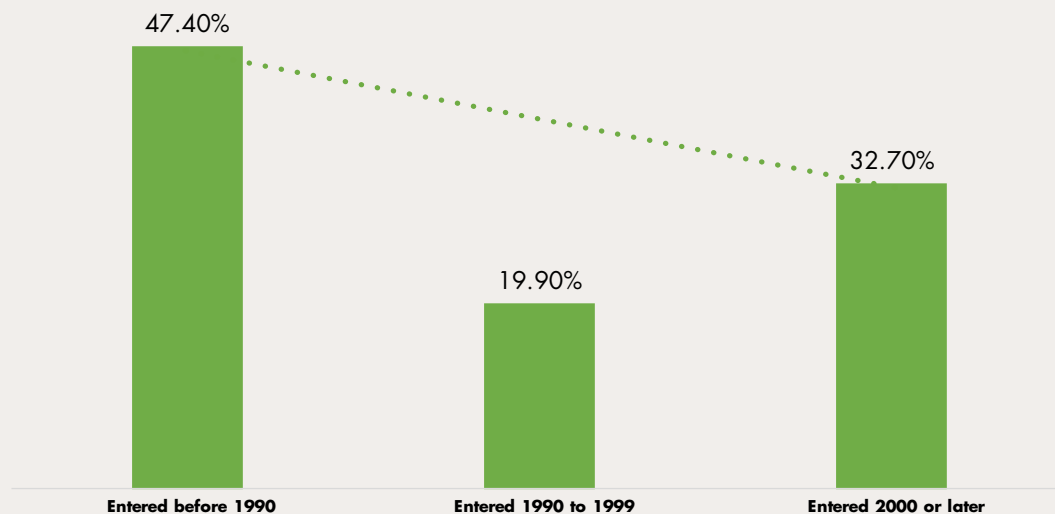
TUCSON CITIZENSHIP (IN THOUSANDS)



Source: U.S. Census Bureau, 2010 & 2013 American Community Surveys 1-Year

In The Past 2.5 Decades, Tucson Population **Born Outside** The U.S. Has **Decreased** By **31%**

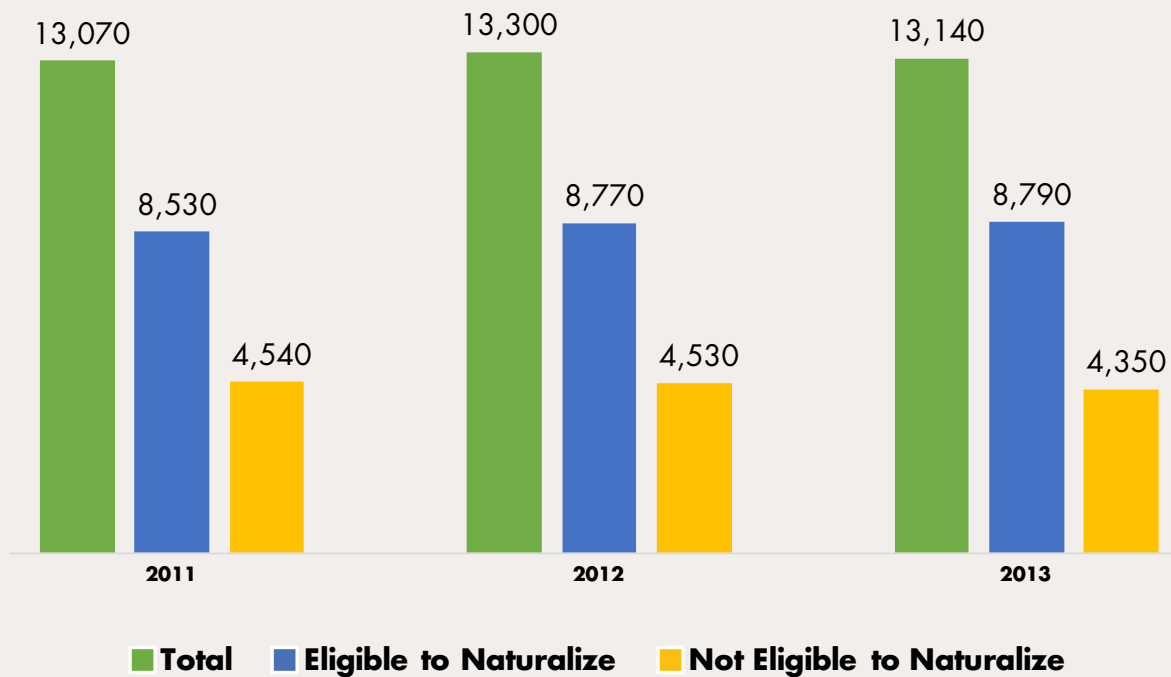
TUCSON POPULATION BORN OUTSIDE THE U.S.



Source: U.S. Census Bureau, 2013 American Community Survey 1-Year, 2014

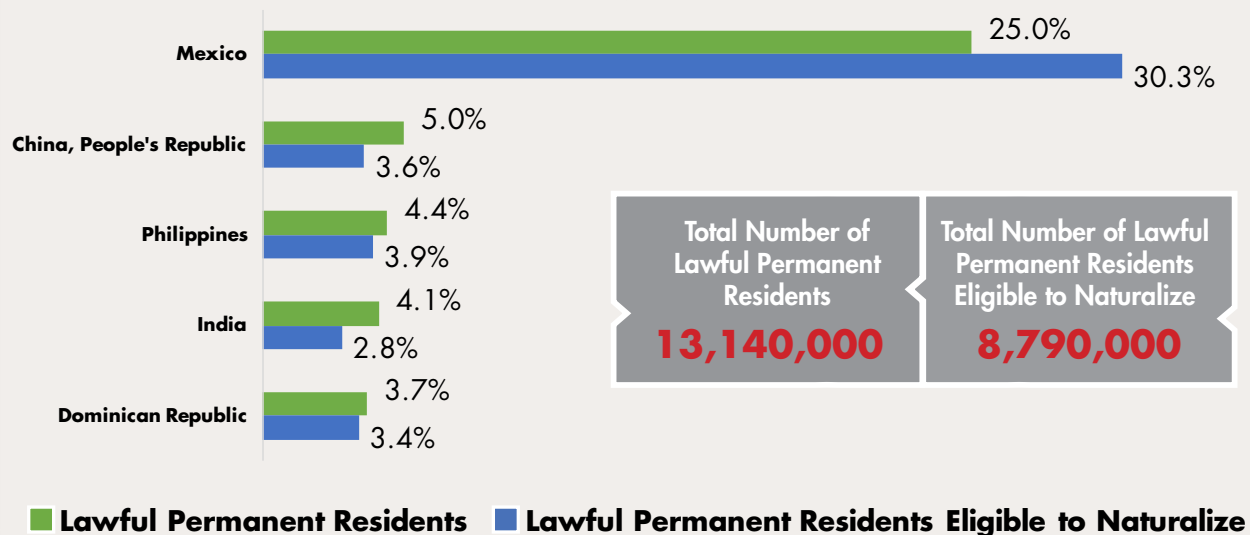


Size Of The Lawful Permanent Resident Population In U.S.



Source: U.S. Department of Homeland Security.
www.dhs.gov/sites/default/files/publications/ois_lpr_pe_2013.pdf

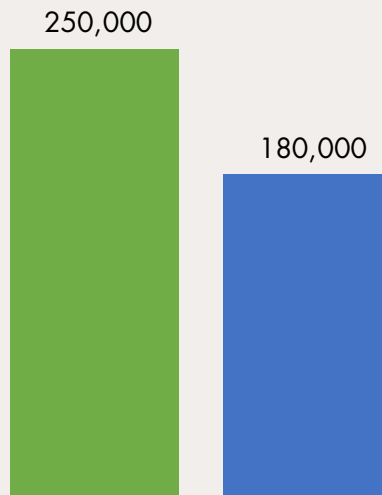
Country Of Birth Of Lawful Permanent Resident Population: 2013 In U.S.



Source: U.S. Department of Homeland Security.
www.dhs.gov/sites/default/files/publications/ois_lpr_pe_2013.pdf



Arizona, Lawful Permanent Resident Population: 2013

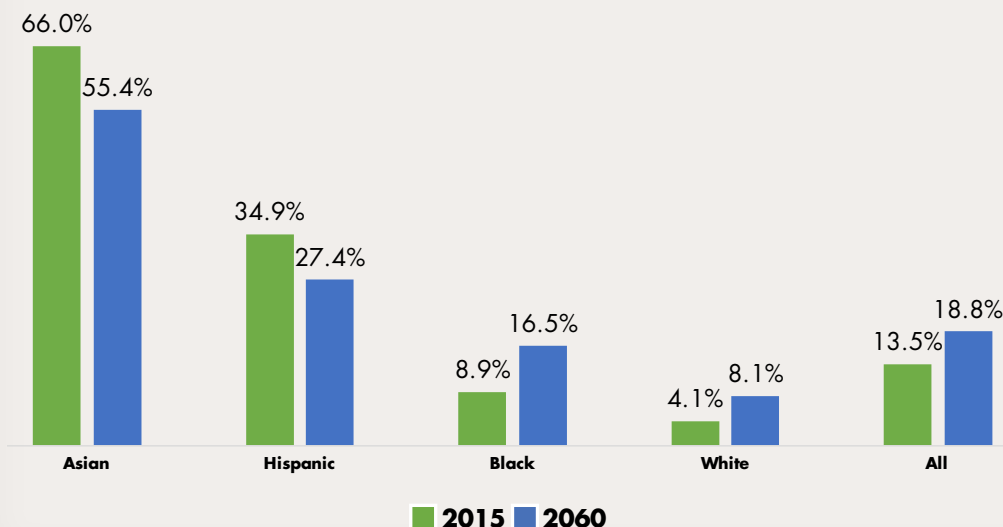


■ Lawful Permanent Residents ■ Lawful Permanent Residents Eligible to Naturalize

Source: U.S. Department of Homeland Security.
www.dhs.gov/sites/default/files/publications/ois_lpr_pe_2013.pdf

In 2016, Foreign-born Hispanics Are Projected To Decrease By **7.5 Percentage Points**

PERCENT OF FOREIGN-BORN BY RACE/ETHNICITY PROJECTIONS 2015 - 2060



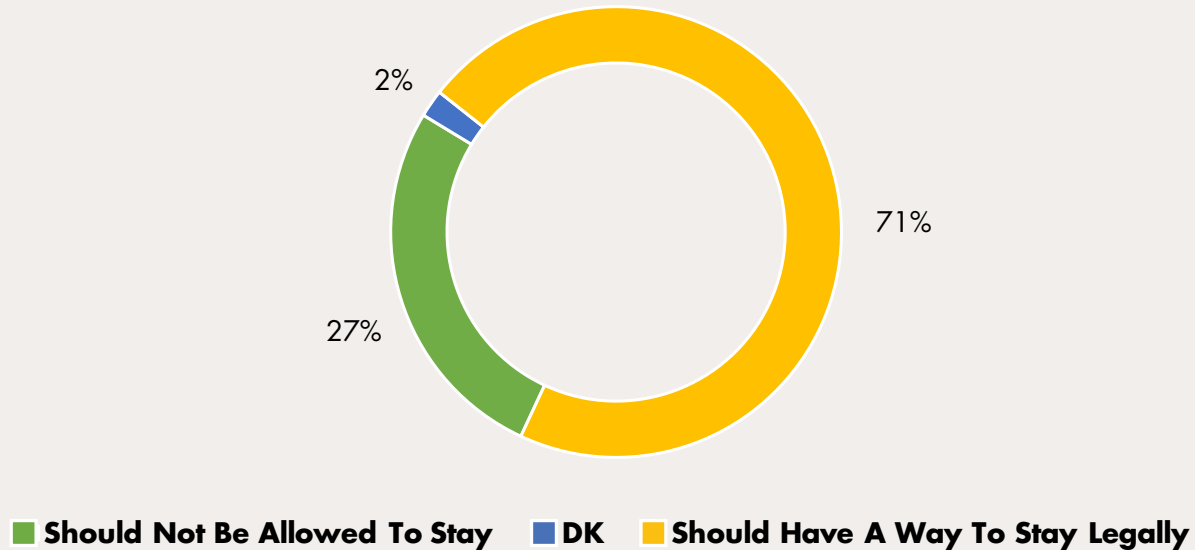
RESEARCHER'S TIP: A percentage change is a difference divided by some base number, while a percentage point change is a simple addition or subtraction.

Source: U.S. Census Bureau, 2014 Populations Projections
www.pewresearch.org/fact-tank/2015/03/09/u-s-immigrant-population-projected-to-rise-even-as-share-falls-among-hispanics-asians/



Seventy-One Percent Of Americans Support A Path To Legal Status For Undocumented Immigrants

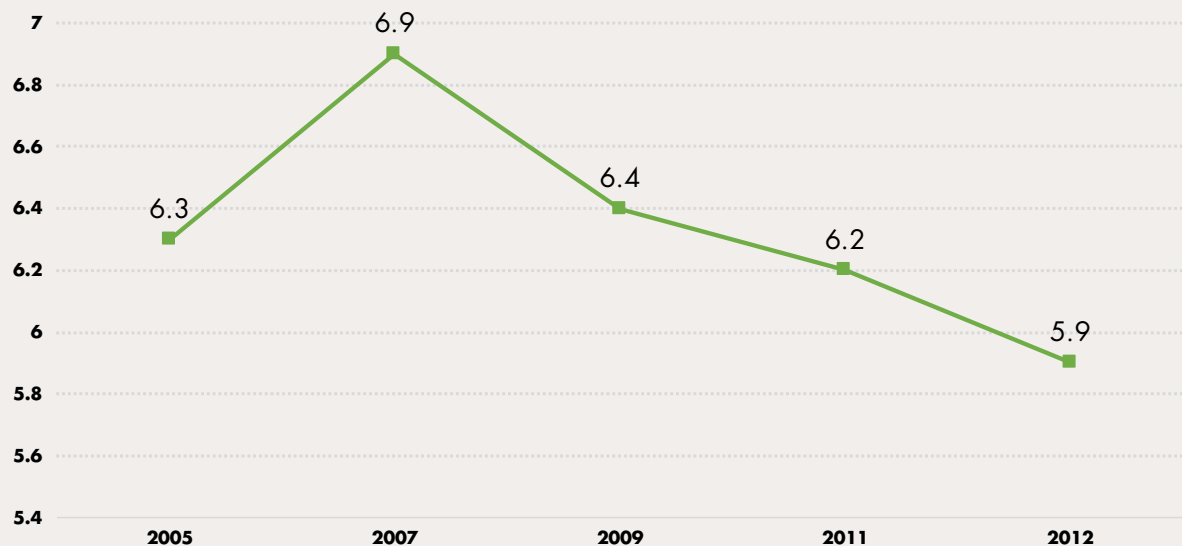
UNDOCUMENTED IMMIGRANTS IN THE U.S. WHO MEET CERTAIN REQUIREMENTS...



Source: Pew Research Center, U.S. Politics & Policy, 2015.

www.people-press.org/2015/06/04/broad-public-support-for-legal-status-for-undocumented-immigrants/

From 2007 To 2012, Mexican Unauthorized Immigrant Population Declined By 14%



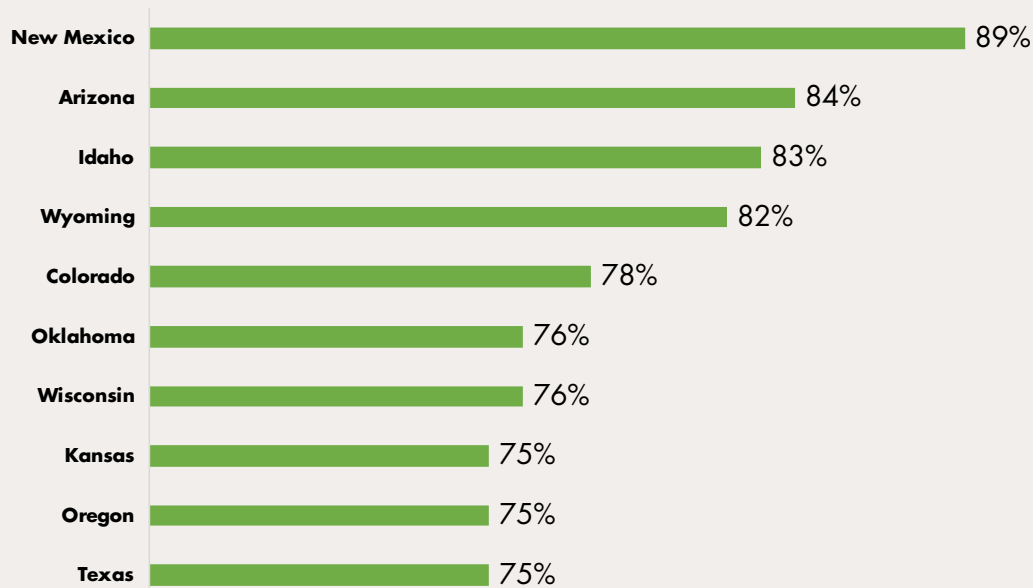
Source: Pew Research Center, Estimates For 2005-2012 Based On Augmented American Community Survey Data From Integrated Public Use Microdata Series (IPUMS)

www.pewresearch.org/fact-tank/2015/07/15/what-we-know-about-illegal-immigration-from-mexico/



In 2012, Arizona Had The **Second Highest Share** Of Unauthorized Mexican Immigrants

% MEXICAN AMONG EACH STATE'S UNAUTHORIZED IMMIGRANTS



Source: Pew Research Center, Estimates For 2012 Based on Augmented American Community Survey Data From Integrated Public Use Microdata Series.
www.pewresearch.org/fact-tank/2015/07/15/what-we-know-about-illegal-immigration-from-mexico/

The annual income of unauthorized immigrants would be **15.1** percent higher within five years **if they were granted legal status**.

Immigration reform that includes a pathway to citizenship for undocumented immigrants in five years would increase the earnings of all American workers by **\$618 billion** over the next decade.

If the undocumented immigrants in our nation were granted legal status today and citizenship in five years, the 10-year cumulative increase in U.S. gross domestic product, or GDP, would be **\$1.1 trillion**.

If undocumented immigrants acquired legal status today and citizenship in five years, the economy would add an average of **159,000** new jobs per year, and formerly unauthorized workers would pay an additional **\$144 billion** in federal, state, and local taxes over a 10-year period.

Center for American Progress, *The Facts on Immigration Today*, 2014.
cdn.americanprogress.org/wp-content/uploads/2013/04/ImmigrationFacts-brief-10.23.pdf



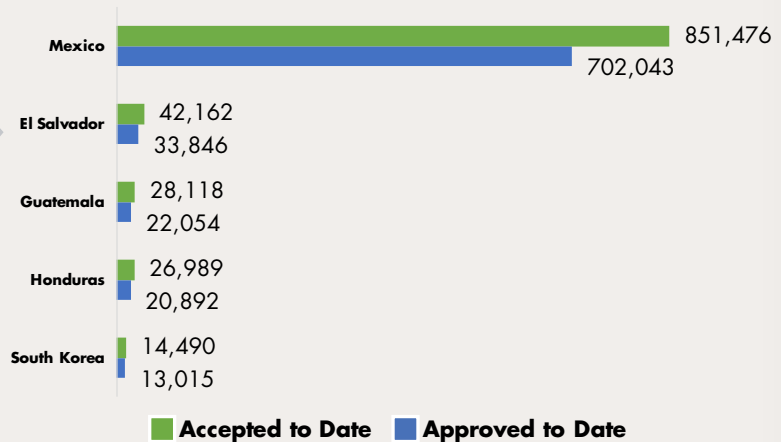
From 2012 To March 2015 **Mexico DACA ORIGIN REQUESTS** Had An **82%** Approval Rate

What Is DACA?

Deferred Action for Childhood Arrivals.

On June 15, 2012, the Secretary of Homeland Security announced that certain people who came to the United States as children and meet several guidelines may request consideration of deferred action for a period of two years, subject to renewal. They are also eligible for work authorization. Deferred action is a use of prosecutorial discretion to defer removal action against an individual for a certain period of time. Deferred action does not provide lawful status.

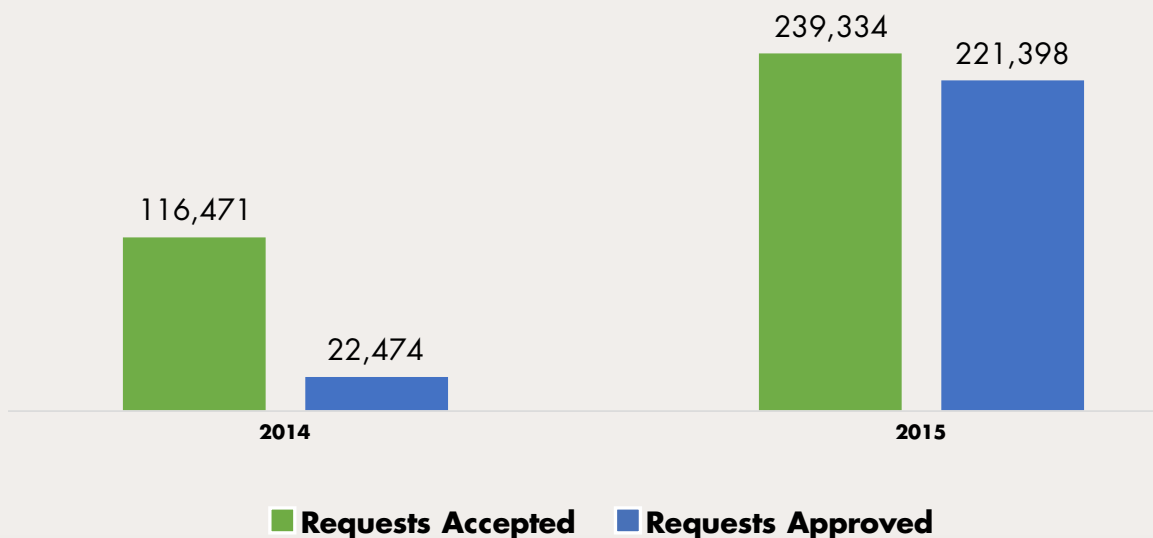
TOTAL DACA REQUESTS ACCEPTED/APPROVED TO DATE: 2012-2015 (MARCH 31) PER COUNTRY OF ORIGIN



Source: Department of Homeland Security, U.S. Citizenship and Immigration Services, Biometrics Capture Systems, CIS Consolidated Operational Repository (CISCOR), April 2015.
www.uscis.gov/sites/default/files/USCIS/Resources/Reports%20and%20Studies/Immigration%20Forms%20Data/Naturalization%20Data/1821d_performance_data_fy2015_qtr2.pdf

In 2014, **DACA RENEWAL REQUESTS** Had A **19%** Approval Rate In Comparison To 2015, **93%** Approval Rate

TOTAL DACA RENEWAL REQUESTS RECEIVED/APPROVED TO DATE: 2012-2015 (MARCH 31)

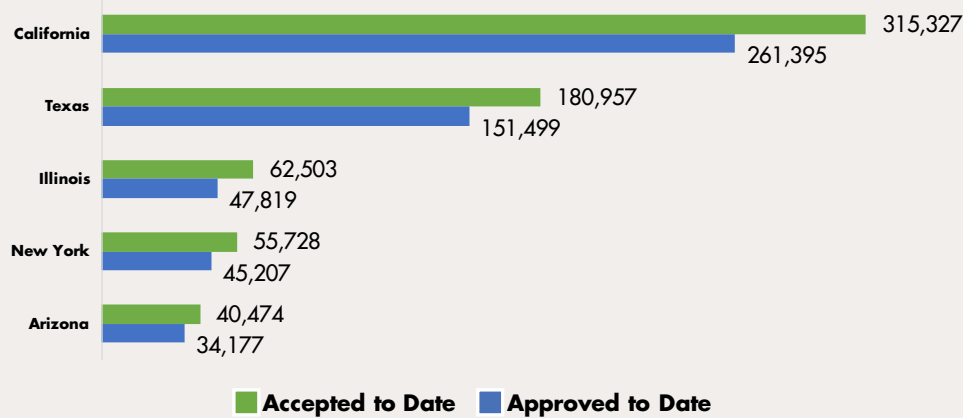


Source: Department of Homeland Security, U.S. Citizenship and Immigration Services, Biometrics Capture Systems, CIS Consolidated Operational Repository (CISCOR), April 2015.
www.uscis.gov/sites/default/files/USCIS/Resources/Reports%20and%20Studies/Immigration%20Forms%20Data/Naturalization%20Data/1821d_performance_data_fy2015_qtr2.pdf



Arizona Is The 5th Highest State With DACA Requests That Are Accepted And Approved

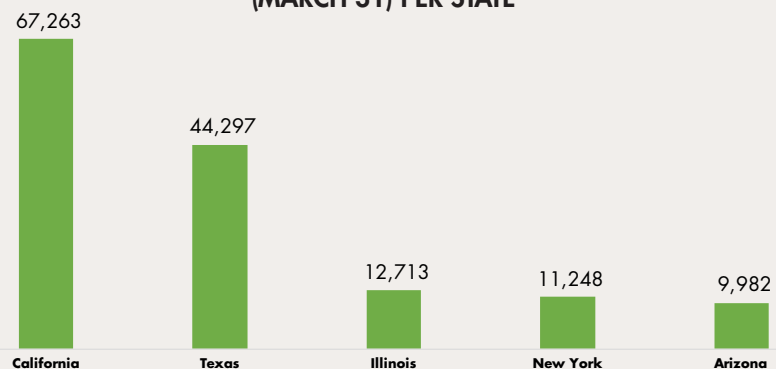
TOP STATES FOR DACA REQUESTS ACCEPTED/APPROVED TO DATE: 2012-2015 (MARCH 31)



Source: Department of Homeland Security, U.S. Citizenship and Immigration Services, Biometrics Capture Systems, CIS Consolidated Operational Repository (CISCOR), April 2015.
www.uscis.gov/sites/default/files/USCIS/Resources/Reports%20and%20Studies/Immigration%20Forms%20Data/Naturalization%20Data/1821d_performancedata_fy2015_qtr2.pdf

From 2014-2015,
Arizona Had
The 5th Largest
Share Of **DACA**
Renewals
Approved

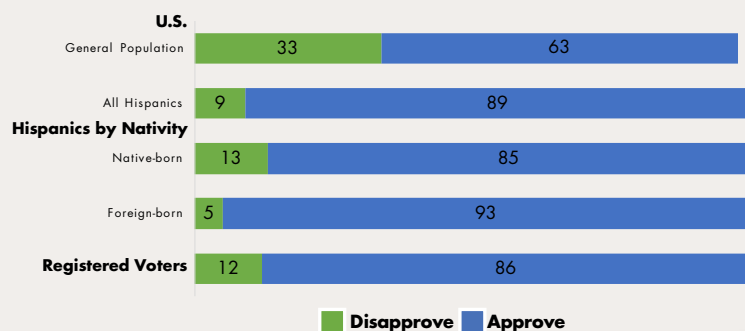
DACA RENEWALS APPROVED TO DATE: 2012-2015
(MARCH 31) PER STATE



Source: Department of Homeland Security, U.S. Citizenship and Immigration Services, Biometrics Capture Systems, CIS Consolidated Operational Repository (CISCOR), April 2015.
www.uscis.gov/sites/default/files/USCIS/Resources/Reports%20and%20Studies/Immigration%20Forms%20Data/Naturalization%20Data/1821d_performancedata_fy2015_qtr2.pdf

The Majority
Of Hispanics
Approve
Obama's Program
For Unauthorized
Immigrants Brought
As Children

PERCENT SAYING THEY....



Source: Pew Hispanic Center, 2012 National Survey of Latinos; Pew Research Center For The People & The Press, July 2012.
www.pewhispanic.org/2012/10/11/latinos-and-immigration-policy/



Higher Immigration is Associated with Lower Crime Rates

- Between 1990 and 2013, the foreign-born share of the U.S. population grew from 7.9 percent to 13.1 percent and the number of unauthorized immigrants more than tripled from 3.5 million to 11.2 million.
- During the same period, FBI data indicate that the violent crime rate declined 48 percent—which included falling rates of aggravated assault, robbery, rape and murder. Likewise, the property crime rate fell 41 percent, including declining rates of motor vehicle theft, larceny/robbery, and burglary.

American Immigration Council, *The Criminalization of Immigration in the United States*, July 2015
immigrationpolicy.org/sites/default/files/docs/the_criminalization_of_immigration_in_the_united_states_final.pdf

Immigrants Are Less Likely Than The Native-born To Be Behind Bars

- According to an original analysis of data from the 2010 American Community Survey (ACS) conducted by the authors of this report, roughly 1.6 percent of immigrant males age 18-39 are incarcerated, compared to 3.3 percent of the native-born. This disparity in incarceration rates has existed for decades, as evidenced by data from the 1980, 1990 and 2000 decennial censuses. In each of those years, the incarceration rates of the native-born were anywhere from two to five times higher than that of immigrants.
- The 2010 Census data reveals that incarceration rates among the young, less- educated Mexican, Salvadoran, and Guatemalan men who make up the bulk of the unauthorized population are significantly lower than the incarceration rate among native-born young men without a high-school diploma. In 2010, less-educated native-born men age 18-39 had an incarceration rate of 10.7 percent—more than triple the 2.8 percent rate among foreign-born Mexican men, and five times greater than the 1.7 percent rate among foreign-born Salvadoran and Guatemalan men.

American Immigration Council, *The Criminalization of Immigration in the United States*, July 2015
immigrationpolicy.org/sites/default/files/docs/the_criminalization_of_immigration_in_the_united_states_final.pdf

Immigrants Are Less Likely Than The Native-born To Engage In Criminal Behavior

- A variety of different studies using different methodologies have found that immigrants are less likely than the native-born to engage in either violent or nonviolent “antisocial” behaviors; that immigrants are less likely than the native-born to be repeat offenders among “high risk” adolescents; and that immigrant youth who were students in U.S. middle and high schools in the mid-1990s and are now young adults have among the lowest delinquency rates of all young people.

American Immigration Council, *The Criminalization of Immigration in the United States*, July 2015
immigrationpolicy.org/sites/default/files/docs/the_criminalization_of_immigration_in_the_united_states_final.pdf



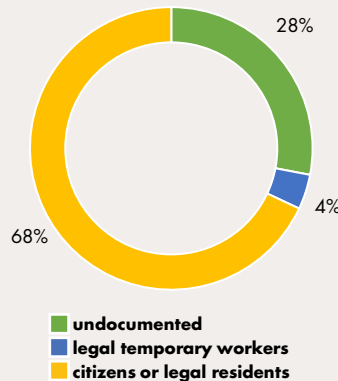
Immigration Myths Busted

COMMON MYTHS ABOUT IMMIGRATION DEBUNKED

#1 Myth

**MOST
IMMIGRANTS
ARE HERE
ILLEGALLY**

FACT



**40.2
Million**
Immigrants in U.S.

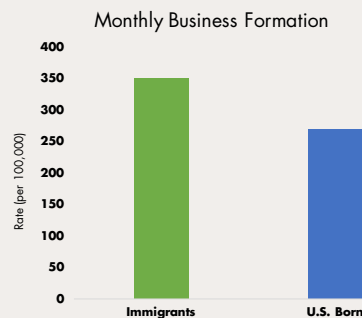
72%
Of immigrants are
in the U.S. legally.

Source: Lutheran Immigration and Refugee Services, Immigration Myths Busted Infographic

#2 Myth

**IMMIGRANTS
TAKE JOBS
AWAY FROM
AMERICANS**

FACT



Immigrants at all
skill levels actually
**create job
opportunities.**

Immigrants are **30%**
more likely than U.S.-
born citizens to form
new businesses.

Immigrant labor is complementary to native labor, resulting in limited competition in the short-run and **increased job opportunities** in the long run.

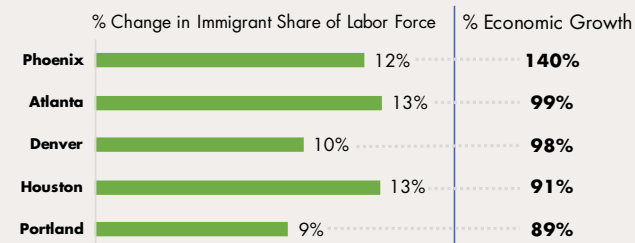
Source: Lutheran Immigration and Refugee Services, Immigration Myths Busted Infographic



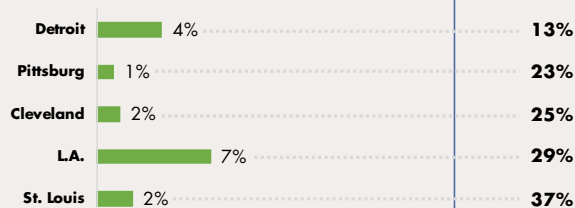
#3 Myth

**IMMIGRANTS
DRAIN
RESOURCES
WITHOUT
CONTRIBUTING
ECONOMICALLY
OR PAYING
TAXES**

5 **Fastest** Growing Metro Areas



5 **Slowest** Growing Metro Areas



FACT

Immigrants have played a central role in the cycle of **economic rebirth of American cities.**

Taxes paid by both legal and undocumented immigrants exceed the costs of the services these immigrants utilize.

Source: Lutheran Immigration and Refugee Services, Immigration Myths Busted Infographic.

#4 Myth

**IMMIGRATING
TO THE U.S.
FOR WORK
IS EASY**

FACTS

1% of immigrants received employment-based visas in 2009.

There are only **14,000** employment-based visas allocated annually.

1.28 million estimated flow of immigrants into the U.S. in 2009.

Only **5,000** employment-based visas are for low-skilled positions despite the high demand for these workers.

Visas for employment-based immigration have numerical caps, require immigrants to fit specific qualifications that demonstrate "extraordinary ability" and require employers to complete a lengthy verification process to ensure no U.S. worker is available for the position.

Source: Lutheran Immigration and Refugee Services, Immigration Myths Busted Infographic.



#5 Myth

IMMIGRANTS
INCREASE
CRIME

Incarceration rate, California, 2000

(highest population of immigrants, undocumented and legal)

Native-born

4.5%

Immigrant

0.7%

From 1994 to 2005 Nationally

FACTS

Men age 18-39 (vast majority of U.S. prison population) that are **native-born** are **11 times** more likely to be in prison than immigrants.

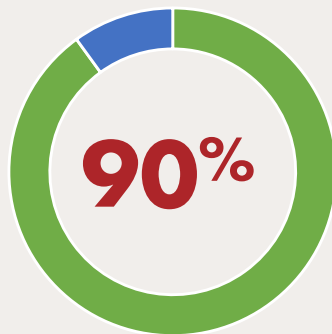
The undocumented population **doubled** while the rate of **violent crime** declined by **34.2%** and the **property crime** rate fell by **26.4%**.

Source: Lutheran Immigration and Refugee Services, Immigration Myths Busted Infographic.

#6 Myth

ALL MIGRANTS
CHOOSE TO
LEAVE THEIR
HOME COUNTRIES
AND DO NOT
INTEGRATE INTO
THE AMERICAN
CULTURE

FACT



More than **90%** of the children of recent immigrants speak English regardless of the country of origin.

Many migrants, such as refugees and asylum seekers, are forced from their home countries because of conflict or religious and/or political persecution.

The rate of citizenship among Latinos grew to **56% by 2008**.

Source: Lutheran Immigration and Refugee Services, Immigration Myths Busted Infographic.

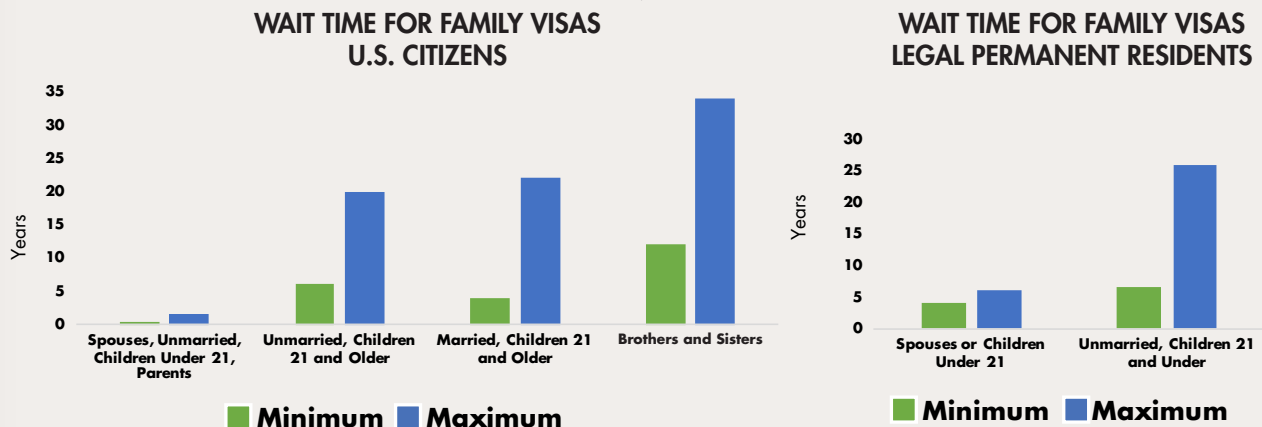


#7 Myth

IMMIGRANTS FREQUENTLY BRING THEIR EXTENDED RELATIVES WITH THEM

FACT

Wait Time For Family Visas, As Of May 2012



Source: Lutheran Immigration and Refugee Services, Immigration Myths Busted Infographic

#8 Myth

UNDOCUMENTED IMMIGRANTS HAVE CHILDREN IN THE U.S. TO AVOID DEPORTATIONS

FACTS

The parents of **5,100 children** in foster care are in detention or have been deported.
(Conservative estimate)

In the first six months of 2011, the federal government **deported more than 46,000 mothers and fathers** of U.S. citizen children.

In the next five years, **15,000 more children** will be in the same situation.

In FY2011, the U.S. deported a total of **397,000 people**.

Source: Lutheran Immigration and Refugee Services, Immigration Myths Busted Infographic



Latinos count!

THANK YOU AZHCC
FOR CAPTURING
THE GROWTH
AND POWER
OF OUR COMMUNITY!

As a proud member of the AZHCC
we look forward to a continuous
partnership that promotes the
growth of the Hispanic community.



INVESTING IN HOPE FOR THE FUTURE

mixed
VOces

Uniendo comunidades | Bridging communities

razafund.org

mixedvoces.com

SEE YOU NEXT YEAR!



SAVE THE DATE
SEPTEMBER 29-30, 2016

Phoenix Convention Center
(South Building)



www.hispanicwomen.org

CONSUMER
DEMOGRAPHICSTRADE WITH
MEXICO

"Any business leader or government agency needs trustworthy and up to date information to make critical decisions based on facts. The *DATOS* report from the Arizona Hispanic Chamber of Commerce is the best source of detailed decision making data pertaining to the Hispanic community in Arizona there is. Because of the impact that Hispanics represent in our State, this is no longer data for a niche market, but data for the reality of our overall market as is."

—David Farca, President of the Board of Directors, Arizona-Mexico Trade Commission

"The Consulate General of México in Phoenix commends the Arizona Hispanic Chamber of Commerce's valuable efforts in recognizing through *DATOS* the importance of the Arizona-Mexico trade relationship and the growing economic, social and cultural contributions of the Mexican community to the state of Arizona. Mexico is Arizona's single largest trading partner. Arizona exports over \$8.6 billion to Mexico per year, and imports \$7.4 billion. It's time for Arizona to benefit from its geographic proximity to México and boost interactions to promote economic development and growth"

—Embajador Roberto Rodríguez Hernández, Cónsul General de México en Phoenix, Arizona

Amid Growing National Tension On Immigration, Az Working To Mend Ties With Mexico

On June 17, 2015, Gov. Doug Ducey, flanked by a diverse array of Arizona business leaders, traveled to Mexico City as part of a highly-anticipated initiative to mend strained relations with our state's leading international trading partner.

Ducey had gone there to deliver the message that Arizona was "Open for Business" and ready to make a fresh start.

"The trip was a big step in making sure Mexico understood that Arizona's business community, including its growing Hispanic business interests, realizes how vital our cross-border partnership is to the future prosperity of our respective constituencies," said Gonzalo A. de la Melena, Jr., President and CEO of the Arizona Hispanic Chamber of Commerce, who was among the 50 or so business leaders who accompanied the governor. "We need to do better than we have in the past and I believe the governor's trip to Mexico was a big step in the right direction."

Mexico's top business and political leaders were also ready to move past the tensions created by the immigration-related controversies of the past decade and to trumpet the importance of reaffirming its longstanding historical, cultural and economic ties to Arizona. On the cultural and historical front, Arizona used to be part of Mexican and today the vast majority of Arizona Latinos, who now make up 30 percent of the state's population are of Mexican origin.

On the economic front, Arizona-Mexico trade topped \$16 billion in 2014, and cross-border commerce is expected to grow rapidly in the coming years. (Mexico was the United States' third-largest trading partner with \$507 billion in total import-export trade in 2013, according to the office of the U.S. Trade Representative.)

Future economic ties between Arizona and Mexico look promising. While the Arizona economy is steadily rebounding from the Great Recession and the U.S. economy has begun to show signs of a strong recovery, Mexico's economy has been booming. It's now the world's 13th-largest economy, on par with Spain, and it is projected to be the fifth-largest economy in the world by 2050.

Mexican visitors to Arizona are expected to pump about \$2.9 billion annually into the state's economy by 2016 and account for about 160,000 jobs statewide, according to the Economic and Business Research Center. Mexican immigrants in Arizona also contribute substantially to the \$50 billion in total annual consumer spending by the state's 2.1 million Latinos.

According to the U.S. Census, the products Arizona exports to Mexico represent a wide range of industries. Arizona's leading exports come from aeronautics related industries, but also include copper ore, electronics, natural gas and artificial surgical implants. On the import side, Mexico sends us processors and electronics, fruits and vegetables, turbojet and gas turbine parts and refined copper.



Trade With Mexico Facts

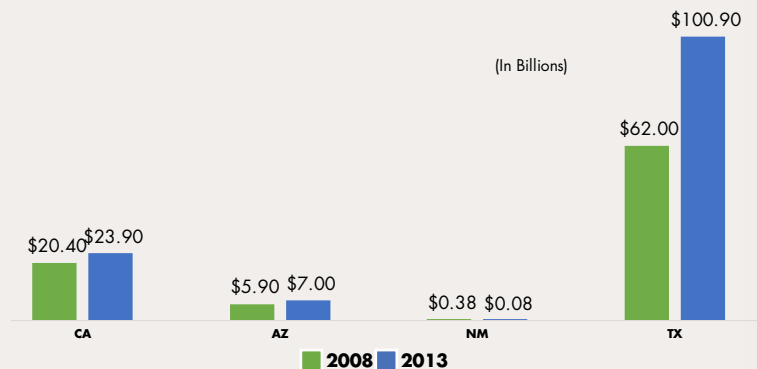


- Mexico is a growing world market, as well as Arizona's most important trading partner.
- In 2013, trade generated between Arizona and Mexico exceeded \$14 billion.
- Mexico is the world's 14th-largest economy, and is projected by Goldman Sachs to be the fifth-largest by 2050.
- Arizona's trade office in Mexico will assist Arizona companies in successfully entering the Mexican market and attract new companies and investments that will contribute to the state's economy to create high-wage jobs.
- Mayor LeVault of Youngtown, AZ notes that Mexican travelers add about \$2.7 billion per year to the Arizona economy, resulting in about 160,000 jobs.

Source: Magazine, *Improved Safety, Reduced Congestion*, Vol. 19: No. 4, 2015.
www.azmag.gov/Documents/Magazine-NOV2014-Web.pdf

From 2008 To 2013, **Arizona Merchandise Exports To Mexico Increased By 20%**

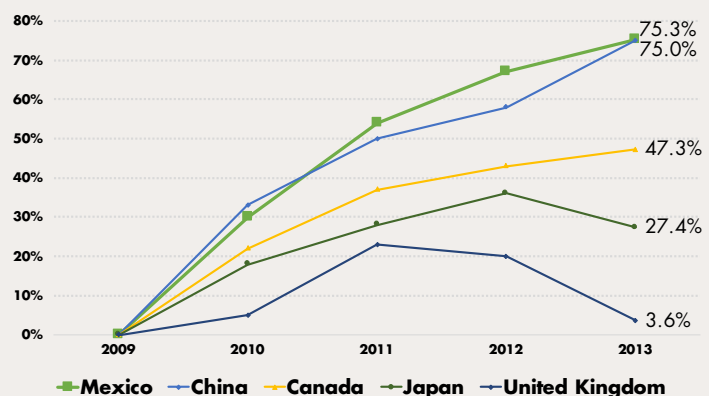
U.S. BORDER STATES' MERCHANDISE EXPORTS TO MEXICO 2008-2013



Source: U.S. Department Of Commerce
www.wilsoncenter.org/sites/default/files/Border_Economy_Transition_Wilson_Lee_0.pdf

U.S. Exports To Mexico Had **The Highest Export Growth** From 2009 To 2013

U.S. EXPORT GROWTH TO ITS TOP FIVE MARKETS 2009-2013



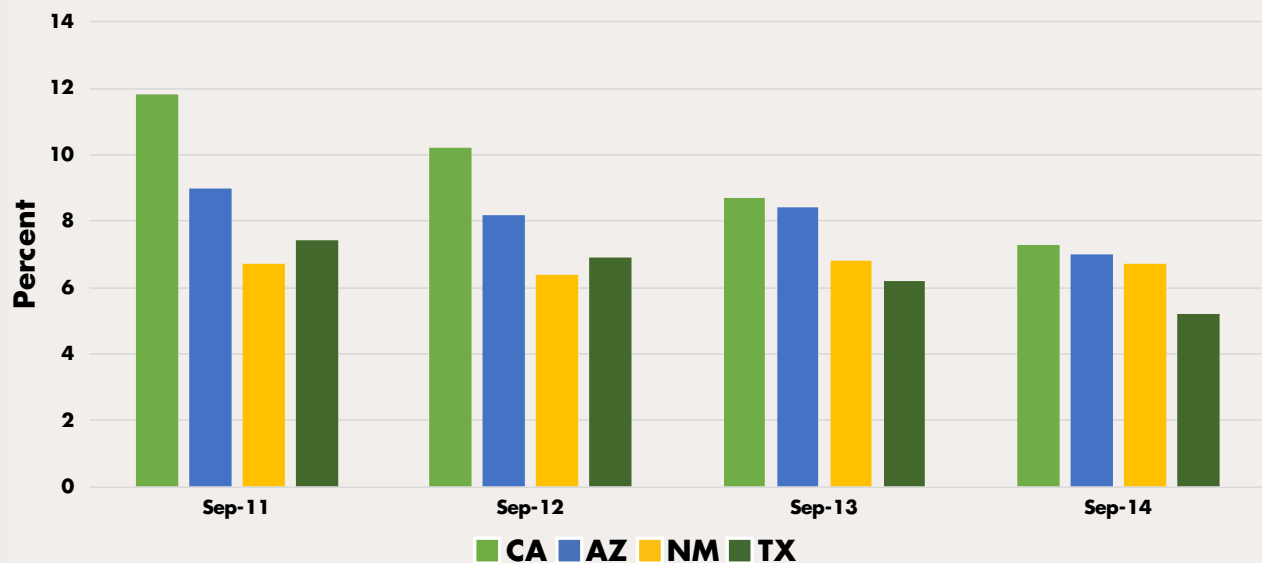
Source: Author's calculations. Data From United States International Trade Commission, p81, 2014.
www.wilsoncenter.org/sites/default/files/Border_Economy_Transition_Wilson_Lee_0.pdf



"Growing industries along the border, including energy, biosciences and aerospace manufacturing, are putting a greater premium on high-skilled workers and are forcing companies to make investment decisions based less on the availability of cheap labor and more on the availability of high skills...Creating, attracting and retaining the right talent at the border remains a challenge."

—Ruth Soberanes, North American Research Partnership

BORDER STATE UNEMPLOYMENT RATES (SEPT. 2011-SEPT. 2014)

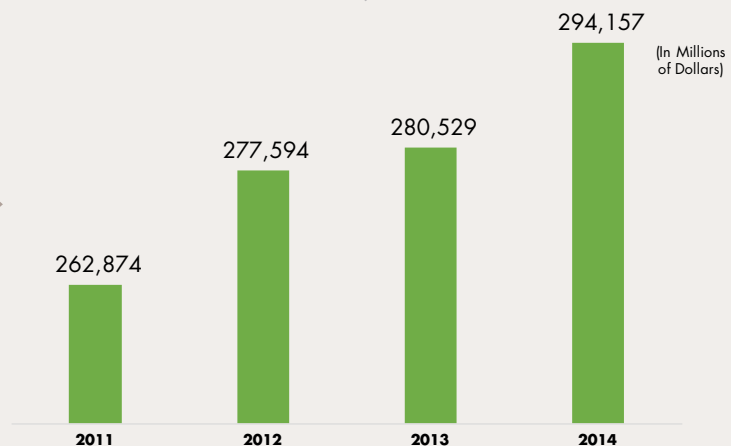


Source: Bureau Of Labor Statistics, U.S. Department Of Labor, 2014.
www.wilsoncenter.org/sites/default/files/Border_Economy_Transition_Wilson_Lee_0.pdf

From 2011 To 2014
**Mexico Imports To
 The U.S. Increased
 By Nearly 12%**



YEAR-END MEXICO IMPORTS FROM 2011-2014



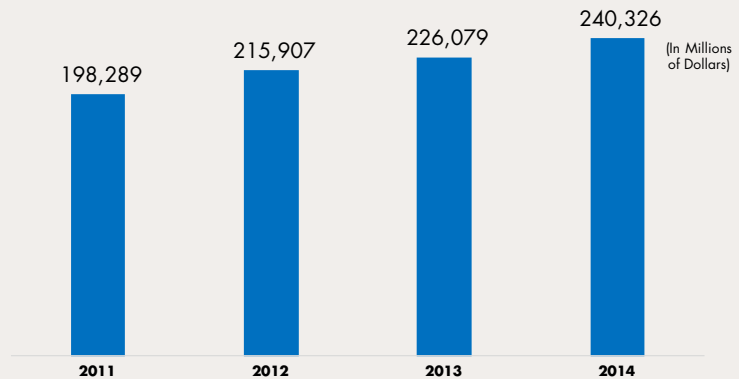
Source: U.S. Census Bureau, Foreign Trade, 2015
www.census.gov/foreign-trade/statistics/product/enduse/imports/c2010.html



From 2011 To 2014
U.S. Exports To
Mexico Exports
Increased By
21%



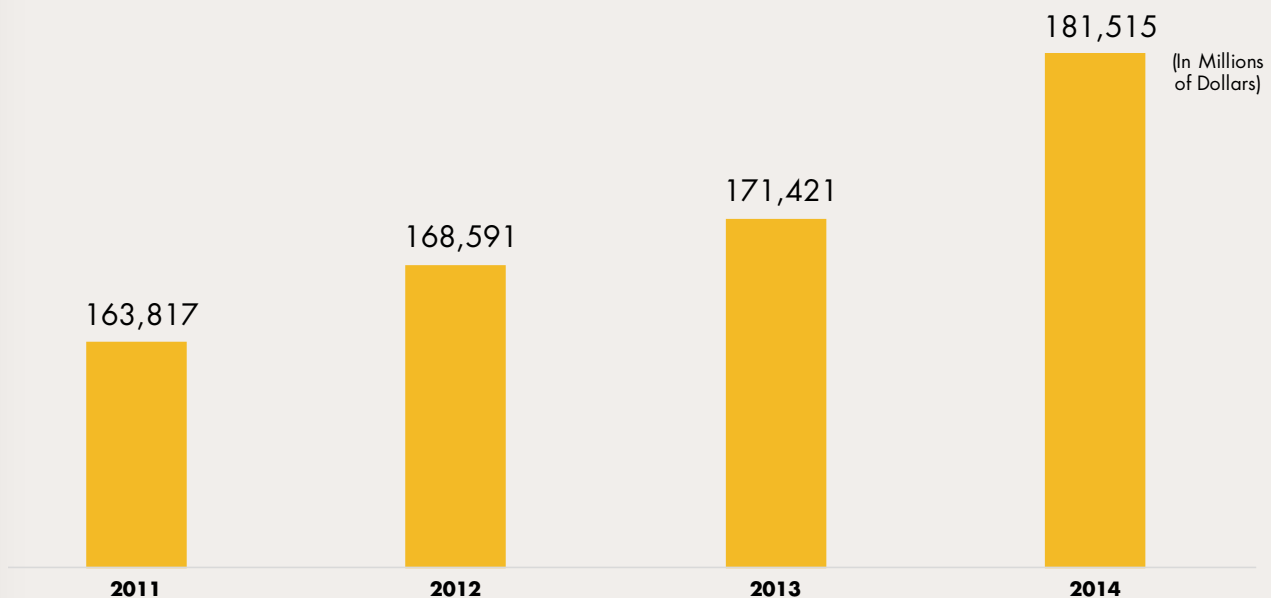
YEAR-END MEXICO EXPORTS FROM 2011-2014



Source: U.S. Census Bureau, Foreign Trade, 2015
www.census.gov/foreign-trade/statistics/product/enduse/exports/c2010.html

From 2011 – 2014 **NAFTA With Mexico**
Consumption Increased By Almost **11%**

NAFTA WITH MEXICO (CONSUMPTION) 2011 - 2014

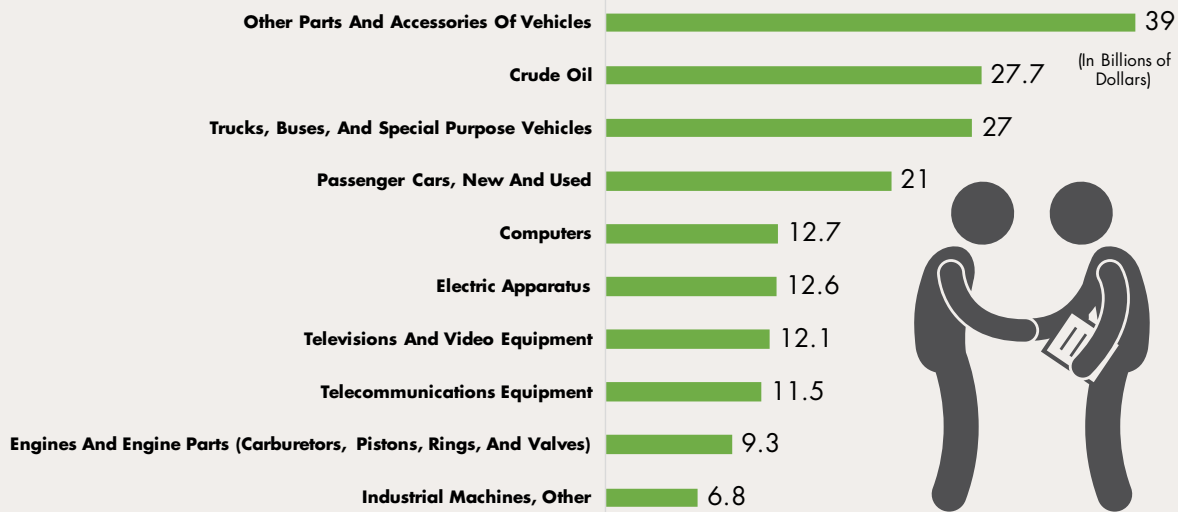


Source: U.S. Census Bureau, Foreign Trade, 2015
www.census.gov/foreign-trade/balance/c0005.html



The **Top 5 Imports** From Mexico To U.S. In 2014 Totalled More Than **\$127 Billion**

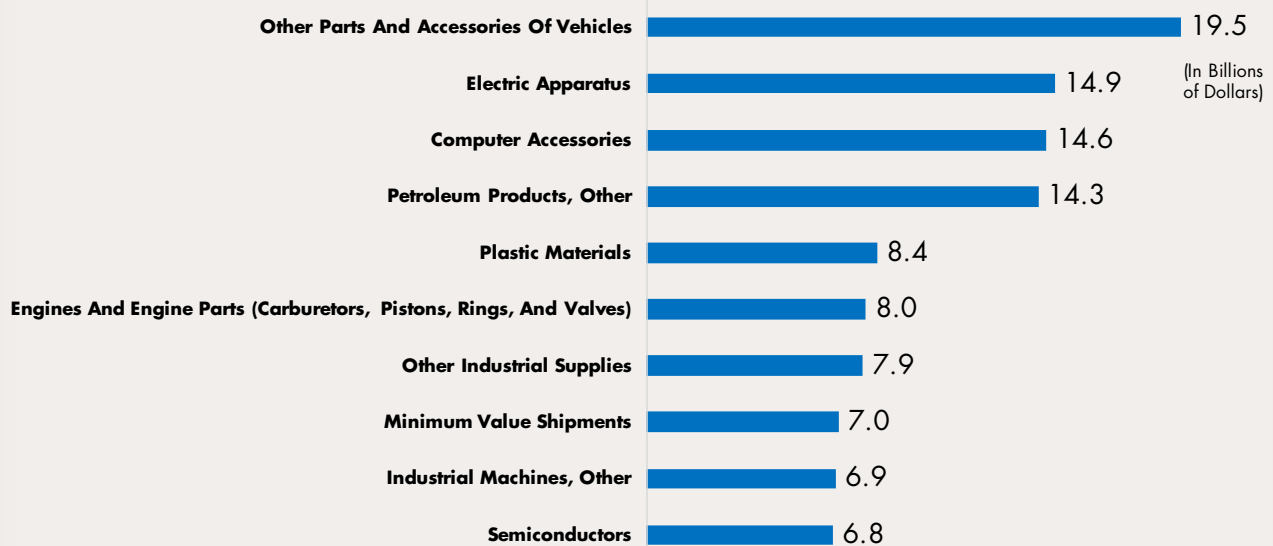
U.S. IMPORTS BY PRODUCT FROM MEXICO 2014



Source: U.S. Census Bureau, Foreign Trade, 2015
www.census.gov/foreign-trade/statistics/product/enduse/imports/c2010.html

The **Top 10 U.S. Products Exported** To Mexico In 2014 Totalled More Than **\$108 Billion**

U.S. EXPORTS BY PRODUCT TO MEXICO 2014

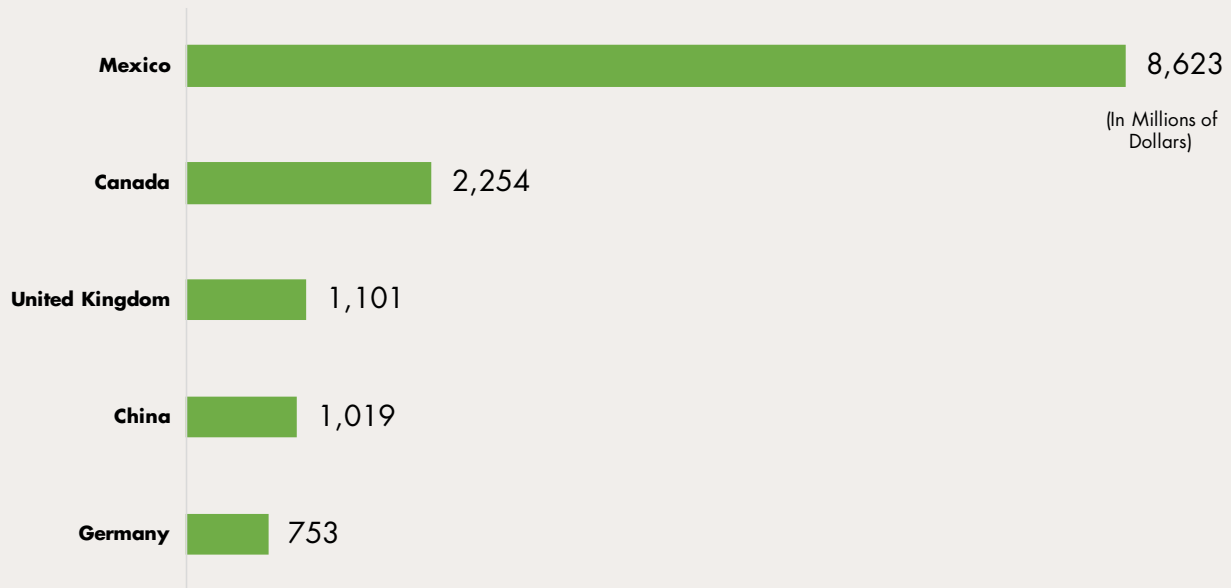


Source: U.S. Census Bureau, Foreign Trade, 2015
www.census.gov/foreign-trade/statistics/product/enduse/exports/c2010.html



Based On 2014 Dollar Value, **Mexico Was The Top Export Destination** From Arizona

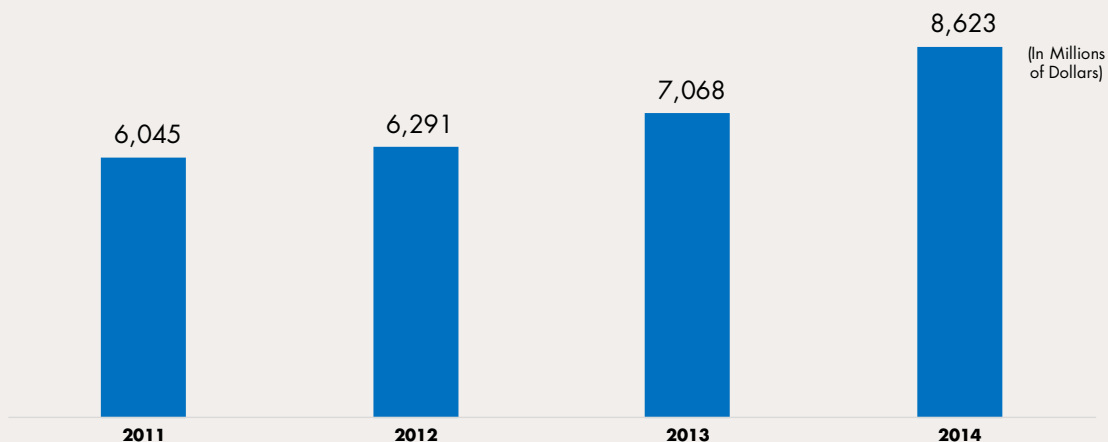
TOP U.S. EXPORTS (ORIGIN OF MOVEMENT) FROM ARIZONA



Source: U.S. Census Bureau, Foreign Trade, 2015
www.census.gov/foreign-trade/statistics/state/data/az.html

From 2011 To 2014, The Arizona To Mexico **Exports Dollar Value** Increased By Approximately **43%**

ARIZONA TO MEXICO EXPORTS FROM 2011-2014 BASED ON DOLLAR VALUE

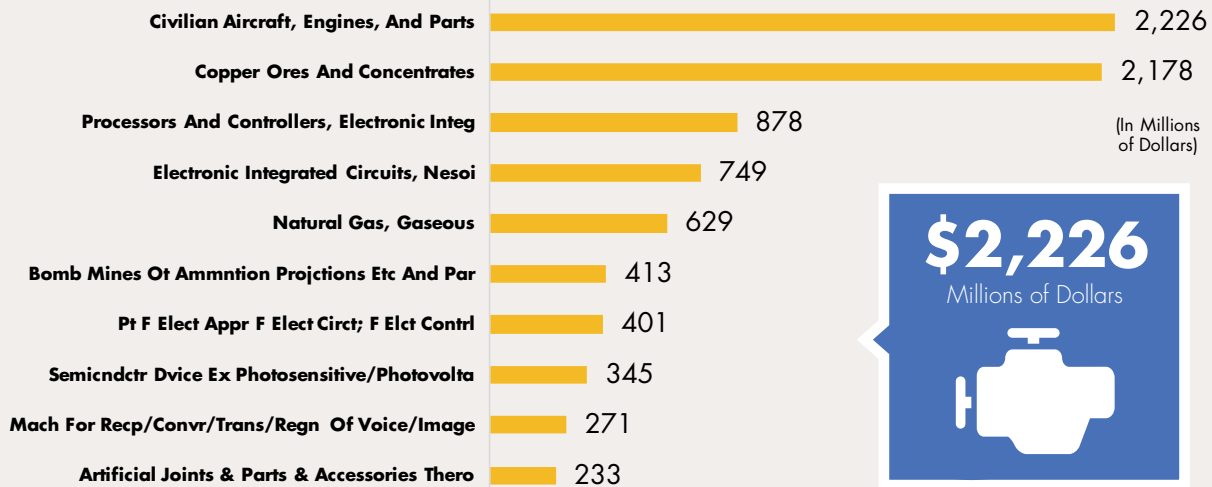


Source: U.S. Census Bureau, Foreign Trade, 2015
www.census.gov/foreign-trade/statistics/state/data/az.html



In 2014, **Civilian Aircraft, Engines And Parts**
Accounted For Nearly **11% Of Total Share**
Products Exported By Arizona

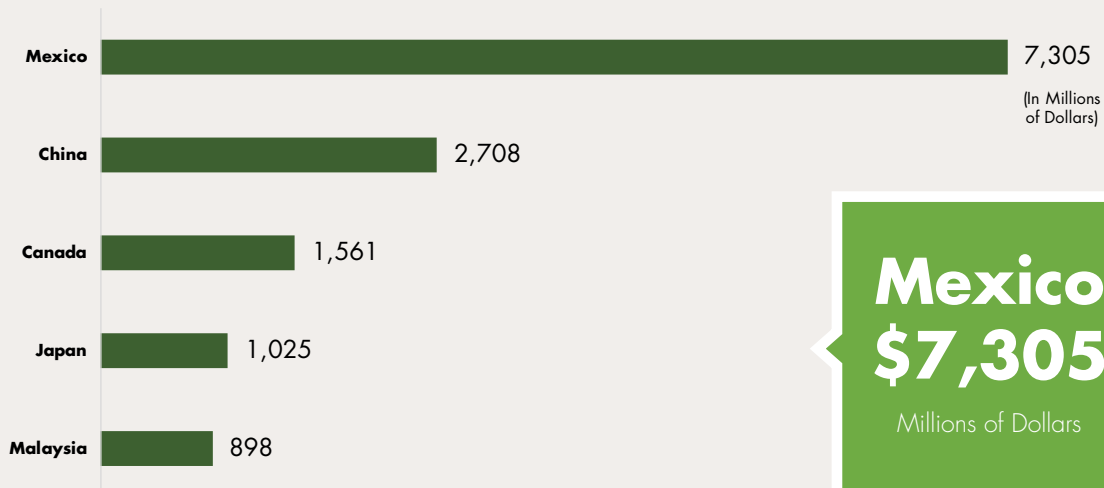
TOP 10 ARIZONA EXPORT PRODUCTS BASED ON 2014 DOLLAR VALUE



Source: U.S. Census Bureau, Foreign Trade, 2015
www.census.gov/foreign-trade/statistics/state/data/az.html

In 2014, **Mexico More Than Doubled** The Second Arizona Import Country (China) And **Quadrupled** The Third Highest Arizona Import Country (Canada) In Dollar Value

TOP 5 ARIZONA IMPORT COUNTRIES BASED ON 2014 DOLLAR VALUE

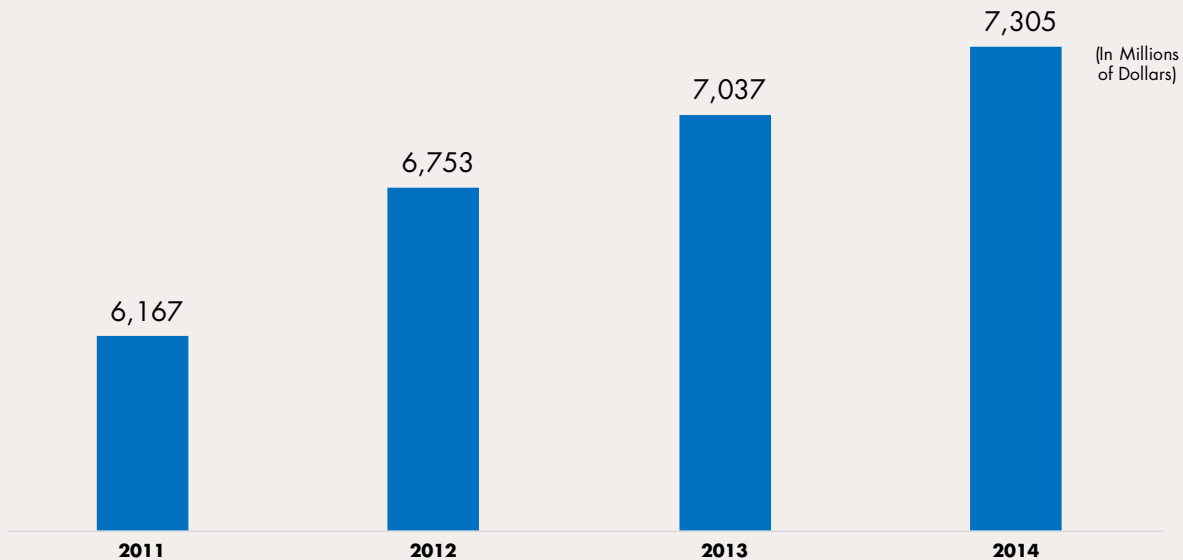


Source: U.S. Census Bureau, Foreign Trade, 2015
www.census.gov/foreign-trade/statistics/state/data/imports/az.html



From 2011 To 2014, **Arizona Imports From Mexico** On Average Increased By **6% Yearly**

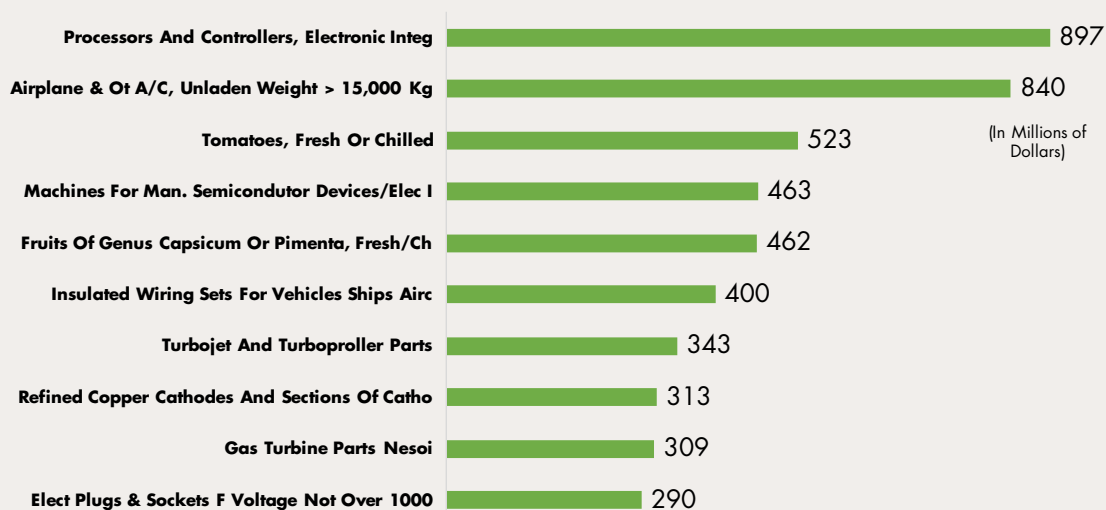
ARIZONA IMPORTS FROM MEXICO BASED ON DOLLAR VALUE 2011-2014



Source: U.S. Census Bureau, Foreign Trade, 2015
www.census.gov/foreign-trade/statistics/state/data/imports/az.html

The Top 10 U.S. Imports To Arizona Accounted For Nearly **25%** Of Total Share Imports

TOP 10 U.S. IMPORTS TO ARIZONA BASED ON 2014 DOLLAR VALUE



Source: U.S. Census Bureau, Foreign Trade, 2015
www.census.gov/foreign-trade/statistics/state/data/imports/az.html



Nafta For The Rest Of Us

LET'S MAKE TRADE WORK FOR AS MANY OF US AS POSSIBLE

North America's trillion-plus dollars in annual *NAFTA* trade is a *powerful* economic force. Yet this trade can be tremendously controversial as well. This is because large firms in North America often benefit from *NAFTA* trade in far more visible ways than "the rest of us." Predictably, debates on globalization, trade and income inequality become emotional and divisive rather than rational, inclusive, and strategic. Yet as we struggle to add well-paying jobs to our economy and diversify our economic options, numerous communities, businesses and individuals need and want to take greater advantage of the benefits of expanding North American trade. So, who are we talking about and what is holding "the rest of us" back?

- Border communities facilitate well over a trillion dollars in trade annually yet struggle with congested ports of entry, persistent poverty and increasing global competition.
- Small- and medium-sized enterprises employ more workers than any other sector, yet only 1% of U.S. firms actually export and many are left out of the global value chain.
- Institutions such as cross-border collaboratives, economic development organizations and others are the "connective tissue" of North America yet struggle for survival.
- Tourists from the United States, Mexico and Canada comprise the three nations' largest tourism markets yet battle with ports of entry congestion and a disappointing welcome.
- Students are our future human capital and are key to our future economic development, yet North American student exchange is severely underdeveloped.
- Consumers have enjoyed expanded choice in some areas due to *NAFTA* but still suffer from trade protectionism, monopolies and a wide array of policies that limit choice.
- Wage earners struggle with wage stagnation and shrinking benefits when the global economy clearly is calling for added value rather than a race to the bottom on compensation.

What We Will Do About It

The North American Research Partnership has launched a new initiative called "*NAFTA* for the Rest of Us" which focuses on analyzing and developing both policies and actions needed to expand economic opportunity for a broad range of entities and individuals. The initiative will feature

- Advising and implementation of North American strategy for "the rest of us:" communities, small- and medium-sized enterprises, non-profits and others;
- Reports, policy briefs, blog posts, a social media focus and stakeholder surveys on "*NAFTA* for the Rest of Us" core issue areas;
- Video interviews with subject matter experts as well as members of the abovementioned groups: small business owners, elected officials, tourists and students; and
- Events focused on bringing attention to policy issues affecting these groups (including webinars and teleconferences).

In an age of intensifying anxiety over economic inequality, globalization and related issues, we need to work to broaden the benefits of trade to build a real "*NAFTA* for the Rest of Us."

For more information on how you can participate in or support this initiative, contact **Erik Lee, Executive Director**, North American Research Partnership, tel. **858.449.3798**, erik@naresearchpartnership.org.



Mexican Visitor Expenditures In Arizona Are Projected To Reach **\$2.9 Billion** In 2016

MEXICAN VISITOR EXPENDITURE ESTIMATES FOR 2013 AND PROJECTIONS FOR 2014-2016

MEXICAN VISITORS	2007-2008	2013	2014	2015	2016
ESTIMATED VISITORS	24,040	17,460	19,340	20,880	22,550
ESTIMATED PARTIES	13,690	9,480	9,960	10,470	11,030
ESTIMATED EXPENDITURES	2,688,670	2,260,630	2,455,410	2,670,260	2,907,340

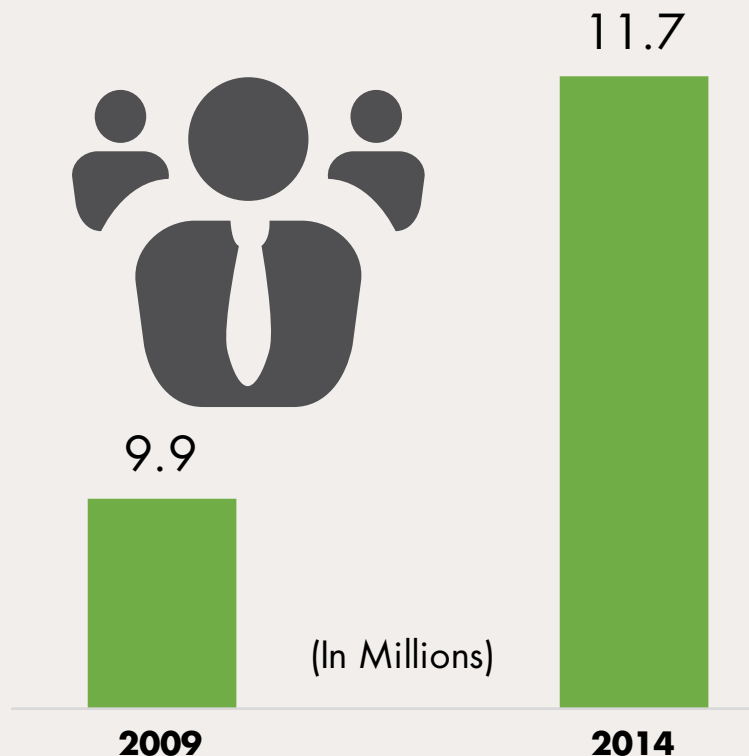
Source: Economic and Business Research Center, *Extending the Border Zone to the Entire State of Arizona*, 2015
www.azmag.gov/Documents/EDC_2015-05-11_Extending-the-Border-Zone-to-the-Entire-State-of-Arizona.pdf

Exports Support Jobs for American Workers

- \$2.34 Trillion, Record-setting value of U.S. goods and services exports in 2014

- 93,354, U.S. jobs supported by goods exports from Arizona in 2014

U.S. JOBS SUPPORTED BY EXPORTS IN 2014 INCREASED BY 18% SINCE 2009



Source: Office of Trade and Economic Analysis, International Trade Administration, U.S. Department of Commerce, 2015
www.trade.gov/mas/ian/statereports/states/az.pdf



Arizona's Metropolitan Exports in 2013

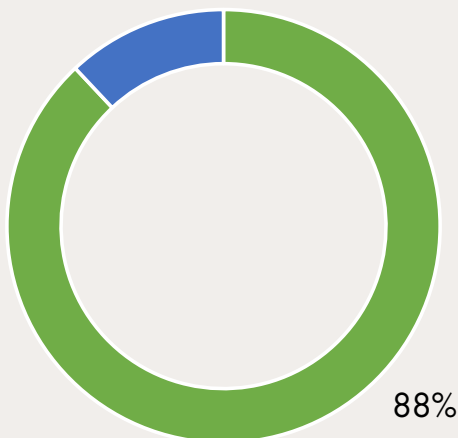


METRO AREA	TOTAL MERCHANDISE EXPORTS	SHARE OF STATE EXPORTS
PHOENIX-MESA-SCOTTSDALE	\$11.5 BILLION	65.7%
TUCSON	\$2.6 BILLION	14.8%
YUMA	\$460 MILLION	2.6%
SIERRA VISTA-DOUGLAS	\$418 MILLION	2.4%
FLAGSTAFF	\$254 MILLION	1.5%

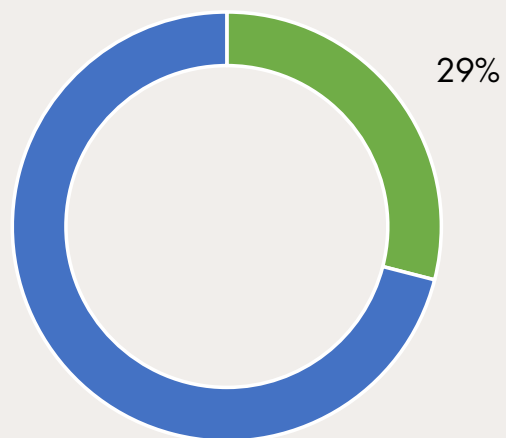
Source: Office of Trade and Economic Analysis, International Trade Administration, U.S. Department of Commerce, 2015
www.trade.gov/mas/ian/statereports/states/az.pdf

**Exports
Sustain
Arizona
Businesses**

7,488
Companies
Exported
From Arizona
in 2013



**SMALL-MEDIUM ENTERPRISE
SHARE OF ARIZONA EXPORTERS
(<500 EMPLOYEES)**



**SMALL-MEDIUM ENTERPRISE SHARE
OF ARIZONA'S TOTAL MERCHANDISE
EXPORTS IN 2013**

Source: Office of Trade and Economic Analysis, International Trade Administration, U.S. Department of Commerce, 2015
www.trade.gov/mas/ian/statereports/states/az.pdf

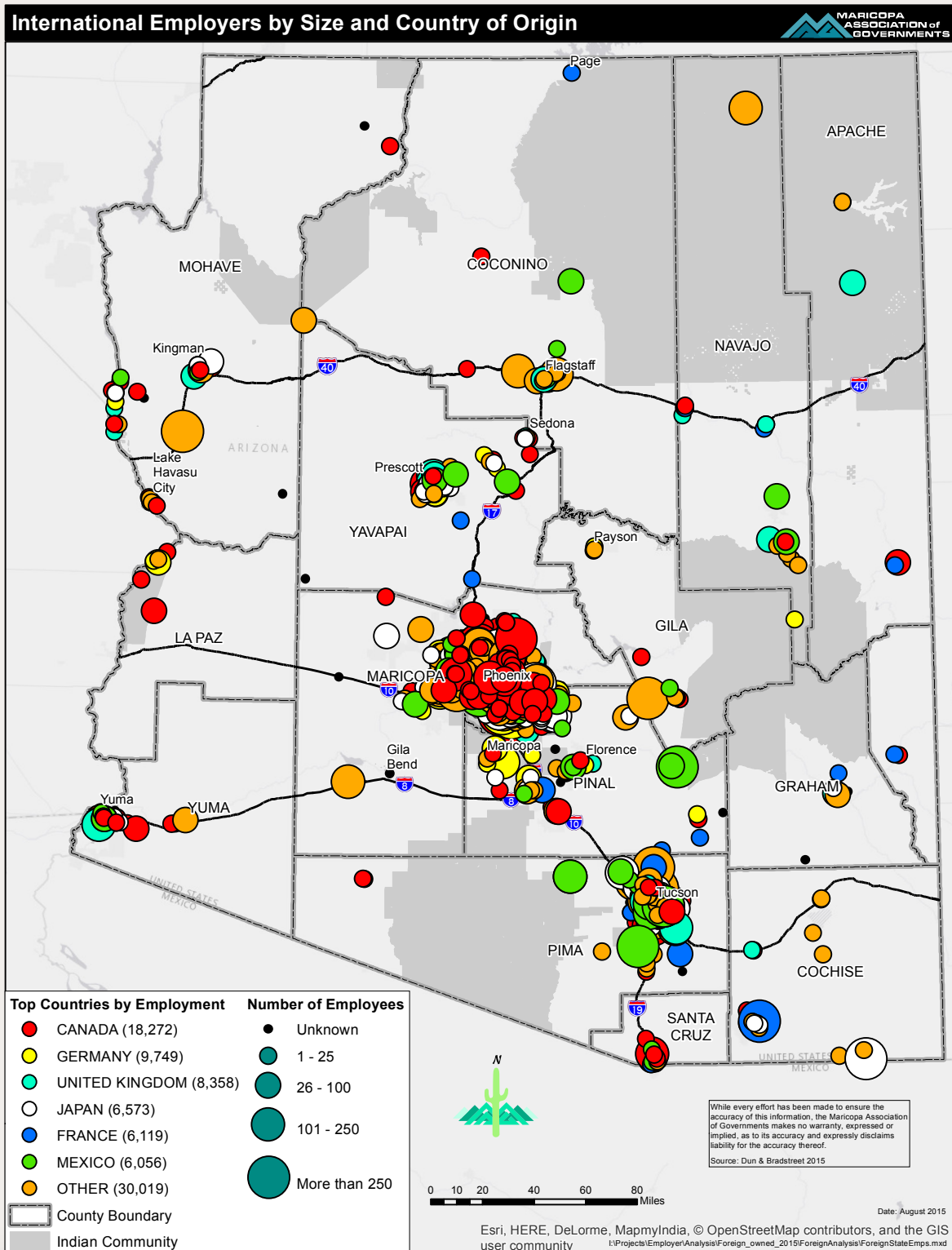


Notes



International Employers In Arizona

By Size And Country Of Origin



Source: Maricopa Association of Governments



EXCERPT FROM:

**Extending the Border Zone
to the Entire State of Arizona:
Estimated Expenditures and Economic
Impact Simulations, 2013–2016**

Alberta H. Charney, Ph.D.

Alan Hoogasian, M.A., M.S



Report Submitted to:
Maricopa Association of Governments



March 12, 2015

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Excerpt from Extending the Border Zone to the Entire State of Arizona: Estimated Expenditures and Economic Impact Simulations, 2013–2016

Executive Summary

- Every year, thousands of frequent, low-risk, short-term visitors travel from Mexico into Arizona to conduct business, visit with family and friends, or shop at local stores—spending billions of dollars. Although these visitors have been pre-cleared through thorough background checks for frequent travel into the U.S., their U.S.-issued border crossing cards (BCCs) limit their travel in Arizona to 75 miles entering through Arizona's land ports of entry—allowing visitors to travel about as far as the city of Tucson, with the exception of a 25-mile limit for visitors entering through the San Luis port of entry (Yuma region).
- A resolution of support to extend the border zone from its current 75-mile zone to the entire state and to streamline the Mexican visa process at the land ports of entry is currently being supported by regional planning agencies¹ throughout Arizona, including the Maricopa Association of Governments (MAG), as well as the Intertribal Council of Arizona and the city of Nogales, Arizona. Extending the zone for the BCC requires an administrative action by the U.S. Department of Homeland Security.
- The supporters of the proposal questioned what could happen if these legal visitors could bring their tourism dollars into all of Arizona, where they could go to shopping centers, attend Spring Training baseball games, or travel all the way up to Flagstaff or the Grand Canyon where they could spend more dollars.
- In 2015, MAG requested that the UA conduct an economic impact analysis of Mexican spending resulting from extending the border zone to the entire

state of Arizona. Since the late 1970s, the University of Arizona (UA) has conducted four extensive research studies that assess direct spending by Mexican visitors and estimate their total economic impact on Arizona. The last Mexican visitors study prior to this study was conducted in 2007-2008.

- This report outlines calculations of baseline expenditures of Mexican visitors to Arizona from 2013 to 2016, and provides “what if” scenarios of the effect of extending the border zone statewide. The “what if” scenarios include 1) An increase in all border crossers² by three percent; 2) an increase in passenger crossers³ by three percent; and 3) increases of five percent, 10 percent and 15 percent in the number of Mexican travelers⁴ traveling north of the existing border zone. The UA utilized IMPLAN, a nationally recognized impact analysis model to estimate the economic impacts related to these scenarios.
- The analysis used data and detailed characteristics of Mexican visitors and their spending obtained in a 2007-2008 Mexican visitors study conducted by the UA for the Arizona Office of Tourism. The first task was to build a model based on the 2007-08 survey to accurately estimate travel parties⁵ and expenditures, by port of entry and by destination-county; as a result, initial 2013 estimates of expenditures, by port of entry, and by destination-county, were made.
- It can be reasonably assumed that spending increased in proportion to increases in per capita income⁶ in Mexico; Short-term trends were used to “project” border crossers for 2014 – 2016, by port of entry by mode, based on the growth rates in passenger crossers numbers from their trough to current levels for each port of entry.

¹ Central Arizona Governments (CAG), Flagstaff Metropolitan Planning Organization (FMPO), Pima Association of Governments (PAG), Southeastern Arizona Governments Organization (SEAGO), Western Arizona Council of Governments (WACOG) and Yuma Metropolitan Planning Organization (YMPO).

² Refers to data provided by the U.S. Customs and Border Protection of all non-U.S. Citizens (representing Mexican citizens) crossing legally into Arizona through its southern ports of entry either by foot, in personal-owned vehicles, in buses, train, or in small private aircrafts. The percentage of non U.S. Citizens to total (U.S. and non U.S. Citizens) border crossings is assumed unchanged since the 2008 study. Arizona's southern ports of entry include Douglas, Lukeville, Naco, Nogales (international airport, and Mariposa and DeConcini gateways), San Luis (commercial and passenger gateways), Sasabe, and Lukeville.

³ Mexican citizens crossing legally into Arizona through its six land ports of entry in personal-owned vehicles, and buses.

⁴ Mexican citizens crossing legally into Arizona through its air and land ports of entry.

⁵ Group of people traveling together on a trip under a single or pooled budget. Example is a family of two parents and three children.

⁶ Measured as annual compounded average growth in per capita Mexican Gross Domestic Product (1.74 percent), a proxy for income growth in Mexico.



Excerpt from Extending the Border Zone to the Entire State of Arizona: Estimated Expenditures and Economic Impact Simulations, 2013–2016

- Total 2013 border crossers to Arizona are 27.4 percent below the 2007-08 levels. Strong recent trends in passenger crossers, particularly through the ports of San Luis and Nogales, result in a projected average annual compounded growth rate for border crossers of almost 9 percent between 2013 and 2016.
- The total number of travel parties fell by almost 31 percent between 2007-08 and 2013, more than the reduction in all border crossers. This is because the number of pedestrian crossers fell dramatically, particularly in Nogales, and pedestrians have a smaller travel party size. Therefore, the 44 percent fall in pedestrian crossers translates into a decrease in travel parties that is larger than the decrease in total border crossers. Annual spending of Mexican visitors to Arizona declined to \$2.257 billion in 2013 – approximately \$431 million lower than the 2007–2008 levels, due to the recession and effects of heightened travel and border security measures.
- Based on a 9 percent projected annual increase in passenger crossers and the small assumed 1.74 percent annual increase in per party expenditures, estimated total expenditures grew 6.9 percent annually from 2013 to 2016. The total direct and indirect jobs impact of these estimated expenditures were 23,076 in 2013, and 25,064, 27,257, and 29,677 in 2014–2016.
- The projected baseline expenditures for 2014, 2015 and 2016 were used to assess the economic impacts of the “what if” scenarios of extending the border zone statewide.
- Extending the border zone will affect more than 1 million Mexican visitors who have been issued a BCC over the last 10 years in Nogales and Hermosillo, the two closest cities to Arizona located in the state of Sonora. This group represents a significantly large population who could positively impact Arizona’s economy. Nearly 1.5 million of the 1.7 million visa applications adjudicated at the U.S. State Department’s consulates and embassies in Mexico in fiscal year 2013 were for BCCs⁷.
- The proposed change would allow pre-cleared Mexican visitors holding a BCC, which currently acts as a visa document, to travel beyond Tucson without having to fill out an additional paper I-94 form and provide flexibility to spend their tourist dollars throughout Arizona, invigorating tourism-sensitive economies in both rural and urban regions of the state. Analysis of border crossings during the 1999 border zone extension in Arizona from 25-mile to 75-mile indicates an increase of under 3.9 percent in border crossings between 1998 and 1999 (year prior to the extension) compared to between 1999 and 2000 (the year following the change).
- The most recent border zone expansion occurred in 2013 in the state of New Mexico, which extended its border zone from 25 miles to 55 miles. Analysis of border crossings right after the extension indicates crossings (including through the El Paso port of entry) were 4.2 percent higher during the year after the border expansion than the year prior to the border expansion.
- Three “what if” scenarios were run: an increase in all border crossers by 3 percent; an increase in passenger crossers by 3 percent; and increases of 5 percent, 10 percent and 15 percent in the number of Mexican visitors traveling to the north of the existing border zone.
- Overall this report concludes that extending the border zone to the entire state of Arizona could:
 - **Generate up to \$181 million in additional estimated spending and 2,179 additional jobs in 2016⁸**
 - **Bring the total projected spending of Mexican visitors to Arizona to nearly \$3.1 billion and a total jobs impact of 31,856.** These numbers are expected to move with the Mexican economy.

⁷ U.S. State Department Hearing on Border Security – 2013.

⁸ Based on a scenario of a three percent increase in border crossings resulting from the positive message the extension would send, and a 15 percent increase in passenger crossings who decide to travel north of the 75-mile border zone due to the extension



Excerpt from Extending the Border Zone to the Entire State of Arizona:
Estimated Expenditures and Economic Impact Simulations, 2013–2016

Summary Table: Total Effects Of Potential Spending By Mexican Visitors Due To Proposed Border Zone Extension

BASELINE IMPACTS OF 2016 PROJECTIONS OF MEXICAN VISITORS SPENDING

<i>Spending baseline projections</i>	2,907,340,000
<i>Expected jobs created from baseline spending</i>	29,677

ADDITIONAL SPENDING BY MEXICAN VISITORS DUE TO PROPOSED BORDER ZONE EXPANSION - BEST CASE SCENARIO, 2016

<i>A 3 percent increase in total border crossers</i>	75,350,000
<i>A 15 percent increase in passenger crossers traveling farther north</i>	105,870,000
Total potential spending	181,220,00

JOBS EFFECTS OF ADDITIONAL SPENDING

<i>A 3 percent increase in total border crossers</i>	769
<i>A 15 percent increase in passenger crossers traveling farther north</i>	1,410
Total Jobs effect	2,179

TOTAL EFFECT OF POTENTIAL SPENDING BY MEXICAN VISITORS DUE TO PROPOSED BORDER ZONE EXTENSION, 2016

<i>Spending - baseline projections and additional spending</i>	3,088,560,000
<i>Expected jobs created from baseline projections and additional spending</i>	31,856

⁷ U.S. State Department Hearing on Border Security – 2013.

⁸ Based on a scenario of a three percent increase in border crossings resulting from the positive message the extension would send, and a 15 percent increase in passenger crossings who decide to travel north of the 75-mile border zone due to the extension

RESOURCES



DATOS Arizona Resources 2015

- DATOS Arizona Resources 2015
- AAA Arizona
- Advertising Age
- AIDS.gov
- American Express
- American Heart Association
- American Immigration Council
- Arizona Community Forum
- Arizona Department of Health Services
- Arizona Diamondbacks
- Arizona Hispanic Chamber of Commerce
- Arizona Minority Education Policy Analysis Center (AMEPAC)
- Arizona State University
- Arizona State University Morrison Institute For Public Policy
- Arizona State University L. William Seidman Research Institute
- Arizona State University Thunderbird School of Global Management
- Blue Cross Blue Shield of Arizona
- Bureau of Labor Statistics
- Campaign US
- Cancer Treatment Centers of America
- Center for American Progress
- Centers for Disease Control and Prevention
- Chicanos Por La Causa
- The College Board
- College Success Arizona
- Community Commons
- Cox Communications
- Crain Communications
- eMarketer
- Experian
- Families USA
- Gallup
- Geoscape
- Gizmodo
- Helios Education Foundation
- Hispanic Millennial Project
- IHS Global Insight
- Instituto Cervantes
- Institute for Health Promotion Research at The University of Texas
- International Trade Administration
- JMIR Publications
- Keller Fay Group
- Latin Post
- Latino Commission on AIDS
- Lutheran Immigration and Refugee Services (LIRS)



RESOURCES

- Macerich
- Maricopa Association of Governments (MAG)
- Maricopa County Community College District
- Massachusetts Mutual Life Insurance Company
- McKinsey & Company
- Media Monitors
- MIC Food
- Migration Policy Institute (MPI)
- MIND Research Institute
- Mintel
- National Association of Hispanic Real Estate Professionals (NAHREP)
- Nielsen
- North American Research Partnership (NARP)
- National Public Radio (NRP)
- OYE! Business Intelligence
- Partnership for a New American Economy
- Pew Research Center
- Phoenix Children's Hospital
- Phoenix International Raceway
- Phoenix Suns
- Pivot by Arteaga/Hyland
- PricewaterhouseCoopers LLP
- Prudential Research
- R.L. Polk & Company
- Republic Media
- Resurgent Republic
- RetailDIVE
- The Roman Catholic Diocese of Phoenix
- Salt River Project (SRP)
- Scarborough Research
- Selig Center for Economic Growth, University of Georgia
- Simmons National Consumer Survey
- St. Luke's Health Initiatives
- State of Arizona - Voter Registration Data
- The State of Obesity
- Statista - The Statistics Portal
- Toyota and Barrios Bellos
- U.S. Census Bureau
- U.S. Department of Commerce
- U.S. Department of Education
- U.S. Department of Homeland Security
- Univision/Univision Arizona
- Urban Institute
- Valley Metro
- Valley of the Sun United Way
- Vantage West Credit Union
- VIANT
- WestGroup Research
- The W. K. Kellogg Foundation
- Yankelovich
- Young Entrepreneurs Academy

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THE STATE OF ARIZONA'S HISPANIC MARKET

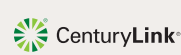
SOUTHERN AZ REGIONAL OVERVIEW 2015



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