



LATINA POWER SHIFT

nielsen
.....

AN UNCOMMON SENSE
OF THE CONSUMER™

EXECUTIVE SUMMARY

U.S. Hispanic women, also known as Latinas, have recently and rapidly surfaced as prominent contributors to the educational, economic, and cultural wellbeing of not only their own ethnicity, but of American society and the consumer marketplace. This rise of Latinas is driven both by strong demographics and a healthy inclination to embrace and retain their Hispanic culture even as they make significant strides toward success in mainstream America.

- The rise of Latinas. Latinas are outpacing Latino males in their educational pursuits and career development, are overwhelmingly the decision-makers in household spending, have surpassed the proportion of non-Hispanic white families with children, and through their youth and increased incomes have become an attractive consumer segment who is being actively courted by marketers.
- Latinas are leading the shift to the ambicultural® middle.¹ Latinas' embrace of culture and language is salient, in that over the past decade, bilingual language proficiency has significantly increased while the proportion of Spanish dominance has held steady.
- Latinas are expanding their purchasing power. Latinas are rapidly catching up with or exceeding Hispanic males and non-Hispanic females in big ticket purchasing (homes and autos) and in the use of financial services. Eighty-six percent of Latinas say they are the primary decision makers in their households making them pivotal to the Hispanic market's \$1.2 trillion in annual buying power.^{2,3}
- Family needs are reflected in the Latina shopping basket. In many categories, the consumer behavior of Latinas distinctively varies from that of other American females. Some of the high levels of purchasing by Latinas are associated with the needs of their larger families or cultural nuances— many food categories, oral hygiene products, bottled water, detergent, and paper products, for example.
- Latinas cultivate connectivity. Focused on strong shifts toward an increasingly balanced bicultural milieu, Latinas are adopting and adapting all types of technology at a higher pace than U.S. females. In significant areas, Latinas are outpacing society in using technology for culturally-centered social networking. Personal technology has found an ideal fit with Latinas' propensity to be connected, to communicate, and to investigate ways for improving their and their families' wellbeing. For many Latinas, personal technology and social networking are enabling the maintenance and recovery of ethnic culture, language and traditions. This takes place domestically as Latinas build affinity groups around their ethnicity and their common trajectories within American society, as well as internationally as they create robust connections with relatives and friends in their countries of origin.

¹Ambicultural is a registered service mark of EthniFacts, LLC and is used with their permission.

²Nielsen, April 2013.

³UGA Selig Center Multicultural Economy Study 2012.

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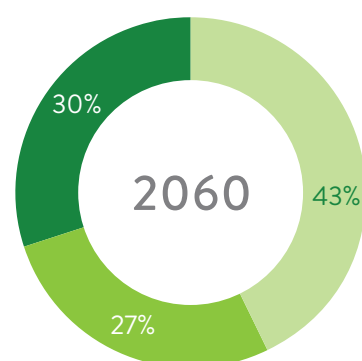
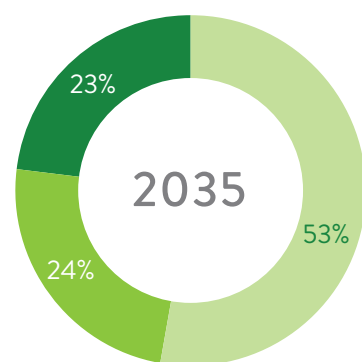
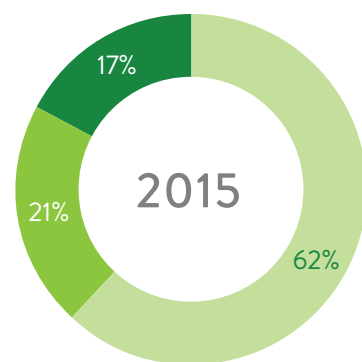
SECTION ONE:

LATINAS ARE KEY DRIVERS OF HISPANIC ECONOMIC POWER IN THE U.S.

The Hispanic Market Imperative (Nielsen Q2 2012) and other recent reports have documented the prominent role of Latinos in all aspects of American life and as the primary driver of U.S. growth essential to future business success. As companies unlock the potential value of Latino consumers, it is becoming evident that the key to reaching their hearts, minds, and pocketbooks is increasingly through Latinas.

Hispanic women are a key growth engine of the U.S. female population and are expected to become 30 percent of the total female population by 2060, while the non-Hispanic white female population is expected to drop to 43 percent. By 2060, there will be no single dominant ethnic group, instead the female (and total) population will be comprised of a diverse ethnic plurality where Latinas play a sizeable role.

PROJECTED DISTRIBUTION OF U.S. FEMALE POPULATION BY RACE & HISPANIC ORIGIN 2015 TO 2060



NON-HISPANIC WHITE ●
 NON-HISPANIC ETHNIC ●
 HISPANIC ●

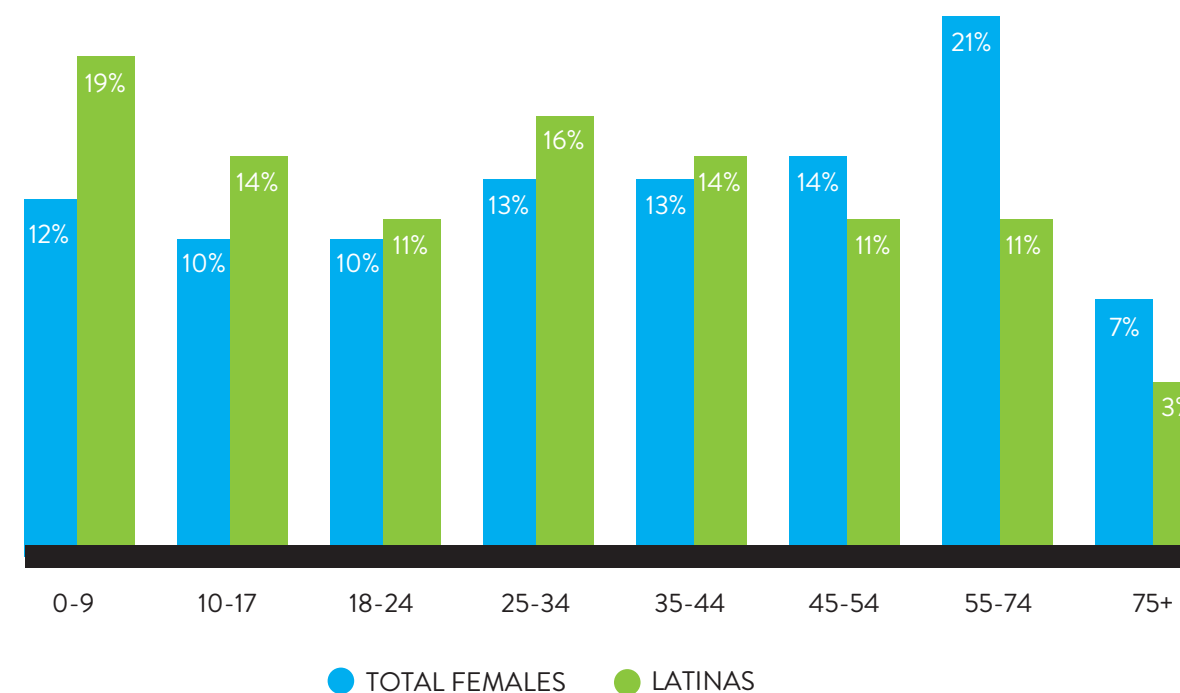
Source: U.S. Census. Projections of the Population by Sex, Race and Hispanic origin for the U.S. 2015 to 2060, December 2012.

AMERICA'S MOMS ARE MORE LATINA

Almost a quarter (23 percent) of all U.S. births in 2011 were to a Latina mom, greater than the Latina's share (17 percent) of all women of childbearing age.⁴ Latinas in nearly two thirds (63 percent) of Hispanic families have children under age 18 compared to 40 percent for non-Hispanic white females.⁵ This high incidence of Latina motherhood is in part due to the fact that the under 45 Latina population is 16 percentage points higher than that of total females, as shown in the graph below. Young Latina moms are in acquisition mode for an array of household and family products as they establish families and make decisions for their new households. Latinas bring with them their cultural tastes, experiences and expectations, at times different from their older Latina moms and non-Latina peers. This unique cultural background and series of "firsts" in terms of education, income and confidence have them crossing into new territory for marketers.

TODAY, HISPANICS REPRESENT A MAJORITY OF CHILDREN UNDER AGE 18 IN CALIFORNIA AT 52% AND NEW MEXICO AT 59%, AND ARE NEARING A MAJORITY IN TEXAS AT 49%. IN THESE AND MANY MORE MARKETS, LATINAS ARE BECOMING CENTRAL PLAYERS IN THE MODERN AMERICAN FAMILY.

2013 U.S. FEMALE POPULATION DISTRIBUTION BY AGE



Source: Nielsen Pop-Facts Demographics, 2013 Update
⁴2011 American Community Survey, 2011, US Census Bureau
⁵Current Population Survey, 2010, US Census

PREDOMINANT DECISION MAKERS

In the last decade, Latinas have moved ahead of their male counterparts as the main engine of Hispanic social and economic advancement and are at the fulcrum of Latino empowerment across all economic sectors. Based on a recent Nielsen study in the U.S., Latinas say they are the primary or joint decision maker in every category from purchasing groceries, insurance, financial services, electronics, to family care. The traditional view of the Hispanic family has often centered on Latino males, but in today's America, Latinas are not just increasingly the primary wage earner and influencer in the modern Hispanic household, they are also making their interests and concerns felt in the workplace, politics, healthcare and education. They are a growing force at school, the office, the supermarket, the shopping mall and the Internet. Their desire to succeed is second only to their passion to connect with friends, family and others in their community.

With Hispanics outpacing non-Hispanic whites in the proportion of families with children under 18, Latinas will become a more dominant driver in the consumption of everything from media, banking, and real estate to family care, household products and cosmetics. Latinas' increasing level of education, income, and social connectivity demands that companies understand and appeal to their primary drivers of engagement and consumption behavior.

86%

EIGHTY-SIX PERCENT OF LATINAS SAY A WOMAN IS THE PRIMARY SHOPPER IN THEIR HOUSEHOLDS SO IT IS WOMEN WHO CONTROL THE LION'S SHARE OF THE \$1.2 TRILLION IN ANNUAL HISPANIC BUYING POWER.^{6,7}

ACHIEVING A HIGHER STANDARD OF LIVING

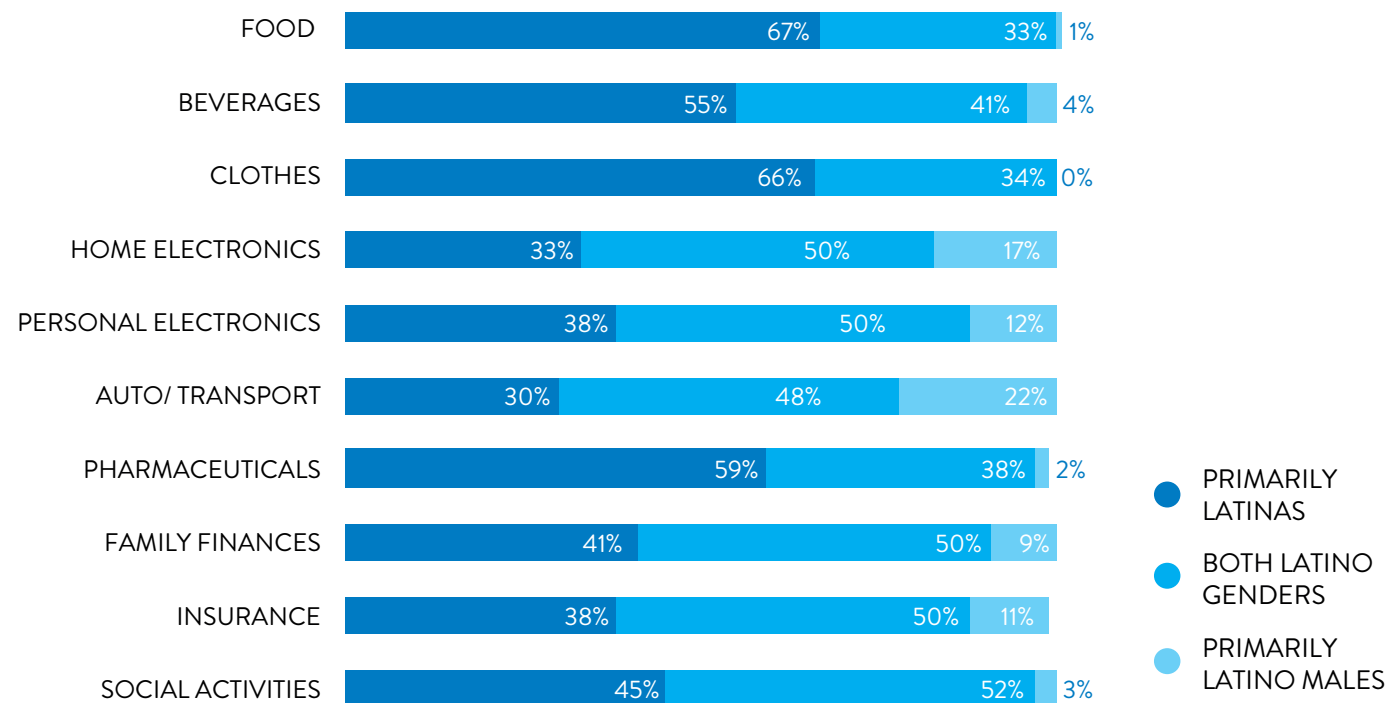
Many Latinas are embracing opportunities to advance, demonstrated by positive gains in higher education and higher earnings, which are shifting Latinas towards the middle class and beyond. For the first time, Latinas have exceeded non-Hispanic females in college enrollment. A record seven in ten (73 percent) Hispanic high school female graduates are enrolling in college, 11 percentage points ahead of Hispanic males (61 percent) and one percentage point higher than non-Hispanic females (72 percent).⁸ While four-year college graduation rates fall well below the total population, Latinas are also demonstrating forward momentum through increases in "some college" experience (up 4 percentage points to 45 percent from 2008 to 2013) and up three percentage points in four-year college graduation rates (reaching 16 percent in 2013).⁹

Latinas in households making \$75,000 or more increased by 5 percentage points over the past ten years showing notable gains, despite the recession and slow recovery. At the same time, Latina households are rising out of the lowest income category and holding their position in other income groups indicating strong resilience among blue and pink collar segments.

U.S. LATINAS ARE EMBRACING ENTREPRENEURSHIP WITH THE NUMBER OF LATINA FIRMS RISING 46% FROM 2002 TO 2007, FASTER THAN LATINO (33%) AND FASTER THAN TOTAL FEMALE (20%) BUSINESSES.¹⁰

U.S. LATINAS ARE TAKING CENTER STAGE IN NATIONAL AND LOCAL POLITICS COMPRISING 34% OF ALL LATINO ELECTED OFFICIALS IN 2013, A RISE OF 126% SINCE 1996.¹¹

LATINA PERCEIVED DECISION-MAKING BY GENDER

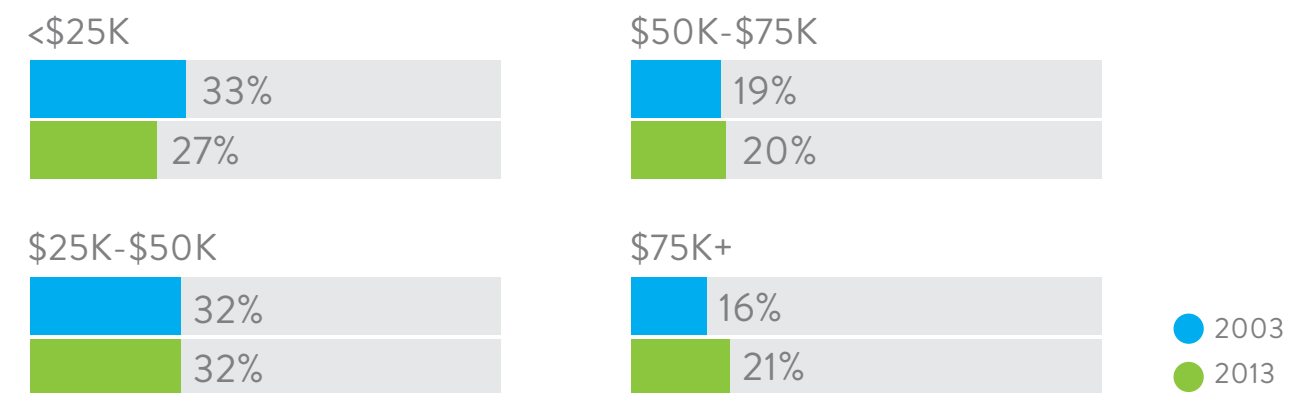


Source: Nielsen Women of Tomorrow Report, 2011.

⁶Nielsen, April 2013.

⁷UGA Selig Center Multicultural Economy Study 2012.

HOUSEHOLD INCOME OVER PAST TEN YEARS FOR LATINAS 18+



Source: Nielsen, Feb 2013.

⁸Pew Hispanic Research Center and female enrollment estimates based on ages 16 to 24 years of age, CPS U.S. Census Bureau Oct 2011, school enrollment supplement by Bureau of Labor Statistics.

⁹Nielsen, Feb 2013.

¹⁰U.S. Department of Commerce, Minority Business Development Agency, 2002-2007.

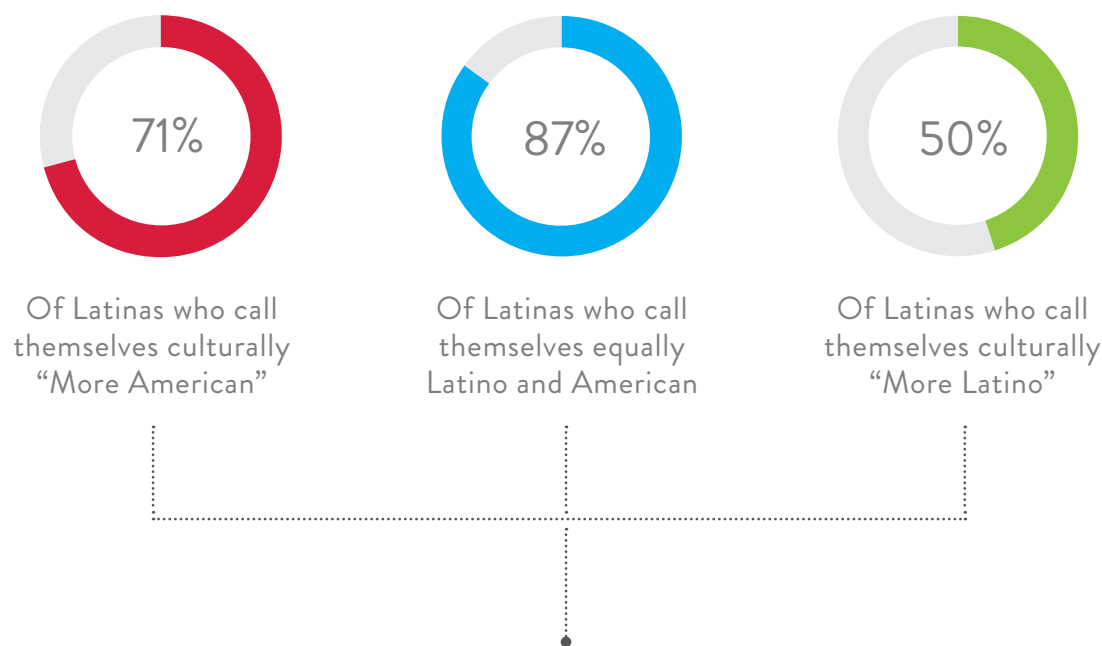
¹¹NALEO Educational Fund National Directory of Latino Elected Officials, 1996 and 2013.

Data reflects verified Latinas serving in elected office in January of that year.

APPEAL OF THE AMBICULTURAL® MIDDLE

Because of her unique place in the multigenerational Hispanic family, and her willingness to seek relationships outside of it, the modern Latina is innately ambicultural® --able to pivot from English to Spanish, Latina to American, and back again without thinking about it.¹² Ambicultural® connotes a willingness and ability to function competently in two cultures which is a very attractive cultural destination for Latinas. Hispanic women who feel equally Latina and American overwhelmingly want to stay that way (87 percent). Fifty percent of those who culturally feel more Latino than American and 71 percent of those who culturally feel more American than Latino, want to shift to the ambicultural® middle. The gravitational pull is to be culturally both American and Latino, without denying either end, and to fully embrace their duality.

ASPIRE TO THE AMBICULTURAL® MIDDLE SHIFT FROM CURRENT TO DESIRED IDENTITY



...WANT TO BE EQUALLY LATINO AND AMERICAN IN THE FUTURE

Source: EthniFacts Latino+ Identity Project, 2013.
¹²Ambicultural is a registered service mark of EthniFacts, LLC and is used with their permission.

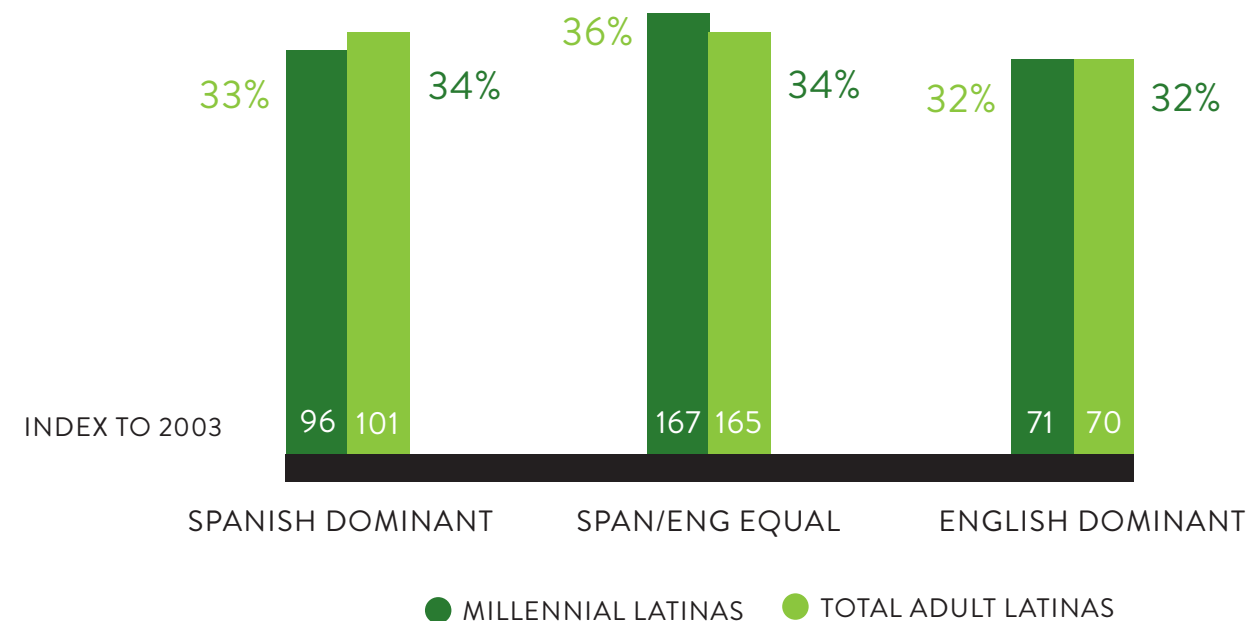
AMBICULTURAL®: THE ABILITY AND WILLINGNESS TO FUNCTION COMPETENTLY IN TWO CULTURES.

FOR U.S. LATINOS, THIS IS NOT A TRANSITION BETWEEN TWO CULTURES, IT IS AN ASPIRATIONAL AND BEHAVIORAL DESTINATION THAT INCLUDES A SHIFT FROM BOTH THE LESS AND MORE ACCULTURATED SIDES OF THE TRADITIONAL CULTURE MODEL.

Language is a fundamental cultural maintenance behavior and Latinas are making the conscious choice to hold onto Spanish in combination with English, thus enhancing their ability to integrate into different social and professional scenarios, heightening their marketability in the workforce.

Some marketers assume that Millennial Latinas (ages 18-34) will be vastly different from their older counterparts and shift to English dominance, but that is not supported in the data. Millennial Latinas, significantly more likely to be U.S. born, have similar levels of Spanish and English use compared to older Latinas.

LANGUAGE USED AT HOME 2013



Source: Nielsen, Feb 2013.

IMPORTANT STEPS TO MARKETING TO THE LATINA

- Recognize the Latinas' purchasing power. They represent a significant and growing spending power for the modern American family.
- Embrace cross-cultural and linguistic dexterity. Do not assume Latinas will assimilate - ambicultural® is the new battleground where two languages and two cultures are better than one.
- Utilize cross channels for messaging. Latinas' are powerful connected networks. Your campaign should employ the full range of mass and social media channels.

SECTION TWO:

LATINA CONSUMPTION IN MODERN U.S. HOUSEHOLDS

Latinas' consumer behavior differs from that of other ethnicities and from the overall U.S. female population. It is reflective of both their family-centered value system and their "do it all" mindset. Not only are Latinas increasingly their family's breadwinner and decision-maker, but they still embrace their traditional role as nurturer and family caretaker, and often espouse products that make themselves and their families look and feel their best.

SHIFTING TIDE IN FINANCIAL PRODUCT USE

Nearly a quarter of Latinas (24 percent) have increased their personal contribution to the household over the past year. Latinas intend to spend the extra money they earn over the next five years on building the financial security of their family, primarily by paying off debt and increasing their savings.

WHERE LATINAS WILL SPEND EXTRA MONEY OVER NEXT FIVE YEARS

(Top Indices to non-Hispanic white females)

Pay off debt	73% (135)	Home electronics	20% (143)
General savings	63% (121)	Personal electronics	19% (119)
Retirement savings	38% (112)	Investments	19% (190)
Education for self	21% (263)	Having another child	16% (145)
New home	21% (350)	Educating children	15% (136)

Source: Nielsen Women of Tomorrow Report, 2011.

CHANGE IN ADULT LATINA CONTRIBUTION TO HOUSEHOLD INCOME OVER PAST YEAR

INDEX TO NON-HISPANIC WHITE FEMALES

 **24% INCREASE**
114 Index

63% SAME
94 Index

 **13% DECREASE**
108 Index

Source: Nielsen Women of Tomorrow Report, 2011

As Latinas' income and education level have advanced, so has their ability and willingness to invest in long-term and fixed assets. Even though Hispanics suffered the greatest losses in the foreclosure crisis, three in four Hispanics agree that buying a home is the best long-term investment possible and 56 percent consider it a symbol of success (compared to only 32 percent of all Americans).¹³

Latinas are more likely than other females to have bought a first home or made a first time financial investment in the past year, and they are just as likely to have bought a new car, made a major home improvement or refinanced a home.

LIFE EVENTS EXPERIENCED IN LAST 12 MONTHS	LATINAS 18+	LATINAS TO TOTAL U.S. FEMALES 18+
	% Penetration	Index
Bought A Used Car Or Light Truck	8.4%	102
Made Major Home Improvement	7.4%	100
Refinanced Your Home	4.1%	100
Bought First Home	2.1%	121
Bought New Home (Not First Home)	1.4%	91
First Time Financial Investment	1.3%	121

Source: Nielsen, April 2013, HH 18+.

While twenty-first century Latinas are advancing their consumption of major assets, we cannot fail to note the Latina segment who resists banked financial products and lives in a primary cash market. These Latinas represent high growth potential if marketers can help them understand the enormous benefits of building a financial history for themselves and their families.

¹³Sources: Paul Taylor et al, "Hispanics Say They Have The Worst of A Bad Economy" Pew Hispanic Center, January 26, 2012,.; Fannie Mae National Housing survey January 2011 – December 2011, March 2012.

INSIDE THE SHOPPING CART

The caretaking and nurturing nature of Latinas seems evidenced in their shopping carts. Latinas tend to buy either prepared perishable foods or foods that require cooking, over-indexing in categories such as dry grains and beans, eggs, oils, flour, dry mixes, spices, prepared and unprepared meat and seafood, cereals, and yogurt.

Other areas where Latinas buy more than non-Hispanic white females – almost all beverage categories and baby and household products are likely indicative of their larger household size and their younger families with more children. The beverage categories of note where Latina's over-index compared to non-Hispanic white females include juices (both refrigerated and shelf stable), bottled water and non-carbonated soft drinks. Latinas over-index in several food and household products in addition to health and personal care.

Latinas' are increasing health awareness for both themselves and their families making them more conscientious about weight, preventative health measures, and personal care.

Latinas' pride in their appearance results in a higher share of beauty, skin and hair products compared to non-Hispanics. Latinas greatly over-index with Women's fragrance products than their non-Hispanic counterparts. They are more likely than the overall U.S. female population to use personal care and beauty products, not only for themselves but also for men and children.

HISPANIC TO NON-HISPANIC WHITE FEMALE HEAD OF HOUSEHOLD DOLLAR MARKET SHARE INDEX (INDICES OF 100 OR GREATER)

NON-PERISHABLES	PERISHABLES	BEVERAGES	HOUSEHOLD	PERSONAL CARE- BEAUTY
Dry veg./beans/grains 316 Shortenings/oils 164 Spices/extracts 133 Pkg. milks 131 Dry mixes 130 Can seafood 123 Cereal 116 Flour 115 Pasta 108 Sugar & substitute 108 Table syrups 107 Can vegetables 103 Cookies 102 Table bkfast- shelf stable 101 Condiments/sauces 101	Baby food 208 Egg 138 Prep. food 130 Unprep. froz. meat/ seafood 117 Yogurt 110 Fresh meat 104 Pkg meat 103 Dairy desserts 103 Dressings/salads/ prep. food - deli 101 Produce 100	Juice/drinks-refrig. 150 Juices -shelf 148 Btld. water 139 Soft drinks non-carb 129 Wine 116 Beer 115 Milk 108 Coffee 104 Tea 103 Carb. beverages 102 Liquor 100	Total baby needs 156 Disp. diapers 155 Laundry supplies 130 HH cleaners 118 Paper products 111	Women's fragrance 208 Men's toiletries 207 Cologne 170 Hair care 159 Personal soaps 147 Sanitary protect 144 Grooming 141 Family plan 137 Cosmetics 135 Deodorant 131 Skin care 130 Oral hygiene 125 Shaving 118 Fem hygiene 115

Sources: Nielsen Homescan, 01/01/12 - 12/29/12.

Many Latinas today rank health and nutrition as a primary concern. One-third of Latinas are trying to lose weight by dieting, one-third look for organic or natural products and a quarter are counting calories. These levels are equal to or higher than the total U.S. female population and it is important to understand the changing needs of today's progressive Latina.

TOTAL AGREE	LATINAS 18+	LATINAS TO TOTAL U.S. FEMALES 18+
	% Penetration	INDEX
I'll Try Any New Diet	18%	132
I Look For Organic/Natural When Food Shopping	34%	116
Normally Count Calories In The Foods I Eat	25%	102
Most Time Trying to Lose Weight	35%	100
I Do Some Sport/Exercise Once A Week	52%	99

Sources: Nielsen, April 2013, Households with females 18+.



WHAT LATINA CONSUMPTION IMPACTS

- Family consumption behaviors. Latinas are the key to future growth across a wide array of product categories, especially when it comes to family consumption.
- Family and financial health. As household wealth increases, Latinas' will invest and spend in many categories to build financial stability for their families.
- Product experimentation. Products or categories that are new to many Latinas will require education to spur interest, whether for financial products or new food categories.

SECTION THREE:

THE CONNECTED
LATINA

U.S. Hispanic women are both the guardians of Latino culture and advocates of change. There is a perception that men have the proclivity towards gadgets, but it is really the Latina who inspires technology adoption, driven by her rising education, income and role as super mom. She is creating her own digital persona. Today's Latinas are using their mobile devices to connect media, entertainment, brands and family. She has taken multi-tasking to a new level by increasing her connectivity with television and digital communications, often simultaneously and on multiple screens. She might be searching for new Latino recipes on Pinterest, filling-in details from her favorite novela on Twitter, posting and exchanging with comadres (good friends) on Facebook, or sharing her kids' latest tales on Flickr.

HOW SHE CONSUMES MEDIA

The U.S. Latinas' ambicultural® identity plays a vital role in her persona. Latinas do not come home and say they are going to watch a Spanish or English program, instead they use technology to help find entertainment that supports their cross-cultural disposition. They are choosing programs that resonate, which come in both languages and are pertinent to both Latino and American culture. Latinas draw equally from culture and innovation to formulate a vibrant ecosystem that begins with personal and family interests, and then radiates outward to embrace community, media, and a global network of Latinas and moms who share interests, passions and priorities.



Latinas are consuming more television and digital media than ever before, extending the hours in their day to consume everything on demand, in the language they prefer. Access to robust content options allows for a more enriched media experience that more closely aligns with how they identify themselves. As Latinas are increasingly enabled to fully express their cultural duality in the digital space, brands can leverage their cultural values to create meaningful connections.

P&G EMPOWERING LATINAS IN THE
AMBICULTURAL® DIGITAL SPACE

ORGULLOSA.COM IS A P&G MULTI-BRAND ONLINE INITIATIVE THAT BLENDS LATINA LIFESTYLE STORIES WITH PRODUCT INFORMATION, SCHOLARSHIPS, BEAUTY TIPS, RECIPES, AND CONTINUAL MESSAGES OF EMPOWERMENT AND SUPPORT. ORGULLOSA IS AN EXCELLENT EXAMPLE OF INTEGRATING MASS MEDIA BRAND INITIATIVES WITH AN OVERARCHING SOCIAL MEDIA STRATEGY TAILORED TO AMBICULTURAL® LATINAS.

TV MINUTES GROW IN BOTH
LANGUAGES

Latina television viewing has increased with the rising use of Spanish broadcast and cable in both Spanish and English. Cable and Spanish broadcast have increased their content options for Latinas and made strong gains in overall viewing time.

LATINA TELEVISION VIEWING MINUTES	LATINAS 18+		
	2003	2013	'03 TO '13
PUTS (PERSONS USING TELEVISION)	4:42:58	4:58:26	+15:33
ENGLISH CABLE	1:15:36	1:29:26	+13:49
ENGLISH BROADCAST	1:22:56	0:43:54	-39:02
SPANISH CABLE	0:04:13	0:14:54	+10:41
SPANISH BROADCAST	1:19:21	1:34:54	+15:33

Source: Nielsen, Feb 2013.
2003 PUTS based on LIVE data, while 2013 includes DVR playback.

RELEVANCE OF
SPANISH TV

A NIELSEN BRAND EFFECT STUDY CONDUCTED ACROSS CATEGORIES FOUND THAT AVERAGE BRAND RECALL AMONG HISPANIC WOMEN IS TWICE AS HIGH IN SPANISH TV COMPARED TO ENGLISH TV. THIS IS NOT NECESSARILY A REFLECTION OF LANGUAGE ALONE, BUT THE AMOUNT OF RELEVANT CONTENT AND ADVERTISING MESSAGES DESIGNED TO APPEAL TO LATINAS IS GREATER ON SPANISH TV THAN ON ENGLISH TV.

Source: Nielsen TV Brand Effect, January 2012 to April 2013, Women 18+.

LEADERS IN MOBILE AND INTERNET TECHNOLOGY

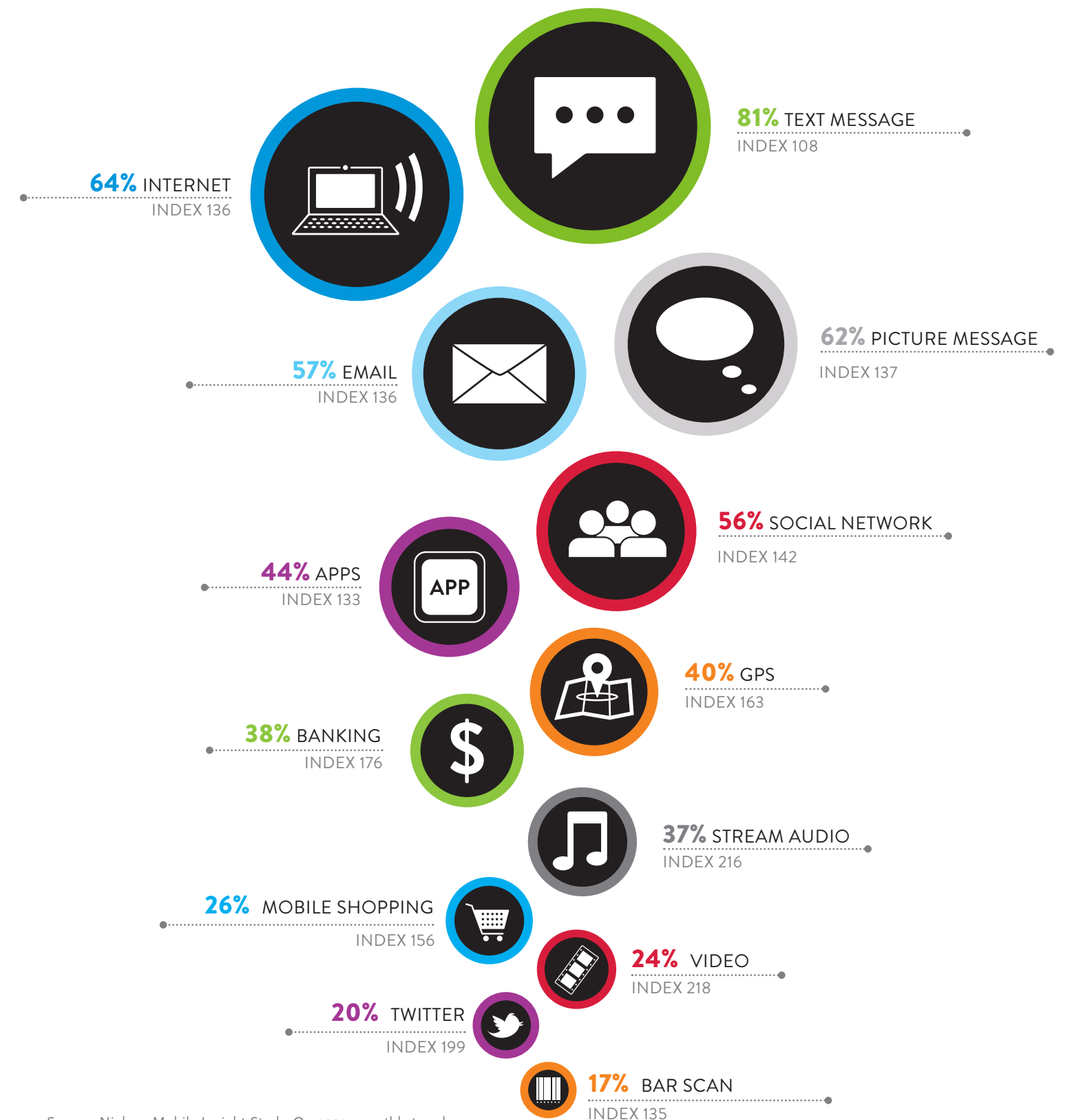
Latinas are discovering the benefits of untethered entertainment and savoring a multitude of mobile activities at rates consistently and sizably ahead of non-Hispanic white females. Online Latinas are more likely than their non-Hispanic white counterparts to own smartphones at 77 percent (vs 55 percent). Latinas seem to be bypassing laptops and desktops in favor of mobile technology.¹⁴

Mobile devices allow greater personalization and give Latinas the integrated systems they need to connect with family, their personal networks and information and entertainment options. Latinas are quick to adopt new capabilities like mobile banking, shopping and price comparisons. Moreover, social networking is used by 56 percent of Latinas who share information among their connected communities in the U.S. and Latin America. Forty-four percent of Latinas use apps on their mobile devices, 40 percent GPS and 37 percent streaming audio.



¹⁴Nielsen Mobile Insight Study, Q4 2012, monthly trends. Study based on females who are online.

U.S. LATINAS' ONLINE MOBILE ACTIVITIES OVER THE PAST 30 DAYS INDEX TO NON-HISPANIC WHITE FEMALES



Source: Nielsen Mobile Insight Study, Q4 2012, monthly trends. Study based on females who are online.

DIGITAL INFORMATION STEERS DECISION-MAKING

Technology is a key companion to today's consumer and the Latina is no exception. Eight-out-of-ten Latinas are using online information to make decisions about purchasing products online, three quarters are using it to make day-to-day decisions or as a lifestyle guide through big events, and two thirds to help inform in-store retail purchases. The importance of online information is crucial to buying decisions both online and off.

STRONGLY OR SOMEWHAT AGREE	TOTAL ADULT LATINAS	LATINA MILLENNIALS TO TOTAL LATINA ADULTS INDEX
I have purchased a product online based on online info	81%	102
I rely on online lifestyle info to help me make day to day decisions	77%	108
I rely on online lifestyle info to help me navigate big life events	75%	105
I have purchased a product in store based on what online info	69%	107
I follow brands online	62%	106

How much do you agree or disagree with each of the following statements? [Strongly agree, somewhat agree, somewhat disagree, strongly disagree]

Source: Nielsen Batanga Media Hispanic Women Study, 2013.

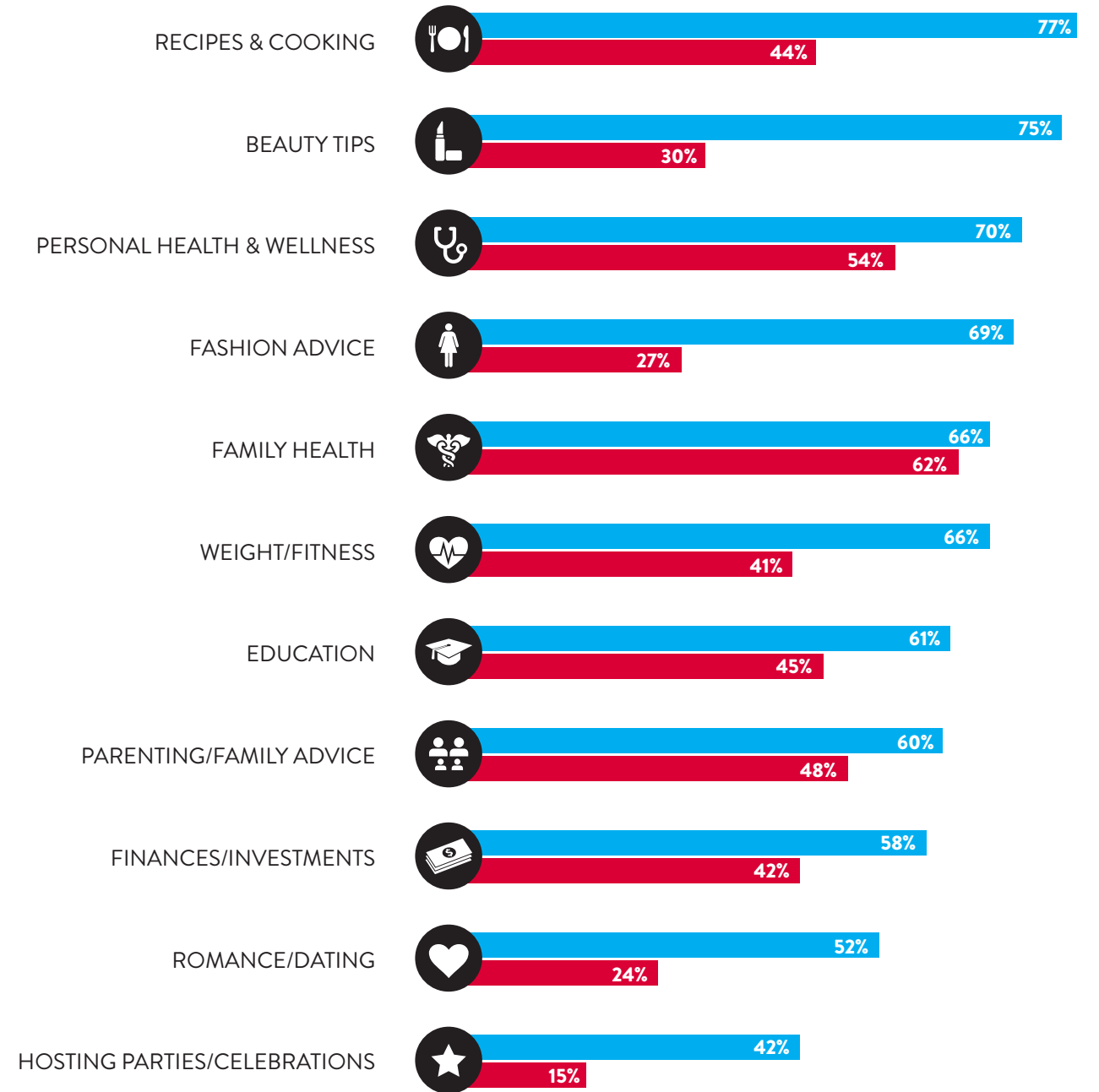
INFORMATION LATINAS WANT AND NEED

Latinas have a voracious appetite for information with the majority searching several times per month for an array of topics from health to education, dating and more. Their extensive interest in using the Internet to learn makes it a fertile environment for marketers of all types. The most important search topics are family, personal health, and well-being.



U.S. LATINAS' ONLINE SEARCH IN KEY CATEGORIES (% RATE TOPIC AS VERY IMPORTANT)

● % SEARCHED TOPIC SEVERAL TIMES PER MONTH ● RATE TOPIC AS VERY IMPORTANT



Source: Nielsen Batanga Media Hispanic Women Study, 2013.

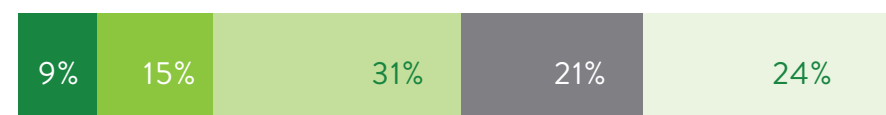
LATINA SOCIAL & CULTURAL ECOLOGY

Social media is increasingly seeding eco-niches of Latinas, that is, aggregating people around common cultural interests and behaviors. Principal eco-niches¹⁵ include Latino friends and family social networks, ambicultural[®] special interest communities, Latino media and Spanish language sites.

These Latino online experiences often materialize on popular sites where cultural interests are in full expression and are attracting like-minds to create the Latino online ecosystem. These are in Spanish and English, in the U.S. and Latin America, and range from all imaginable topics and areas of interest. On social networks like Facebook for example, 77 percent of Latinas say over half their friends are Hispanic.

About a fifth of Latinas predominantly use Spanish to surf the web and almost a third use Spanish and English equally. Beyond language, a majority (62 percent) of Latinas wish for more lifestyle information about Latinas online, and over sixty percent want more lifestyle information written in Spanish. When Latinas search for Latino subject matter online, recipes top the list, followed by news, music, family health, beauty and celebrations.

LANGUAGE USED BY LATINAS TO SURF THE WEB



● ONLY SPANISH ● MOSTLY SPANISH ● BOTH SPANISH AND ENGLISH EQUALLY
● MOSTLY ENGLISH ● ONLY ENGLISH

Source: Ethnifacts Latino + Identity Project, 2013.

HOW TO ATTRACT LATINAS ON MEDIA

- Integrated marketing initiatives. Reach Latinas where they learn and network in digital space and via devices that they over-index on (mobile).
- Bi-Lingual programming. Increasing broadcast media choices in both Spanish and English offer marketers multiple venues to attract Latinas in culture.
- Identify cultural interests and behaviors. Understanding and activating Latinas' rich eco-niches will pay dividends to savvy marketers.

¹⁵Ethnifacts Latino + Identity Project 2013.

¹⁶The term, Latino eco-niches is attributed to Ethnifacts, LLC 013.



77%

ON AVERAGE,
77 PERCENT OF
LATINAS' SOCIAL
NETWORK FRIENDS
ARE HISPANIC.¹⁶



62% WISH FOR MORE
LIFESTYLE INFORMATION
WRITTEN "FOR LATINAS
LIKE ME"



56% WISH THERE WAS
MORE ONLINE LIFESTYLE
INFORMATION WRITTEN
IN SPANISH



59% SAY LATINA
CELEBRITIES INFLUENCE
HOW I WANT TO LOOK
AND BEHAVE

Source: Nielsen Batanga Media Hispanic Women Study, 2013.

CONCLUSION

U.S. Latinas are in the driver's seat with better education, better income, and better jobs. Latinas are the guardians of culture and the leading proponents of ambiculturalism.[®] Rather than choosing between Latino or American culture, they are assertively becoming both, which then influences all of their consumption, media, and digital behaviors. Latinas leverage all the resources available to them, unlike previous generations who did not have access to advancements in modern technology. English TV viewership keeps pace as Latinas increase their overall television consumption in both languages. Spanish TV and the Internet are readily available as opposed to prior generations who did not have the opportunity to fully sustain Latino culture. Mobile and global connectivity are providing a means of navigating both American and Latino cultures and creating a greater sense of community, thus enabling Latinas to continually fit in and feel like they belong. Ultimately, technology helps hold family together and allows them to keep up the connections so important and inherent to Latino culture.

It is inevitable that Latinas will strongly influence the U.S. new mainstream with their upward trajectory and growing impact on the future of families, media, technology and commerce. The same female-led traditions and matriarchal roles that are revered and prioritized as central to Hispanic culture and values—hard work, familism, femininity, determination, resilience, and optimism—are being used by Latinas to leave their imprint on American society. Latina's thriving social networks, facility with technology, and hunger for information will bolster their innate abilities to navigate the complexities of living between two cultures, even as they build new bridges to others around them. Marketers who properly grasp the significance of this market will be the first to gain Latinas' trust and benefit from all that they have to offer, now and long into the future.

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ABOUT THE HISPANIC/LATINO ADVISORY COUNCIL

The Hispanic/Latino Advisory Council was assembled in order to assist our efforts to recruit, measure, and accurately report on U.S. Latino households. The Council consists of industry, community and business leaders from around the country. They advise us as we train our bilingual sample recruiters and translate materials for Latino TV households.

ABOUT THIS REPORT

Nielsen is an industry leader in multicultural research and is the publisher of the 2012 State of the Hispanic Consumer: The Hispanic Market Imperative. Since then, Nielsen has received countless requests for added perspective on this important market, particularly regarding Latina women who make the majority of household spending decisions for the \$1.2 trillion dollar Hispanic market. This report offers illuminating perspective about important changes among Latinas and their increasingly central role in the changing marketplace.

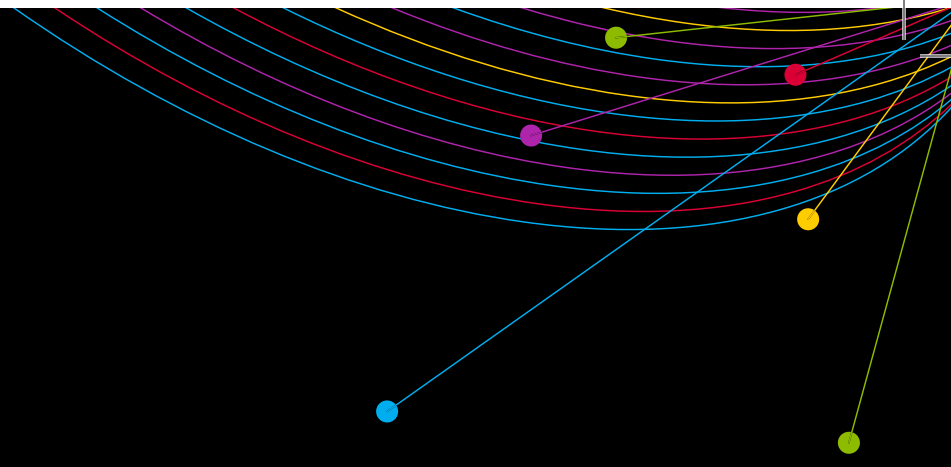
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Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence and mobile measurement. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands.

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