

# US HISPANIC MILLENNIALS

## Bridging Cultural and Technology Gaps

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## EXECUTIVE SUMMARY

**US Hispanic millennials number more than 21 million, making up about 21% of the total US millennial population. When it comes to digital devices and media, they largely mirror their peers, but with some important differences, particularly in regard to digital shopping and buying.**

It's a large, diverse group that trails non-Hispanics in certain key economic measures, but Hispanic millennials' earnings exceed that of previous Hispanic generations, and their education patterns suggest further gains in the future.

Mobile is also a particularly important channel for this demographic, as it's a source of entertainment and information but also a form of independence and privacy.

This report looks at how US Hispanic millennials use digital devices, consume media and make purchasing decisions, both on and offline. It also considers the implications of the mobile dynamic and how it may affect mcommerce among these millennials. And lastly, the report assembles a variety of data about language preferences of this young cohort.

## KEY QUESTIONS

- **How much buying power do US Hispanic millennials have in the US retail market?**
- **How do US Hispanic millennials use digital devices to shop?**
- **How receptive is this group to mainstream advertising?**

## US Hispanic and Non-Hispanic Population, by Age, 2014

millions and % of total population

	Hispanic population	% share	Non-Hispanic population	% share
<12	12.6	22.6%	36.8	14.0%
12-17	5.6	10.1%	19.2	7.3%
18-24	6.7	12.0%	24.6	9.4%
25-34	9.0	16.2%	34.4	13.1%
35-44	8.0	14.3%	32.4	12.3%
45-54	6.3	11.3%	37.0	14.1%
55-64	4.0	7.2%	36.0	13.7%
65+	3.5	6.3%	42.7	16.2%
<b>Total</b>	<b>55.8</b>	<b>100.0%</b>	<b>263.1</b>	<b>100.0%</b>

Note: Hispanics can be of any race

Source: US Census Bureau, "Annual Estimates of the Resident Population by Sex, Age, Race and Hispanic Origin"; eMarketer calculations, Feb 14, 2014

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## THE US HISPANIC MILLENNIAL CONSUMER

**To understand digital attitudes and behaviors among US Hispanic millennials, one must first look at Hispanic social and economic patterns in the country, starting with the basic unit: the home.**

Hispanic millennials tend to live in multigenerational homes that are larger than the average American household. Per the US Census Bureau's 2009 to 2011 "American Community Survey," Hispanics are 2.1 times more likely to live in a multigenerational household than are non-Hispanics. November 2013 data showed that Hispanic homes had an average of 3.27 people while non-Hispanic homes consisted of 2.43 members.

Nearly half of US Hispanic millennials still reside with their parents or relatives. June 2013 data from PNC Financial Services Group found that 45% of Hispanic 20-somethings lived at home, compared with 39% of non-Hispanic 20-somethings.

Households that include a Hispanic millennial are more likely to have a child, too: In 2012, the mean age for first-time mothers among the US population was 25.8, according to data from the Centers for Disease Control and Prevention. For Hispanic women, it was 23.8, up from 22.4 in 2006. The average age at which Hispanic women first have children has been steadily increasing over the past several years.

Hispanic millennials earn less than non-Hispanic whites in that age group. Numbers from the Bureau of Labor Statistics show that Hispanics between ages 16 and 24 who worked full time in Q1 2014 made an average of \$421 per week, while their white counterparts brought in \$479. The unemployment rate is higher among young Hispanics, too. Fully 20.4% of Hispanics 16 to 24 were unemployed compared with 18.3% of non-Hispanic whites during the same time period.

Nevertheless, young Hispanics who head up their own households tend to be in a better position financially than the previous generation of Hispanics. In 2003, just one-fifth of Hispanic households led by 18- to 29-year-olds had an annual income of more than \$50,000, according to May 2013 Nielsen data cited in Hispanic Retail 360. By 2013, that percentage had nearly doubled, with 35% of Hispanic millennial-led households bringing in \$50,000 per year or more.

"Their buying power often surpasses that of older Hispanic adults," said Stephen Amendt, digital service manager at EC Hispanic Media. "We see that reflected in the different ads that they view—especially in the automotive sector. We see them interested in buying newer cars than their parents are interested in."

Not only are Hispanic millennials likely to out-earn their parents, education patterns show that trend is likely to continue. Among recent high school graduates, college enrollment is higher among Hispanics than among non-Hispanic whites, according to data from the US Census Bureau. In 2012, 49.0% of Hispanics were enrolled, compared with 47.2% of non-Hispanic whites. This is a massive shift from 1995, when just 35.3% of recently graduated Hispanics enrolled in college vs. 44.0% of white students.

Looking ahead, Hispanic millennials will continue to pursue higher education at significant rates. In an April 2014 study from ThinkNow Research and Sensis, some 84% of respondents who obtained a college degree planned on getting a graduate degree. Only 57% of non-Hispanic millennial college graduates reported having the same goal.

## SPENDING AND SHOPPING PATTERNS

While future earnings prospects appear bright for Hispanic millennials, their current earnings trail those of non-Hispanic whites. But they seem to be spending more. Nielsen's data shows that US Hispanic millennials spend slightly more on retail than their non-Hispanic white counterparts. In 2012, they spent an average of \$6,598 per household, approximately 10% more than the latter group.

But how do they decide what brands to buy?

When it comes to brand loyalty, they fall somewhere between their parents and non-Hispanic millennials, said Nancy Tellet, senior vice president of research and consumer insights at Viacom's Tr3s Digital. "They tend to underindex in sole brand usage in comparison to the slightly older foreign-born in the food and cleaning categories. But on the other hand, they have low usage of generic brands," she said. "They still want brands, so they look for the best deal within a set that they like."

The hunt for the best deal greatly influences how and what this demographic buys. Hispanics as a whole tend to be price-sensitive consumers. April 2014 data from Prosper Insights & Analytics shows how price affects Hispanics' retail purchases. While not specific to Hispanic millennials, the study found that 76% of Hispanic consumers usually or only buy clothing when it is on sale.

Pragmatism is highly valued among this group, Tellet said. "Getting a good deal makes them feel superior, smart and successful. It's not just a rational benefit; it's an emotional high-end benefit. They are constantly looking for insider news, shopper rewards and in-store deals. They're marshalling all of their resources and turning to FatWallet.com and shopkick and combining those deals with ones they find in old-school fliers from stores like Target and Wal-Mart."

Price is particularly important to less-aculturated or foreign-born Hispanic millennials, according to Maria Parra, president of Ingenium Research Boutique. "They have very hectic lives. Most of them have two jobs. If they only have one job, they also likely have kids or long schedules. If they have family back in their country of origin, they are sending money," she said. "They like brands, but because of their economic responsibilities, they try to be smart about their purchases."

For this reason, local businesses with loyalty programs like Walgreens are a big hit, Parra said. Many Hispanic millennials enjoy racking up points so they can redeem them later to get deals on specific brands they like. Correspondingly, in its "Hispanic Millennials & Local Shopping" study, BIA/Kelsey found in Q3 2013 that Hispanic millennials belonged to an average of 5.5 local loyalty programs, compared with 4.6 for non-Hispanic millennials. Though only a small pool of Hispanic millennials was surveyed, the study was representative of the adult US population.

## DIGITAL AS A MEANS OF INDEPENDENCE

**Almost every segment of the broader population has embraced mobile devices to the point that differences in uptake vary little between different demographic groups. Take smartphone penetration: Among US Hispanics, it has been higher than the norm but is now approaching average levels, where it will likely continue for the next few years.**

### US Smartphone User Penetration, by Race/Ethnicity, 2012-2018

% of population in each group

	2012	2013	2014	2015	2016	2017	2018
<b>Non-Hispanic</b>							
—Asian	47.1%	53.3%	59.6%	61.7%	63.3%	64.6%	65.0%
—Black	40.8%	48.5%	54.7%	58.4%	62.5%	63.8%	64.9%
—White	37.0%	44.3%	50.0%	56.4%	60.6%	64.8%	68.5%
—Other*	33.8%	39.9%	45.0%	49.9%	54.0%	57.1%	59.1%
<b>Hispanic**</b>	<b>42.7%</b>	<b>47.4%</b>	<b>52.8%</b>	<b>56.9%</b>	<b>60.3%</b>	<b>64.0%</b>	<b>65.0%</b>
<b>Total</b>	<b>38.8%</b>	<b>45.7%</b>	<b>51.4%</b>	<b>56.8%</b>	<b>60.7%</b>	<b>64.3%</b>	<b>66.9%</b>

Note: individuals of any age who own at least one smartphone and use the smartphone(s) at least once per month; \*includes Native Americans, Alaska Natives, Hawaiian and Pacific Islanders, and bi- and multiracial individuals; \*\*can be of any race

Source: eMarketer, March 2014

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For Hispanic millennials, however, who are more likely to live in multigenerational households with more people in them, mobile devices offer some special benefits: privacy and freedom.

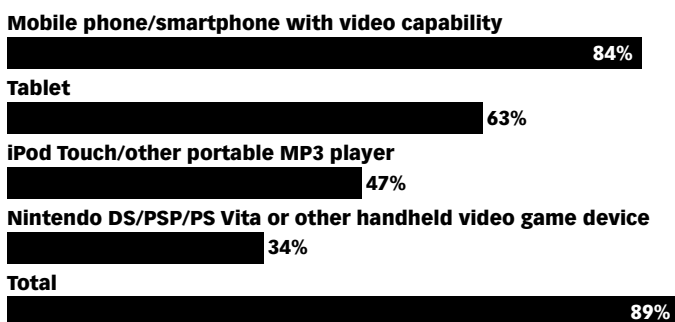
"There's often one computer at home shared by the entire family," Tellet said. "They don't want to wait in line to get on the computer. And privacy—you don't want someone else to see what you're doing. If it's a shared computer, that's hard to avoid. To them, smartphones are a form of digital independence."

Mobile devices also provide a sense of control to Hispanic millennials, who largely straddle two different worlds. Young Hispanics likely consume a lot of Spanish-language programming on the family TV screen, but much of it tends to be geared toward their parents, said Adriana Waterston, senior vice president of marketing and business development and senior qualitative researcher at Horowitz Associates. They want to consume plenty of English-language content, too, and mobile devices allow them to fit everything into their bicultural realm. "They've got the smartphones, tablets and gaming devices. They've got the lifestyle that leads to mobile viewing," she said. "Now they're finding, 'Hey, I can use these products and services to really curate the content that matters to me.'"

Out of all the devices at their disposal, Hispanic millennials are most partial to their smartphones. In an April 2013 survey from McLaughlin & Associates and Penn Schoen Berland, 63% of Hispanic mobile phone users ages 18 to 29 said that if they could choose only one, having a cellphone or smartphone was more important than having broadband internet, cable/satellite TV or a home landline.

In January 2014 polling from Horowitz Associates, nearly 90% of Hispanic millennial TV viewers said they owned some type of mobile device with video capability. Among that percentage, 84% said they owned a mobile phone or a smartphone with video capability and 63% reported owning tablets.

### Mobile Device Ownership with Video Capability Among US Hispanic Millennial TV Viewers, Jan 2014 % of respondents



Note: n=190 ages 18-34  
Source: Horowitz Associates Inc., "State of Cable & Digital Media-Multicultural 2014," May 5, 2014

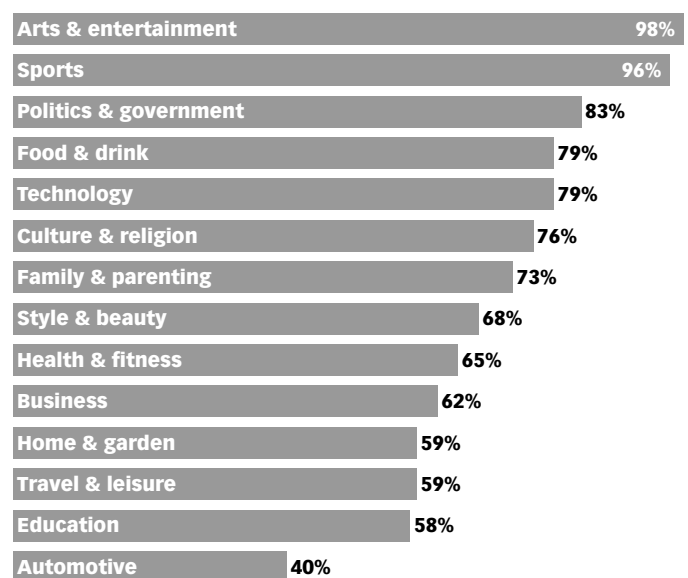
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Looking beyond mobile devices across the entire digital landscape, young Hispanics value the digital channel because it can preserve aspects of their culture, said Roberto Ruiz, senior vice president of strategy and insights at Univision Communications. "Technology is a culture-enabler for this group. When you think about the passion points—music, sports and anything to do with your country of origin—all of it is enabled by technology."

An October 2013 report from ShareThis found that nearly all Hispanic millennials tracked by the network consumed or searched for sports, as well as arts and entertainment content; roughly three-quarters did so for culture and religion, and family and parenting content. It is worth noting, though, that the report found Hispanic millennials' content consumption habits were nearly identical to that of non-Hispanic millennials.

### Types of Content Searched/Viewed by US Hispanic Millennial Internet Users, Oct 2013

% of total millennial users on the ShareThis network



Note: ages 18-35; including social views; represents activity on the ShareThis network, broader industry metrics may vary  
Source: ShareThis, "Consumer Study: Online Sharing Behaviors of Hispanic Consumers," Feb 20, 2014

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Not surprisingly, Hispanic millennials are active on social networks. The latest data for 2012 from the Pew Research Hispanic Center, a project of the Pew Research Center, shows that 84% of Hispanic internet users between ages 18 and 29 are users of Facebook, Twitter or some other social networking site.

Among these young Hispanics, Ruiz said he sees a tremendous amount of engagement on social media during Spanish-language award shows. "You can't compare the number of tweets that come from the Academy Awards to those from the Latin Grammys because the audiences are different, but if you divide tweets by audience, our viewers are significantly more prone to tweeting than non-Hispanics," he said.

## THE NEXT WAVE: DIGITAL SHOPPING

**Although Hispanic millennials' social, mobile and media usage broadly parallels that of non-Hispanics, they lag other groups when it comes to buying online.**

This may partly reflect the "shared PC" dynamic discussed earlier. Users of any demographic accustomed to going online mostly via smartphone would be less likely to transact online.

But the dynamic is not merely associated with hardware. Online safety is an additional factor contributing to Hispanic millennials' hesitation to make a purchase digitally. In September 2013 polling from Experian Marketing Services, only 36.5% of US Hispanics ages 18 to 34 agreed with the statement, "It's safe to make purchases online," meaning that a significant majority feels unsafe about doing so. Non-Hispanic respondents were a bit more trusting, with 45.8% agreeing that transacting online is a safe activity.

Approximately 34% of the Hispanic millennials surveyed said that they are doing more of their shopping online than before. Non-Hispanics reported buying online at a higher rate than they were previously, with 45.8% doing more of their shopping on the internet.

### Attitudes About Ecommerce According to US Hispanic and Non-Hispanic Millennial Consumers, Sep 2013 *% of respondents in each group*



*Note: any respondents who agree; ages 18-34  
Source: Experian Marketing Services, "Summer Simmons Connect," Jan 22, 2014*

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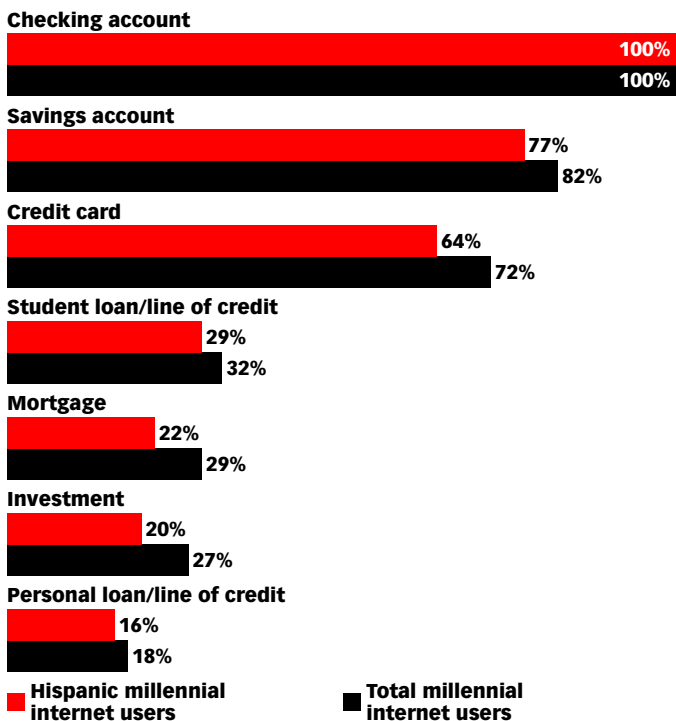
Hispanics' concern about safety is also apparent in the McLaughlin survey. When it comes to digital privacy, Hispanics ages 18 to 29 were slightly more concerned than their older generations about safeguarding their personal data. Seventy-three percent of the younger respondents said protecting their personal information was the most important online privacy issue to them, while 69% of 30- to 40-year-olds and 71% of 41- to 55-year-olds said the same.

"I hear all the time in focus groups about the reticence to shopping online and being mistrustful of that process, and if they have a credit card, putting that information out there," Horowitz's Waterston said.

The adoption of credit and banking is in itself another issue. Stemming from the low credit card penetration and the lack of access to formal banking in several Latin American countries, many US Hispanics prefer to transact with cash. The latest data from the Federal Deposit Insurance Corporation shows that approximately 33% of Hispanics between ages 15 and 34 were unbanked in 2011. An additional 18% were "underbanked"—a term used to define those who owned checking accounts, but bought or utilized items such as non-bank money orders, payday loans and rent-to-own services.

A February 2014 study from TD Bank shows that Hispanic millennials do in fact lag in credit card ownership. All 18- to 34-year-olds polled had checking accounts, but when it came to owning a credit card, Hispanic millennials fell behind. Some 72% of total millennial internet users said they were credit card owners, but only 64% of Hispanic millennials reported they had one.

**Financial Products and Account Ownership Among US Hispanic vs. Total Millennial Internet Users, Feb 2014**  
% of respondents



Note: Hispanic n=501; total n=2,031; ages 18-34  
Source: TD Bank, "The Millennial: Financial Behaviors & Needs," March 10, 2014

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The availability of prepaid cards might be a solution for those who are wary of identity theft or who lack access to banking, but it's not for everyone, Waterston said. For someone who may be living in a country without legal permission, "filling out any form with a name, address and other type of personal information is something they are cautious about doing."

But for many Hispanic millennials, the bias against digital commerce is underscored by the pleasures of shopping and buying in the real world, surrounded by friends and family.

Hispanic millennials frequent shopping centers at higher rates than non-Hispanics. According to a 2012 research study from Tr3s, 30% of US Hispanics ages 18 to 29 said they go to the mall at least once a week. Just 12% of non-Hispanic millennials said the same.

Indeed, Hispanic millennials seem to be more inclined to enjoy nonvirtual activities in general. According to Experian, adult Hispanic millennials were 135% more likely to go see a movie on opening weekend than non-Hispanics, as cited in Tr3s's 2014 "Hispanics at the Movies" study. And in a January 2013 Urban Land Institute study titled "Generation Y: Shopping and Entertainment in the Digital Age," Hispanic millennials were significantly more likely than the general millennial population to dine out on a weekly basis. Twenty-five percent of Hispanic respondents said they go out weekly for brunch, while just 16% of the total US millennial population said the same. Similarly, when it comes to dinner, 47% of young Hispanics said they go out once a week vs. 38% of US millennials.

## DIGITAL BUYING PREFERENCES

Despite their concerns about online security and their penchant for real-world shopping, Hispanic millennials do shop and buy online. These somewhat reluctant shoppers can be persuaded to transact online if a product is well-priced, or if the product can't be found elsewhere.

BIA/Kelsey data from Q3 2013 found that Hispanic millennials do 33.3% of their annual local shopping online, including anything from researching a business's offerings to checking reviews on Yelp to actually making a purchase. By comparison, non-Hispanics in the same age group did 26.1% of their annual local shopping online. Nearly half—46%—of the Hispanic respondents who use their smartphones and tablets to shop locally did so on a daily basis, likely seeking the best offerings at grocery stores, restaurants, gas stations and drugstores within a 25-mile radius. Just 32.7% of non-Hispanic millennials said they do the same.

And they're more willing to interact with these businesses if it means there's a deal to be had. Hispanic millennials follow, friend, "like" and share local businesses on social networks at more than twice the rate than their non-Hispanic peers, according to BIA/Kelsey. Hispanic millennials averaged 9.5 of these actions during a six-month period in 2013 while non-Hispanic millennials averaged 4.2.

"These actions are usually incentive-based," said Celine Matthiessen, vice president of analytics and insights at BIA/Kelsey. "Following a local business on social media, friending, 'liking,' sharing will give them a coupon or an offer, so Hispanic millennials tend to do that at a higher rate."

They are also highly likely—like many other shoppers—to use mobile devices in-store. May 2013 polling from ThinkNow Research found that 91% of Hispanics ages 18 to 34 had at some point used their mobile phones in-store to assist them in making an electronics purchase, and 89% said they had used their phone to help make a decision in a clothing store.

And they don't hesitate to use their mobile devices to help their friends and family shop, too. The survey found that 69% of Hispanic millennials had at some point used their mobile phones while shopping in-store to help a friend or relative make a purchase decision or obtain a discount.

## BRAND APPS VS. MOBILE SITES

Much of Hispanic millennials' digital shopping with brands and retailers is conducted via mobile web, and they overindex in smartphone visits to retailers' sites, according to John Fetto, senior marketing manager for the consumer insights group at Experian Marketing Services. Their interaction with apps, however, is just average.

"When you download an app, you've already kind of committed to something. It's not like just visiting a website. An app is taking up memory on your device and it's on the list of things you have to update or maintain," Fetto said. It's likely this group is "looking to mobile browsers to give them that first level of interaction to see what the company has to offer their needs."

On the other hand, it could be that marketers and app developers are missing something when it comes to targeting these consumers. "Given that they're an early adopter group, there's a lot more potential for app usage," he said.

It could also be a language barrier, especially with less-aculturated Hispanic millennials, according to Waterston. "Being unacculturated doesn't make people uninterested. Less-aculturated Latinos haven't been on the leading edge of these technologies not by lack of interest, but because they haven't necessarily been served in the proper ways."

A 2013 study conducted from YouGov commissioned by BiTE Interactive found that 45% of fluent Spanish speakers between the ages of 18 and 34 said they felt brands weren't doing enough to make their apps accessible to Spanish speakers. Nearly one-fourth of the 500 surveyed said that they would be more interested in learning about a brand if that brand offered a Spanish-language app.

Brands are beginning to recognize the need for a more active presence in the Hispanic market via apps. In March 2014, the Latinum Network launched a bilingual promotions and advertising app called Veo that runs in Spanish or English, depending on the language the user has selected in their iOS or Android device settings. The platform houses free trials, recipes and promotional offers. Brands such as the National Basketball Association (NBA), H&R Block, Nestlé and Discovery en Español are among those active on the network.



## ENGLISH OR ESPAÑOL?

**As they pool all their resources and scour for the best prices both online and off, US Hispanic millennials remain receptive to offerings from brands and advertisers about products and services. In a September 2013 study, Experian found that 18.7% of Hispanics ages 18 to 34 would be interested in receiving advertisements on their mobile devices compared with 8.5% of non-Hispanics the same age.**

"They consider ads a source of information," Univision's Ruiz said. "Hispanic millennials are way less jaded and they want to understand what's new out there, so they pay attention to ads. A non-Hispanic on the other hand has likely grown up with the idea that ads are something annoying they need to get away from."

In ThinkNow's survey, 77% of Hispanic millennials agreed that advertisements on their mobile phones provide them with useful information about new products and services. And per the Experian survey, 22.7% of Hispanic millennials reported they are likely to purchase products they see advertised on their cellphones; just 14.1% of non-Hispanics said the same.

Social posts from brands are helpful, too. While November 2013 findings from Twitter were specific to millennials, it serves to illustrate the role brands' tweets and ads play in influencing Hispanic Twitter users' purchase decisions. Fully 66% of Hispanics who follow brands reported to Twitter that month that they had purchased something they learned about on the channel.

### Brand-Related Twitter Activities of US Hispanic Twitter Users, Nov 2013

% of respondents

**81%** follow at least one brand on Twitter

**73%** of users who have retweeted a brand have made a purchase

**66%** of users who have tweeted at a brand have made a purchase

**60%** of brand followers have purchased something they learned about on Twitter

Note: ages 18+

Source: Twitter as cited in company blog, March 14, 2014

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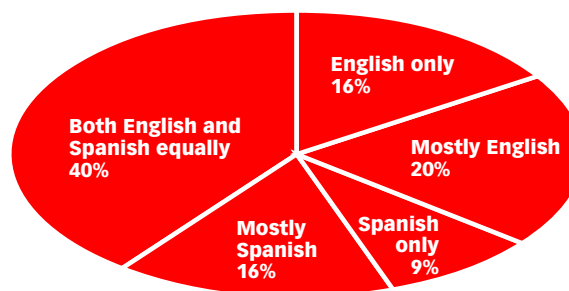
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But what is the right way to communicate with this bicultural and diverse group of consumers? How do Hispanic millennials want to be recognized?

Most of them consume media in both Spanish and English, demonstrating that they identify with both cultures. March 2014 data from Sensis and ThinkNow found that 40% of US Hispanic millennial internet users consume media equally in Spanish and English. Nine percent of respondents said they consume media in Spanish only, and 16% only consume media in English.

### Language In Which US Hispanic Millennial Internet Users Regularly Consume Media, March 2014

% of total



Note: TV, radio, internet, magazines; numbers may not add up to 100% due to rounding

Source: ThinkNow and Sensis, "Hispanic Millennial Project: Wave 1," April 23, 2014

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What they prefer is slightly different when broken down by media channel. May 2014 Ipsos Public Affairs polling found that when it comes to written content and radio, Hispanic millennials largely prefer English. This is especially the case when it comes to the internet, as 45% of respondents indicated a preference for browsing in English, while 36% said they prefer Spanish and English equally. Just 19% preferred online content in Spanish.

### Preferred Language for Consuming Media According to US Hispanic Millennial Internet Users, Feb 2014

% of total

#### Internet



#### Newspapers



#### Magazines



#### Radio



#### TV



■ English ■ Equal ■ Spanish

Note: n=502; numbers may not add up to 100% due to rounding

Source: Ipsos Public Affairs survey as cited in company blog, May 5, 2014

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TV is the only channel they don't overwhelmingly prefer to consume in English. In the survey, 37% expressed an equal-language preference, while 36% indicated they prefer to watch TV in English.

When it comes down to it, it's not so much about language in mainstream advertising, said Annette Gonzalez-Malkin, vice president at Hunter Public Relations. "Nearly half of Hispanic millennials are US-born, are more acculturated and are consuming media in English. Still, they maintain a strong cultural duality. It's more about infusing advertising with cultural nuances."

But there is a fine line between giving Hispanics a cultural nod in a mainstream ad and marginalizing them, she added.

Univision's Ruiz agreed. Hispanic millennials tend to be more aware and sensitive of cultural cues in advertising than their older generations. Portraying certain stereotypes will just make this group feel alienated, he noted.

"A company that's doing it right is Target," Gonzalez-Malkin said. "They ran a baby-product campaign last summer with a Hispanic reality show contestant singing, 'If You're Happy and You Know It' in both Spanish and English. It wasn't overt and it worked organically."

Another example of a company effectively targeting this group is Mattel, who launched a holiday bilingual marketing campaign last year, EC Hispanic Media's Amendt said. "Their 'toy feliz' campaign reflected cultural duality. 'Toy' is obviously an English word, but it's a play on the Spanish word 'estoy,' and then they're using 'feliz.' They identified the American and Hispanic sides of the duality."

## EMARKETER INTERVIEWS

### Hispanic Millennials Collect Offline and Online Offers to Land Deals



**Nancy Tellez**  
Senior Vice President, Research and Insights  
**Tr3s Digital**  
Interview conducted on April 17, 2014



**Stephen Amendt**  
Digital Service Manager  
**EC Hispanic Media**  
Interview conducted on May 13, 2014



**John Fetto**  
Senior Marketing Manager  
for the Consumer Insights Group  
**Experian Marketing Services**  
Interview conducted on April 30, 2014



**Annette Gonzalez-Malkin**  
Vice President  
**Hunter Public Relations**  
Interview conducted on May 8, 2014



**Celine Matthiessen**  
Vice President, Analytics and Insights  
**BIA/Kelsey**  
Interview conducted on May 16, 2014



**Eric Oria**  
Senior Director, Marketing and Strategy  
**GameStop**  
Interview conducted on April 29, 2014



**Maria L. Parra**  
President  
**Ingenium Research Boutique**  
Interview conducted on May 13, 2014



**Roberto Ruiz**  
Senior Vice President, Strategy and Insights  
**Univision Communications**  
Interview conducted on April 30, 2014



**Adriana Waterston**  
Senior Vice President, Marketing and Business  
Development and Senior Qualitative Researcher  
**Horowitz Associates**  
Interview conducted on April 17, 2014

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