



## WELCOME TO DATOS TUCSON 2012



Arizona's Hispanic market is booming and as this year's *DATOS: Tucson* report illustrates Southern Arizona's largest metropolitan community is undeniably leading the way.

Consider that Tucson's Hispanic population grew at 12 times the rate of the non-Hispanic population from 2010 to 2011. Along with that astronomical population growth has come an equally impressive increase in buying power.

Statewide, Arizona Latinos will spend \$40 billion on goods and services in 2012. In Pima County, Latino purchasing power will grow to nearly \$8 billion by 2015.

As a result, every segment of the Southern Arizona market (from automobile purchases to housing) will be impacted by the growing number Latino households. In the next five years, for instance, 65 percent of new homeowners in Tucson will be Latino.

Documenting and interpreting these and similar trends have been the driving motivation behind the research and publication of the third annual *DATOS: Tucson*. The report is partly based on the annual *DATOS: Focus on the Hispanic Market*, a statewide report released earlier this year, though most of the content in *DATOS: Tucson* reflects the fast-changing markets in Tucson, Pima County and Southern Arizona.

While the entire state – and perhaps most especially the Arizona-Sonora border – is still recovering from the devastating that the global recession, *DATOS: Tucson* confirms that the Latino market is strong and growing and an increasingly significant part of the state's economic recovery.

Arizona's Hispanic population grew by 46 percent between 2000 and 2010, and is estimated to grow another 50 percent by 2020. In Pima County, Hispanics accounted for 48 percent of all births in 2011. Statewide, Hispanics were 3 of 5 people added to the population from 2010 to 2011.

What does this all mean to companies, for-profit and non-profit, that do business in Arizona? It means that in order to prosper they must answer the following question: "How do I give my Hispanic customers in Tucson and across Arizona what they want?"

*DATOS: Tucson*, we believe, provides many of those answers.

The Arizona Hispanic Chamber of Commerce and the Tucson Hispanic Chamber of Commerce wish to thank our corporate supporters and everyone who attended this year's annual luncheon for supporting *DATOS: Tucson*.

Special thanks go to the Blue Cross Blue Shield of Arizona, presenting sponsor of *DATOS: Tucson*. We also wish to thank the University of Phoenix, PetSmart, Univision Arizona and the *Arizona Daily Star* for their support and contributions.



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TERMINOLOGY AND RESEARCH NOTES

In *DATOS: TUCSON*, 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. Note that the data in this report is not always collected annually.

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TABLE OF CONTENTS

INTRODUCTION	7
SECTION I: CONSUMER BEHAVIOR	9
PURCHASING POWER	9
CONSUMER	17
TECHNOLOGY	42
MEDIA	50
POLITICS	59
SECTION II: CONSUMER DEMOGRAPHICS	67
POPULATION	72
EDUCATION	84
BUSINESS	100
TRADE WITH MEXICO	111
RESOURCES	118



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—Fall 2012
- **Black & White Ball and Business Awards**  
—Spring 2013
- **DATOS: Focus on the Hispanic Market Annual Breakfast**—Fall 2013
- **DATOS: Tucson**—Fall 2013

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## INTRODUCTION

### GROWTH OF HISPANIC ECONOMIC CLOUT UNDENIABLE

If you've ever questioned the economic power of Hispanic consumers or the value of culturally relevant marketing, it is time to take note.

This year's *DATOS: Tucson* makes use of the latest data from the decennial census and a wide variety of other sources to affirm the steady, rapid growth and influence of Arizona's Hispanic population – a deeply rooted community that is proving it will not be diminished by the whims of political or economic cycles. "Tucson is one of the state's powerhouses in terms of Hispanic buying power and the entire Southern Arizona region is growing more important every day. *DATOS: Tucson* is our way of telling that story," said Lea Marquez Peterson, president and CEO of the Tucson Hispanic Chamber of Commerce. Gonzalo de la Melena, president/CEO of the Arizona Hispanic Chamber of Commerce, adds, "Without a doubt, Hispanics are helping drive our state's economic recovery. *DATOS: Tucson* speaks to our growing

economic influence in Tucson and Southern Arizona, as well as statewide and across the nation."

Here are just a few of the highlights of this report:

- Arizona Hispanics will account for \$40 billion statewide in consumer spending in 2012.
- The Hispanic population in Pima County grew at about 12 times the rate of non-Hispanics from 2010 and 2011.
- More than half of the children under five in Pima County are Hispanic.
- There are approximately 65,000 Hispanic-owned small businesses in Arizona, one-third of which are owned by Latinas.
- With \$1.2 Trillion in buying power in 2012, if U.S. Hispanics were a country they would be the 15<sup>th</sup> largest economy in the world.

As Hispanics carry out their myriad roles as parents, students, business owners, volunteers, artists, activists and more, they consume goods

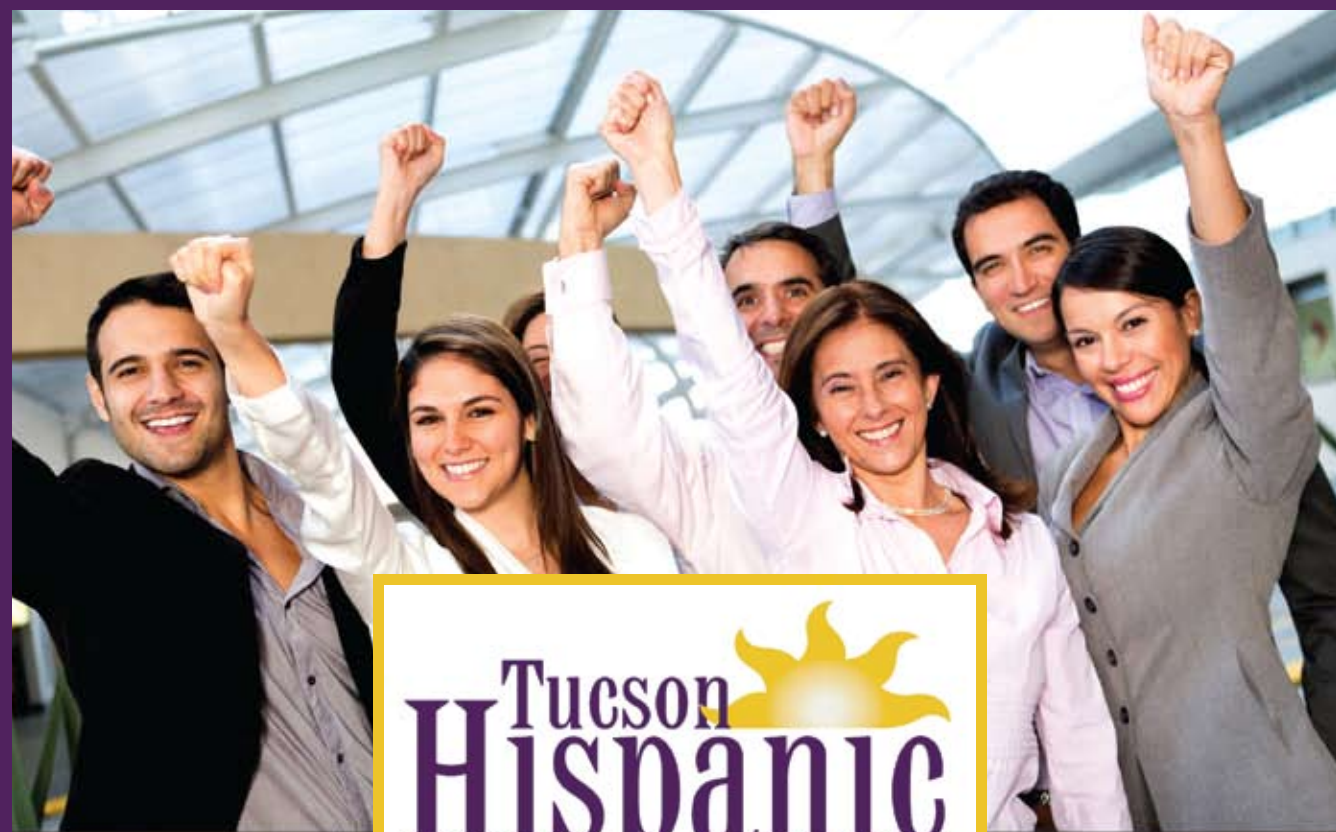
and services that drive significant dollars through our state and local economies. Attached to these dollars are cultural identities and preferences that cannot be ignored by businesses that must connect with Hispanic consumers. This report shows that the strength of today's Hispanic market is not only undeniable, but it's helping to transform Arizona's economy.

*DATOS: Tucson*, meanwhile, is more robust than ever. It breaks new ground, thanks to the participation of a special editorial content team led by Dr. Loui Olivas.

Thanks to this team of skilled researchers and content contributors – and the support of our sponsors – *DATOS: Tucson* is the premier guide to understanding Tucson and Southern Arizona's evolving demographics and the unique characteristics of Hispanic consumer behavior.

—Andrea Whitsett, policy analyst, Morrison Institute for Public Policy at Arizona State University and James E. Garcia, Director of Strategic Communication and Policy at the Arizona Hispanic Chamber of Commerce.





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## DATOS: TUCSON 2012 HIGHLIGHTS

- » WITH MORE THAN \$1.2 TRILLION IN PURCHASING POWER, U.S. HISPANICS ARE THE 15TH LARGEST CONSUMER MARKET IN THE WORLD.
- » ARIZONA HISPANICS WILL PURCHASE \$40 BILLION IN GOODS AND SERVICES THIS YEAR. BY 2015, ARIZONA'S HISPANIC PURCHASING POWER WILL GROW TO \$50 BILLION.
- » U.S. HISPANICS ACCOUNTED FOR MORE THAN 50 PERCENT OF THE TOTAL U.S. POPULATION GROWTH FROM 2000-2010.
- » ARIZONA'S HISPANIC POPULATION INCREASED BY 46% FROM 2000 TO 2010.
- » THERE ARE MORE THAN 65,000 HISPANIC-OWNED BUSINESSES IN THE STATE, ONE-THIRD OF WHICH ARE OWNED BY LATINAS.
- » NEARLY TWO-THIRDS OF ALL NEW HOME OWNERS IN TUCSON BETWEEN NOW AND 2017 WILL BE HISPANICS.
- » FROM FALL 1998 TO FALL 2012, HISPANIC STUDENTS ACCOUNTED FOR 87% OF ARIZONA'S TOTAL STUDENT ENROLLMENT INCREASES.
- » IN 2011, A MAJORITY OF THE STATE'S HIGH SCHOOL GRADUATES WERE HISPANIC.
- » A MAJORITY OF THE CHILDREN UNDER 5 YEARS OLD IN PIMA COUNTY ARE HISPANIC.
- » TUCSON HISPANICS SPENT \$251 MILLION ON HEALTH CARE IN 2010.
- » TUCSON HISPANICS SPENT MORE THAN \$1 BILLION A YEAR ON FOOD.
- » THERE ARE 116, 841 REGISTERED VOTERS IN THE TUCSON "DMA" IN 2012.
- » HISPANICS ACCOUNTED FOR 48% OF ALL BIRTHS IN PIMA COUNTY IN 2011.
- » HISPANICS ACTIVELY USE VIDEO-SHARING WEBSITES. SIXTY-FOUR PERCENT OF HISPANICS VISIT VIDEO-SHARING WEBSITES, AND 66 PERCENT OF THOSE VISITING THE SITES MAKE AN ONLINE PURCHASE.
- » AN ASTOUNDING 70 PERCENT OF HISPANICS IN THE U.S. ARE ENGAGED IN SOCIAL MEDIA; NAMELY FACEBOOK, TWITTER AND THE READING AND WRITING OF BLOGS.
- » FROM 2000 TO 2011, THE NUMBER OF WHITE, NON-HISPANIC STUDENTS DROPPED BY MORE THAN 8,500, WHILE THE NUMBER OF HISPANIC STUDENTS GREW BY MORE THAN 22,000.





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## PURCHASING POWER

THE BILLIONS OF DOLLARS INJECTED INTO THE U.S. ECONOMY EVERY YEAR BY HISPANICS IS A TANGIBLE MEASURE OF THE POPULATION'S GROWING INFLUENCE IN EVERY ASPECT OF SOCIETY. NOT SURPRISINGLY, GROWTH IN HISPANIC PURCHASING POWER PARALLELS HISPANIC POPULATION GROWTH.

WHAT MAY SURPRISE SOME IS THE RATE OF GROWTH. ARIZONA'S HISPANIC POPULATION, FOR INSTANCE, HAS MORE THAN DOUBLED IN THE PAST 20 YEARS.



The purchasing power of U.S. Hispanics was greater than the GDPs of all but 14 nations in 2010

List of countries with a Gross Domestic Product (GDP) of \$1 Trillion or more in 2010

- |                             |                             |                                                   |
|-----------------------------|-----------------------------|---------------------------------------------------|
| 1. U.S. (\$14.6 Trillion)   | 6. U.K. (\$2.25 Trillion)   | 11. Russia (\$1.5 Trillion)                       |
| 2. China (\$5.9 Trillion)   | 7. Brazil (\$2.1 Trillion)  | 12. Spain (1.4 Trillion)                          |
| 3. Japan (\$5.5 Trillion)   | 8. Italy (\$2.05 Trillion)  | 13. Mexico (\$1.04 Trillion)                      |
| 4. Germany (\$3.3 Trillion) | 9. India (\$1.73 Trillion)  | 12. S. Korea (\$1.02 Trillion)                    |
| 5. France (\$2.56 Trillion) | 10. Canada (\$1.6 Trillion) | 15. U.S. Hispanics (\$1 Trillion in buying power) |

Source: World Bank, 2010



# WHAT'S YOUR STORY?



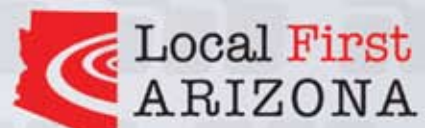
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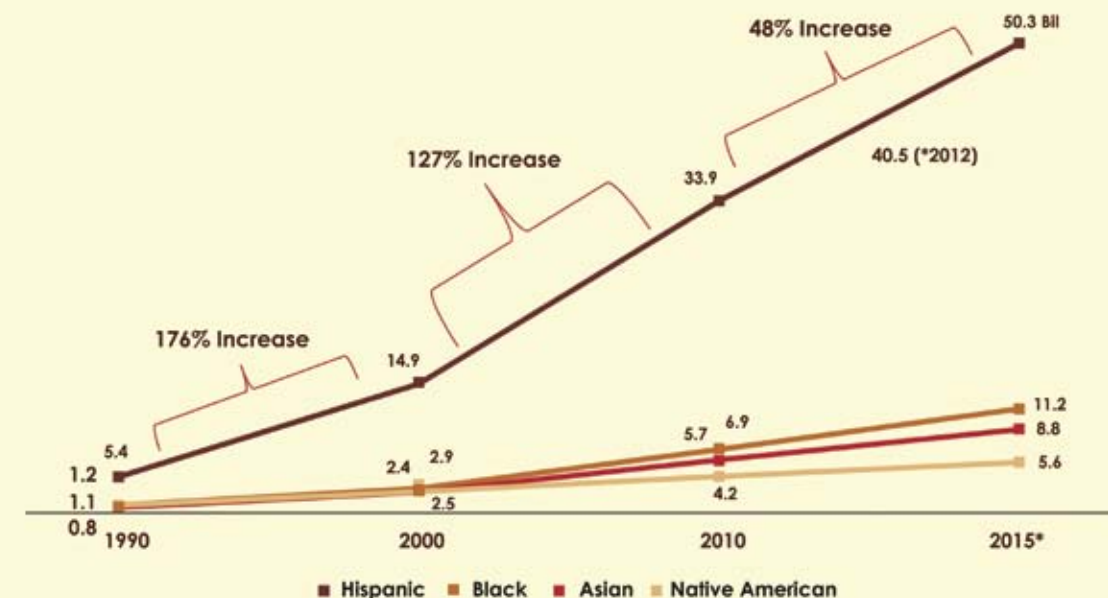
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## PURCHASING POWER

### Arizona's Hispanic Purchasing Power Will Grow 48% (2010-2015)



Source: Selig Center for Economic Growth, Terry College of Business, The University of Georgia, August 2010

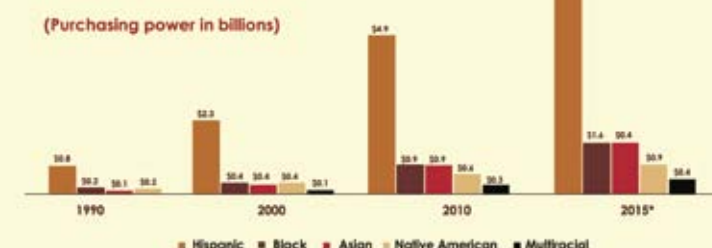
### ¿Sabías Qué?

The buying power of Hispanics will rise from \$1 trillion in 2010 to \$1.5 trillion in 2015, accounting for nearly 11% of the nation's total buying power.

—Portada-Online.com

### Hispanics lead Pima County Estimated Minority Purchases 2008-2015

- Hispanics will increase by more than \$2.6 Bill



Source: Adapted from Selig Center for Economic Growth, Terry College of Business, The University of Georgia, July 2010 by Prof. Olivas assuming 15.4% population factor





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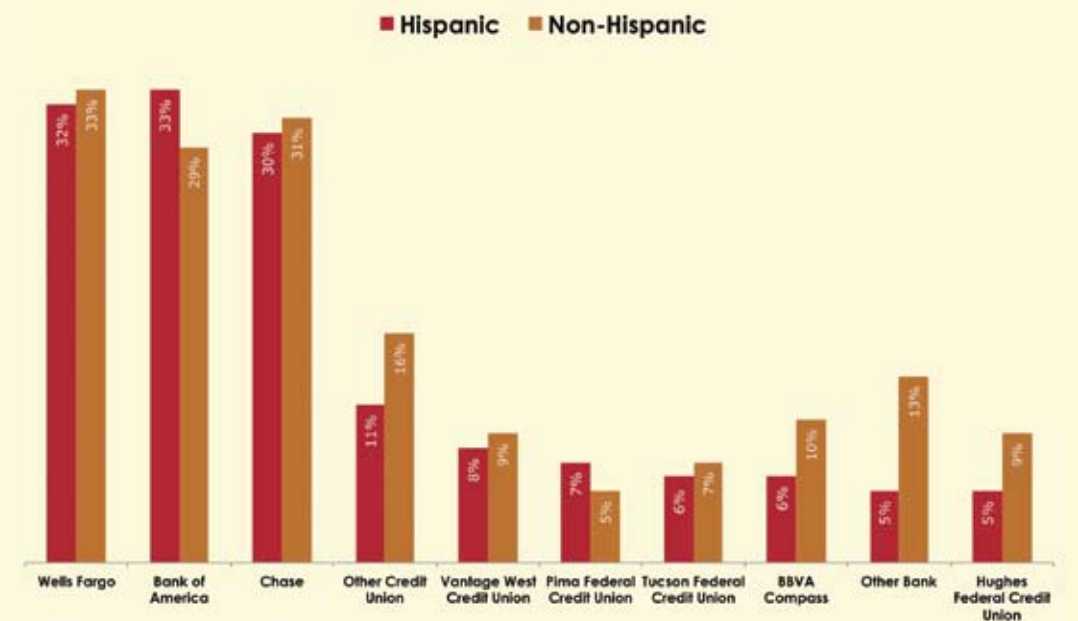
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## CONSUMER

TO REACH THE INFLUENTIAL AND FAST-DEVELOPING HISPANIC MARKET, IT IS IMPERATIVE TO UNDERSTAND HOW HISPANICS BEHAVE AS CONSUMERS. FOR AN ADVERTISING CAMPAIGN TO SUCCEED IN THE HISPANIC MARKET, A COMPANY MUST ESTABLISH MARKETING STRATEGIES THAT APPEAL TO HISPANICS' CONSUMER BEHAVIOR AND PREFERENCES.

## FINANCIAL SERVICES

### Top Banks/Credit Unions Among Households in Tucson (Ranked by % of Hispanics)



Source: Scarborough, 2011 Release 1 (Aug 2010 – Jan 2011), Tucson DMA, Adults 18+ (Courtesy of Univision)



# CONSUMER FINANCIAL SERVICES

FOREMOSTT OU NDERSTANDINGH ISPANIC CONSUMERSI SK NOWINGH OWT HEY USE AND INVEST THEIR MONEY. IN THIS FLUCTUATING ECONOMY, MAKING ANY BROAD-BASED ASSUMPTIONS ABOUT THE FINANCIAL KNOWLEDGE, PRACTICES AND BEHAVIORS OF ANY POPULATION IS RISKY (PARTICULARLY THE DYNAMIC HISPANIC POPULATION), BUT SEVERAL TRENDS ILLUSTRATE THE FINANCIAL COMFORTZ ONEF ORT HEP RESENT-DAYH ISPANICC ONSUMER.



## HISPANIC MARKET TRENDS

When ranking financial institutions, Hispanic consumers in Tucson list traditional mainstream banks such as Wells Fargo, Bank of America and Chase far above credit unions and other banks. Hispanic investors in Tucson use investment products less than non-Hispanics, but still recognize their potential. In keeping with older Hispanics' aversion to debt, Hispanic consumers overall prefer the perceived lower risk of mutual funds to the perceived higher risk of stocks or other investments, particularly additional mortgage debt.

Considering that the Hispanic population overall tends to use financial services less than non-Hispanics, we can expect Hispanics to favor paying cash for their purchases in the coming year as the economy continues to recover.

### Tucson Hispanics offer an opportunity for Financials Services Providers

Top 10 Financial Services Used  
(Ranked by Tucson Hispanic %)

	Hispanic %	Non-Hispanic %
Checking Account	60%	88%
Debit Card	59%	72%
Savings Account	55%	74%
ATM Card	39%	51%
Online Bill Paying	24%	39%
Online Banking	23%	38%
Home Mortgage	19%	31%
Auto Loan	19%	19%
401k	11%	26%
Money Market Account	7%	21%

Source: Scarborough, 2012 Release 1 (Feb 2011 – Jan 2012), Tucson DMA, Adults 18+ (Courtesy of Univision)

### ¿Sabías Qué?

Sixty percent of Hispanics aged 50 and up prefer payment with cash. Only 15% prefer paying with a credit card.

—AARP Viva Polls

# CONSUMER LATINA SHOPPERS

## Profile of the Arizona Latina

### She is younger

**50%** Between 18-34 years old compared to **25%** for non-Hispanics

### Her home has more people per household

**69%** Live in a house with 4+ people vs. **32%** for non-Hispanics

### Her home has more children per household

**73%** 1+ children in the household vs. **41%** for non-Hispanics

### She has a more positive outlook

**31%** Latinas believe they will be better off financially in the next year vs. **24%** of non-Hispanics



Source: Simmons NHCS, Summer 2011 Adult Full Year, (July '10 – Sept '11) Population, Base: Arizona Women 18+ (Courtesy of Univision)

### ¿Sabías Qué?

Hispanic men are 50% or more likely than their female counterparts to earn \$50,000 or more per year.

—U.S. Census Bureau





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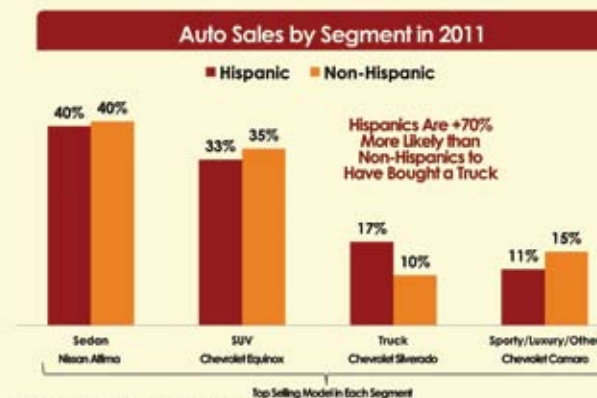
## RETAIL-AUTOMOTIVE

THOUGH HISPANICS ACCOUNT FOR 16 TO 17 PERCENT OF THE U.S. POPULATION, CONSUMER SPENDING IN THE HISPANIC COMMUNITY IS GROWING AT TWICE THE RATE FOR NON-HISPANICS.

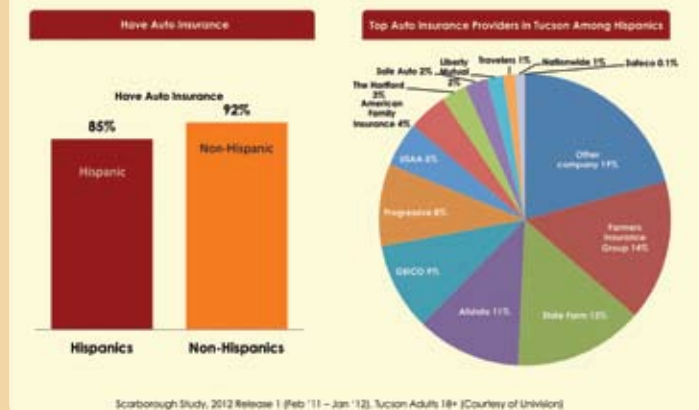
### HISPANIC MARKET TRENDS

In the coming year, more than 20 percent of Hispanic consumers in Tucson expect to buy household furniture, electronics and technology. In the next five years, Hispanics will account for nearly two-thirds of all new home owners. In 2010, Tucson Hispanics spent nearly \$700 million on food prepared at home and another \$447 million on food outside the home.

### Hispanics Spent Nearly \$134 Million on Vehicle Purchases in Tucson in 2011



### Auto Insurance and Tucson Hispanics





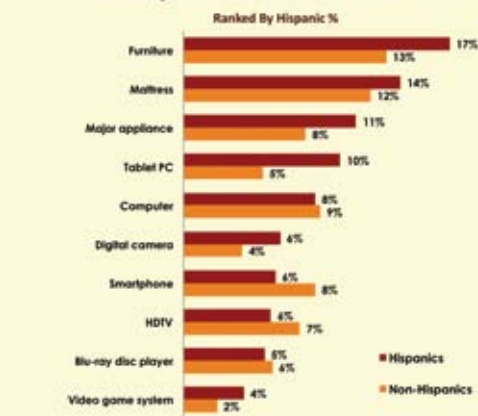
CONSUMER  
RETAIL-GENERAL

Over 245,000 Hispanic Adults in Tucson Have  
Shopped at a Mall in the Past 3 Months <sup>1</sup>

Malls Shopped/Visited In Past 3 Months <sup>1</sup>				Population Characteristics with a 3 Mile Radius <sup>2</sup>		
Rank	In Past 3 Months	% of Hispanics	% of Non-Hispanics	Total Population (2011)	Hispanic Population (2011)	Hispanic % of Total Population (2011)
#1	Tucson Mall	60.4%	47.2%	92,493	32,125	34.7%
#2	Park Place	44.1%	43.6%	118,735	34,116	28.7%
#3	El Con Mall	36.8%	25.7%	126,769	41,218	32.5%
#4	Foothills Mall	30.3%	30.0%	65,950	15,212	23.1%
#5	Other shopping center	20.3%	27.2%	N/A	N/A	N/A
#6	Tucson Spectrum	16.7%	4.2%	106,585	87,870	82.4%
#7	La Encantada	10.8%	21.7%	31,483	4,013	12.7%
#8	Arizona Mills	9.9%	4.4%	N/A	N/A	N/A
#9	The Mall at Sierra Vista	6.9%	7.7%	N/A	N/A	N/A
#10	Outlets at Casa Grande	6.6%	2.1%	N/A	N/A	N/A
#11	VF Outlet	6.2%	2.7%	N/A	N/A	N/A
#12	Oro Valley Marketplace	5.3%	9.8%	18,777	2,037	10.8%
#13	Crossroads Festival	4.6%	10.6%	N/A	N/A	N/A
#13	Scottsdale Fashion Square	4.6%	1.7%	N/A	N/A	N/A
#15	St. Phillip's Plaza	2.2%	3.6%	N/A	N/A	N/A
#16	Casas Adobes Plaza	1.9%	7.2%	N/A	N/A	N/A

1) Source: Scarborough, 2012 Release 1 (Feb 2011 – Jan 2012), Tucson DMA, Adults 18+ (Courtesy of Univision);  
2) Source: Geoscape

Top 10 Big Ticket Items Tucson Hispanics Plan  
to Buy in the Next 12 Months



Source: Scarborough, 2012 Release 1 (Feb 2011 – Jan 2012), Tucson DMA, Adults 18+ (Courtesy of Univision)

Hispanics spent \$369 Million (33%, of Total  
Spending) on Clothing and Footwear in Tucson <sup>1</sup>

Hispanic Rank	Top Stores Shopped for Clothing in Past 3 Months <sup>1</sup>	% of Hispanics <sup>1</sup>	% of Non-Hispanics <sup>1</sup>	Hispanic Rank	Top Stores Shopped for Shoes in Past 3 Months <sup>1</sup>	% of Hispanics <sup>1</sup>	% of Non-Hispanics <sup>1</sup>
#1	Walmart	44.0%	37.8%	#1	JCPenney	26.5%	7.6%
#2	JCPenney	42.3%	20.7%	#2	Walmart	23.0%	14.9%
#3	Target	41.2%	38.6%	#3	Famous Footwear	20.2%	13.4%
#4	Ross Dress For Less	40.2%	23.0%	#4	Other store	19.0%	19.1%
#5	Old Navy	19.0%	9.9%	#5	Payless	18.5%	12.7%
#6	Dillard's	17.0%	20.4%	#6	Foot Locker	14.1%	3.8%
#7	Other store	16.9%	25.2%	#7	Target	12.2%	9.5%
#8	Kmart	15.8%	11.9%	#8	Kohl's	9.0%	13.9%
#9	Kohl's	15.4%	28.1%	#9	Other sporting store	8.9%	8.2%
#9	Victoria's Secret	15.4%	8.8%	#10	Sears	7.9%	4.7%
#11	Sears	15.3%	10.9%	#11	Kmart	6.8%	5.7%
#12	Marshalls	13.7%	6.2%	#11	Sports Authority	6.6%	4.9%
#13	Forever 21	13.2%	5.4%	#13	Finish Line	6.5%	1.8%
#14	Macy's	12.1%	13.4%	#14	Dillard's	6.0%	10.7%
#15	Factory 2-U	12.0%	1.6%	#15	Lady Foot Locker	5.2%	0.8%

1) Source: Univision—2011 Hispanic Market Research; 2) Source: Scarborough, 2012 Release 1 (Feb 2011 – Jan 2012), Tucson DMA, Adults 18+ (Courtesy of Univision)

CONSUMER  
HEALTH CARE

IN THE AREA OF HEALTH AND WELLNESS, ALMOST 20 PERCENT OF HISPANICS 45 OR OLDER USED HERBAL SUPPLEMENTS OR REMEDIES IN 2010 FOR ORDINARY AILMENTS SUCH AS PAIN RELIEF AND STOMACH ACHES. HISPANICS ALSO ARE THE LEAST LIKELY TO HAVE HEALTH INSURANCE IN THE UNITED STATES. IN 2010, TUCSON HISPANICS SPENT \$251 MILLION ON HEALTH CARE.

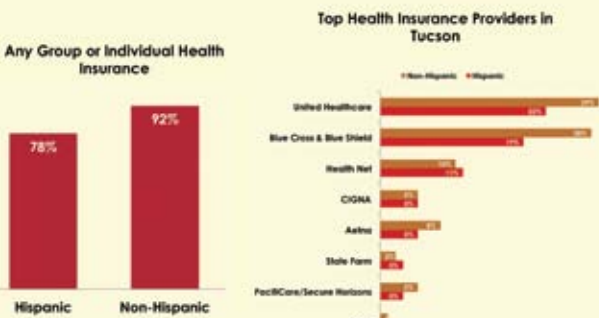
HISPANIC MARKET TRENDS

As a reflection of the growing and relatively young Hispanic population as compared to the aging non-Hispanic population, Hispanics use maternity care, pediatrics and other hospital services more than non-Hispanics.

In Tucson, Hispanics ranked United Healthcare, BlueCross BlueShield and Healthnet highest among health insurance providers.

Among young Hispanic adults, more than half nationwide were uninsured in 2009, compared to 34 percent of blacks and 24 percent of white, non-Hispanics.

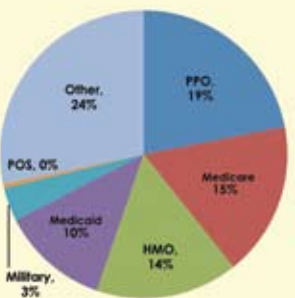
Health Insurance and Tucson Hispanics



Source: Scarborough, 2011 Release 2 (Aug 2010 – Jul 2011), Tucson DMA, Adults 18+ (Courtesy of Univision)

Health Insurance and Tucson Hispanics

Type of Group or Individual Health Insurance



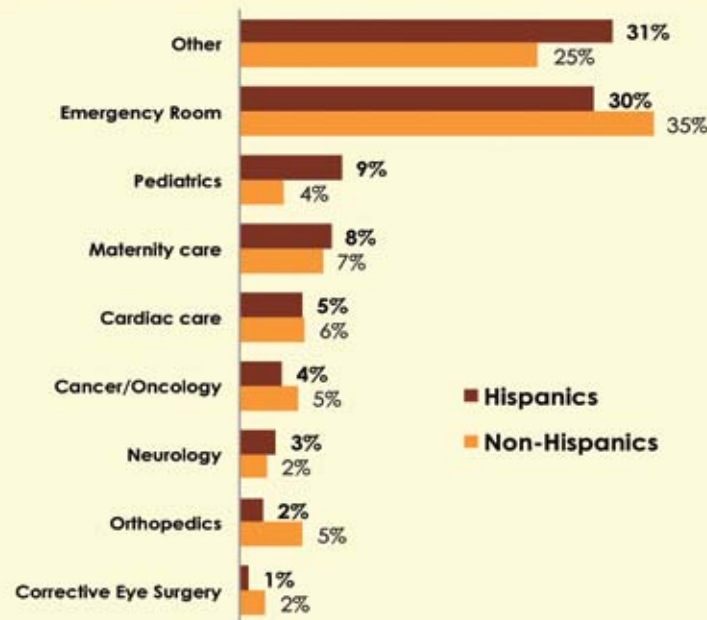


# CONSUMER

## HEALTH CARE

### Top Medical Services Used at Tucson Hospitals in the Past 3 Years

Among Hispanics & Non-Hispanics Who Have Used a Medical Service at a Hospital in the Past 3 Years



Scarborough Study, 2012 Release 1 (Feb '11 – Jan '12), Tucson Households Who Have Used a Medical Service at a Hospital in the Past 3 Years (Courtesy of Univision)

### Top Hospitals Visited Among Hispanic Households in Tucson

Ranked by Percentage of Hispanic Households Who Visited in Past 3 Years

Hispanic Rank	Hospital	% of Hispanics	% of Non-Hispanics
#1	University Medical Center	25.4%	16.3%
#2	Tucson Medical Center	22.6%	23.5%
#3	St. Mary's Hospital	18.7%	5.6%
#4	Other Hospital	12.5%	13.1%
#5	St. Joseph's Hospital	11.8%	18.5%
#6	Northwest Medical Center Tucson	10.7%	17.4%
#7	University Physicians Healthcare Hospital at Kino Campus	8.9%	3.8%
#8	Coronader Heart & Vascular Institute	6.5%	4.1%
#9	VA Medical Center	5.7%	7.7%
#10	Northwest Medical Center Oro Valley	4.5%	6.7%

Scarborough Study, 2012 Release 1 (Feb '11 – Jan '12), Tucson Households Who Have Used a Medical Service at a Hospital in the Past 3 Years (Courtesy of Univision)

Tucson Hispanics Spent **\$251 Million** on Healthcare in 2010

# CONSUMER

## FOOD

### Tucson Hispanics Spent \$690 Million on Food at Home Purchases in 2012, 29.7% of Tucson's Total



Source: IHS 2011 Global Insight Hispanic Market Monitor

### Tucson Hispanics Spend More on Average on Grocery Purchases than Non-Hispanics

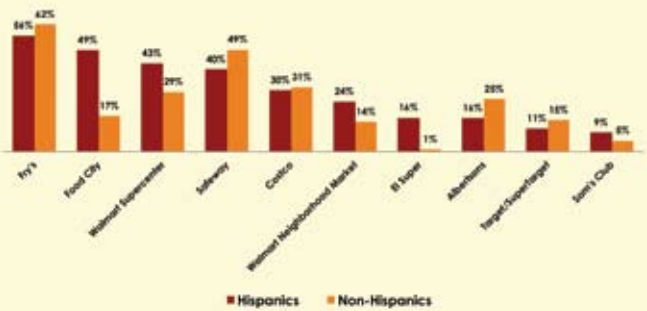
Average Amount Household Spent on Groceries Past 7 Days (HHLD)



An extra \$8 per week adds up to an additional \$416 per year per family.

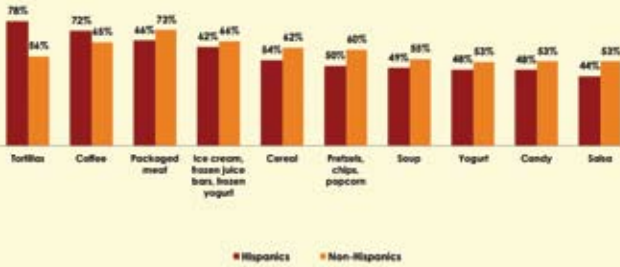
Source: Scarborough, 2012 Release 1 (Feb 2011 – Jan 2012), Tucson DMA, Households (Courtesy of Univision)

### Top 10 Tucson Grocery Stores Shopped



Source: Scarborough, 2012 Release 1 (Feb 2011 – Jan 2012), Tucson DMA, Adults 18+ (Courtesy of Univision)

### Top 10 Packaged Products Household Used (Ranked by % of Hispanics)



Source: Scarborough, 2012 Release 1 (Feb 2011 – Jan 2012), Tucson DMA, Adults 18+ (Courtesy of Univision), reflects products used in past 30 days

### ¿Sabías Qué?

The product shipment value of frozen enchiladas produced in the United States was \$48.9 million in 2002. Frozen tortilla shipments were valued even higher, at \$156 million.

—U.S. Census Bureau

### "Almost 60% of growth in food and beverages will come from the Hispanic market as the non-Hispanic market's growth in these categories is negative"

—Francisco Bethencourt, PepsiCo Director of Strategy and Business Development Hispanic

# CONSUMER FOOD

Tucson Hispanics Represent \$447 Million, or 28%, of All Food Away From Home Spending

**\$267 Million**  
Spent at Quick Service Restaurants <sup>1</sup>

Hispanics Represent **31%** of All Dollars Spent at Quick Service Restaurants <sup>1</sup>

Hispanic Families Average **5.6 Visits** to a QSR in One Month (Compared to 4.8 for Non-Hispanic Families) <sup>2</sup>

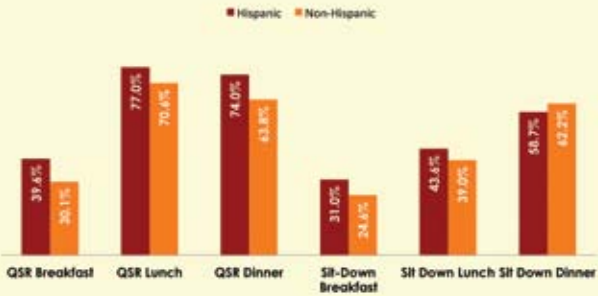
**\$180 Million**  
Spent on "Other" Food Away from Home

Hispanics Represent **25%** of All Dollars Spent at Other Restaurants <sup>1</sup>

Hispanic Families Average **3.1 Visits** to a Sit Down Restaurant in One Month (Compared to 3.2 for Non-Hispanic Families) <sup>2</sup>

<sup>1</sup> Source: Global Insight - 2011 Hispanic Market Monitor (Courtesy of Univision)  
<sup>2</sup> Source: Scarborough, 2012 Release 1 (Feb 2011 - Jan 2012), Tucson DMA, Adults 18+ (Courtesy of Univision).

8 out of 10 Hispanic Adults in Tucson Have Dined at a Restaurant in the Past Year  
Tendency to Eat at Fast-Food vs. Sit Down Restaurants by Meal Type



<sup>1</sup> Source: Global Insight - 2011 Hispanic Market Monitor (Courtesy of Univision)  
<sup>2</sup> Source: Scarborough, 2012 Release 1 (Feb 2011 - Jan 2012), Tucson DMA, Adults 18+ (Courtesy of Univision).

Top Quick Service Restaurants Among Hispanics Vary by Time of Day

Rank	Restaurant	Breakfast	
		% Hispanic	% Non-Hispanic
#1	McDonald's	30.8%	10.3%
#2	Starbucks	10.3%	9.9%
#3	Jack in the box	8.4%	4.0%
#4	Burger King	5.5%	3.1%
#5	Carl's Jr. Restaurant	4.1%	2.8%

Rank	Restaurant	Lunch	
		% Hispanic	% Non-Hispanic
#1	McDonald's	38.8%	24.7%
#2	Subway	28.4%	20.1%
#3	Burger King	17.8%	14.3%
#4	Segee's	14.5%	12.0%
#5	Taco Bell	13.1%	12.4%

Rank	Restaurant	Dinner	
		% Hispanic	% Non-Hispanic
#1	McDonald's	25.4%	14.9%
#2	Little Caesars	21.8%	4.7%
#3	Peter Piper Pizzeria	17.6%	3.1%
#4	Taco Bell	14.4%	12.9%
#5	Burger King	14.3%	4.9%

<sup>2</sup> Source: Scarborough, 2012 Release 1 (Feb 2011 - Jan 2012), Tucson DMA, Adults 18+ (Courtesy of Univision).

Top Sit Down Restaurants Among Hispanics Vary by Time of Day

Rank	Restaurant	Breakfast	
		% Hispanic	% Non-Hispanic
#1	Denny's	14.3%	5.1%
#2	IHOP	10.7%	9.3%
#3	Other Restaurant	5.7%	10.1%
#4	Village Inn	3.3%	1.9%
#5	Golden Corral	2.0%	1.8%

Rank	Restaurant	Lunch	
		% Hispanic	% Non-Hispanic
#1	Other Restaurant	15.7%	22.2%
#2	Golden Corral	7.7%	3.5%
#3	Olive Garden	7.0%	4.1%
#4	Denny's	5.8%	2.0%
#5	Applebee's	4.4%	2.9%

Rank	Restaurant	Dinner	
		% Hispanic	% Non-Hispanic
#1	Other Restaurant	25.2%	40.3%
#2	Olive Garden	12.7%	4.9%
#3	Golden Corral	11.4%	7.3%
#4	Red Lobster	9.3%	4.0%
#5	Applebee's	7.4%	8.4%

<sup>2</sup> Source: Scarborough, 2012 Release 1 (Feb 2011 - Jan 2012), Tucson DMA, Adults 18+ (Courtesy of Univision).

"86% of the growth through 2020

for Coca Cola's youth target market will come from multi-cultural consumers, especially Hispanics, and focusing on this segment is critical to the company's future growth."  
—Beda Perez, CMO Coca Cola

¿Sabías Qué?

Latinos traditionally consume more mayonnaise than other households.

—Hispanic Market Weekly

# CONSUMER PET OWNERSHIP

Experian Simmons National Consumer Studies (2006 to 2011) determined that the number of minority households with dogs or cats increased 30 percent overall from 2006 to 2011, representing an additional 2.6 million minority pet owners. The much larger group of White Non-Hispanic households with pets increased only 13 percent.

From 2006 to 2011, the percentage of Hispanic households that are dog or cat owners grew from 34 percent to 40 percent. About 61 percent of White Non-Hispanic households have dogs or cats. White Non-Hispanic households, meanwhile, account for 82 percent of all pet owners, as compared to Hispanics at 9 percent, blacks at 5 percent and Asians at 2 percent.



# When it comes to supporting our community, WE'RE THERE

Cox Communication's commitment to diversity extends beyond our workplace into the communities we serve. Cox is proud and committed to serving our ever-growing Hispanic community.



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## TECHNOLOGY

### CELL PHONE

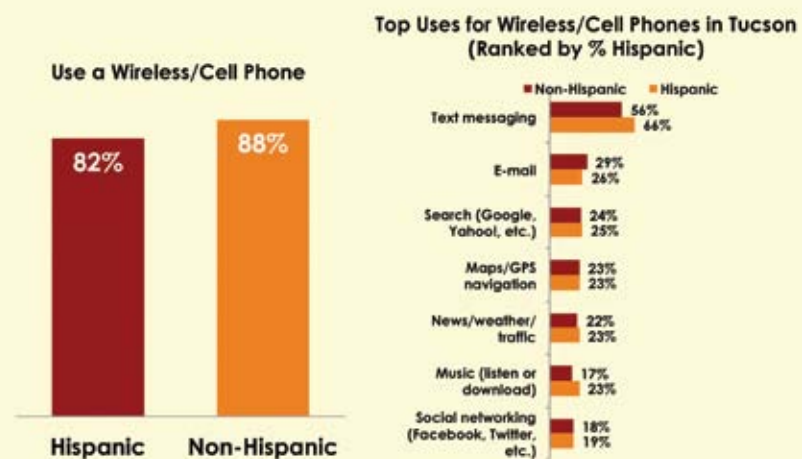
CELL PHONES ARE A TECHNOLOGICAL STAPLE OF AMERICANA NDA MERICAN LATINOS OCIETY. T HE TOP USES OF CELL PHONES IN THE HISPANIC MARKET ARE VERY SIMILAR TO THE REST OF THE MARKET, WITH TEXT MESSAGING BY FAR THE MOST POPULAR USE OF A CELL PHONE. EMAIL, MUSIC AND INTERNET SEARCHING ARE THE NEXT TOP USES.

### HISPANIC MARKET TRENDS

Yet, clear distinctions surface in the per capita rate of use. Hispanic users are almost two times more likely to switch wireless carriers in the next year, and 45 percent of Hispanic cell phone owners have smartphones, compared to 27 percent of non-Hispanic whites.

About 72 percent of Hispanic cell phone users make movie plans on their phones, including looking up movie times and theater locations (data plan use). Hispanic users also are more likely than the general market to choose a movie based on ads on their mobile phones. About 82 percent of Tucson Hispanics own a mobile phone.

### 82% of Hispanics in Tucson Have Cell Phones



Source: Scarborough, 2012 Release 1 (Feb 2011 – Jan 2012), Tucson DMA, Adults 18+ (Courtesy of Univision)

### ¿Sabías Qué?

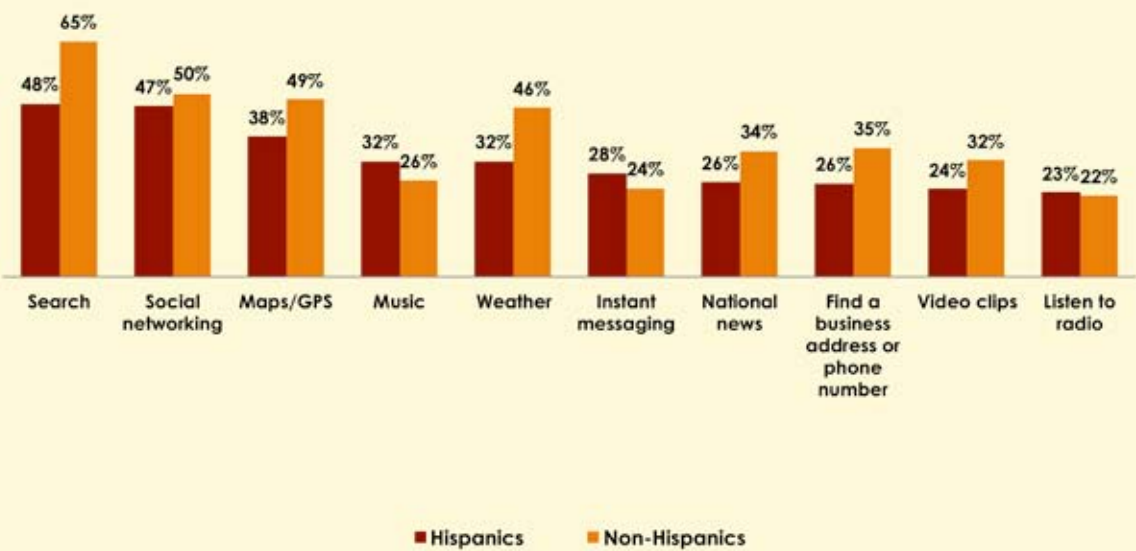
Hispanics accounted for 43% of all new wireless subscribers between 2009 and 2010.

—Experian Consumer Research

# TECHNOLOGY

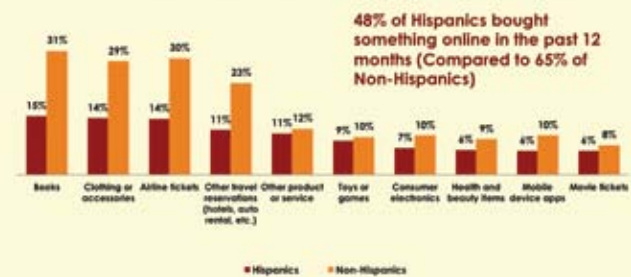
## CELL PHONE

### Top Online Activities by Tucson Adults Hispanic and Non-Hispanics (Ranked by % of Hispanics - in the Past 30 Days)



Source: Scarborough, 2012 Release 1 (Feb 2011 – Jan 2012), Tucson DMA, Adults 18+ (Courtesy of Univision)

### Top Items on the Internet purchased by Tucson Hispanic and Non-Hispanic Adults (Ranked by % of Hispanics - in the Past 12 Months)



48% of Hispanics bought something online in the past 12 months (Compared to 65% of Non-Hispanics)

Source: Scarborough, 2012 Release 1 (Feb 2011 – Jan 2012), Tucson DMA, Adults 18+ (Courtesy of Univision)

### Social Networking Sites Most Visited by Tucson Hispanics

Hispanic Rank	Internet sites visited past 30 days	Hispanic %	Non-Hispanic %	Non-Hispanic Rank
#1	Facebook	45.3%	47.9%	#1
#2	YouTube	38.8%	38.0%	#2
#3	Twitter	7.1%	4.9%	#4
#4	LinkedIn	1.3%	6.8%	#3

Source: Scarborough, 2012 Release 1 (Feb 2011 – Jan 2012), Tucson DMA, Adults 18+ (Courtesy of Univision)

# TECHNOLOGY

SPANISH IS SPOKEN BY NEARLY 500 MILLION PEOPLE AROUND THE WORLD. IT IS THE SECOND MOST POPULAR LANGUAGE FOR INTERNATIONAL COMMUNICATIONS, AND THE THIRD MOST POPULAR LANGUAGE AMONG INTERNET USERS, AFTER ENGLISH AND CHINESE, RESPECTIVELY.

## SOCIAL MEDIA

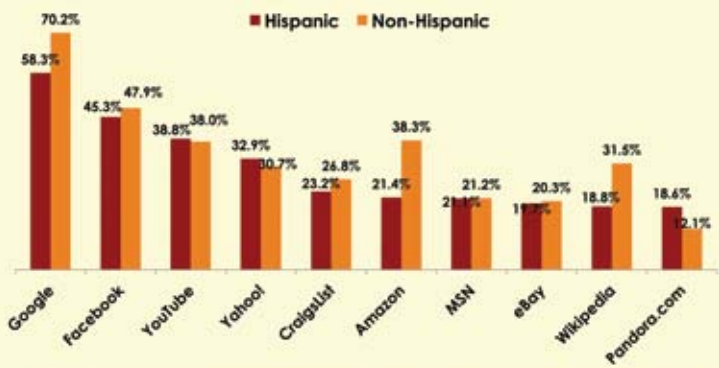
### HISPANIC MARKET TRENDS

An astounding 70 percent of Hispanics in the U.S. are engaged in social media; in particular, Facebook, Twitter and the reading and writing of blogs. Advertisers should know that Hispanics are more actively involved in Facebook and other social media than non-Hispanics. The top industries using social media to reach out to Hispanics are the automotive, consumer packaged goods, quick-service restaurants, airlines and telecommunications industries.

Hispanic bloggers overwhelmingly wrote about parenting and Hispanic issues, as well as heritage, culture, cooking/recipes, fashion/beauty and art. Hispanics also actively participate in video-sharing websites. Sixty-four percent of Hispanics visit video-sharing websites. More than 9 out of 10 of those Hispanics use YouTube and 41 percent made a purchase online.

### 69% of Tucson Hispanics Accessed the Internet in the Past 30 Days

% of Hispanics & Non-Hispanics Visiting Websites in Tucson (Top 10)



Source: Scarborough, 2012 Release 1 (Feb 2011 – Jan 2012), Tucson DMA, Adults 18+ Accessing the Internet in the Past 30 Days (Courtesy of Univision)

### ¿Sabías Qué?

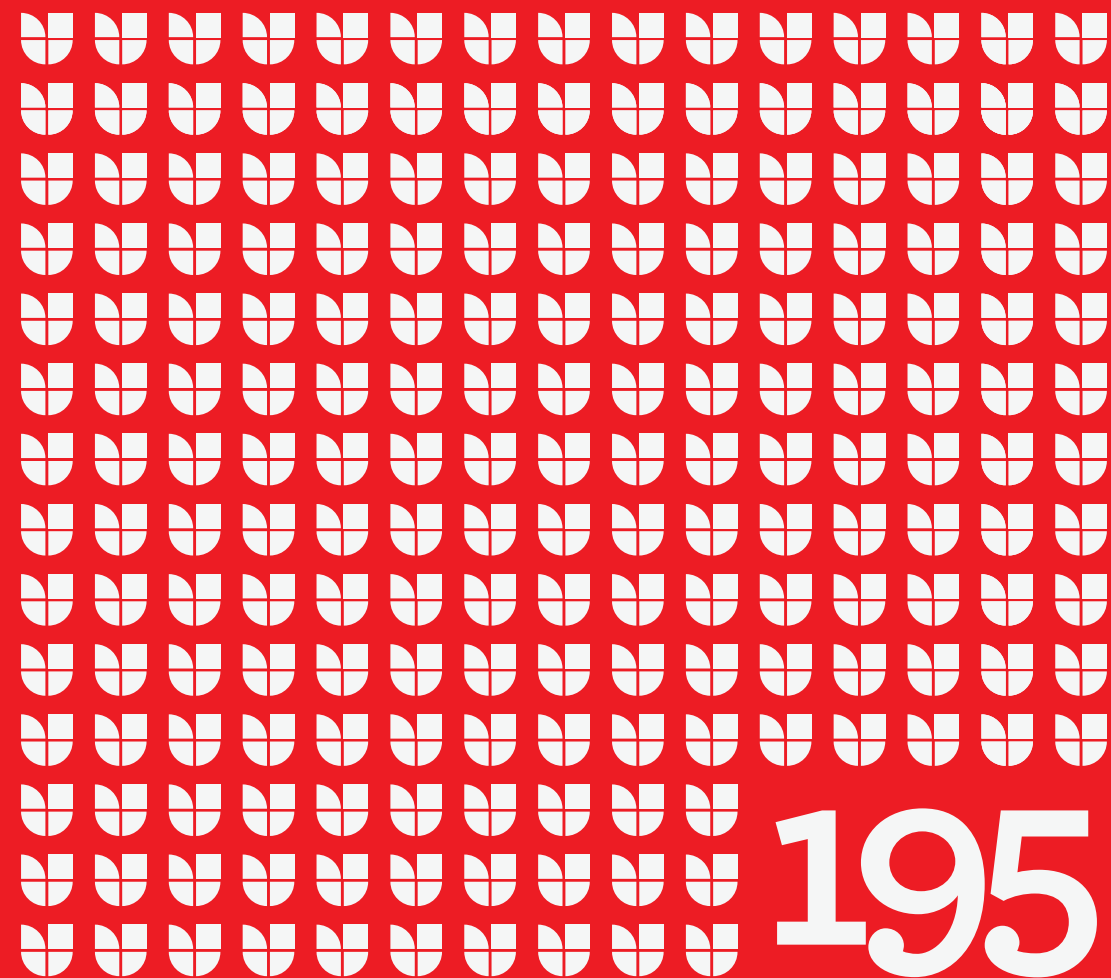
Spanish speakers are the third-largest language group among Internet users, with 8% of the total, after English (38%) and Chinese users (22%).

—YahooNews.com



# Guess how many nights we beat NBC in 2011.

(adults 18-49 in primetime)



# 195



*The New American Reality.*

[univision.net/balanceyourplan](http://univision.net/balanceyourplan)

Source: The Nielsen Company, NPM, 12/27/10-12/25/11, Mon-Sat 8-11pm/Sun 7-11pm, Live+SD, A18-49(000). Qualifications available upon request.



## MEDIA

ADVERTISERS IN THE UNITED STATES SPENT \$4.3 BILLION TO REACH HISPANICS IN 2010, A 14 PERCENT INCREASE OVER 2009, ACCORDING TO THE ASSOCIATION OF HISPANIC ADVERTISING AGENCIES.



## TELEVISION

THE NUMBER OF SPANISH-LANGUAGE TELEVISION STATIONS, RADIO STATIONS, BROADCAST NETWORKS AND PRINT OUTLETS IS INCREASING. THAT SHOULD BE NO SURPRISE, GIVEN THAT HALF OF ALL U.S. POPULATION GROWTH FROM 2000 TO 2010 WAS AS A RESULT OF THE INCREASING LATINO POPULATION.









## HISPANIC MARKET TRENDS

When Hispanic viewers want news about their family's country of origin, they prefer watching on Spanish-language television more than two to one (38 percent to 17 percent). For daily news, the preference for Spanish-language television is slightly greater; 36 percent prefer Spanish-language broadcasts, while 33 percent prefer English-language outlets. However, when a disaster is occurring, Hispanic viewers prefer to receive news and instructions in English rather than Spanish (42 percent to 25 percent).

While Hispanics use premium-channel cable TV service and HDTV service at the same rate as the white, non-Hispanic market, they are less likely to use DVR and on-demand movies. They are, however, more likely to use pay-per-view for movies or events.

MEDIA  
TELEVISION

94% of Tucson Hispanics  
Watched TV in the Past 7 Days

Broadcast Total Day Average Audience			Respective Prime Average Audience		
1		15,900	1		40,100
1 (tie)		15,900	2		27,600
3		13,400	3		25,100
4		5,800	4		20,900
5		4,200	5		10,000
6		2,500	6		4,200
7		1,700	7		3,300
7 (tie)		1,700	7 (tie)		3,300
9		800	9		800

Source: Scarborough, 2012 Release 1 (Feb 2011 – Jan 2012), Tucson DMA, Adults 18+ (Courtesy of Univision)  
Source: Tucson NSI July 12, 06/28/12-07/25/12, Total Day M-Su/6a-2a &  
Prime M-Sa 7p-10p/Su 6p-10p (FOX/CW M-Sa 7p-9p/Su 6p-9p), Adult 18+ Viewers

¿Sabías Qué?

A total of 66% of Hispanics say very few brands genuinely care about the state of their communities, but 79% say companies that make sincere efforts to be a part of their communities deserve their loyalty.

—Research Alert Vol. XXVIII, No. 19



MEDIA

RADIO

DESPITE A BOOM IN INTERNET USAGE AND THE AVAILABILITY OF CABLE TELEVISION CHANNELS, RADIO ADVERTISING REVENUE INCREASED SIX PERCENT IN 2010 TO \$17.3 BILLION, REFLECTING THE BIGGEST ANNUAL GROWTH RATE IN MORE THAN A DECADE. ON THE DIGITAL FRONT, STREAMING WEBSITES AND HDR ADIOS HOWEDT HEH IGHESTR ATEO FI NCREASE IN ADVERTISING DOLLARS FOR THE YEAR, WITH A 24 PERCENT GROWTH TO \$616 MILLION.

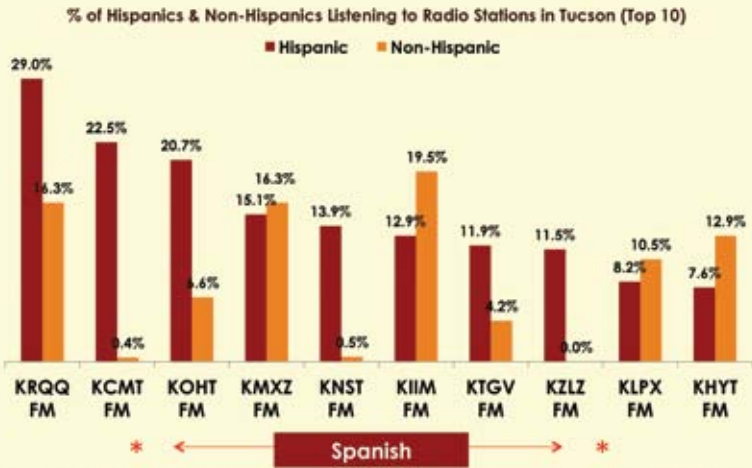


HISPANIC MARKET TRENDS

In step with this rise in advertising revenue, automakers and dealers increased their radio investment in 2010 by 22 percent to \$1.8 billion, a reflection of the remarkable rebound in the auto industry.

On the digital front, streaming websites and HD radio showed the highest rate of increase in advertising dollars for the year, with a 24 percent growth to \$616 million.

90% of Tucson Hispanics Listened to the  
Radio in the Past 5 Days



Source: Scarborough, 2012 Release 1 (Feb 2011 – Jan 2012), Tucson DMA, Adults 18+ M-Su 6a-12Mid Cume (Courtesy of Univision)





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## MEDIA

### PRINT

EVEN AS INTERNET USE FOR NEWS, SHOPPING AND COMMUNICATIONS RAPIDLY EXPANDS, PRINT MEDIA, INCLUDING NEWSPAPERS, MAGAZINES AND BULK MAIL ADVERTISING, REMAINS AN EFFECTIVE ADVERTISING OUTLET.



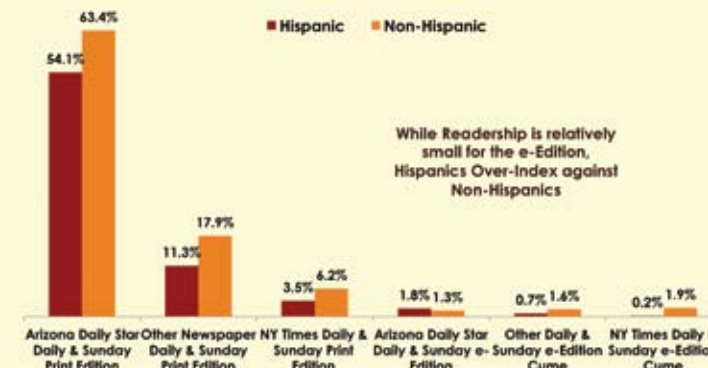
### HISPANIC MARKET TRENDS

When asked about their preferences for gathering information, Hispanics preferred the Internet over newspapers when:

- » Shopping for a car (28 percent to 15 percent),
- » Searching for news about their family's country of origin (21 percent to 4 percent),
- » Searching for general news (12 percent to 6 percent).
- » Most Hispanics prefer to find their food bargains in English-language newspapers (22 percent) and Spanish-language
- » Newspapers (10 percent) when compared to the Internet (6 percent).
- » The number of Hispanic print news publications has remained more or less constant from 2007 to 2009, while English-language newspapers saw a 17 percent decline in circulation from 2004 to 2009.

### 38% of Tucson Hispanics Read a Print Newspaper or e-Edition in Past 7 Days

% of Hispanics & Non-Hispanics Reading Newspapers' Print and e-Editions in Tucson



Source: Scarborough, 2012 Release 1 (Feb 2011 - Jan 2012), Tucson DMA, Adults 18+ Cumulative (Courtesy of Univision)





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## POLITICS

AS THE 2012 ELECTION CYCLE HEATS UP, CAMPAIGN STRATEGISTS ARE DECIPHERING POLLS AND DEVELOPING ADVERTISING STRATEGIES, HOPING TO ATTRACT THE EVER-ELUSIVE SWING VOTERS. THE PROCESS IS NEVER EASY, BUT POLITICAL ANALYSTS SAY THE RAPID GROWTH OF ARIZONA'S HISPANIC VOTING BASE, THE DECENNIAL REDISTRICTING PROCESS AND THE STATE'S CONTENTIOUS POLITICAL CLIMATE IN RECENT YEARS ARE EXPECTED TO HAVE A TANGIBLE EFFECT DURING THE 2012 ELECTIONS.

### HISPANIC MARKET TRENDS

In 2008, about 35 percent more Hispanics were registered to vote in Arizona than in 2000. Based on an established pattern of a 17- to 18-percent growth rate for each four-year election cycle, an estimated 482,000 Hispanics in Arizona could be registered to vote in 2012 and 317,000 of those voters could go to the polls in November 2012. Statewide voter turnout organizations led by a coalition called One Arizona have set a goal to register 100,000 new Latino voters this year.

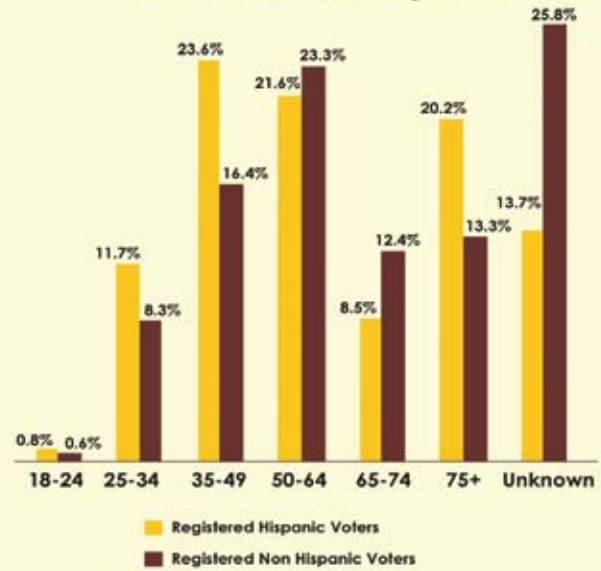
In the meantime, more than 12.3 million Latinos are expected to vote nationwide this year, up 26 percent from the 2008 election cycle. However, approximately 22 million Hispanic are eligible to vote, according to the National Association of Latino Elected and Appointed Officials (NALEO) Educational Fund.



POLITICS

116,841

Registered Hispanic Voters in the Tucson DMA  
Tucson DMA Hispanic Voters Are Younger

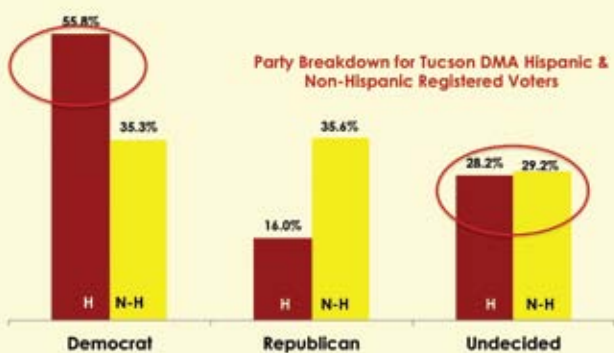


36% of Hispanic Voters  
Are 18-49

25% of Non-Hispanic Voters  
Are 18-49

Source: Aristotle, Voter Registration Data, State of Arizona, Data Run February 2012. (Courtesy of Univision)

Tucson Area Hispanic Political Party Affiliation



Tucson Area Hispanics are more likely to be Democrat than Non Hispanics, yet they are comparable in undecided voters



Source: Aristotle, Voter Registration Data, State of Arizona, Data Run February 2012. (Courtesy of Univision)

¿Sabías Qué?

The number of U.S. Latino adults who are eligible to vote increased from 13.2 million in 2000 to 21.3 million in 2010

—Hispanic Market Weekly

POLITICS

Latino voters represent wave of political change for Arizona  
Report projects possible change from red to blue state

By Joseph Garcia  
Morrison Institute Latino Public Policy Center

A sea change in Arizona's political landscape is coming, with a wave of young Latinos coming of voting age in the next couple of decades.

They will be eligible to vote as the Latino population continues to grow exponentially by a high birth rate. Non-Hispanic Whites in Arizona are going the opposite direction, with a constricting population as many Baby Boomers enter retirement. That dynamic is not going to change because it is the change coming to Arizona and much of the United States, according to a recent report by the new Morrison Institute Latino Public Policy Center.

Arizona's Emerging Latino Vote, released earlier this year, shows Latinos voters will have an undeniably big impact at the ballot box. That's because there will be a 178 percent or greater increase in the number of Arizona Latino citizens aged 20 and older from 2010 to 2030. In contrast, the number of adult non-Latino Arizona citizens is expected to increase by only 42 percent during this period.

Latino registered voters in Arizona will go from making up 15 percent of the electorate in 2010, to 25 percent in 2030. As a result, by 2025, Democrats will match or surpass the number of Republicans in Arizona, shifting the balance of power and perhaps turning Arizona from a "red state" to a "blue state."

Research shows Latino voters traditionally register as Democrats. Exit interviews and polling show Latinos also usually vote Democratic – even if they register as independents, as a growing number of voters across the board are registering. And the Republican Party's backing of SB 1070 is expected to only further galvanize the Latino vote.

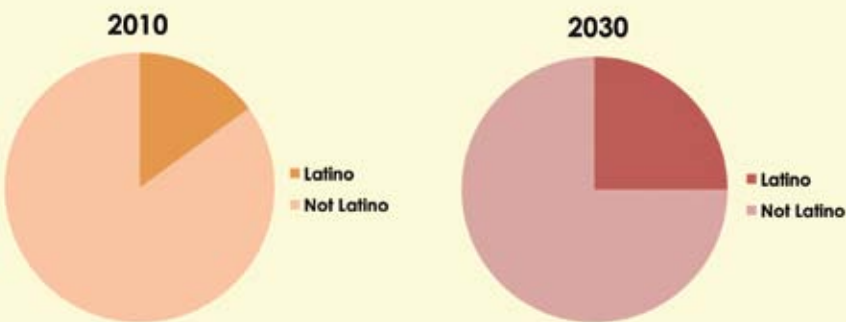
Change is coming – and the eventual change will be beyond the ballot box, with Latinos taking more and greater leadership roles statewide, joining more influential boards and committees, and representing the majority of Arizona's workforce.

The future is full of both opportunity and challenges for Arizona Latinos, but Latinos increasingly will have a say in the final outcome as they learn to flex their strengthened political muscle and might.

Joseph Garcia, a former political reporter and editor, is director of Morrison Institute Latino Public Policy Center. [MorrisonInstitute.asu.edu/Latino](http://MorrisonInstitute.asu.edu/Latino)

Arizona's Emerging Latino Vote was co-authored by Morrison Institute Senior Policy Analyst Bill Hart and ASU Faculty Associate Dr. E.C. Hedberg.

Percentage of Registered Voters by Ethnicity,  
Ages 20 and Older/Arizona



Source: 2010 American Community Survey, 2010 Current Population Survey, Geolytics projects

www.evergreenmortuary-cemetery.com



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Let our team of counselors answer any of your questions regarding pre-need or at-need, cremation, funeral, burial, memorialization or shipping arrangements.

## DEMOGRAPHICS

IT'S OFTEN POINTED OUT THAT THE NATION'S HISPANIC POPULATION IS NOT MONOLITHIC. IN FACT, HISPANICS IN THE UNITED STATES REPRESENT EVERY LATIN AMERICAN NATION AND SPAIN, ALTHOUGH THE VAST MAJORITY WAS BORN IN THE UNITED STATES AND MANY HAVE FAMILY LINES STRETCHING BACK DECADES OR EVEN CENTURIES. YET, EVEN AS THE 2001 TERRORIST ATTACKS AND THE DESTRUCTIVE FALLOUT OF GLOBAL ECONOMIC RECESSION PRODUCED NEW BRANDS OF CULTURAL AND PHYSICAL OBSTACLES, THE EXPLOSION OF SOCIAL MEDIA AND MOBILE ELECTRONIC DEVICES HAVE CHALLENGED THE TRADITIONAL CONCEPTS OF "BORDERS" AND "CULTURES."

### HISPANIC MARKET TRENDS

In 2010, U.S. Hispanics were predominantly Mexican (63 percent), followed by Puerto Rican (9.2 percent) and Cuban (3.5 percent). Central and South Americans, and Dominicans make up the other 24.3 percent of the nation's Hispanic population.

Nearly half of all Hispanics in the U.S. live in 10 metropolitan areas. Forty-nine percent of U.S. Hispanic households include children under the age of 18, compared to 23 percent of all U.S. households.

The white, non-Hispanic population in Arizona was still the majority in 2010, but dropped to 57.8 percent of the state's population. Of the minority populations in Arizona, Hispanics made up 31.2 percent of the total population in 2010 (up from 25 percent in 2000), and other ethnic populations combined for the remaining 12.6 percent.

For the Pima County market, it is clear that the Hispanic population growth is the primary growth. In 2010, 52 percent of the under-18 population in Pima County was Hispanic, which experts calculate will result in a Hispanic majority sometime in the next 10 to 20 years.

Nearly half of all U.S. Hispanics live in California and Texas.



## DEMOGRAPHICS

### U.S.

IN 2010, THE U.S. MINORITY POPULATION REPRESENTED 36.2 PERCENT OF THE TOTAL U.S. POPULATION. THE DRIVING FORCE IN THIS MINORITY POPULATION GROWTH IS THE HISPANIC POPULATION. FROM 2000 TO 2010, THE HISPANIC POPULATION CONTRIBUTED 55.7 PERCENT OF THE TOTAL POPULATION GROWTH IN THE UNITED STATES.

NATURAL BIRTHS FUELED MOST OF THE INCREASE AMONG HISPANICS WITH NET INTERNATIONAL MIGRATION CONTRIBUTING ABOUT 33 PERCENT OF THE INCREASE.

### ARIZONA

THERE WERE SLIGHTLY MORE THAN 1.9 MILLION HISPANICS IN ARIZONA IN 2010, WHICH ACCOUNTS FOR 31.2 PERCENT OF ARIZONA'S TOTAL POPULATION. COUNTIES WITH THE HIGHEST HISPANIC POPULATION PERCENTAGES ARE ALONG THE SOUTHERN BORDERS OF THE STATE, PARTICULARLY SANTA CRUZ, YUMA AND GREENLEE.

MARICOPA COUNTY, WITH 1.1 MILLION HISPANICS, HAD THE HIGHEST TOTAL CONCENTRATION OF HISPANICS IN ARIZONA IN 2010. PIMA COUNTY WAS HOME TO NEARLY 339,000 HISPANICS IN 2010.

HISPANICS REPRESENT 35 PERCENT OF PIMA COUNTY'S POPULATION AND 42 PERCENT OF TUCSON'S POPULATION. TUCSON'S HISPANIC POPULATION INCREASED BY 20 PERCENT AND THE NON-HISPANIC POPULATION DECREASED BY THREE PERCENT.

### PHOENIX

In 2010, Phoenix was home to almost 590,000 Hispanics, accounting for 41 percent of the city's population. The Hispanic population in Phoenix has more than doubled since 1990.

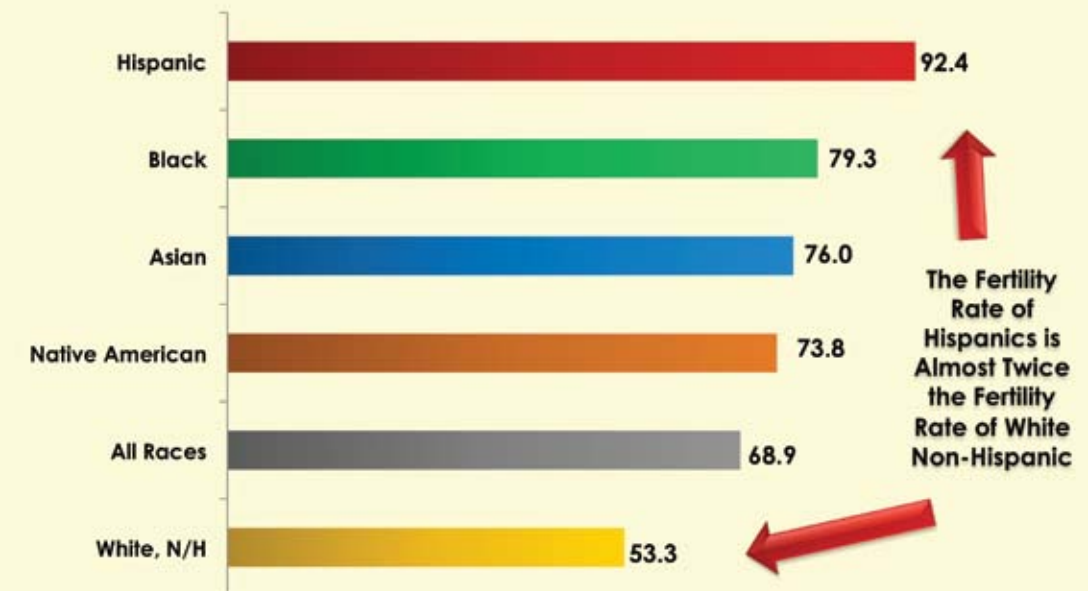
### PIMA

Pima County was the second most populated in Arizona with more than 980,000 people in 2010 (almost 339,000 Hispanics), of which more than 216,000 reside in Tucson.

## DEMOGRAPHICS

### Arizona Fertility Rate 2009

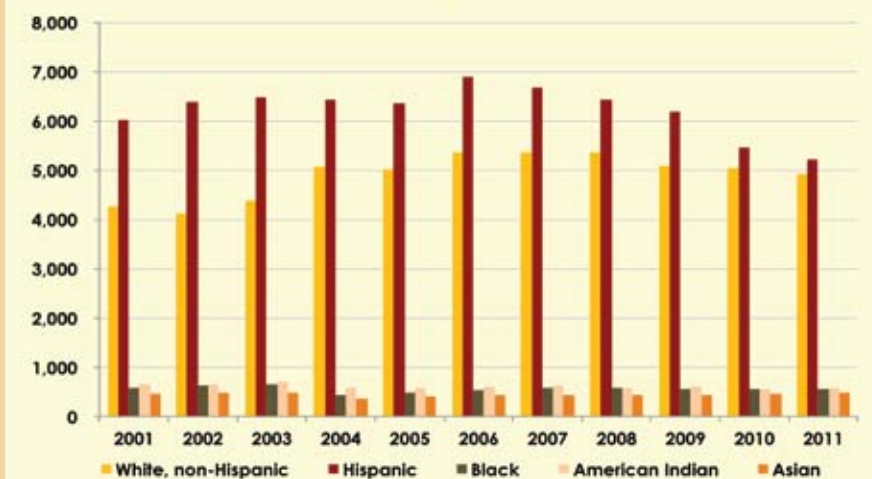
(Live births per 1,000 females 15-44)



Source: Arizona Health Status and Vital Statistics 2010  
Source: National Vital Statistics Reports, Vol. 39, No. 3, December 2010, Arizona Health Status and Vital Statistics 2010

"Firms talking the lead in areas likely to benefit from the population growth of Hispanic/Latinos in the United States are likely to see their **revenues grow faster** than those of their competitors over the long term—  
Dave Koslin, Goldman Sachs

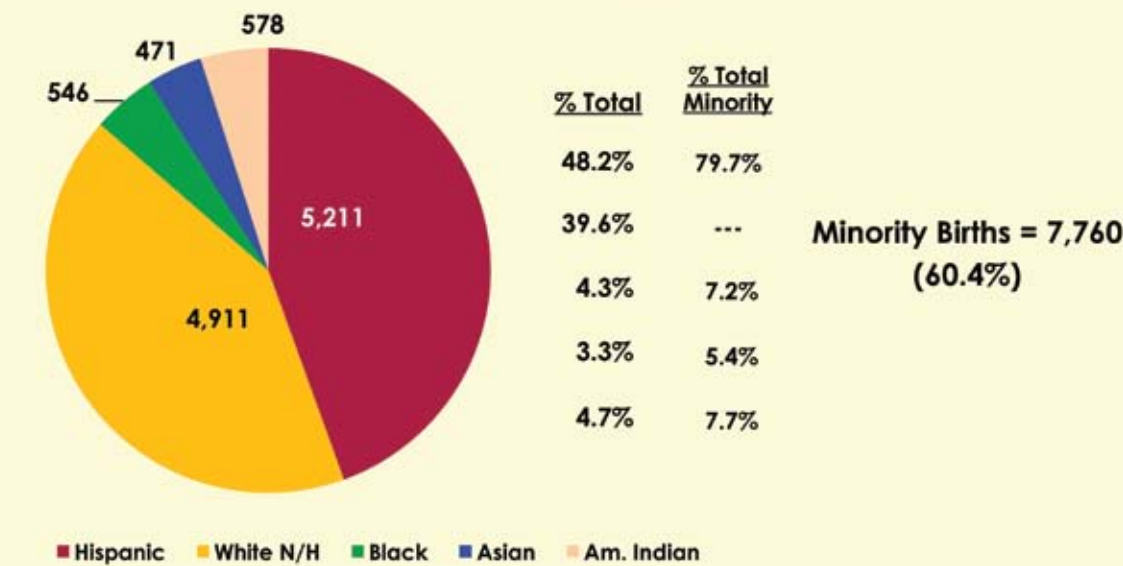
### Pima County Birth Rates by Race/Ethnicity 2001 - 2011



Source: Arizona Department of Health Services

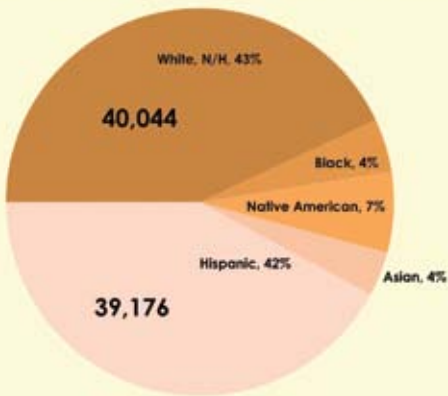
# DEMOGRAPHICS

## Hispanics accounted for 48% of all births in Pima County, 2011



Source: Arizona Department of Health Services

## In 2009, The Arizona Hispanic Birth Rate was Almost Equal to White, Non-Hispanic



Total Number of Births in Arizona for 2009 = 92,816

Source: National Vital Statistics Reports, Vol. 39, No. 3, December 2010

**AZ's Future Buyers**  
**52%**  
of people in Pima under 18 are "Hispanic"

# POPULATION

BIRTH AND FERTILITY RATES ARE THE GREATER PREDICTORS. IN THE PAST TWO DECADES IN ARIZONA, THE HISPANIC POPULATION HAS DOUBLED. MOST OF THAT GROWTH WAS DUE TO U.S. BIRTHS, NOT IMMIGRATION.

THE U.S. HISPANIC POPULATION IS COMPARATIVELY YOUNG. THE MEDIAN AGE OF HISPANICS IN 2010 WAS 27.3 COMPARED TO THE OVERALL U.S. MEDIAN AGE OF 36.8, AND WHITE NON-HISPANIC MEDIAN AGE OF 40.7 (CONSISTENT WITH AN AGING BABY BOOMER POPULATION AND A SLOWER OVERALL BIRTH RATE).

## AGE

USING CURRENT POPULATION TRENDS, THE U.S. CENSUS BUREAU PREDICTS THAT IN 2050, 60 PERCENT OF U.S. RESIDENTS 65 YEARS OR OLDER WILL BE WHITE, NON-HISPANIC AND 20 PERCENT WILL BE HISPANIC.

## LIFE EXPECTANCY

Hispanic men and women have longer life expectancies than their white, non-Hispanic and black counterparts. The average life expectancy of a Hispanic male is 77.9 years, compared to 69.2 years for a black male and 75.6 white male. Hispanic women can expect to live an average of 83.1 years, compared to 80.4 years for a white, non-Hispanic women and 76.2 years for black women.

## BIRTH AND FERTILITY

As evidence of the approaching U.S. majority minority, 46 percent of the 4.1 million births in the U.S. in 2009 were minority, and 24 percent of those births were Hispanic.

## HISPANIC MARKET TRENDS

National and Arizona Hispanic birth rates in 2008 and 2009 were double those of white, non-Hispanics. The states recording the most Hispanic births in 2009 were California and Texas, with 270,239 and 201,241, respectively, followed by Florida, New York, Illinois and Arizona, which alone recorded 39,176 Hispanic births.



## POPULATION HOUSEHOLDS

IN 2010, 46 PERCENT OF U.S. HISPANIC HOUSEHOLDS HAD AN ANNUAL INCOME OF \$34,999 OR LESS AS COMPARED TO 32 PERCENT OF WHITE, NON-HISPANIC HOUSEHOLDS. TWENTY-EIGHT PERCENT OF HISPANIC HOUSEHOLDS HAD AN ANNUAL INCOME OF \$35,000-\$74,999, COMPARED TO 33 PERCENT OF WHITE, NON-HISPANICS. TWENTY-ONE PERCENT HAD AN ANNUAL INCOME OF \$75,000 OR MORE COMPARED TO 35 PERCENT OF WHITE, NON-HISPANICS.

THE AVERAGE HISPANIC HOUSEHOLD IN 2010 HAD FOUR MEMBERS, WHILE A TYPICAL WHITE, NON-HISPANIC HOUSEHOLD HAD 2.9 MEMBERS. FEWER HISPANIC ADULTS LIVE ALONE (FOUR PERCENT) THAN WHITE, NON-HISPANICS, (15 PERCENT).

HISPANICS ARE MORE LIKELY THAN WHITES TO LIVE IN MULTIGENERATIONAL HOUSEHOLDS, WITH 23 PERCENT OF HISPANICS LIVING IN A MULTIGENERATIONAL HOUSEHOLD, AS COMPARED TO 13 PERCENT OF WHITE, NON-HISPANICS. THE MEDIAN HOUSEHOLD INCOME OF HISPANIC MULTIGENERATIONAL HOUSEHOLDS WAS 19 PERCENT HIGHER THAN THAT OF HISPANICS LIVING IN OTHER TYPES OF HOUSEHOLDS.

### Hispanics Will Drive Future Home Ownership in Tucson

Representing  
**65%**

Of All New Home Owners Added to the Tucson DMA Between 2012-2017

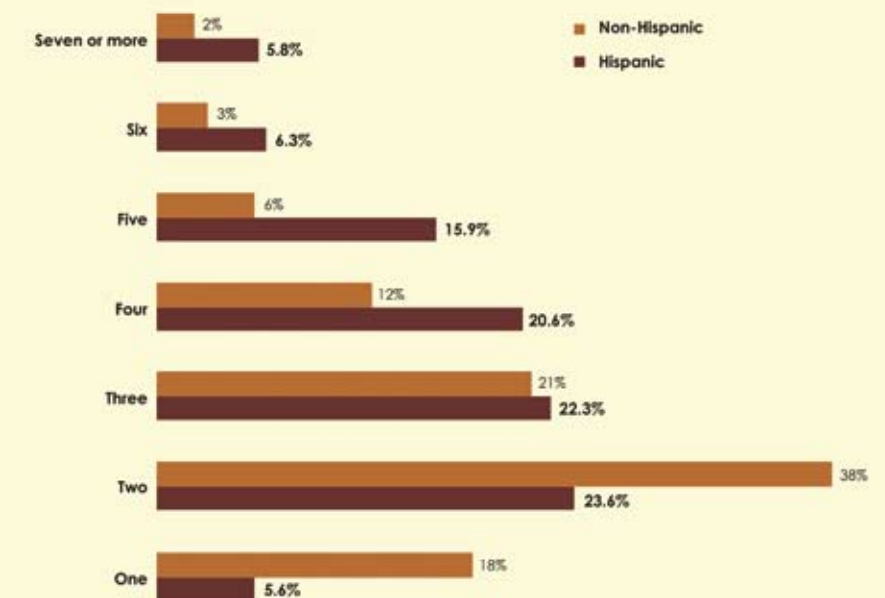
Source: Nielsen HomeLocation/Pop-Facts: 2012 Estimates, 2017 Projections. Created 06/21/2012

**"I encourage all marketing executives to spend 65% of your time**

**"figuring out" your Hispanic opportunity because that is no doubt the single biggest source of growth for all companies in the US in the short and long term."**—David Calhoun, CEO of Nielsen

## POPULATION HOUSEHOLDS

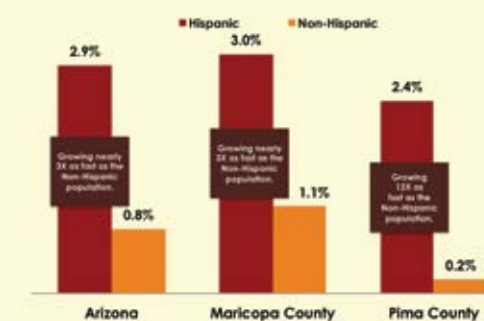
### Tucson Hispanic and non-Hispanic Consumer Household Size



Source: Scarborough, 2012 Release 1 (Feb 2011 – Jan 2012), Tucson DMA, Adults 18+ (Courtesy of Univision)

### Hispanic population grew 12x faster than non-Hispanics in Pima County, 2010-2011

2010 Census vs. 2011 Estimates



U.S. Census Bureau, Census 2010 and 2011 Estimates

### ¿Sabías Qué?

One in every four babies born in the U.S. is Latino.

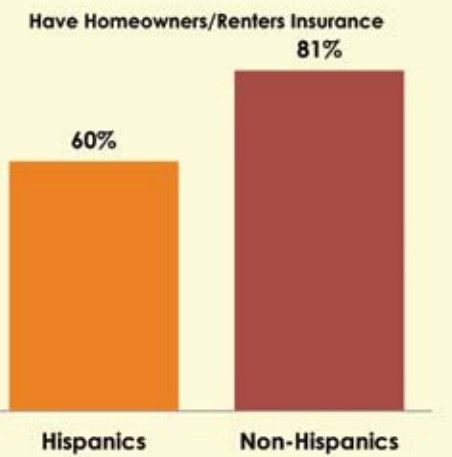
—Hispanic Market Weekly

**Arizona Hispanics were nearly 3 out of 5 persons added to the state's population from 2010 to 2011.**

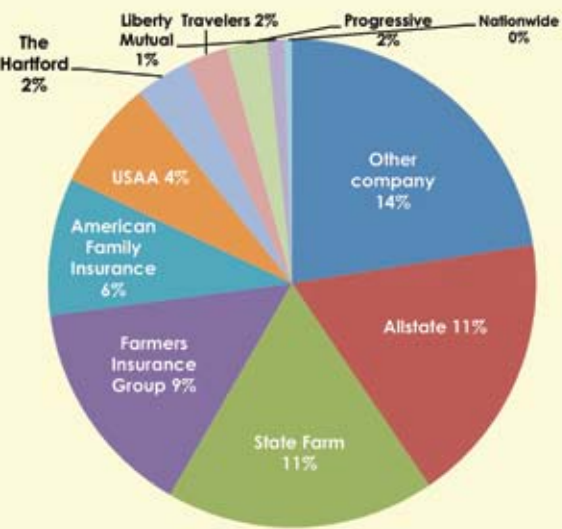
U.S. Census Bureau, Census 2010 and 2011 Estimates

# POPULATION HOUSEHOLDS

Percentage of Tucson Hispanics with homeowners or renters insurance



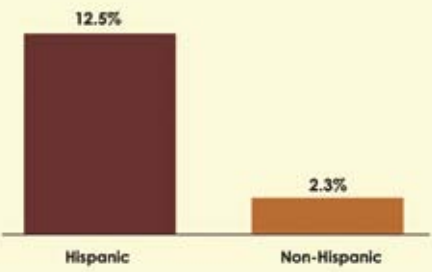
Top providers of homeowners/renters insurance among Tucson Hispanics



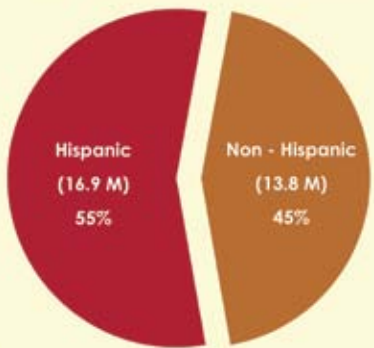
Scarborough Study, 2012 Release 1 (Feb '11 – Jan '12). Tucson Adults 18+ (Courtesy of Univision)

## Hispanic Home Ownership in Tucson To Grow at 5x the Rate of Non-Hispanics'

Hispanic Home Ownership Projected Growth 2012-2017



## Hispanic Contribution to Total Growth of U.S. Population, 2000-2011



Source: U.S. Bureau of Census

# POPULATION HOUSEHOLDS

## Hispanic Percentage of Total Population Growth by County in Arizona

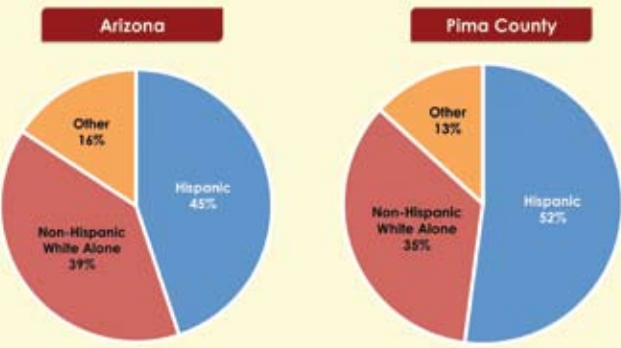
2010 Census vs. 2011 Estimates

County	Hispanic % Pop Change	Non-Hispanic % Pop Change	Hispanic % of Total Growth
Apache	+19%	+0.2%	88%
Cochise	+2%	+1%	49%
Coconino	+3%	-0.4%	100%
Gila	+2%	-1%	100%
Graham	+1%	-1%	100%
Greenlee	+1%	+3%	16%
La Paz	+4%	-2%	100%
Maricopa	+3%	+1%	54%
Mohave	+4%	+1%	50%
Navajo	+3%	-0.5%	100%
Pima	+2%	+0.2%	88%
Pinal	+3%	+2%	43%
Santa Cruz	+0.4%	+1%	58%
Yavapai	+2%	+0.1%	84%
Yuma	+3%	+2%	76%

U.S. Census Bureau, Census 2010 and 2011 Estimates

## Hispanic Children in Pima County Under Age 5 are Majority

Census 2011 Estimate



U.S. Census Bureau, 2011 Estimates

## ¿Sabías Qué?

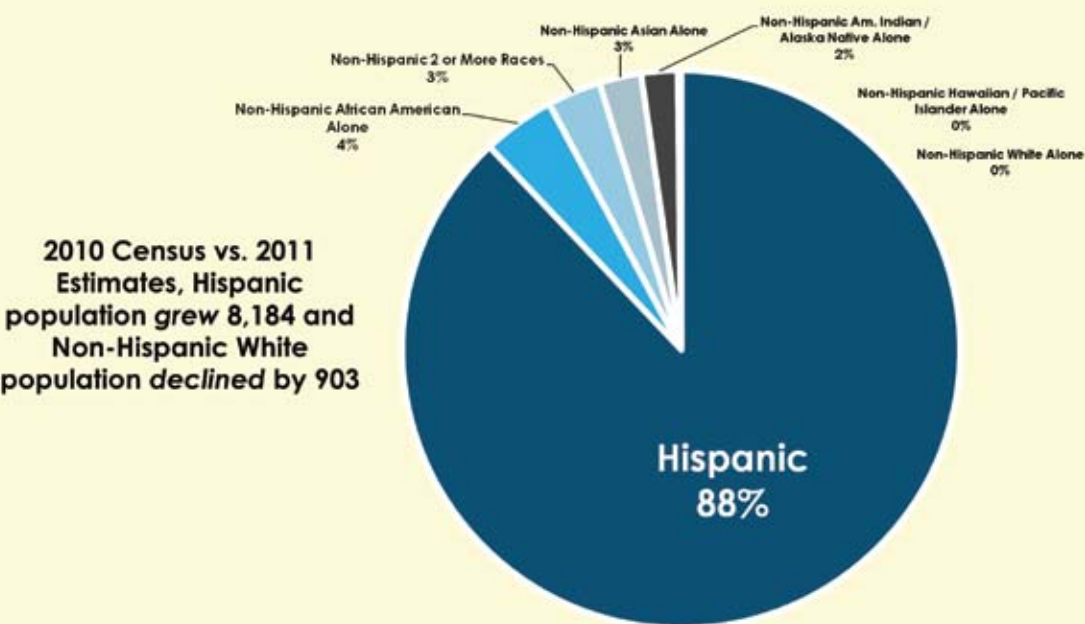
The most popular names for Hispanic baby girls born nationwide in 2010 were Sophia, Valentina and Isabella. The most popular names for Hispanic baby boys were Santiago, Sebastián and Matías.

—BabyCenter.com



# POPULATION HOUSEHOLDS

In Pima County, Hispanics were nearly **9 of 10** new residents from 2010 to 2011



%of Contribution to Total Pima County Population by Race/Ethnicity (2011, Census vs. 2011 Estimate)

U.S. Census Bureau, Census 2010 and 2011 Estimates

5

AZ Hispanics Were Nearly **20 Years Younger** than Non-Hispanic Whites in 2011



Arizona has the **2<sup>nd</sup> largest age disparity** between Hispanics and Non-Hispanic Whites.

(Maine has the largest age disparity at 19.7 years.)

U.S. Census Bureau, 2011 Estimates

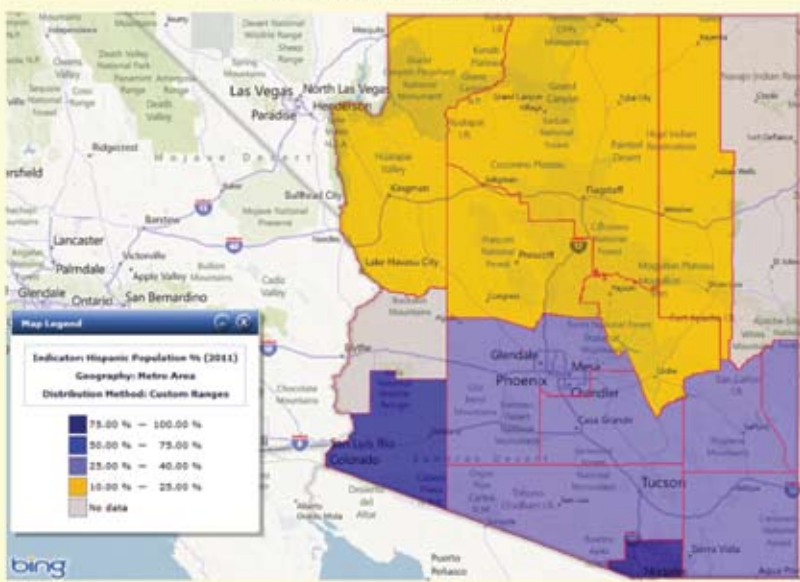
## ¿Sabías Qué?

Hispanic consumers, on average, are more than 10 years younger than non-Hispanics; Their median age is about 28.

—Packworld.com

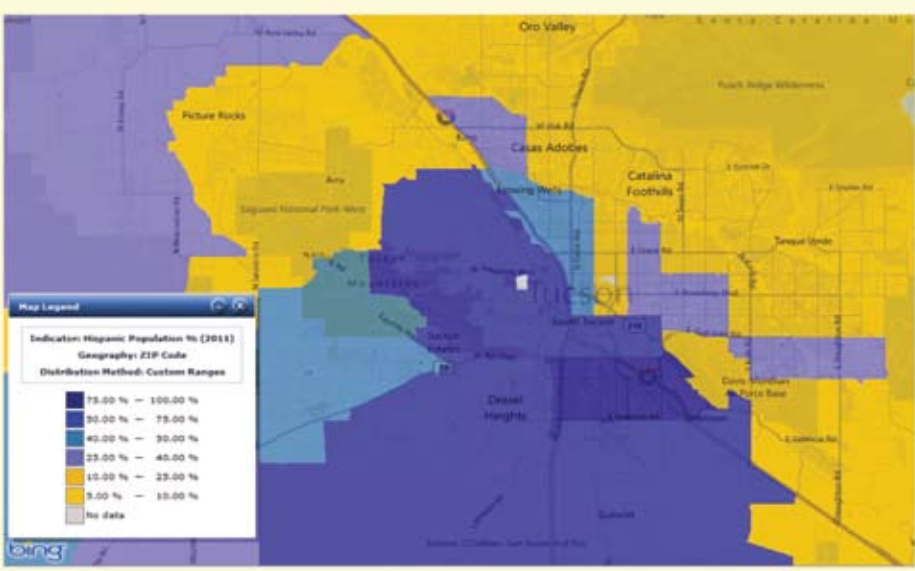
# TUCSON POPULATION

Percentage of Hispanics at the county level in Arizona - 2011



Source: Geoscope

Percentage of Hispanic population in Tucson 2011



Source: Geoscope



EDUCATION

DESPITE THE STATE'S RAPIDLY GROWING LATINO POPULATION, MORE THAN 30 PERCENT OF THE STATE'S LATINO CHILDREN ARE NOT GRADUATING FROM HIGH SCHOOL AND ONLY ABOUT HALF OF HISPANIC COLLEGE FRESHMAN IN FOUR-YEAR SCHOOLS IN ARIZONA AND NATIONWIDE COMPLETE THEIR DEGREES.

GIVEN THE CRUCIAL ROLE EDUCATION PLAYS IN A COMMUNITY'S ECONOMIC PROSPERITY, THE SINGLE GREATEST LONG-TERM CHALLENGE FACING ARIZONA LATINOS MAY NOT BE JOB CREATION, HEALTH CARE OR IMMIGRATION, BUT THE EDUCATION OF OUR CHILDREN.

HISPANIC MARKET TRENDS

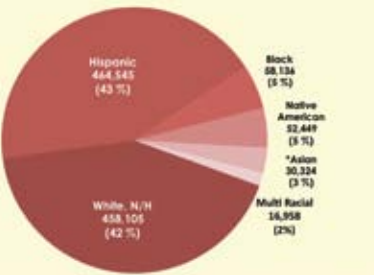
In 2011, Arizona Hispanics became the largest number of high school graduates in the state. The Arizona Department of Education predicts that as many as 55,000 Hispanic high school seniors will graduate from high school in the 2014—2015 academic school year, a 27 percent increase over 2009—2010.

Despite that explosive growth, the rate of graduation for Hispanics (69 percent) lags behind African Americans (73 percent), White, non-Hispanics (83 percent) and Asians (88 percent). Only Native Americans, among the state's major minority groups, graduate from high school at a lower rate.

At the other end of the spectrum, nearly 90 percent of new students who enrolled in public schools from 2000 to 2011 were Hispanic.

In 2015 – perhaps sooner – Latinos will become the majority of the state's public school population.

AZ Hispanic PS-12 Students Now Single Largest Ethnic Group



\*Includes Asian/Not-Hispanic and Pacific Islander/Not-Hispanic  
Source: Arizona Department of Education, October 1, 2011 Enrollment Figures, Published April 2012

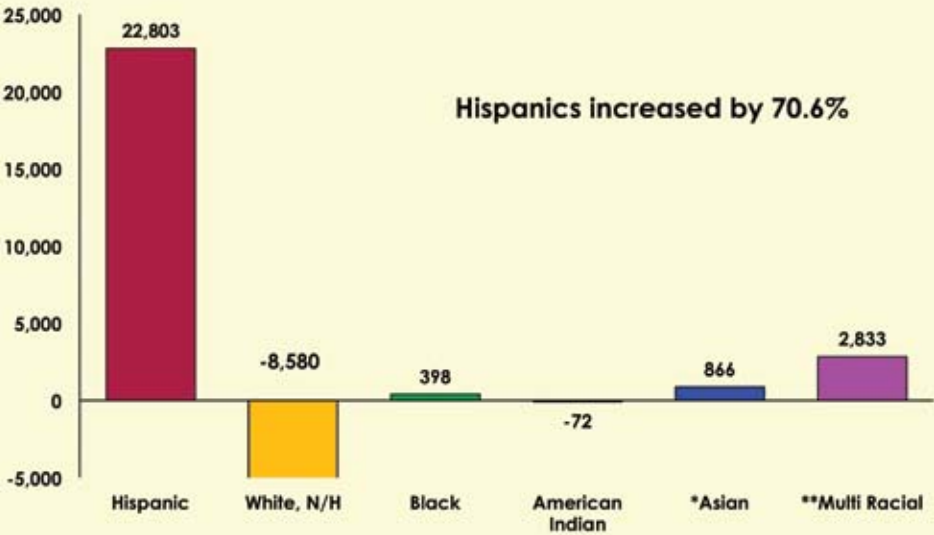
85% of new AZ students 2000 to 2011 PS-12 were Hispanic

	Total	Hispanic	White	Black	*Asian	Native American	**Multi Racial
Fall 2000	893,444	303,101	471,328	41,392	18,330	59,498	---
Fall 2011	1,083,342	444,545	468,105	88,134	33,149	32,449	16,958
Net Gain	189,896	141,444	-13,120	16,744	14,919	-7,049	16,958
% of Total Growth	100%	85%	-7%	9%	8%	-4%	9%

\*Includes Asian/Not-Hispanic and Pacific Islander/Not-Hispanic  
\*\*Multi Racial/Non-Hispanic is a new category added after Fall 2000.  
Source: Arizona Department of Education, October 1, 2000 & October 1, 2011 Enrollment Figures, Published April 2004 & April 2012 respectively.

EDUCATION

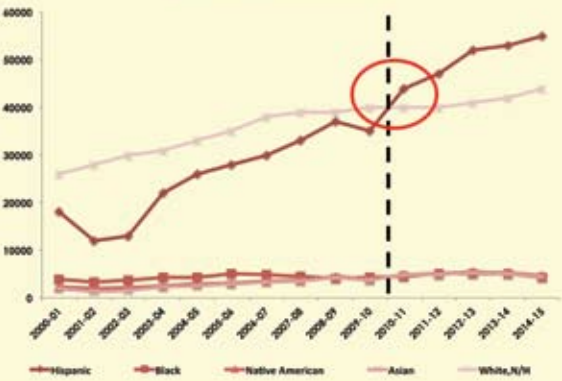
PS-12 Student Growth in Pima County Driven Overwhelmingly by Hispanics



Pima County Enrollment Trends, Fall 2000 and Fall 2011: Grade Level PS-12 by Race/Ethnicity and Net Gain (Minority Net Growth= 26,900)

\*Includes Asian/Not-Hispanic and Pacific Islander/Not-Hispanic  
\*\*Multi Racial/Non-Hispanic is a new category added after Fall 2000.  
Source: Arizona Department of Education, October 1, 2000 & October 1, 2011 Enrollment Figures, Published April 2004 & April 2012 respectively.

Hispanics Now the Majority of Arizona's High School Graduates



Source: Arizona Minority Education Policy Analysis Center (AMEPAC), Minority Student Report 2009, and Arizona Department of Education, April 2011

About 50 percent of Hispanics enrolled as freshman at Arizona's three major state universities graduated

Hispanic enrollment is 16 – 20 percent of total campus population

- At Northern Arizona University, 4,139 Hispanics were enrolled in Fall 2011, making up nearly 16.5 percent of the school's student population. (Source: Northern Arizona University)
- There were 6,712 Hispanics enrolled at the University of Arizona in 2011, accounting for 16 percent of the school's population. (Source: University of Arizona)
- About 12,200 Hispanic students attended Arizona State University in Fall 2011 and they made up 20 percent of ASU's total student population. (Source: Arizona State University)
- Nationwide, an average of 15 percent of college and university enrollment is Hispanic. (Source: Excellence in Education)
- Arizona's three largest public universities have graduated about half of the Hispanic students within six years. That mirrors the average college graduation rates nationally for Hispanics. About 59 percent of white, non-Hispanics graduate from four-year universities nationwide. (Source: Rising to the Challenge, American Enterprise Institute report, March 2010)





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## HISPANIC BUSINESSES

HISPANIC BUSINESS OWNERS ARE PLAYING AN INCREASINGLY SIGNIFICANT ROLE IN THE ECONOMY IN ARIZONA AND NATIONWIDE. FROM 2002 TO 2012, THE NUMBER OF MINORITY-OWNED FIRMS IN THE U.S. IS EXPECTED TO GROW BY 51 PERCENT, ACCOUNTING FOR A TOTAL OF 3.2 MILLION MINORITY-OWNED COMPANIES.

IN CONTRAST, THE NUMBER OF NON-HISPANIC FIRMS IN THE U.S. IS EXPANDING AT A RATE OF APPROXIMATELY 18 PERCENT EACH YEAR.

IT IS INTERESTING TO NOTE THAT A 2005 SURVEY FOUND THAT APPROXIMATELY 33 PERCENT OF HISPANIC-OWNED FIRMS IN ARIZONA WERE OWNED BY FOREIGN-BORN HISPANICS.

### HISPANIC MARKET TRENDS

Arizona has the fifth largest percentage of Hispanic-owned businesses in the U.S. (10.7 percent of the state's total) and is home to an estimated 65,000 Hispanic-owned business, approximately 20,000 of which are owned by Latinas.

In 2011, Hispanic women owned 14 percent of the woman-owned businesses in Arizona.

- **Latina-owned businesses are the fastest growing segment of business ownership in the country.**
- **Between 2002 and 2007, Latina-owned businesses grew 45 percent. Total receipts for Latina-owned companies grew nearly 60 percent in that same period.**
- **One in 10 (all women-owned firms across the country are owned by Hispanic women.**
- **The top industries for Latinas include: health care and social assistance (20.1% of all Hispanic WOBs are in this sector), other services (18.1%), and administrative and support and waste management and remediation services (17.1%).**

SOURCE: U.S. Census 2007 Survey of Business Owners





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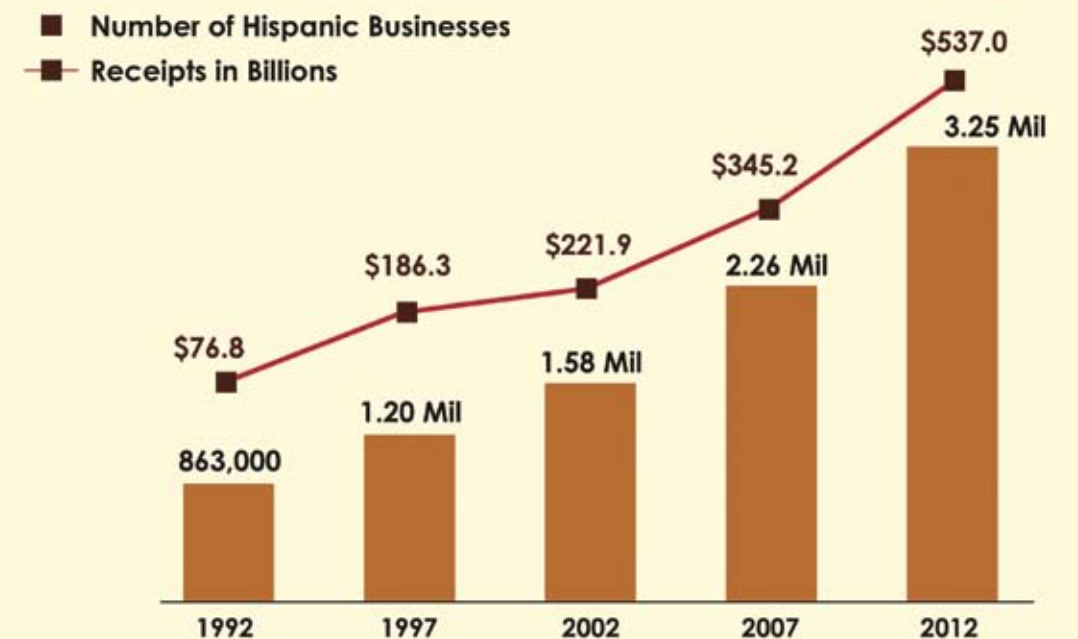
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## HISPANIC BUSINESSES

**Hispanic Businesses Estimated to Reach  
3.25 Million in 2012, with \$537 Billion in Purchasing Power**



Source: Survey of Business Owners, 1992, 1997, 2002 and 2007

### U.S. Hispanic businesses

**Characteristics**  
Most Hispanic-owned firms are small, sole proprietorships and/or family-owned.

Hispanic businesses represented 9 percent of all classifiable businesses in 2007.

Average gross receipts for Hispanic-owned firms increased to \$152,700 in 2007 from \$141,000 in 2002, while white, non-Hispanic firms averaged annual gross receipts of \$490,000.

In 2007, there were 44,000 Hispanic-owned firms with revenues of more than \$1 million.



Sources: 1. Fry, Richard, 2011, Hispanic College Enrollment Spikes, Narrowing Gaps with Other Groups, 8-25-11, Washington, DC: Pew Research Center Social & Demographic Trends project.  
2. U.S. Census Survey of Business Owners: Hispanic-Owned Businesses: 2007

### ¿Sabías Qué?

In 2007, there were 1 million firms owned by people of Mexican origin. They accounted for 45.8% of all Hispanic-owned firms.

- Hispanic Business Magazine



**The Best of Two Worlds**

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## TRADE WITH MEXICO

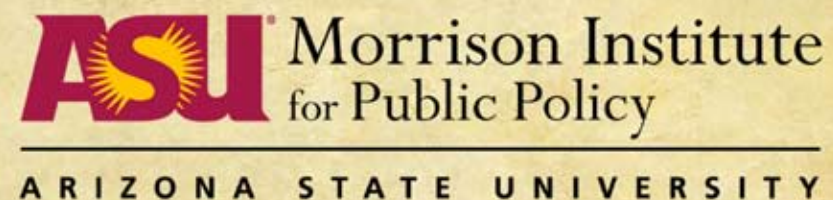
### THE EYE-OPENING VALUE AND POTENTIAL OF ARIZONA-MEXICO ECONOMIC TIES

*Mexico is Arizona's leading international trade partner*

North America is an interconnected region with multiple economic, social and cultural ties. This reality translates into significant opportunities: Mexico is the second largest

destination for U.S. exports, and the third largest source of imports, with six million U.S. jobs dependent on trade with Mexico<sup>1</sup>. In 2011, trade between Mexico,

Canada and the United States surpassed \$1 trillion of trade<sup>2,3</sup>, up from \$283 million USD in 1993. Our combined GDP in 1993 was \$7.6 trillion USD. In 2010, it was \$17.3 trillion USD.<sup>4</sup>



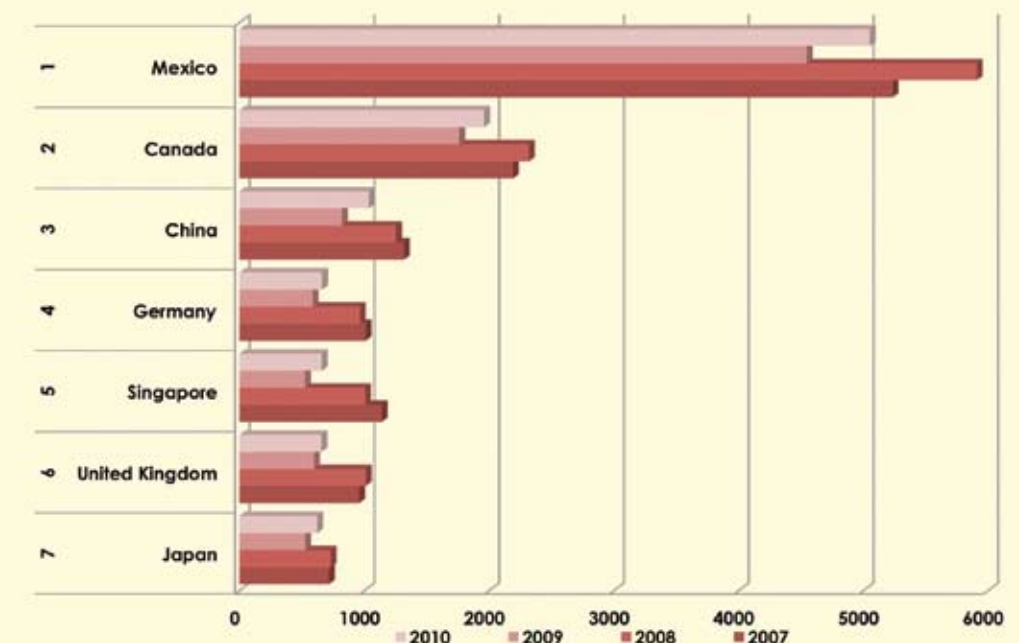
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[ArizonaIndicators.org](http://ArizonaIndicators.org)



### Arizona Exports (millions of USD)



<http://www.census.gov/foreign-trade/statistics/state/data/az.html>



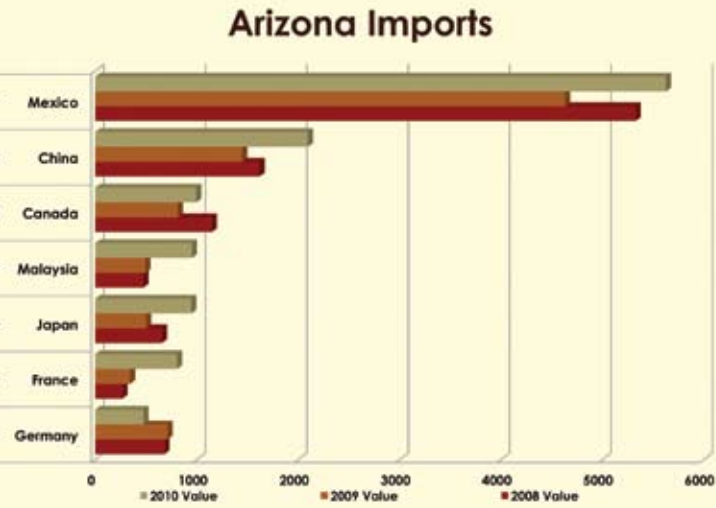
For Arizona, Mexico represents a neighbor, a partner and an economic opportunity. Mexico is the number one international trading partner for Arizona, California, New Hampshire, New Mexico and Texas. It also represents the second largest export market for 16 U.S. States and the third largest market for eight states.<sup>5</sup> Thanks to the partnership forged by the North American Free Trade Agreement (NAFTA) and Mexico's vast network of trade agreements, Mexico presents unique opportunities for greater trade and investment links with

Arizona. As mutual stakeholders in efforts to expand our future prosperity, Mexico remains Arizona's largest trading partner by far, with a 33% share of Arizona exports, compared to China's 6%.<sup>6</sup> Among U.S. states, Arizona ranks fourth in exports to Mexico.<sup>7</sup> In 2011, Arizona exported \$5.74 billion USD to Mexico.<sup>8</sup> From 1993 to 2010, Arizona exports to Mexico grew at an annual average rate of 10.2%. In 2010, 111,216 jobs in Arizona depended on trade with Mexico.<sup>9</sup> Despite these remarkable figures, the significance of cross-border economic activity between Arizona and Mexico is often overlooked.

Arizona shares 389 miles of border with Mexico, which is now the 13<sup>th</sup> largest economy in the world<sup>10</sup>. It is precisely that border that is the most important asset of the economic relationship.<sup>11</sup> In this chapter of *DATOS: Focus on the Hispanic Market*, you will find relevant statistics on the economic benefits that trade has brought to a wide range of communities and businesses on both sides of our common border. You also will find information on opportunities for many Arizona companies, particularly regarding how economies of scale can benefit the energy and aerospace industries.

THE BORDER IS VITAL

Did you know that in 2009, 60% of all winter produce consumed in the U.S. and Canada passed



<http://www.census.gov/foreign-trade/statistics/state/data/imports/az.html>

U.S.-Mexico Border Trade Quick Facts

- In 2011, U.S.-Mexico goods and services trade reached an estimated one-half trillion dollars.
- Seventy percent of bilateral commerce crosses the U.S.-Mexico border via trucks.
- An estimated 6 million U.S. jobs depend on bilateral trade.
- 79 percent of Mexican exports are sold to the United States, including products produced in the border region and throughout the country.
- U.S. imports from Mexico contain, on average, 40 percent U.S. content.
- Mexico is the No. 1 foreign destination for U.S. tourists, and Mexican tourists comprise the second largest group of foreign visits to the United States each year.
- 85 percent of Mexican arrivals to the U.S. occur at the land ports of entry along our shared border.

[Source: U.S. Department of Commerce and "The State of Trade, Competitiveness and Economic Well-being in the U.S.-Mexico Border Region" by Erik Lee and Christopher E. Wilson of the North American Center for Transborder Studies, ASU, June 2012]

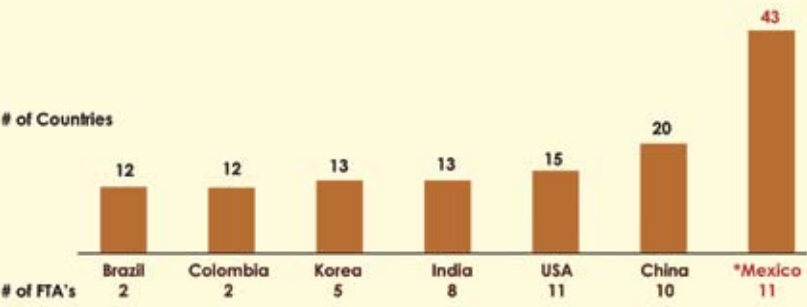
through Nogales, AZ?<sup>11</sup> Border infrastructure is critical to facilitate trade and improve the quality of life on both sides of the border. The logistics of 75,000 trucks moving across the border on a daily basis (80% of Mexico — U.S. bilateral trade)<sup>12</sup> creates jobs and brings food to tables across the continent. Keeping the trade flowing is not without challenges. The amount of produce that crossed through Nogales dropped from 5.1 billion pounds in the 2009-2010 seasons to 4.5 billion pounds last season, according to the Agricultural Marketing Service of the U.S. Department of Agriculture.<sup>13</sup> However, improvements to the San Luis II and Mariposa ports of entry aim to make the Arizona-Sonora region more competitive.<sup>14</sup> With so much at stake, it is crucial to work together to ensure that trade is highly efficient and secure.

LOOKING SOUTH OFFERS A GLOBAL VIEW

Beyond the immediate border area, the Mexican economy is the perfect partner for Arizona's prosperity. With 85 airports, 76 seaports on the Atlantic and Pacific Oceans, and 227, 422 miles of highways,<sup>15</sup> Mexico's infrastructure is well-suited for Arizona's businesses.

Mexico has the second largest number of Free Trade Agreements (FTAs) in the world. Its wide array of agreements covers 43 countries on three continents.<sup>16</sup> This offers a singular opportunity for international

Free Trade Agreements



Source: Ministry of Foreign Affairs  
\*Including Economic Partnership Agreement with Japan

Top Sources of Tourism and International Spending for the United States, 2010

Country	Arrivals (Millions)	Rank	Spending (billions of USD)	Rank
Canada	19.96	1	20.8	1
Mexico	13.47	2	8.7	4
United Kingdom	3.85	3	11.6	3
Japan	3.39	4	14.6	2
Germany	1.73	5	5.8	6
France	1.34	6	4.1	8
Brazil	1.2	7	5.9	5

commerce and investment because it gives strategic access to a potential market of more than one billion consumers, representing close to 60% of the world's GDP.<sup>17</sup> "Thanks to NAFTA and its network of trade agreements, Mexico trades more than Argentina and Brazil combined, and more per person than China."<sup>18</sup>

In addition to unparalleled

¿Sabías Qué?

The value of total goods traded between the United States and Mexico in 2010 was \$393 billion.

—Hispanic Network Magazine



global access through FTAs, Arizona's southern neighbor also boasts a young, talented population that itself also constitutes a thriving domestic market.<sup>19</sup> In other words, Mexico is open for business.

ECONOMIES OF SCALE

When one looks at Arizona and the region to its immediate south, it is impossible not to notice the inherent similarities in both the terrain and climate. These characteristics shape economic development into industries that, in turn, grow faster and more sustainably by working together. Arizona's commercial development priorities often overlap with Sonora's priorities.

For example, 90% of the recent foreign investments in Mexico's renewable sector are in wind energy.<sup>20</sup> These investments, coupled with renowned expertise in the electro-electronic industries, make supply chains in Mexico more efficient. The same can be said for solar, hydraulic and geothermal power.

Meanwhile, Arizona and Sonora are diligently promoting their sunny climates with notable success. In 2013, the largest stored heat plant in the United States will be in Phoenix.<sup>21</sup> Arizona also has distinct expertise in research-industry partnerships, which can be used just as effectively on both sides of the border. With wind and solar energy alone, the engineering and manufacturing expertise in both countries can



**Arizona-Mexico Trade rebounding after steep recession-related decline**

In 2008, \$20.78 billion worth of goods were traded between Arizona and Mexico. Of the \$20.78 billion in goods, \$6.3 billion were exports and \$13.9 billion were imports. **In 2009, exports from Arizona to Mexico dropped by more than 20 percent**, largely as a result of the recession.

Source: The Arizona-Sonora Border Region: A Review of Economic Integration along the Border, Eller College of Management website, University of Arizona

**Trade between Arizona and Mexico is rebounding.** Arizona listed exports of **\$5.7 billion** to Mexico in 2011. Imports from Mexico totaled about **\$5.6 billion**.

Source: International Trade Commission, U.S. Department of Commerce, March 2012

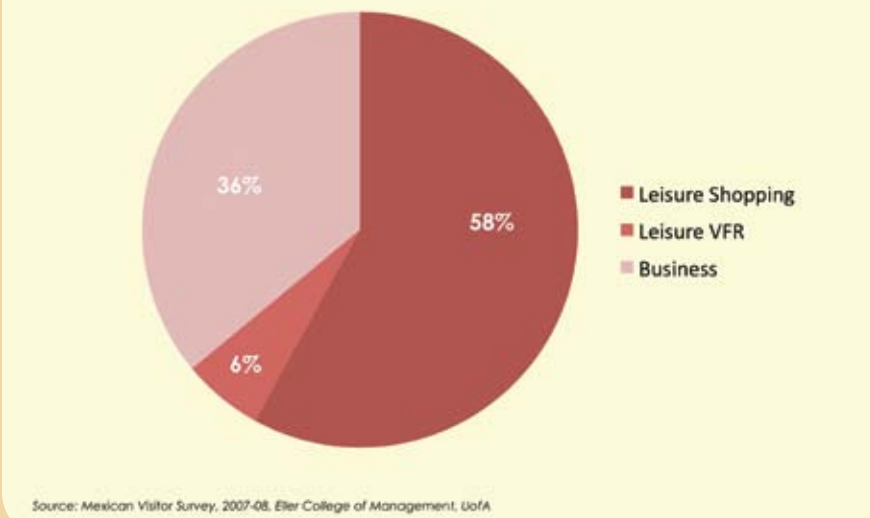
There were more than 24 million legal border crossings from Mexico into Arizona between July 2007 and June 2008, 99 percent of whom were residents of the state of Sonora. Two-thirds of the visitors from Mexico came to enjoy leisure activities, while 33 percent were here to do business. **Mexican visitors spent nearly \$2.7 billion in 2007 — 2008 in Arizona.**

Source: The Arizona-Sonora Border Region: A Review of Economic Integration along the Border, Eller College of Management website, University of Arizona

combine to make renewable energy efficient by reducing costs and allowing economies of scale to make the entire region more competitive. Another clear example of overlapping commercial development priorities is the aerospace industry. In Mexico,

aerospace has grown at an average rate of more than 20% since 2002.<sup>22</sup> In 2015, aerospace is expected to account for more than 37,000 jobs through approximately 350 companies.<sup>23</sup> Many of those firms are expected to thrive in Sonora. In addition, on the Arizona side of the border, the aviation industry accounts

**Nearly 60% of Visitors From Mexico in 2007 Came to Shop, 36% Conducted Business**



for 470,000 jobs and contributes \$38.5 billion to the economy, making the state an established hub for aviation investments.<sup>24</sup> On the aerospace defense side, Mexico's recent accession to the Wassenaar Arrangement on Export Controls will facilitate defense research and development as well as manufacturing,<sup>25</sup> which is attractive for the 17

military installations in Arizona.<sup>26</sup> Similar to Silicon Valley, which is populated by companies that partner and create joint ventures in the high-tech sector, the Arizona — Sonora region can create lucrative partnerships and joint ventures, particularly in the aerospace and renewable energy industries.

TRENDING HIGH-TECH

Arizona is home to one of eight TechBA offices, a program developed by the Mexican Ministry of the Economy (SE) and the U.S. — Mexico Foundation for Science (FUMEC). TechBA supports and guides consolidated small- and medium-sized high-tech enterprises for rapid growth in Mexico and other countries. The program has created thousands of high-quality jobs around the world and has pushed Mexican technology developers to challenge themselves by creating specialized niches in the supply chain.

Many people are surprised to learn about the scope and quality of some Mexican investments in Arizona. In the TechBA program alone, companies that engage in the Arizona market include sectors like software development, biotechnology, aerospace and clean/renewable energy. ■

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<sup>2</sup> U.S. Census Bureau — trade between US-Canada and US-Mexico.  
<sup>3</sup> Mexico's INEGI — trade between Canada and Mexico.  
<sup>4</sup> Embassy of Mexico, Washington, D.C. Fact Sheet, *North America Matters*, with data from the International Monetary Fund (IMF), World Economic Outlook, 2010.  
<sup>5</sup> Secretaría de Economía, NAFTA and Trade Office, Washington, D.C.  
<sup>6</sup> Morrison Institute for Public Policy, Arizona State University, "Exports from Arizona to Major Destinations in Millions of Inflation-Adjusted (2010) Dollars, <http://arizonaindicator.org/content/exports>  
<sup>7</sup> Wilson, Op. Cit. P.39.  
<sup>8</sup> U.S. Census Bureau, Trade Statistics, <http://www.census.gov/foreign-trade/statistics/state/data/az.html>  
<sup>9</sup> Wilson, Op. Cit. Pp. 41, 48.  
<sup>10</sup> World Bank, GDP by country 2010, <http://siteresources.worldbank.org/DATASTATISTICS/Resources/GDP.pdf>  
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<sup>13</sup> Nogales International, [http://www.nogalesinternational.com/news/produce-industry-eyes-comeback-in---winter-season/article\\_6dca633c-1639-11e1-afaf-001cc4c002e0.html](http://www.nogalesinternational.com/news/produce-industry-eyes-comeback-in---winter-season/article_6dca633c-1639-11e1-afaf-001cc4c002e0.html)  
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<sup>16</sup> PROMEXICO, Why Mexico? An Open Economy, [http://mim.promexico.gob.mx/wb/mim/apertura\\_comercial](http://mim.promexico.gob.mx/wb/mim/apertura_comercial)  
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<sup>24</sup> Arizona Commerce Authority, Aerospace and Defense Arizona, <http://www.azaerospace.com/aviation/>  
<sup>25</sup> Con el ingreso de México, al Arreglo de Wassenaar, las empresas de alta tecnología tendrán acceso a un mercado de más de 11,000 MDD, Secretaría de Economía, <http://www.economia.gob.mx/eventos-noticias/sala-de-prensa/comunicados/7331-boletin-035-12>  
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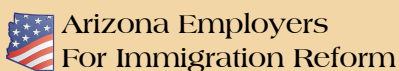
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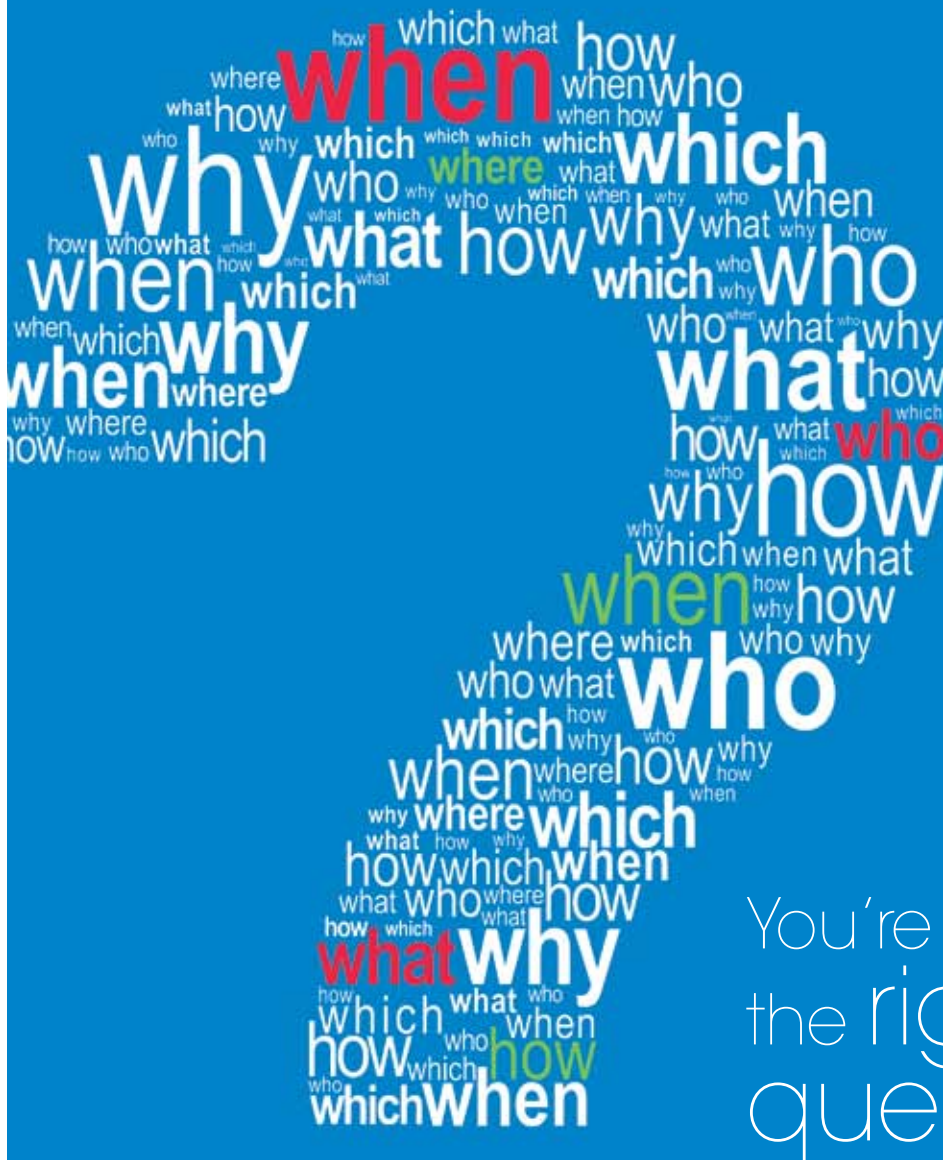
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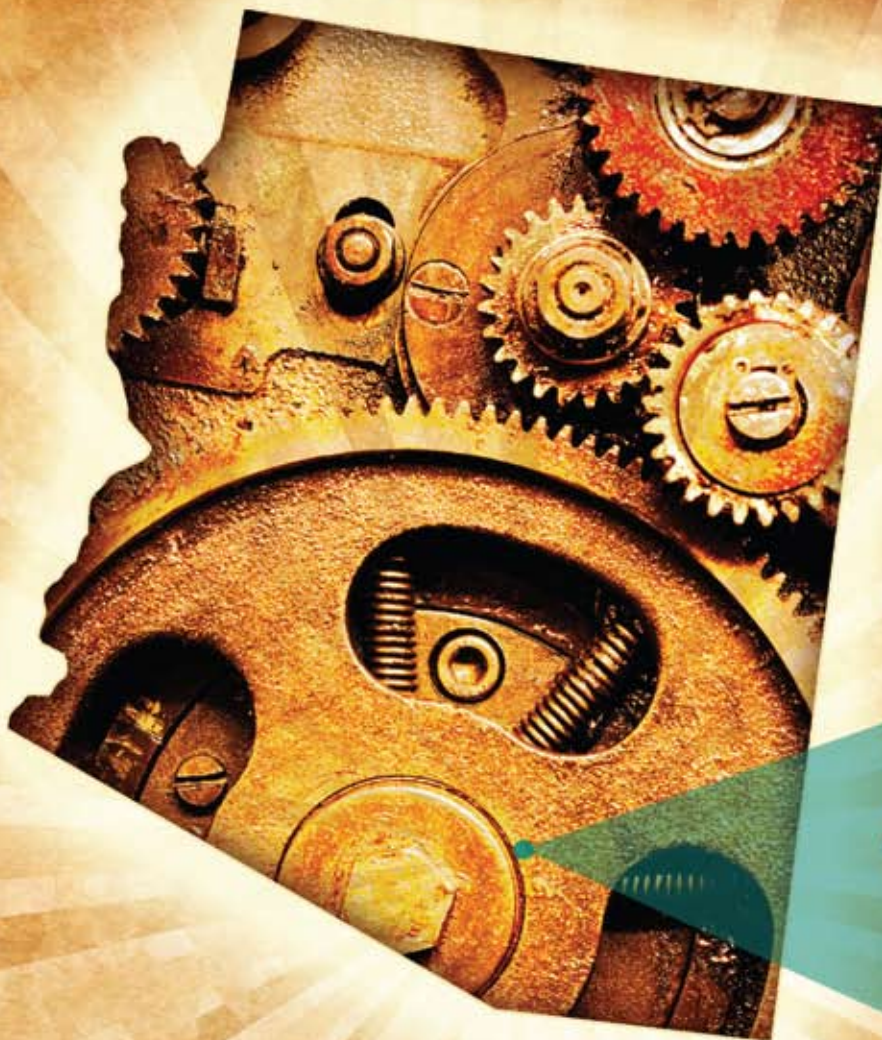


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