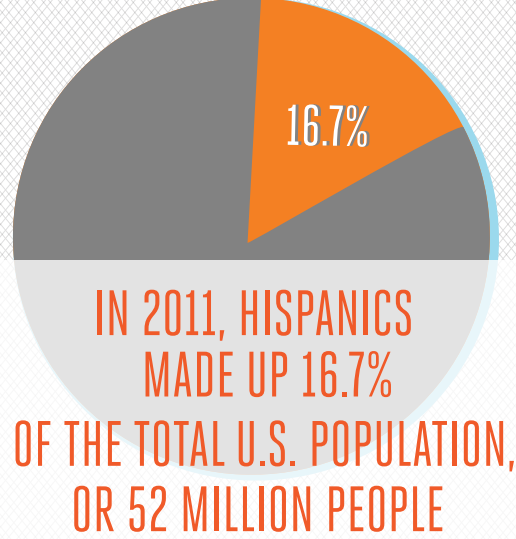


The Power of the U.S. Latino Market

30

FACTS ABOUT LATINO INFLUENCE THAT MAY SURPRISE YOU

1 out of every 6 American adults, and 1 out of every 4 children is Latino.



BY 2050, HISPANICS WILL REPRESENT

30%

OF THE U.S. POPULATION

There are 8 states in the U.S. that have a population of 1 million or more Hispanic residents: Arizona, California, Colorado, Florida, Illinois, New Jersey, New York and Texas.

USA
#2 HISPANIC POPULATION
MEXICO
#1 HISPANIC POPULATION

ONLY ONE COUNTRY-MEXICO-IS HOME TO MORE HISPANICS THAN THE U.S.

The states with the fastest-growing Hispanic populations are South Carolina, Alabama, Tennessee and Kentucky, all of which more than doubled their Hispanic populations in the past decade.

10

10 Hispanic origin groups—Mexicans, Puerto Ricans, Cubans, Salvadorans, Dominicans, Guatemalans, Colombians, Hondurans, Ecuadorians and Peruvians—

= 92%

make up 92% of the U.S. Hispanic population.

HISPANIC ESTIMATED PURCHASING POWER WAS \$1.2 TRILLION IN 2012

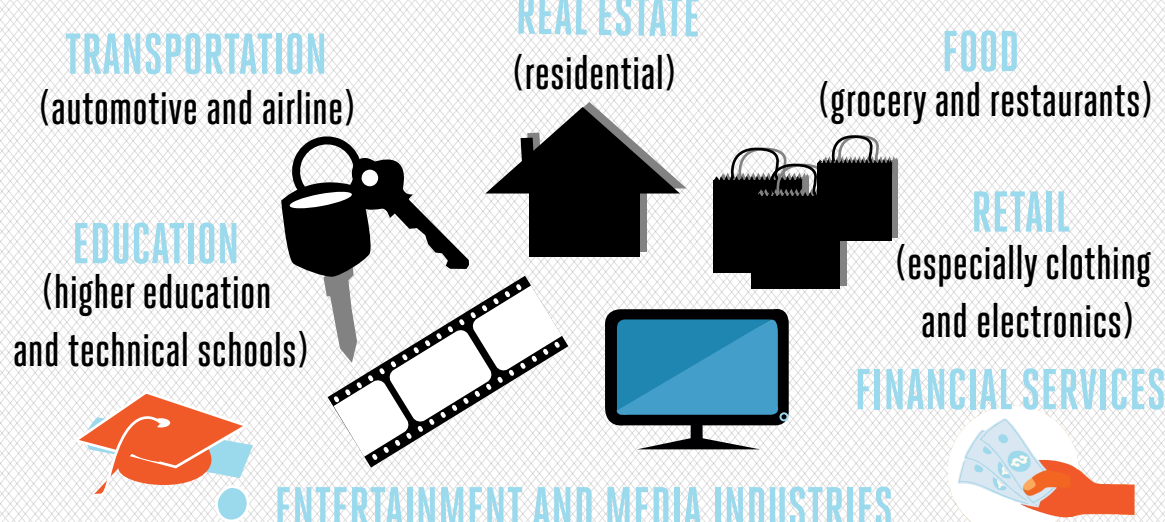
IF THE HISPANIC MARKET IN THE UNITED STATES WERE A STANDALONE COUNTRY, IT WOULD RANK AMONG THE TOP 20 ECONOMIES IN THE WORLD.

THE PER CAPITA INCOME OF U.S. HISPANICS IS HIGHER THAN ANY ONE OF THE BRIC COUNTRIES (BRAZIL, RUSSIA, INDIA, CHINA)

Hispanic households spent more on telephone services, men's and boys' clothing, children's clothing, and footwear than non-Hispanics.

Also, Hispanics spent a higher proportion of their money on food (groceries and restaurants), housing, utilities, and transportation.

SEVEN ECONOMIC SECTORS ARE EXPECTED TO BENEFIT FROM LATINO DEMOGRAPHIC CHANGE:

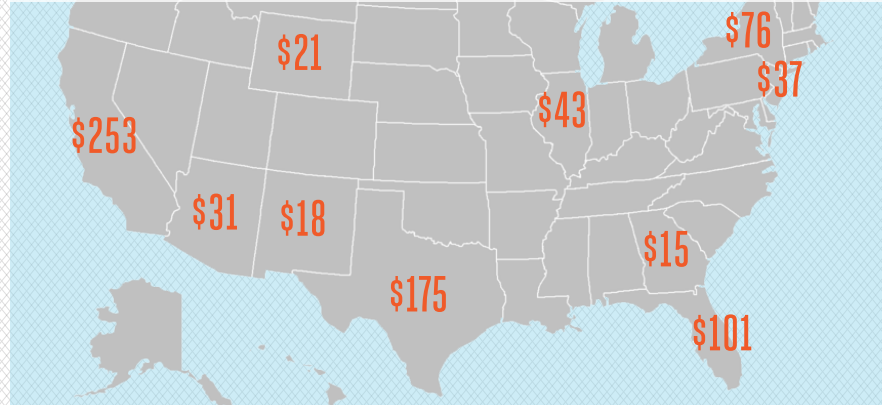


HISPANICS SPEND SUBSTANTIALLY MORE THAN THE TOTAL MARKET IN THESE 10 PRODUCT USE CATEGORIES

TOP 10 HISPANIC PRODUCT CATEGORIES

DRIED VEGETABLES AND GRAINS	GROOMING AIDS
HAIR CARE	DISPOSABLE DIAPERS
SHORTENING OIL	FAMILY PLANNING
BABY FOOD	PHOTOGRAPHIC SUPPLIES
WOMEN'S FRAGRANCES	BABY NEEDS

THE TEN STATES WITH THE LARGEST HISPANIC MARKETS: SPENDING POWER IN BILLIONS



Hispanics are expected to account for 40% (5 million) of the estimated 12 million to 14 million of net new households within the next decade.

In the past decade, upscale Hispanic households (defined as having an annual income of \$75,000 or more) have more than doubled to roughly 3 million.

The number of Hispanic-owned businesses in the United States increased by 43.6% to 2.3 million, more than twice the national rate of 18.0% between 2002 and 2007.

The top 500 U.S. advertisers dedicated \$4.3 billion to targeting Hispanics in 2010.

Advertising growth increased by 20.7% for the Hispanic market compared to 1.7% of non-Hispanic market.

TOP 10 SPANISH LANGUAGE ADVERTISERS IN BOTH 2010 & 2011



U.S. Latinos accounted for 11%, or \$2.2 billion, of total e-commerce purchases made across the United States in the first quarter of 2012.

51%

¡HOLA!

More than eight in ten (82%) Latino adults say they speak Spanish. Nearly all (95%) say it is important for future generations to continue to do so.

Hispanics like ads 51% more if viewed in Spanish rather than English.

Overall, Hispanics are 28% more likely to own a smartphone than non-Hispanic whites.

Approximately 60% of Latino households own at least one video- and Internet-enabled cell phone compared to 43% of the general market.

Hispanics outpace all ethnic groups in mobile data service consumption including music and picture downloads, and at a growing rate.

The average mobile phone bill is 8% higher for Hispanics than for the general market.

86% of U.S. Hispanics have a high-speed Internet connection in their homes and

78% use the Internet as their main information source, even more than television.

26.8% of Hispanic internet users spent six hours or more per day on social media sites, versus only 8.5% of total internet users.

72% of Hispanic internet users visited Facebook in May 2012 and almost 15% of Facebook's audience is Hispanic, up from 14.5% in 2011.

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