NOSOTROS LE AYUDAMOS A EXPANDIR SU NEGOCIO

HELPING BUSINESSES GROW IN THE BILINGUAL, BICULTURAL ARIZONA SONORA REGION

LA ÚNICA CÁMARA DE COMERCIO CON PRESENCIA REGIONAL EN EL SUR DE ARIZONA
THE ONLY CHAMBER OF COMMERCE WITH A REGIONAL PRESENCE TO BETTER SERVE OUR MEMBERS

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Thank you to the Southern Arizona Hispanic Market Outlook Research and Editing Committee

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Allegra - 22nd & Park
Congratulations to the Tucson Hispanic Chamber and Telemundo on their inaugural edition of the Southern Arizona Hispanic Market Outlook. This report will serve as an important tool for local businesses as they work to grow their customer base, expand operations and create jobs for the people of Southern Arizona and throughout the state.

The Hispanic population in Arizona is a dynamic, fast-growing market that should be highly valued by businesses focused on their long term success.

As governor of Arizona, I understand the importance of the Hispanic population in our state. Hispanics currently make up more than one third Arizona’s population, and by 2035 will be the majority of our state. Our growing Hispanic population will include many young families and future entrepreneurs who seek high quality education for their children and a business-friendly environment to grow their firms. Both of these issues are top priorities for my administration.

I look forward to working closely with the Hispanic business community and the region as a whole to promote Arizona as a great place to live, work and do business.

Congratulations again on the first of many editions of your publication. I look forward to reading it!

Governor Doug Ducey
Welcome to Hispanic Market Outlook 2015

Bienvenidos to our inaugural Southern Arizona Hispanic Market Outlook – the most comprehensive Hispanic market research report covering Pima, Santa Cruz and Cochise Counties! Thank you to Telemundo, our research partner and the Arizona Daily Star and Clear Channel Radio for their media partnership.

The Southern Arizona Hispanic Market Outlook is one of the most significant events that our Tucson Hispanic Chamber hosts for the Southern Arizona business community. The report provides detailed information that can assist Arizona businesses in reaching the fast growing Hispanic market in Southern Arizona.

Our Tucson Hispanic Chamber and affiliate chambers in Douglas, Nogales and Sierra Vista provide business education workshops, business lending assistance and numerous networking opportunities to assist businesses in Arizona and Sonora. Please contact our team at (520) 620-0005 or visit our website: www.TucsonHispanicChamber.org to learn more about the largest Latino business organization in Arizona.

¡Bienvenidos! On behalf of Telemundo Tucson we are proud to partner with the Tucson Hispanic Chamber of Commerce in their inaugural Southern Arizona Hispanic Market Outlook.

KHRR-TV Telemundo and the Tucson Hispanic Chamber have made a commitment to provide the business communities of Tucson, Southern Arizona and Northern Mexico the facts and figures on the growing population of the region to create opportunities to expand their businesses.

KHRR-TV Telemundo has been a part of the Spanish-speaking community in the Tucson area for more than 20 years. Owned by NBCUniversal, Telemundo Tucson delivers its viewing audience, which reaches to the U.S./Mexico border, local breaking news, weather, entertainment and sports coverage across a variety of platforms, including Noticiero Telemundo Arizona, Enfoque Arizona, online at TelemundoArizona.com and via mobile and social media channels. Telemundo Tucson has received multiple awards for its commitment to journalism and community service. The success of our partners, both in the community and business is at the core of our mission.
Gala and Bi-National Awards

Saturday, Oct. 17th
Casino del Sol Resort

CELEBRATING
the Hispanic Business Man and Woman of the Year

Register at:
TucsonHispanicChamber.org

Small Businesses Have Created 65% of New U.S. Jobs.*

Small businesses are the engines of neighborhood economies. They create jobs, spur innovation and build lasting local assets.

Citi Community Development is proud to work with community organizations like Tucson Hispanic Chamber of Commerce to support America’s small businesses.

Learn more at citicomunitydevelopment.com
Free: the key to cross-border commerce at your fingertips

ARIZONA-SONORA BUSINESS RESOURCE GUIDE

The 2nd edition of the Arizona-Sonora Business Resource Guide is the most comprehensive directory of the businesses and agencies involved in cross-border trade. It's yours at no charge as a phone app. Download it today at http://tucson.com/azsonoraapp

Arizona Daily Star tucson.com
The Hispanic population has led our nation’s growth over the last decade with a population of more than 55 million people. The Hispanic community in Arizona has also experienced tremendous growth allowing the state to be identified as one of the fastest growing states in the nation during the last decade. In Arizona, Hispanics represent over a third of the total population and almost two million people.

The Tucson Area is defined throughout this book as Pima County, Santa Cruz County and Cochise County.
**MARKET PROFILE**

**Hispanics in the Tucson Area Are More Likely to be Younger**

Age & Gender Demographics Among Adults (18+) in the Tucson Area

- A18-34: Hispanic: 36%, Non-Hispanic: 28%
- A35-54: Hispanic: 40%, Non-Hispanic: 26%
- A55-64: Hispanic: 14%, Non-Hispanic: 18%
- A65+: Hispanic: 11%, Non-Hispanic: 28%

Hispanic Median Age: 41
Non-Hispanic Median Age: 53


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**Tucson Area Hispanics Represent a Large Share of Key Demographics**

Share of Tucson DMA Target Demos

- A18-34: Hispanic: 46%, Non-Hispanic: 54%
- A18-49: Hispanic: 44%, Non-Hispanic: 56%
- A25-54: Hispanic: 40%, Non-Hispanic: 60%
- W18-34: Hispanic: 48%, Non-Hispanic: 52%
- W18-49: Hispanic: 45%, Non-Hispanic: 55%
- W25-54: Hispanic: 42%, Non-Hispanic: 58%
- M18-34: Hispanic: 45%, Non-Hispanic: 55%
- M18-49: Hispanic: 42%, Non-Hispanic: 58%
- M25-54: Hispanic: 39%, Non-Hispanic: 61%
- P12-17: Hispanic: 51%, Non-Hispanic: 49%

Data for the Tucson area, the largest metropolitan area in Southern Arizona mirrors national trends in that the percentage of Hispanic homes with children is higher than the general population. This is valuable information for businesses throughout the region that sell products and services focused on young families.

Children Are Prominent in Tucson Area Hispanic Homes

Adults (18+) Who Live in a Household with the Presence of Children 2-17 Years of Age

- **Live in a Household with Children 2-5**
  - Hispanic: 19%
  - Non-Hispanic: 10%

- **Live in a Household with Children 6-11**
  - Hispanic: 25%
  - Non-Hispanic: 12%

- **Live in a Household with Children 12-17**
  - Hispanic: 26%
  - Non-Hispanic: 12%

In the Tucson area, most of the full time positions are held by the Hispanic population. With growing employment figures, the Hispanic population in Southern Arizona is on track to become a major economic engine on the supply side (labor force) and the demand side (purchasing power).

The Pima County One-Stop Career Center

The Pima County One-Stop Career Center prepares our workforce by helping young people get their first job, assisting “mature” workers get a post-retirement job, and helping everyone in between. Programs sponsored by One-Stop include Basic Education, English as a Second Language and Occupational Skills Training, including On-the-Job Training and internships.

Specifically, One-Stop:

• Develops skilled workers for quality jobs;
• Assists employers to address workforce and recruitment needs;
• Mitigates the impact of layoffs;
• Assists households in financial crisis; and
• Helps persons with issues, such as homelessness, lack of literacy, or language barriers to transition into employment.

English language learners will get assistance not only with the coursework to help them prepare for the GED, but also with skills training to secure meaningful employment. More than 53 percent of clients using One-Stop’s services are Hispanic.

One-Stop helps the business community by providing on-the-job training to new employees where the employer is reimbursed for up to 50 percent of the wage rate during the training period, then agrees to retain the trainee as a regular employee at the end of the contract.

One-Stop helps employers recruit by assisting with advertising, collecting resumes and applications, pre-screening applicants, candidate testing and assessment, offering job space for interviewing and helping with job fairs.

Our dedicated Kino Veterans’ Workforce Center helps military veterans find jobs and get training, benefits and support. We team with employers, who provide the mentoring and supervision of temporary employees and interns while One-Stop pays the salary. One-Stop also provides internship toolkits to help employers get the most out of their interns.
Purchasing Power

If the U.S. Hispanic population were its own country, it would rank fifth just below Mexico in terms of gross domestic product. It would represent one of the top 20 economies of the world. If today the U.S. Hispanic gross domestic product were combined with the Mexican gross domestic power, the two powerhouses would easily challenge the size of the United Kingdom economy, surpassing India, Russia and Brazil on a one on one basis. Hispanic purchasing power creates a myriad of business opportunities for all industries.

The Purchasing Power of U.S. Hispanics Was Greater Than All But 15 Nations in 2013

Countries with a Gross Domestic Product (GDP) of $1 Trillion or More in 2013

1. U.S. ($16.8 Trillion)
2. China ($9.2 Trillion)
3. Japan ($4.9 Trillion)
4. Germany ($3.7 Trillion)
5. France ($2.8 Trillion)
6. U.K. ($2.7 Trillion)
7. Brazil ($2.2 Trillion)
8. Italy ($2.1 Trillion)
9. Russia ($2.1 Trillion)
10. India ($1.9 Trillion)
11. Canada ($1.8 Trillion)
12. Australia ($1.6 Trillion)
13. Spain ($1.4 Trillion)
14. S. Korea ($1.3 Trillion)
15. Mexico (1.3 Trillion)

16. U.S. Hispanics ($1.2 Trillion)


Arizona’s Hispanic Purchasing Power Ranks High Among Other States

Arizona Ranks #7 in 2014 Total Hispanic Purchasing Power

In Billions

Source: Selig Center for Economic Growth, Terry College of Business, The University of Georgia, June 2016
Population growth combined with the fact that the Hispanic rate of poverty has decreased\(^1\), are positive signals of the formation of an upcoming solid Hispanic middle class. Hispanic purchasing power has seen a steady growth over the last 25 years including during the most recent economic recession in 2008. Generalizations of the Hispanic community as being primarily from the blue collar industries are changing as Arizona’s Hispanic purchasing power exceeds 38 billion dollars, almost a fifth of the whole state’s total purchasing power.

In Pima County, Hispanic purchasing power equates to 8 billion dollars a year. A powerful trend for Southern Arizona businesses is that consumer spending for Hispanics in the Tucson area is expected to increase by 88 percent in the upcoming decade. In general, Hispanics in the Tucson area place a high value on housing and food supplies while they transition from lower socio-economic levels into the middle class. The Hispanic community will be matching their new economic leverage with decision making influence as they have a growing sense of ownership and a need for stability. In addition, as socio economic levels improve for the Hispanic population in Southern Arizona, Hispanics will be looking for upper market goods and services.

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\(^1\)Pew Research

**Arizona’s Hispanic Purchasing Power Projected to Grow in the Next 5 Years**

**Arizona Hispanic Purchasing Power Estimates (in Billions)**

- 2000: $14.7
- 2010: $32.3
- 2014: $38.3
- 2019: $49.2

Source: Selig Center for Economic Growth, Terry College of Business, The University of Georgia, June 2014
By 2024, Hispanics are estimated to spend nearly $14 billion dollars in the Tucson DMA. That equates to 28% of total market spending. Today, Hispanics in the Tucson area spend nearly $8 billion dollars a year with the majority in Shelter (Mortgage or Rent) and Food at Home and Away from Home. This provides a large opportunity for Southern Arizona real estate developers, apartment owners and food providers.
A Simmons NHCS report studied U.S. Hispanic attitudes towards health. Interestingly, U.S. Hispanics are 80% more likely to believe that “the most expensive medicine is usually the best”. This belief may be attributed to their high television viewing numbers (see Media section) and their access to medicine-related television commercials.

The Hispanic population in the United States indexes higher than the general population on consciousness of their image and how it relates to health. The Simmons NHCS report stresses the importance of convenience and healthy food choices for Hispanics.

**U.S. Hispanics Are More Likely to Agree With Statements Regarding Their Health**

Hispanics Are Above the National Average With Their Agreement Towards Health Related Topics.

- “At the first sign of pain or discomfort, I take medication”
- “It is important to go to the doctor when I am sick”
- “I actively seek information about nutrition and a healthy diet”
- “I always look for the most advanced medicine available”
- “The most expensive medicine is usually the best”

Source: Simmons NHCS, Winter 2015 (Feb 2014-Mar 2015), Base: U.S. Adults 18+

**U.S. Hispanics Are Actively Engaged in Their Healthy Lifestyle**

Hispanics Are More Likely Than the U.S. Population to be Mindful of Their Healthy Image.

**“Image Shapers”**

“Health and image are allied together for them. Looking good means being healthy. Convenience and healthy choices can-and do-go together for this group.”

Source: Simmons NHCS, Winter 2015 (Feb 2014-Mar 2015), Base: U.S. Adults 18+
More than 245,000 Hispanics in the Tucson DMA received any medical care services over the past three years. In 2014, medical care services for the Hispanic community in Tucson equated to over $370 million dollars a year. With projections for population growth of the Hispanic community in the Tucson area, the dollars spent on medical care services will grow exponentially.
**Tucson Area Hispanics Are Above the Market Average with Medical Services**

Medical Services Received by Hispanic Households in the Past 3 Years:

<table>
<thead>
<tr>
<th>Health Specialist Used</th>
<th>% of Hispanics</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hospital emergency room</td>
<td>37%</td>
<td>109</td>
</tr>
<tr>
<td>Urgent care facility</td>
<td>30%</td>
<td>105</td>
</tr>
<tr>
<td>Other medical service</td>
<td>30%</td>
<td>87</td>
</tr>
<tr>
<td>Pediatrics</td>
<td>18%</td>
<td>161</td>
</tr>
<tr>
<td>Maternity care</td>
<td>13%</td>
<td>163</td>
</tr>
<tr>
<td>Orthopedics</td>
<td>12%</td>
<td>105</td>
</tr>
<tr>
<td>Neurology</td>
<td>10%</td>
<td>130</td>
</tr>
<tr>
<td>Cardiac care</td>
<td>8%</td>
<td>84</td>
</tr>
<tr>
<td>Cancer/oncology</td>
<td>6%</td>
<td>67</td>
</tr>
<tr>
<td>Corrective eye surgery</td>
<td>5%</td>
<td>77</td>
</tr>
<tr>
<td>Mental healthcare</td>
<td>5%</td>
<td>114</td>
</tr>
</tbody>
</table>

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

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**Hispanics Use Many Tucson Area Hospitals and Medical Centers**

Hospitals/Medical Centers Used by Hispanics in the Past 3 Years:

<table>
<thead>
<tr>
<th>Hospitals/Medical Centers Used</th>
<th>% of Hispanics</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tucson Medical Center</td>
<td>35%</td>
<td>123</td>
</tr>
<tr>
<td>St. Mary’s Hospital</td>
<td>19%</td>
<td>135</td>
</tr>
<tr>
<td>St. Joseph’s Hospital</td>
<td>17%</td>
<td>93</td>
</tr>
<tr>
<td>University of Arizona Medical Center - University Campus</td>
<td>15%</td>
<td>102</td>
</tr>
<tr>
<td>Carondelet Heart &amp; Vascular Institute</td>
<td>12%</td>
<td>152</td>
</tr>
<tr>
<td>Other hospital</td>
<td>11%</td>
<td>115</td>
</tr>
<tr>
<td>University of Arizona Medical Center - South Campus</td>
<td>11%</td>
<td>146</td>
</tr>
<tr>
<td>University of Arizona Medical Center - Diamond Children’s</td>
<td>11%</td>
<td>216</td>
</tr>
<tr>
<td>Northwest Medical Center</td>
<td>10%</td>
<td>61</td>
</tr>
<tr>
<td>VA Medical Center</td>
<td>5%</td>
<td>69</td>
</tr>
</tbody>
</table>

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

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**Tucson Medical Center**

As a community nonprofit hospital, Tucson Medical Center (TMC) is committed to improving the overall health of our local residents and promoting health equity.

Part of that effort lies in supporting the needs of our Spanish speaking patients within the walls of the hospital.

With Spanish Medical Interpreters on staff, TMC also has trained 90 bilingual employees for dual role interpretation, with a goal of reaching 100 this year.

Outside of the hospital, TMC works closely with the Tucson Hispanic Chamber of Commerce, regularly participating in Chamber-sponsored health fairs and events, and is engaged in medical tourism discussions with Pima County.

TMC also is the lead agency for Safe Kids Pima County, a network of organizations dedicated to preventing accidental childhood injury. With a focus on child passenger safety, bike/pedestrian safety and drowning prevention, the Safe Kids Pima County coalition and TMC’s Desert Kids Safety Program provided free to the community in 2013-14:

- 2,700 booster seats
- 7,000 bicycle helmets
- 1,200 swim lessons
- 1,080 car seats

Outreach efforts are focused on areas that are medically and economically underserved. Although those areas are increasingly spread throughout the community, TMC conducts a significant amount of outreach in areas with a predominantly Hispanic population, including:

- Reaching more than 700 first graders at elementary schools such as Los Niños, Mission Manor and Cavett through Water Safety is for YOU!
- Providing booster seat and bike helmet education at three Head Start Centers
- Distributing more than 80 booster seats at La Fiesta de San Augustin in 2014
Tucson area Hispanics use a variety of health care specialists with Dentists and Eye Doctors (Ophthalmologist) the most common. In addition, Hispanics index higher than the general population in their response to health related advertising. Twenty seven percent of Hispanics in Tucson made an appointment to see a doctor after viewing a health care advertisement.

**Tucson Area Hispanics Provide a Growth Opportunity for Health Care Specialists**

<table>
<thead>
<tr>
<th>Health Care Specialists Used by Hispanics in the Past 12 Months</th>
<th>% of Hispanics</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dentist</td>
<td>40%</td>
<td>89</td>
</tr>
<tr>
<td>Eye doctor (ophthalmologist)</td>
<td>23%</td>
<td>86</td>
</tr>
<tr>
<td>Eye examiner (optometrist)</td>
<td>19%</td>
<td>93</td>
</tr>
<tr>
<td>Other specialist</td>
<td>18%</td>
<td>89</td>
</tr>
<tr>
<td>OB/GYN</td>
<td>17%</td>
<td>117</td>
</tr>
<tr>
<td>Cardiologist</td>
<td>10%</td>
<td>88</td>
</tr>
<tr>
<td>Physical therapist</td>
<td>8%</td>
<td>90</td>
</tr>
<tr>
<td>Skin doctor (dermatologist)</td>
<td>7%</td>
<td>44</td>
</tr>
<tr>
<td>Chiropractor</td>
<td>5%</td>
<td>65</td>
</tr>
<tr>
<td>Cosmetic surgeon</td>
<td>1%</td>
<td>70</td>
</tr>
</tbody>
</table>

Source: Scarborough, 2015 Release 1 (Feb 2016-Jan 2015) Tucson DMA. Adults 18+

**Tucson Area Hispanics Respond Positively to Health Related Advertising**

Actions Taken as a Result of a Health Ad in the Past 12 Months:

- **Asked Doctor to Prescribe a Specific Drug**
  - 11% Hispanic
  - 7% Non-Hispanic

- **Discussed Ad With a Friend or Relative**
  - 7% Hispanic
  - 6% Non-Hispanic

- **Made an Appointment to See a Doctor**
  - 27% Hispanic
  - 20% Non-Hispanic

Source: Scarborough, 2015 Release 1 (Feb 2016-Jan 2015) Tucson DMA. Adults 18+
**Tucson Area Hispanics Are More Likely to Use Many Medications**

Medications Purchased by Hispanics (18+) in the Past 12 Months

- Cold/Flu: 45% (Index: 104)
- Allergy: 40% (Index: 104)
- Blood Pressure: 21% (Index: 84)
- Children’s: 17% (Index: 127)
- Cholesterol: 11% (Index: 74)
- Diabetes: 10% (Index: 121)
- Digestive: 9% (Index: 72)

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

Tucson area Hispanics are more likely to use more cold/flu, allergy, children’s and diabetic medication than the general population. They are less likely to use blood pressure, cholesterol and digestive medication. In surveying the Hispanic population that is 18 years or older, Scarborough determined that most Hispanics in the Tucson area are in a PPO plan followed by Medicare.

**PPO is Preferred Provider Organization**

**Tucson Area Hispanics Are More Likely to Use a PPO Health Insurance Policy**

Type of Health Insurance Used by Adults (18+)

- PPO: 23% (Hispanic), 19% (Non-Hispanic)
- Medicare: 24% (Hispanic), 17% (Non-Hispanic)
- Other: 33% (Hispanic), 16% (Non-Hispanic)
- HMO: 17% (Hispanic), 12% (Non-Hispanic)
- Medicaid: 16% (Hispanic), 7% (Non-Hispanic)
- Military: 18% (Hispanic), 4% (Non-Hispanic)
- POS: 4% (Hispanic), 1% (Non-Hispanic)

Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+
Tucson Area Hispanics are less likely to have group insurance with a major provider. This creates an opportunity in the market. Individual health insurance is more prominent in the Hispanic population in the Tucson area. This may be led by a variety of factors which could include the rollout of the Affordable Care Act, small business owner individual policies or smaller employers not providing insurance and employees are required to take out individual policies.

### Tucson Area Hispanics Are Less Likely to Have Health Insurance Through a Major Provider

<table>
<thead>
<tr>
<th>Group/Individual Health Insurance Provider Used by Adults (18+)</th>
<th>Hispanic</th>
<th>Non-Hispanic</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Healthcare</td>
<td>24%</td>
<td>38%</td>
</tr>
<tr>
<td>Blue Cross/Blue Shield</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Health Net</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>CIGNA</td>
<td>4%</td>
<td>11%</td>
</tr>
<tr>
<td>Aetna</td>
<td>2%</td>
<td>7%</td>
</tr>
<tr>
<td>Aflac</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Other Provider</td>
<td>15%</td>
<td>24%</td>
</tr>
</tbody>
</table>

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

### Health Insurance Policies Among Tucson Area Hispanics Are On the Rise

<table>
<thead>
<tr>
<th>Year-to-Year Health Insurance Policy Growth Among Adults (18+)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any Health Insurance</td>
</tr>
<tr>
<td>Individual Health Insurance</td>
</tr>
<tr>
<td>Group Health Insurance</td>
</tr>
</tbody>
</table>

CareMore

CareMore (www.caremore.com) is a Medicare Advantage Health Plan that provides focused and innovative approaches to the complex problems of aging. The founding physicians created the basis for the company twenty years ago.

CareMore is also a community-focused healthcare delivery system that serves the community and our members by prolonging active and independent lives. Our CareMore Care Centers, in strategic locations within our coverage areas, serve as a physical manifestation of our Model of Care. Many of our Care Centers also have senior-focused gyms attached or adjacent to our clinic space. These are aptly named Nifty After Fifty (www.niftyafterfifty.com) locations.

We serve caregivers and families by providing support, education, and access to services. CareMore’s holistic approach to the wellness of our seniors also protects the precious financial resources of seniors and the Medicare program through innovative methods of managing chronic disease, frailty, and end of life.

CareMore’s outreach within the Hispanic Community includes a focus on educating and providing health and wellness information related to Medicare-eligible seniors in Arizona. We deliver knowledge via social and educational events, cooking demonstrations, exercise, and other health-related services. Our message is that we want to not only empower our communities, but give seniors the most important aspect of aging - DIGNITY.

Our services and outreach to the Hispanic Community have included local events and opportunities to educate diverse communities. We have worked with organizations such as the Tucson Hispanic Chamber, Marana Health Centers, El Rio Community Clinics/Centers, American Diabetes Association’s Step Out Walk, Better Breathers Clubs in partnership with the American Lung Association, El Pueblo Community Center, City of Tucson, City of South Tucson, and the Community Food Bank. CareMore has been a proud sponsor for Arizona Bilingual’s Back to School program, Grandparents’ Day at the Tucson Children’s Museum, and our signature community forums known as Mas Por Su Medicare in partnership with Unvisión and Pima Council On Aging (PCOA).

We are a company that is proud to give back and serve the Hispanic Community. Please consider us your community partner for all your endeavors now and in the future.
Radio and Broadcast Television continue to provide the greatest percentage of the Hispanic audience in the Tucson area. Though newspaper has seen a steady decline over the last several years, the use of internet to view media continues to grow providing an opportunity for online newspaper viewership. Telemundo captures the largest percentage of the Hispanic viewing audience (18 – 49 years of age) in the Tucson area as of May 2015.
Arizona Bilingual Newspaper

Arizona Bilingual connects with over 150,000 readers every month through 25,000 printed editions, Internet, Social Media and local community events.

Arizona Bilingual Newspaper focuses on outreach to our bilingual and Hispanic communities in Tucson, Southern Arizona and Sonora Mexico. In addition, over the last five years, the Newspaper has hosted a number of local community events focused on education, health, business, and community resources. The purpose is to embrace and develop new business in our communities and be a resource for all with reliable, truthful and accurate information.


Many Tucson Area Hispanics Speak Both Spanish and English

2014-2015 Language Strata % Among Hispanic TV Households

72% of Tucson Area Hispanics Are Bilingual


Tucson Area Spanish Language Television Viewers Prefer to Speak Spanish in the Home

Language Preference of Spanish Language Television Viewers

76% OF SPANISH-LANGUAGE TELEVISION VIEWERS IN TUCSON SPEAK SPANISH INSIDE THE HOME

40% OF THIS GROUP, MAKE ENGLISH THEIR LANGUAGE OF CHOICE OUTSIDE THE HOME

Spanish Considered, Only Spanish or Spanish More Than English


Spanish Language Stations Include: KHRR-TEL & KUVE –UNI (M-Su, 4a-2a)

English Considered, Only English or English More Than Spanish

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2014-2015 Language Strata % Among Hispanic TV Households

72% of Tucson Area Hispanics Are Bilingual


Tucson Area Spanish Language Television Viewers Prefer to Speak Spanish in the Home

Language Preference of Spanish Language Television Viewers

76% OF SPANISH-LANGUAGE TELEVISION VIEWERS IN TUCSON SPEAK SPANISH INSIDE THE HOME

40% OF THIS GROUP, MAKE ENGLISH THEIR LANGUAGE OF CHOICE OUTSIDE THE HOME

Spanish Considered, Only Spanish or Spanish More Than English


Spanish Language Stations Include: KHRR-TEL & KUVE –UNI (M-Su, 4a-2a)

English Considered, Only English or English More Than Spanish
Tucson area Hispanics are more likely to view local news on television whether morning, evening or late than the general population. This may indicate the importance of local Hispanic news anchors who can attract the Hispanic viewers. Hispanic viewers in the Tucson area utilize hard wired cable service slightly more than satellite service for viewing.
Though a majority of Spanish television viewers speak Spanish inside the home, Scarborough found that 40% make English their language of choice outside the home. The use of Spanish in advertising is a dilemma faced by businesses of all sizes. Almost 30% of Hispanics in the United States prefer to read Spanish on a company's website, and are more loyal to companies who advertise in Spanish.
**Tucson Area Hispanics Listen to a Broad Array of Music**

**Tucson Area Radio Station Ranker Among Hispanics (18+)**

<table>
<thead>
<tr>
<th>Station</th>
<th>Format</th>
<th>Top 40</th>
<th>Hip Hop</th>
<th>Adult Contemporary</th>
<th>Mexican Regional</th>
<th>Classic Rock</th>
<th>Modern Rock</th>
<th>Country</th>
<th>Hip Hop</th>
<th>Classic Rock</th>
<th>Adult Contemporary</th>
<th>Mexican Regional</th>
<th>Classic R&amp;B</th>
</tr>
</thead>
<tbody>
<tr>
<td>KRGQ</td>
<td>Top 40</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>KCMG</td>
<td>Hip Hop</td>
<td></td>
<td>14%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>KMXZ</td>
<td>Adult Contemporary</td>
<td>14%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>KCMA</td>
<td>Mexican Regional</td>
<td>13%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>KHTA</td>
<td>Classic Rock</td>
<td>12%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>KPRM</td>
<td>Modern Rock</td>
<td>11%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>KMBM</td>
<td>Country</td>
<td>11%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>KSZR</td>
<td>Hip Hop</td>
<td>11%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>KJFX</td>
<td>Classic Rock</td>
<td>9%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>KMBY</td>
<td>Adult Contemporary</td>
<td>8%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>KZIZ</td>
<td>Mexican Regional</td>
<td>8%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>KTGV</td>
<td>Classic R&amp;B</td>
<td>8%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>


**Newspaper Usage Remains Strong Among Tucson Area Hispanics**

**Arizona Daily Star**

<table>
<thead>
<tr>
<th></th>
<th>Daily</th>
<th>Sunday</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Hispanic</td>
<td>37%</td>
<td>48%</td>
</tr>
<tr>
<td>Non-Hispanic</td>
<td>26%</td>
<td>37%</td>
</tr>
</tbody>
</table>

**Share of Hispanics (18+) Who Have Read Arizona Daily Star Print Edition in the Past 12 Months**

**Share of Hispanics (18+) Who Have Read Non-Daily Newspapers (Print Edition) in the Past 6 Months**

<table>
<thead>
<tr>
<th>Newspaper</th>
<th>Weekly</th>
<th>La Estrella de Tucson</th>
<th>Dandy Dime</th>
<th>El Grito</th>
<th>Pre-Dorado</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tucson Weekly</td>
<td>19%</td>
<td>18%</td>
<td>12%</td>
<td>12%</td>
<td>7%</td>
</tr>
<tr>
<td>La Estrella de Tucson</td>
<td>18%</td>
<td>12%</td>
<td>12%</td>
<td>7%</td>
<td></td>
</tr>
</tbody>
</table>

In the 2000’s, Birth rate rather than Immigration attributed to the fast growing Hispanic population in the United States. Similarly in Southern Arizona, Hispanics account for a large portion of all live births. In 2013, there were over 6600 live births in Pima, Cochise and Santa Cruz counties accounting for 47% of all live births.
The Hispanic community in the U.S. has made positive strides in education over the last decade. Most notably, high school drop out rates have dropped dramatically from 32% to 14% among Hispanics age 18-34 over the last 13 years. College enrollment figures nationally have grown though completion rates for Hispanic continue to lag the general population. Nearly half of all Hispanics in the Tucson area have enrolled in some college courses. The University of Arizona, Pima and Cochise Community Colleges continue to work on programs to assist students in completing their degrees.

The **Tucson Area** Hispanic Dropout Rate in Some Counties is Below the State Average

The pursuit of a college education is important to U.S. Hispanics. Five facts about U.S. Hispanics and education:

1. **Hispanic Dropout Rates Have Dropped Considerably**
   - Has dropped from 32% in 2000 to just 14% in 2013 among Hispanics 18-24.

2. **College Enrollment Among Hispanics is Growing**
   - Since 1993, enrollment at two- or four-year college up 20% among Hispanics 18-24.

3. **Hispanics Are Behind in Obtaining 4-Year Degrees**
   - In 2013, only 15% of Hispanics 25-29 received a 4-year degree compared to 40% for Whites.

4. **Hispanics Are More Likely to Attend a 2-Year Public College**
   - In 2013, nearly half (46%) of all Hispanic college students attended a 2-year public college.

5. **Hispanics Are Less Likely to Have Student Loan Debt**
   - Only 22% of Hispanic households have education loans, compared to 42% for White households.

Source: Pew Research Center, Five Facts About Latinos and Education (May 24, 2015)

Source: Arizona Department of Education, Dropout Rate Study Report

The **Tucson Area** Hispanic Dropout Rate in Some Counties is Below the State Average

Dropout Rate Trends Among Hispanics in the Tucson Area (by County)

- **Arizona**
- **Cochise**
- **Pima**
- **Santa Cruz**

Source: Arizona Department of Education, Dropout Rate Study Report
Santa Cruz and Cochise Counties have done a remarkable job in lessening Hispanic high school dropout rates. Both Counties rates are less than the national average. More than 35,000 plan to seek higher education over the next twelve months as reported by Scarborough. This creates a market opportunity for public and private universities and colleges in Southern Arizona.
Tucson area Hispanics 18 and older are more likely than the general population to be going back to school over the next twelve months. This data in combination with the propensity for online learning in the Hispanic community provide a market opportunity for our educational institutions like the University of Arizona, Arizona State University and other colleges which continue to grow their online course offerings.
The racial composition of our high schools is thoroughly studied and debated within the community, especially with our largest school district in Tucson, TUSD being a minority-majority district. The Tucson Hispanic Chamber’s Latino Education committee looks closely at the data on the Hispanic student body at each of the school districts and the Hispanic graduation rate. The chamber’s committee works closely with organizations such as Expect More Arizona, A for Arizona and grass roots efforts that will assist in lessening high school dropout rates and creating role models for our student population in Southern Arizona.

Many **Tucson Area** Hispanics Plan on Extending Their Education

Hispanics (18+) Who Plan on Going Back to School in the Next 12 Months

![Pie chart showing the percentage of Hispanic and Non-Hispanic adults planning to go back to school in the next 12 months.](chart.png)

Non-Hispanic; 62%

Hispanic; 38%

That Translates Into **35,811** Hispanics Who Plan on Going Back to School in the Next 12 Months.

**Tucson Area Hispanics Are More Likely to Continue Their Education**

Hispanics (18+) Who Plan on Going Back to School in the Next 12 Months

**Index: 117**

Non-Hispanic Index: 92

Hispanics (18+) Are More Likely Than Non-Hispanics to Be Planning on Going Back to School in the Next 12 Months.


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**Tucson Area Hispanics Are More Likely to Take an Online College Course**

Share Trends Among Hispanics (18+) Who Have Taken an Online College Course in the Past 30 Days

Hispanics (18+) Are Above the Market Average When It Comes to Taking an Online College Course in the Past 30 Days.

A for Arizona

A for Arizona’s goal is to see rapid expansion in the number of ‘A’-schools serving low-income students in the state. Arizona has created a strong public school choice environment and many excellent examples of highly achieving schools and systems. But we have not yet seen a rapid rate of gain in achievement, particularly in schools serving low-income and Hispanic students.

In order to understand what the best public schools in Arizona need in order to expand their impact, our first priority has been familiarizing ourselves with Arizona’s low-income ‘A’-school leaders. The highest density of low-income “A” schools are in the predominantly Hispanic schools of Southern Arizona, especially rural communities and along the international border.

Since 2014, we have met quarterly with roughly 100 district and charter ‘A’-school leaders. Based on these conversations, we know that Arizona can be the national leader in achievement gains and a proliferation of new or expanded, high-quality public schools serving low-income and Hispanic students. Thankfully, two major state initiatives are now aimed directly at this goal: Arizona’s Public Schools Achievement District and the design of an efficient student-centered funding formula via the Governor’s Classrooms First Council.

The heart and soul of A for Arizona’s work is to recognize, support, and accelerate the impact of our state’s low-income ‘A’ public schools. This work affects not only the quality of life and economic potential of their students but also directly improves the long-term economic viability of our state and affected communities.

---

### Hispanics Are Very Prominent at Tucson Area Colleges and Universities

**Share of Hispanics Enrolled at Tucson Area Universities and Colleges (Fall 2013)**

<table>
<thead>
<tr>
<th>University/College</th>
<th>Under Grad Enrollment</th>
<th>% Hispanic</th>
<th>Hispanic Graduation Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of Arizona</td>
<td>31,670</td>
<td>24%</td>
<td>54%*</td>
</tr>
<tr>
<td>Pima Community College</td>
<td>30,082</td>
<td>40%</td>
<td>10%†</td>
</tr>
<tr>
<td>Cochise College</td>
<td>4,453</td>
<td>42%</td>
<td>22%‡</td>
</tr>
</tbody>
</table>

*Graduation Rate based on students who began their studies in Fall 2008 †Graduation Rate based on students who began their studies in Fall 2011

Source: National Center of Education Statistics: College Navigator

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PAGE 34 • HISPANIC MARKET OUTLOOK
## Graduation Rates Among Tucson Area Hispanics Remains Strong

Graduation/ Dropout Rates Among Tucson Area School Districts (2013)

<table>
<thead>
<tr>
<th>School District</th>
<th>Subgroup</th>
<th>Number in Cohort</th>
<th>Number Graduated</th>
<th>Percent Graduated</th>
<th>Dropout Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tucson Unified District</td>
<td>All</td>
<td>3,227</td>
<td>2,571</td>
<td>79.7</td>
<td>2.3</td>
</tr>
<tr>
<td></td>
<td>Hispanic or Latina</td>
<td>1,696</td>
<td>1,299</td>
<td>76.6</td>
<td>2.4</td>
</tr>
<tr>
<td>Amphitheater Unified District</td>
<td>All</td>
<td>1,152</td>
<td>994</td>
<td>86.3</td>
<td>2.6</td>
</tr>
<tr>
<td></td>
<td>Hispanic or Latina</td>
<td>369</td>
<td>308</td>
<td>82.5</td>
<td>3.8</td>
</tr>
<tr>
<td>Sunnyside Unified District</td>
<td>All</td>
<td>1,035</td>
<td>724</td>
<td>70.0</td>
<td>4.4</td>
</tr>
<tr>
<td></td>
<td>Hispanic or Latina</td>
<td>911</td>
<td>637</td>
<td>69.9</td>
<td>4.4</td>
</tr>
<tr>
<td>Sierra Vista Unified District</td>
<td>All</td>
<td>492</td>
<td>400</td>
<td>81.3</td>
<td>1.5</td>
</tr>
<tr>
<td></td>
<td>Hispanic or Latina</td>
<td>131</td>
<td>108</td>
<td>82.4</td>
<td>1.7</td>
</tr>
<tr>
<td>Nogales Unified District</td>
<td>All</td>
<td>412</td>
<td>354</td>
<td>85.9</td>
<td>1.7</td>
</tr>
<tr>
<td></td>
<td>Hispanic or Latina</td>
<td>403</td>
<td>347</td>
<td>86.1</td>
<td>1.7</td>
</tr>
<tr>
<td>Flowing Wells Unified District</td>
<td>All</td>
<td>379</td>
<td>312</td>
<td>82.3</td>
<td>3.4</td>
</tr>
<tr>
<td></td>
<td>Hispanic or Latina</td>
<td>209</td>
<td>165</td>
<td>78.9</td>
<td>3.3</td>
</tr>
<tr>
<td>Catalina Foothills Unified District</td>
<td>All</td>
<td>382</td>
<td>350</td>
<td>91.6</td>
<td>0.5</td>
</tr>
<tr>
<td></td>
<td>Hispanic or Latina</td>
<td>72</td>
<td>65</td>
<td>90.3</td>
<td>0.4</td>
</tr>
<tr>
<td>Douglas Unified District</td>
<td>All</td>
<td>308</td>
<td>242</td>
<td>78.6</td>
<td>1.8</td>
</tr>
<tr>
<td></td>
<td>Hispanic or Latina</td>
<td>295</td>
<td>231</td>
<td>78.3</td>
<td>1.9</td>
</tr>
</tbody>
</table>

Source: Arizona Department of Education
Tucson area Hispanics spend more weekly on average on groceries than the general population. This may occur due to a number of factors including the larger average size of the Hispanic household. As stated previously in this report, Hispanic households index higher for children age 2 – 17 years of age.

**Tucson Area Hispanics Represent a Significant Share of Grocery Shoppers**

Hispanics (18+) Whose Households Have Shopped for Groceries in the Past 7 Days

Non-Hispanic: 67%
Hispanic: 33%

That Translates Into **292,264** Hispanics Whose Households Have Shopped for Groceries in the Past 7 Days.


**Tucson Area Hispanics Are Likely to Pay More For Their Weekly Groceries**

Average Amount Hispanic (18+) Households Spent on Groceries in the Past 7 Days

$141.27
Non-Hispanic: $127.06

Hispanic (18+) Households Spend More Money Per Week on Groceries Than Non-Hispanic Households.

**Grocery Stores Compete for Business Among Tucson Area Hispanics**

**Grocery Stores Shopped by Hispanic (18+) Households in the Past 7 Days**

<table>
<thead>
<tr>
<th>Grocery Store</th>
<th>% of Hispanics</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fry’s</td>
<td>58%</td>
<td>98</td>
</tr>
<tr>
<td>Walmart Supercenter</td>
<td>52%</td>
<td>117</td>
</tr>
<tr>
<td>Food City</td>
<td>40%</td>
<td>201</td>
</tr>
<tr>
<td>Costco</td>
<td>30%</td>
<td>94</td>
</tr>
<tr>
<td>Safeway</td>
<td>30%</td>
<td>80</td>
</tr>
<tr>
<td>Walmart Neighborhood Market</td>
<td>25%</td>
<td>115</td>
</tr>
<tr>
<td>El Super</td>
<td>17%</td>
<td>237</td>
</tr>
<tr>
<td>Albertsons</td>
<td>15%</td>
<td>94</td>
</tr>
<tr>
<td>Sprouts</td>
<td>8%</td>
<td>97</td>
</tr>
<tr>
<td>Target/Super Target</td>
<td>7%</td>
<td>53</td>
</tr>
<tr>
<td>Trader Joe’s</td>
<td>7%</td>
<td>53</td>
</tr>
<tr>
<td>Bashas’</td>
<td>7%</td>
<td>96</td>
</tr>
<tr>
<td>Sam’s Club</td>
<td>5%</td>
<td>89</td>
</tr>
<tr>
<td>Whole Foods Market</td>
<td>2%</td>
<td>43</td>
</tr>
<tr>
<td>AJ’s Fine Foods</td>
<td>2%</td>
<td>50</td>
</tr>
</tbody>
</table>


**Tucson Area Hispanics Spent Millions on Basic Food Items in the Past Year**

**Estimated Amount Hispanics Spent on Basic Food Items in 2014**

- **Meat, Eggs & Poultry**: $168,000,000 (37% of Total Category)
- **Bakery Products**: $77,000,000 (29% of Total Category)
- **Fruits & Vegetables**: $123,000,000 (33% of Total Category)
- **Dairy Products**: $68,000,000 (31% of Total Category)

**Tucson Area Hispanics are responsible for nearly one third of the dollars spent on basic food items in 2014!**

Source: IHS Global Insight 2015 Hispanic Market Monitor - Tucson DMA.
**Tucson Area Hispanics Are More Likely to Purchase Many Food Items**

Food Products Used by Hispanic (18+) Households in the Past 7 Days

<table>
<thead>
<tr>
<th>Food Product Purchased</th>
<th>% of Hispanics</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coffee</td>
<td>68%</td>
<td>107</td>
</tr>
<tr>
<td>Fresh meat</td>
<td>68%</td>
<td>102</td>
</tr>
<tr>
<td>Tortilla</td>
<td>67%</td>
<td>106</td>
</tr>
<tr>
<td>Packaged meat (bacon, hot dogs, lunch meat, etc.)</td>
<td>64%</td>
<td>106</td>
</tr>
<tr>
<td>Ice cream, frozen juice bars, frozen yogurt</td>
<td>48%</td>
<td>97</td>
</tr>
<tr>
<td>Candy</td>
<td>47%</td>
<td>105</td>
</tr>
<tr>
<td>Ready-to-eat cereal</td>
<td>44%</td>
<td>92</td>
</tr>
<tr>
<td>Pretzels, chips, popcorn</td>
<td>43%</td>
<td>90</td>
</tr>
<tr>
<td>Yogurt (not frozen)</td>
<td>39%</td>
<td>94</td>
</tr>
<tr>
<td>Soup (canned or dry mix)</td>
<td>37%</td>
<td>93</td>
</tr>
<tr>
<td>Any store brand food</td>
<td>35%</td>
<td>99</td>
</tr>
<tr>
<td>Nuts</td>
<td>33%</td>
<td>84</td>
</tr>
<tr>
<td>Salsa</td>
<td>32%</td>
<td>85</td>
</tr>
<tr>
<td>Prepared foods (chicken, salad bars, sandwiches, etc.)</td>
<td>30%</td>
<td>105</td>
</tr>
<tr>
<td>Frozen pizza</td>
<td>16%</td>
<td>79</td>
</tr>
<tr>
<td>Energy bars / nutrition bars</td>
<td>15%</td>
<td>105</td>
</tr>
<tr>
<td>Baby food</td>
<td>4%</td>
<td>102</td>
</tr>
</tbody>
</table>


---

**Many Beverages Are More Likely to be Consumed by Tucson Area Hispanics**

Beverages Drank by Hispanics (18+) in the Past 7 Days

<table>
<thead>
<tr>
<th>Beverages Drank</th>
<th>% of Hispanics</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular Soda</td>
<td>61%</td>
<td>115</td>
</tr>
<tr>
<td>Bottled Water</td>
<td>58%</td>
<td>108</td>
</tr>
<tr>
<td>Bottled / Canned Tea</td>
<td>42%</td>
<td>156</td>
</tr>
<tr>
<td>Orange Juice</td>
<td>36%</td>
<td>113</td>
</tr>
<tr>
<td>Fruit Juice</td>
<td>36%</td>
<td>124</td>
</tr>
<tr>
<td>Sports Drinks</td>
<td>33%</td>
<td>138</td>
</tr>
<tr>
<td>Diet Soda</td>
<td>30%</td>
<td>94</td>
</tr>
<tr>
<td>Energy Drinks</td>
<td>10%</td>
<td>97</td>
</tr>
</tbody>
</table>

In Pima County, Hispanics age 18 to 54 encompass the majority of Hispanic grocery shoppers in the last seven days. Thirty nine percent have an income of less than $35,000. Fry’s food stores dominate the market share for grocery stores serving the Hispanic community in Pima County.

In Santa Cruz County, Hispanics age 35 to 54 encompass the majority of Hispanic grocery shoppers in the last seven days. Fifty seven percent have an income of less than $35,000. The Walmart Super Center dominates the market share for grocery stores serving the Hispanic community in Santa Cruz County.

In Cochise County, Hispanics age 18 to 34 encompass the majority of Hispanic grocery shoppers in the last seven days. Forty four percent have an income of less than $35,000. The Walmart Super Center dominates the market share for grocery stores serving the Hispanic community in Cochise County.
**Tucson Area** Hispanics Represent Over One Third of Fast Food Diners

Adults (18+) Who Have Dined at Any Fast Food Restaurant in the Past 30 Days

- Non-Hispanic, 65%
- Hispanic, 35%

That Translates Into 267,764 Hispanics Who Have Dined at Any Fast Food Restaurant in the Past 30 Days.


---

**Fast Food is Popular Throughout the Day for Tucson Area Hispanics**

Share of Hispanics (18+) Who Have Dined at Any Fast Food Restaurant in the Past 30 Days

- **Breakfast**: 35%
- **Lunch**: 65%
- **Dinner**: 64%

Hispanics (18+) Are Over the Market Average When it Comes to Eating Fast Food for Breakfast, Lunch & Dinner!

**Tucson Area** Hispanics Are More Likely to Use Fast Food Restaurants

Fast Food Restaurants Used by Hispanics (18+) in the Past 30 Days

<table>
<thead>
<tr>
<th>Fast Food Restaurants Visited</th>
<th>% of Hispanics</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>McDonald’s</td>
<td>50%</td>
<td>130</td>
</tr>
<tr>
<td>Little Caesars</td>
<td>31%</td>
<td>189</td>
</tr>
<tr>
<td>Jack in the Box</td>
<td>28%</td>
<td>153</td>
</tr>
<tr>
<td>Burger King</td>
<td>27%</td>
<td>136</td>
</tr>
<tr>
<td>Eggee’s</td>
<td>26%</td>
<td>114</td>
</tr>
<tr>
<td>Carl’s Jr.</td>
<td>25%</td>
<td>142</td>
</tr>
<tr>
<td>Subway</td>
<td>24%</td>
<td>101</td>
</tr>
<tr>
<td>Toco Bell</td>
<td>22%</td>
<td>114</td>
</tr>
<tr>
<td>In-N-Out Burger</td>
<td>19%</td>
<td>111</td>
</tr>
<tr>
<td>Starbucks</td>
<td>18%</td>
<td>133</td>
</tr>
<tr>
<td>Peter Piper Pizza</td>
<td>18%</td>
<td>186</td>
</tr>
<tr>
<td>Wendy’s</td>
<td>16%</td>
<td>131</td>
</tr>
</tbody>
</table>


**Tucson Area** Hispanics Are Frequent Users of Fast Food Restaurants

Number of Times Hispanics (18+) Have Used Fast Food Restaurants in the Past 30 Days

<table>
<thead>
<tr>
<th></th>
<th>1 or 2 Times</th>
<th>3 or 4 Times</th>
<th>5 to 9 Times</th>
<th>10 or More Times</th>
</tr>
</thead>
<tbody>
<tr>
<td>Index</td>
<td>96</td>
<td>112</td>
<td>90</td>
<td>132</td>
</tr>
</tbody>
</table>

Hispanics (18+) Are 32% Above the Market Average When it Comes to Using a Fast Food Restaurant 10 or More Times in the Past 30 Days.

Area banks and credit unions have an opportunity in reaching the unbanked Hispanic community in the Tucson area. More than 31,000 Hispanic households in the Tucson area currently do not use a bank or credit union.

Hispanic outreach efforts in the Tucson area by Chase and Wells Fargo have successfully provided them with the highest market share by Hispanic households. Interestingly, Hispanic households index higher with the Tucson area credit unions overall.”

**Tucson Area Hispanics Represent One Third of Households That Use a Bank or Credit Union**

Adults (18+) Whose Households Use a Bank or Credit Union

- Non-Hispanic: 68.2%
- Hispanic: 31.2%

That Translates Into 265,014 Hispanics Whose Households Use a Bank or Credit Union.

**Many Tucson Area Hispanics Are in Need of Banking Services**

Share of Hispanics (18+) Whose Households Do Not Use a Bank or Credit Union

11%

Index: 139

That Translates Into 31,787 Hispanics Whose Households Do Not Use a Bank or Credit Union.

**Vantage West Credit Union**

It’s no secret the Hispanic population is making a growing impact on the U.S., from culture and arts, to business and sports. In Arizona and beyond, the business community is taking notice of this growing and significant market.

At Vantage West, we are committed to continuous learning and understanding how we can best meet the expectations of all our members. With more than thirty percent of the population in Arizona being Hispanic, Arizona-based Vantage West Credit Union recognizes that delivering the best member service means serving members according to their preferences. This includes taking both language and culture into consideration in order to make for the best member experience.

We rely on research from important sources like Hispanic Market Outlook to help us keep up to speed on important findings that ultimately guide our efforts to strengthen our continuing service and outreach to our Hispanic Community.

We stand by our commitment to the Hispanic market and are proud of the great strides we have made. Our efforts have not gone unrecognized.

In fact, Vantage West recently earned an industry designation, which is given to credit unions that have demonstrated a commitment to serving the Hispanic segment through culturally relevant interaction, as well as offering a choice of language preference.

On Sept. 22, Vantage West will be the first credit union in Arizona to raise a flag that symbolizes its newly awarded Juntos Avanzamos designation. This award serves as a point of pride for Vantage West and also reinforces the importance of embracing the rich Hispanic culture in Arizona.

---

**Nationally Recognized Banks Are Popular With Tucson Area Hispanics**

<table>
<thead>
<tr>
<th>Banks/Credit Unions Used</th>
<th>% of Hispanics</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chase</td>
<td>32%</td>
<td>100</td>
</tr>
<tr>
<td>Wells Fargo</td>
<td>31%</td>
<td>98</td>
</tr>
<tr>
<td>Bank of America</td>
<td>24%</td>
<td>90</td>
</tr>
<tr>
<td>Vantage West Credit Union</td>
<td>15%</td>
<td>115</td>
</tr>
<tr>
<td>Pima Federal Credit Union</td>
<td>9%</td>
<td>133</td>
</tr>
<tr>
<td>Tucson Federal Credit Union</td>
<td>8%</td>
<td>114</td>
</tr>
<tr>
<td>Other credit union</td>
<td>7%</td>
<td>56</td>
</tr>
<tr>
<td>Hughes Federal Credit Union</td>
<td>6%</td>
<td>83</td>
</tr>
<tr>
<td>Other bank</td>
<td>5%</td>
<td>73</td>
</tr>
<tr>
<td>Pyramid Federal Credit Union</td>
<td>4%</td>
<td>107</td>
</tr>
<tr>
<td>Bank of Tucson</td>
<td>3%</td>
<td>228</td>
</tr>
<tr>
<td>BBVA Compass</td>
<td>3%</td>
<td>53</td>
</tr>
</tbody>
</table>


---

**Many Tucson Area Hispanics Take Advantage of Financial Services**

<table>
<thead>
<tr>
<th>Financial Services Used</th>
<th>% of Hispanics</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checking account</td>
<td>68%</td>
<td>85</td>
</tr>
<tr>
<td>Savings account</td>
<td>60%</td>
<td>90</td>
</tr>
<tr>
<td>Debit or ATM card</td>
<td>57%</td>
<td>84</td>
</tr>
<tr>
<td>Online bill paying</td>
<td>25%</td>
<td>74</td>
</tr>
<tr>
<td>Online banking</td>
<td>24%</td>
<td>69</td>
</tr>
<tr>
<td>Home mortgage</td>
<td>21%</td>
<td>77</td>
</tr>
<tr>
<td>Auto loan</td>
<td>14%</td>
<td>71</td>
</tr>
<tr>
<td>Personal loan</td>
<td>11%</td>
<td>149</td>
</tr>
<tr>
<td>Student loan</td>
<td>10%</td>
<td>95</td>
</tr>
<tr>
<td>Home improvement or home equity loan</td>
<td>4%</td>
<td>55</td>
</tr>
<tr>
<td>Money market account</td>
<td>4%</td>
<td>33</td>
</tr>
<tr>
<td>Refinanced home mortgage</td>
<td>3%</td>
<td>41</td>
</tr>
</tbody>
</table>

**Wireless Telephone**

**Tucson Area Hispanics Spend Millions on Their Wireless Telephone Service**

Estimated amount Tucson Area Hispanics (18+) spent on Wireless Telephone Service in the past month

$22,797,968

That’s 34% of the Total Wireless Telephone Spending Category!


---

**Tucson Area Hispanics Choose From Many Wireless/Cell Phone Providers**

Wireless/Cell Phone Providers Used by Hispanics (18+)

<table>
<thead>
<tr>
<th>Wireless Telephone Providers Used</th>
<th>% Hispanics</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>T-Mobile</td>
<td>21%</td>
<td>156</td>
</tr>
<tr>
<td>Verizon Wireless</td>
<td>21%</td>
<td>66</td>
</tr>
<tr>
<td>Cricket</td>
<td>16%</td>
<td>192</td>
</tr>
<tr>
<td>Other carrier</td>
<td>12%</td>
<td>104</td>
</tr>
<tr>
<td>Sprint</td>
<td>11%</td>
<td>106</td>
</tr>
<tr>
<td>AT&amp;T</td>
<td>6%</td>
<td>73</td>
</tr>
<tr>
<td>TracFone</td>
<td>2%</td>
<td>44</td>
</tr>
<tr>
<td>Straight Talk</td>
<td>1%</td>
<td>75</td>
</tr>
<tr>
<td>Boost Mobile</td>
<td>1%</td>
<td>166</td>
</tr>
</tbody>
</table>

Tucson area Hispanics are more likely to use a smartphone than the general population. This is important information for our business community who are focusing on mobile friendly websites and applications for iPhone and androids.

**Tucson Area Hispanics Represent One Third of All Wireless/Cell Phone Users**

Adults (18+) Who Use a Wireless/Cell Phone Service

- Non-Hispanic, 68%
- Hispanic, 32%

That Translates Into **266,582** Hispanics Who Use a Wireless/Cell Phone Service!


**Tucson Area Hispanics Are More Likely to Use a Smartphone**

Wireless/Cell Phone Brand Used by Hispanics (18+)

- Apple/iPhone: 27% (Index: 109)
- Samsung: 26% (Index: 101)
- LG: 15% (Index: 102)
- Blackberry (RIM): 4% (Index: 299)
- Motorola: 2% (Index: 41)

Hispanics (18+) That Currently Use a Smartphone

Index: **106**

- Non-Hispanic: 97

Marketing a product or service via text message is an underutilized advertising tool by most businesses. Tucson area Hispanics are more likely to send multiple text messages and spend more on their monthly cell phone bills. One factor may be the likelihood for Hispanic households to add additional services to call and text Mexico which is an additional fee by most carriers.

**Text Messaging is Very Popular Among Tucson Area Hispanics**

Number of Texts Hispanics (18+) Sent Yesterday

<table>
<thead>
<tr>
<th>Number of Texts</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-9 texts</td>
<td>102</td>
</tr>
<tr>
<td>10-19 texts</td>
<td>120</td>
</tr>
<tr>
<td>20-29 texts</td>
<td>117</td>
</tr>
<tr>
<td>30-49 texts</td>
<td>121</td>
</tr>
<tr>
<td>50 texts or More</td>
<td>143</td>
</tr>
</tbody>
</table>

Hispanics (18+) Are 43% Above the Market Average When it Comes to Sending **50 Texts or More** Yesterday.

**Tucson Area Hispanics Pay More For Their Wireless Telephone Service**

Average Amount Hispanic (18+) Households Spent on Wireless/Cell Phone Bill Last Month

- Hispanic (18+) Households: $85.52
- Non-Hispanic: $78.58

Hispanic (18+) Households Spend More on Their Wireless/Cell Phone Bill Than Non-Hispanics.
Hispanics in the Tucson area spend more in nearly every clothing category than the general population. Data contained in this report indicated that the Hispanic population focuses on a healthy image which likely would influence purchases of clothing and footwear items. In addition, a factor may be the larger average size of the Hispanic household in the Tucson area.

**Tucson Area Hispanics Spend Millions on Clothing and Footwear**

Estimated Amount Spent on Clothing & Footwear in 2014

$406,000,000

That’s 36% of the Total Clothing & Footwear Spending Category!

Source: IHS Global Insight 2015 Hispanic Market Monitor Tucson DMA

---

**Tucson Area Hispanics Spend More on Clothing and Footwear**

Amount Spent per Household on Clothing & Footwear in 2014

- **Men & Boys**: $821 (25% more spending)
  - Hispanic: $656
  - Non-Hispanic: $722
- **Women & Girls**: $1,260 (11% more spending)
  - Hispanic: $1,138
  - Non-Hispanic: $1,046
- **Children Under 2**: $180 (41% more spending)
  - Hispanic: $128
  - Non-Hispanic: $90
- **Footwear**: $670 (39% more spending)
  - Hispanic: $482
  - Non-Hispanic: $340

Source: IHS Global Insight 2015 Hispanic Market Monitor Tucson DMA
### Tucson Area Hispanics Have Many Shopping Malls to Choose From

Malls Shopped/Visited by Hispanics (18+) in the Past 3 Months

<table>
<thead>
<tr>
<th>Malls Shopped or Visited</th>
<th>% of Hispanics</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tucson Mall</td>
<td>54%</td>
<td>119</td>
</tr>
<tr>
<td>Park Place</td>
<td>39%</td>
<td>113</td>
</tr>
<tr>
<td>El Con Mall</td>
<td>37%</td>
<td>116</td>
</tr>
<tr>
<td>Foothills Mall</td>
<td>25%</td>
<td>96</td>
</tr>
<tr>
<td>Tucson Spectrum</td>
<td>24%</td>
<td>162</td>
</tr>
<tr>
<td>Other shopping center or area</td>
<td>18%</td>
<td>89</td>
</tr>
<tr>
<td>VF Outlet</td>
<td>12%</td>
<td>195</td>
</tr>
<tr>
<td>La Encantada</td>
<td>11%</td>
<td>68</td>
</tr>
<tr>
<td>Arizona Mills</td>
<td>9%</td>
<td>148</td>
</tr>
<tr>
<td>The Mall at Sierra Vista</td>
<td>7%</td>
<td>111</td>
</tr>
<tr>
<td>Crossroads Festival</td>
<td>5%</td>
<td>61</td>
</tr>
<tr>
<td>Oro Valley Marketplace</td>
<td>5%</td>
<td>56</td>
</tr>
<tr>
<td>Casas Adobes Plaza</td>
<td>4%</td>
<td>102</td>
</tr>
<tr>
<td>St. Philip’s Plaza</td>
<td>3%</td>
<td>74</td>
</tr>
</tbody>
</table>

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

### Tucson Area Hispanics Are More Likely to Shop at Many Clothing Stores

Clothing Stores Shopped/Visited by Hispanics (18+) in the Past 3 Months

<table>
<thead>
<tr>
<th>Clothing Stores Shopped or Visited</th>
<th>% of Hispanics</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walmart</td>
<td>56%</td>
<td>117</td>
</tr>
<tr>
<td>Ross Dress For Less</td>
<td>31%</td>
<td>141</td>
</tr>
<tr>
<td>Target</td>
<td>31%</td>
<td>103</td>
</tr>
<tr>
<td>JCPenney</td>
<td>25%</td>
<td>133</td>
</tr>
<tr>
<td>Burlington Coat Factory</td>
<td>19%</td>
<td>227</td>
</tr>
<tr>
<td>Sears</td>
<td>18%</td>
<td>161</td>
</tr>
<tr>
<td>Kmart</td>
<td>18%</td>
<td>155</td>
</tr>
<tr>
<td>Old Navy</td>
<td>16%</td>
<td>146</td>
</tr>
<tr>
<td>Victoria’s Secret</td>
<td>16%</td>
<td>149</td>
</tr>
<tr>
<td>Dillard’s</td>
<td>14%</td>
<td>103</td>
</tr>
<tr>
<td>Forever 21</td>
<td>13%</td>
<td>192</td>
</tr>
<tr>
<td>Kohl’s</td>
<td>12%</td>
<td>63</td>
</tr>
</tbody>
</table>

Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+
**Tucson Area Hispanics Spent Millions on Entertainment in the Past Year**

Estimated amount Tucson Area Hispanics (18+) Spent on Entertainment in 2014

$380,000,000

That’s 18% of the Total Entertainment Spending Category!

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

---

**Tucson Area Hispanics Are More Likely to See a Movie on Opening Weekend**

When Tucson Area Adults (18+) Saw a New Movie in the Past 12 Months

- **Opening Weekend**
  - Hispanic: 17%
  - Non-Hispanic: 5%

- **Within First Two Weeks**
  - Hispanic: 24%
  - Non-Hispanic: 27%

- **After Two Weeks**
  - Hispanic: 21%
  - Non-Hispanic: 24%

Hispanics (18+) Are More Likely Than Non-Hispanics to See a New Movie on the Opening Weekend of Its Release

Tucson area Hispanics are heavy movie viewers and indexed much higher than the general population in viewing more than 4 movies at the movie theatres over the last three months. Interestingly, Hispanics in the Tucson area are more likely to attend a new movie on opening weekend than the general population. Advertising in movie theatres may be a good avenue for many industries reaching the Hispanic market in Tucson.

**Tucson Area Hispanics Are Frequently Going to the Movies**

Number of Times Tucson Area Adults (18+) Went to the Movies in the Past 3 Months

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Hispanic Index</th>
<th>Non-Hispanic Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Time</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>2 Times</td>
<td>15%</td>
<td>6%</td>
</tr>
<tr>
<td>3 Times</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>4+ Times</td>
<td>10%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Hispanics (18+) Are Above the Market Average When it Comes to Going to the Movies 4 Times or More in the Past 3 Months.


**Tucson Area Hispanics Occupy Their Time With Many Leisure Activities**

Leisure Activities Done by Hispanics (18+) in the Past 12 Months

<table>
<thead>
<tr>
<th>Leisure Activities Done</th>
<th>% of Hispanics</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gardening (flowers or vegetables)</td>
<td>38%</td>
<td>89</td>
</tr>
<tr>
<td>Jogging • running</td>
<td>31%</td>
<td>130</td>
</tr>
<tr>
<td>Lawn care</td>
<td>30%</td>
<td>94</td>
</tr>
<tr>
<td>Swimming</td>
<td>30%</td>
<td>91</td>
</tr>
<tr>
<td>Bicycling</td>
<td>20%</td>
<td>83</td>
</tr>
<tr>
<td>Basketball</td>
<td>18%</td>
<td>153</td>
</tr>
<tr>
<td>Volunteer work</td>
<td>14%</td>
<td>63</td>
</tr>
<tr>
<td>Bowling</td>
<td>14%</td>
<td>77</td>
</tr>
<tr>
<td>Yoga • Pilates</td>
<td>13%</td>
<td>113</td>
</tr>
<tr>
<td>Hiking • Backpacking</td>
<td>11%</td>
<td>55</td>
</tr>
<tr>
<td>Photography</td>
<td>11%</td>
<td>77</td>
</tr>
<tr>
<td>Soccer</td>
<td>9%</td>
<td>129</td>
</tr>
</tbody>
</table>

Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+
Many Events or Places Visited Are More Popular With **Tucson Area** Hispanics

<table>
<thead>
<tr>
<th>Event Attended/Place Visited</th>
<th>% of Hispanics</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reid Park Zoo</td>
<td>39%</td>
<td>114</td>
</tr>
<tr>
<td>Pima County Fair</td>
<td>24%</td>
<td>125</td>
</tr>
<tr>
<td>Arizona-Sonora Desert Museum</td>
<td>18%</td>
<td>83</td>
</tr>
<tr>
<td>Tucson Rodeo</td>
<td>16%</td>
<td>150</td>
</tr>
<tr>
<td>University of Arizona football game</td>
<td>15%</td>
<td>105</td>
</tr>
<tr>
<td>High school sports event</td>
<td>13%</td>
<td>143</td>
</tr>
<tr>
<td>Old Tucson Studios</td>
<td>11%</td>
<td>135</td>
</tr>
<tr>
<td>Rock concert</td>
<td>11%</td>
<td>86</td>
</tr>
<tr>
<td>Cinco de Mayo celebration</td>
<td>11%</td>
<td>178</td>
</tr>
<tr>
<td>Arizona Diamondbacks baseball game</td>
<td>9%</td>
<td>158</td>
</tr>
<tr>
<td>Live theater</td>
<td>9%</td>
<td>59</td>
</tr>
<tr>
<td>Health/wellness/fitness expo</td>
<td>8%</td>
<td>130</td>
</tr>
</tbody>
</table>

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

Reid Park Zoo

Nothing Gets You Closer! Located in the heart of Tucson, Reid Park Zoo is southern Arizona’s most attended gated attraction with over 600,000 visitors last year. Reid Park Zoo’s 24-acres provide family friendly entertainment and educational experiences, such as our amazing African elephant family. This family includes Nandi, the first elephant born in Arizona, along with her mother, father, two brothers, and auntie. Visitors also enjoy seeing tigers, rhinos, lions, and more as they learn about the importance of conservation.

The Zoo’s nonprofit support organization, Reid Park Zoological Society, utilizes a variety of marketing efforts to reach southern Arizona’s Hispanic community for zoo visits, special events, and rentals. Based on statistics, approximately 170,000 of the Zoo’s visitors last year were Hispanic. We work with local Spanish radio stations and publications that target families and visitors from Mexico to tour the Zoo as well as to market our children friendly events such as Howl-o-Ween and Zoo Lights. Another promotional area is the opportunity for people to host parties, weddings, quinceañeras, and picnics at the Zoo. Our education programs also bring the Zoo to children in the nearby border community of Nogales, Arizona with our Zoo to You program.
**Tucson Area Hispanics Are More Likely to be Interested in the NBA, MLS & MLB**

Hispanic (18+) Level on Interest in Professional Sports (Very/Somewhat)

<table>
<thead>
<tr>
<th>Sport</th>
<th>Hispanic (%)</th>
<th>Non-Hispanic (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>NFL</td>
<td>38%</td>
<td>40%</td>
</tr>
<tr>
<td>MLB</td>
<td>29%</td>
<td>21%</td>
</tr>
<tr>
<td>NBA</td>
<td>24%</td>
<td>16%</td>
</tr>
<tr>
<td>MLS</td>
<td>12%</td>
<td>5%</td>
</tr>
<tr>
<td>NASCAR</td>
<td>11%</td>
<td>14%</td>
</tr>
<tr>
<td>NHL</td>
<td>6%</td>
<td>10%</td>
</tr>
</tbody>
</table>

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

**Over One Third of Casino Visitors in the Tucson Area are Hispanic**

Adults (21+) Who Have Visited a Casino in the Past 12 Months

- Hispanic: 35.7%
- Non-Hispanic: 64.3%

That Translates Into **126,125** Hispanics Who Have Visited a Casino in the Past 12 Months.

Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 21+
**Tucson Area Hispanics Are More Likely to Visit a Casino**

Hispanics (21+) Who Have Visited a Casino in the Past 12 Months.

**Index: 112**
Non-Hispanic Index: 94

Hispanics (21+) Are More Likely Than Non-Hispanics to Have Visited a Casino in the Past 12 Months.

Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 21+

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**Many Casinos Are Popular with Tucson Area Hispanics**

Share of Hispanics (21+) Who Have Visited a Local Casino in the Past 12 Months

<table>
<thead>
<tr>
<th>Tucson Area Casinos Visited</th>
<th>% of Hispanic</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desert Diamond Casino (Tuc)</td>
<td>30%</td>
<td>142</td>
</tr>
<tr>
<td>Casino Del Sol</td>
<td>30%</td>
<td>123</td>
</tr>
<tr>
<td>Desert Diamond Casino (Sah)</td>
<td>20%</td>
<td>106</td>
</tr>
<tr>
<td>Other Casino</td>
<td>7%</td>
<td>74</td>
</tr>
<tr>
<td>Apache Gold Casino</td>
<td>1%</td>
<td>47</td>
</tr>
</tbody>
</table>

Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 21+
**Tucson Area Hispanics Enjoy the Entire Casino Experience**

Casino Activities Done by Hispanics (21+) in the Past 12 Months

<table>
<thead>
<tr>
<th>Activity</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Slot Machines</td>
<td>111</td>
</tr>
<tr>
<td>Concert</td>
<td>134</td>
</tr>
<tr>
<td>Restaurant</td>
<td>95</td>
</tr>
<tr>
<td>Casino Bar/Club</td>
<td>110</td>
</tr>
<tr>
<td>Table Games</td>
<td>83</td>
</tr>
</tbody>
</table>

Hispanics (21+) Are More Likely Than Non-Hispanics to Participate in Many Different Casino Activities.

**Thousands of Tucson Area Hispanics Have Traveled Via Airline**

Hispanics (18+) Who Have Used Any Airline for Domestic/Foreign Travel in the Past 12 Months

Total Market Air Travelers: **377,537**  
**77,910** Hispanic Share

Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+
**Tucson Area Hispanics Prefer Many Different Airlines for Travel**

Airlines Used by Hispanics (18+) for Foreign/Domestic Travel in the Past 12 Months

<table>
<thead>
<tr>
<th>Airline Used</th>
<th>% of Hispanics</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Southwest</td>
<td>16%</td>
<td>69</td>
</tr>
<tr>
<td>US Airways</td>
<td>9%</td>
<td>81</td>
</tr>
<tr>
<td>American</td>
<td>7%</td>
<td>48</td>
</tr>
<tr>
<td>United</td>
<td>5%</td>
<td>63</td>
</tr>
<tr>
<td>Delta</td>
<td>3%</td>
<td>46</td>
</tr>
<tr>
<td>Other airline</td>
<td>3%</td>
<td>47</td>
</tr>
<tr>
<td>Alaska Airlines</td>
<td>2%</td>
<td>49</td>
</tr>
<tr>
<td>AirTran</td>
<td>1%</td>
<td>119</td>
</tr>
<tr>
<td>JetBlue</td>
<td>1%</td>
<td>31</td>
</tr>
</tbody>
</table>

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

**Mexico is Easily a Top Travel Destination for Tucson Area Hispanics**

Places Visited by Hispanics (18+) Who Have Traveled Outside the Continental U.S. in the Past 3 Years

87%

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

Nearly one-third of U.S. households (32 percent) lack broadband service.¹ Despite the growing importance of the Internet in American life, 28 percent of Americans do not use the Internet at all.¹ Low-income and minority Americans disproportionately find themselves on the wrong side of the digital divide.

More than 23% of Hispanic Households in the Tucson area do not have an internet connection. Using the Internet is becoming a necessity across more and more facets of life. It’s used to complete homework, search for and apply for jobs, connect with family and friends and access government programs.

JOBS: Ninety-six percent of working Americans use new communications technologies as part of their daily life, while sixty-two percent of working Americans use the Internet as an integral part of their jobs.² 94% of recruiters use or plan to use social media to find potential employees. 50% of today’s jobs require technology skills, and this percentage is expected to grow to 77% in the next decade.

EDUCATION: According to a study of American middle and secondary school teachers conducted by Pew Research, 67% say the internet has a “major impact” on their ability to interact with parents and 57% say it has had such an impact on enabling their interaction with students. Teachers of the lowest income students are more than twice as likely as teachers of the highest income students (56% v. 21%) to say that students’ lack of access to digital technologies is a “major challenge” to incorporating more digital tools into their teaching.

HEALTH: 21% of uninsured Americans do not use the Internet, making it impossible for them to use the online health exchanges. A Pew Internet Report revealed 59% of caregivers with internet access say that online resources have been helpful to their ability to care and support for the person in their care. ArizonaOn is a state-wide nonprofit focused on connecting low-income students and their families at home to high-speed, low-cost Internet. ArizonaOn works to eliminate the digital, economic, and academic divide by delivering home access to Internet, affordable computers, and digital literacy training for thousands of unconnected households in our state. Learn more at ArizonaOn.org. 1. Digital Nation: Expanding Internet Usage, NTIA Research Preview (Feb. 2011) 2. Pew Internet and American Life Project, Most Working Americans Now Use The Internet or Email at Their Jobs, Sept. 24, 2008.
**Tucson Area** Hispanics Can Choose From Many Internet Service Providers

Internet Service Provider Used Among Hispanic (18+) Households That Subscribe

- Cox: 18%
- CenturyLink: 18%
- Xfinity: 23%
- Other: 43%

Source: Scarborough, 2015 Release 1 (Feb 2013 - Jan 2014) Tucson DMA. Adults 18+

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**Tucson Area** Hispanics Are More Likely to Visit Many Websites

Websites/Apps Visited by Hispanics (18+) in the Past 30 Days

<table>
<thead>
<tr>
<th>Website/AppVisited</th>
<th>% of Hispanics</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google</td>
<td>59%</td>
<td>92</td>
</tr>
<tr>
<td>Facebook</td>
<td>57%</td>
<td>104</td>
</tr>
<tr>
<td>YouTube</td>
<td>45%</td>
<td>104</td>
</tr>
<tr>
<td>Pandora</td>
<td>32%</td>
<td>127</td>
</tr>
<tr>
<td>Yahoo</td>
<td>29%</td>
<td>103</td>
</tr>
<tr>
<td>Netflix</td>
<td>26%</td>
<td>87</td>
</tr>
<tr>
<td>Amazon</td>
<td>24%</td>
<td>67</td>
</tr>
<tr>
<td>Cox</td>
<td>20%</td>
<td>97</td>
</tr>
<tr>
<td>Craigslist</td>
<td>19%</td>
<td>73</td>
</tr>
<tr>
<td>MSN</td>
<td>18%</td>
<td>108</td>
</tr>
<tr>
<td>Instagram</td>
<td>16%</td>
<td>148</td>
</tr>
<tr>
<td>ESPN</td>
<td>16%</td>
<td>114</td>
</tr>
</tbody>
</table>

Source: Scarborough, 2015 Release 1 (Feb 2014 - Jan 2015) Tucson DMA. Adults 18+
Tucson area Hispanics index higher in the use of Social Media daily. At the Tucson Hispanic Chamber and at our affiliate chambers in Nogales, Sierra Vista and Douglas, we have embraced the use of Facebook to promote our member businesses and our activities. We operate multiple Facebook pages and twitter accounts related to our four Hispanic chambers and the 40 under 40 awards. In addition, we promote the chamber’s YouTube account. All of these social media outlets are an opportunity for our member’s to post their events and comments. The Tucson Hispanic Chamber reaches more than 10,000 friends on Facebook and has close to 4500 followers on Twitter.
**Tucson Area** Hispanics Devote Hours to Social Networking Sites

Number of Hours Hispanics (18+) Spend on Social Network Sites per Day

- **Less than 1 Hour**: 22% (Index: 80)
- **1-2 Hours**: 24% (Index: 120)
- **3-4 Hours**: 9% (Index: 121)
- **5 Hours or More**: 5% (Index: 128)

Hispanics (18+) Are **28%** Above the Market Average When it Comes to Spending 5 or More Hours per Day on Social Networking Sites.

Source: Scarborough, 2015 Release 1 (Feb 2014-Jan 2015) Tucson DMA. Adults 18+
**Tucson Area** Hispanics Represent a Large Share of Registered Voters

Adults (18+) Who Are Registered to Vote in Their District of Residence

- Non-Hispanic, 71.0%
- Hispanic, 29.0%

That Translates Into 208,901 Hispanics Who Are Registered to Vote in the Tucson Area

Source: Scarborough, 2015 Release 1 (Feb 2013 - Jan 2014) Tucson DMA. Adults 18+

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**More Tucson Area Hispanics are Registered Democrats**

Political Party Affiliation Among Hispanics (18+) Registered to Vote

- Democrat: 45% (Index: 138)
- Independent: 23% (Index: 65)
- Republican: 18% (Index: 77)
- None: 14% (Index: 159)

Hispanics (18+) Are 38% More Likely Than the Total Market to be Registered Democrats.

Source: Scarborough, 2015 Release 1 (Feb 2013 - Jan 2014) Tucson DMA. Adults 18+
Policy can make or break a lot of things – be it a state’s public image or the ability to bounce back from a declining economy. The Arizona business community knows that good policy matters. Businesses of all sizes and industries have felt the effects – both good and bad – of decisions made at the state Capitol, in Washington, D.C. and even City Hall.

At the federal level, businesses are impacted every day by decisions made on Capitol Hill and at the White House, ranging in scope from immigration to health care to tax policy. Even a local level, businesses face a seemingly endless list of regulations they’re forced to comply with.

The Arizona business community has come together in big ways and influenced policy for the benefit of all Arizonans. But there’s still work to do. Arizona’s continued economic and social advancement requires a collective effort.

One of the easiest ways to make a difference and influence policy is to know the issues, know the candidates, and vote accordingly. VotaAZ makes this process simple.

Visitors to VotaAZ.org can register to vote, view objective information about candidates and learn about the issues. Users can access a list of the candidates specific to their Election Day ballot and view voting records and questionnaires for most candidates in their area.

In addition, VotaAZ.org provides a hub of information on important business issues and related activities at the state capitol. This easy-to-use resource provides the non-partisan facts needed to make informed decisions on Election Day and beyond. VotaAZ.org has been created by the Tucson Hispanic Chamber and the Arizona Chamber of Commerce and Industry with support by BIPAC.
**The Number of Hispanic Owned Businesses in the U.S. Has Grown**

Number of Hispanic Owned Businesses in the U.S. (in Millions)

<table>
<thead>
<tr>
<th>Year</th>
<th>2002</th>
<th>2007</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1.6</td>
<td>2.3</td>
<td>3.2</td>
</tr>
</tbody>
</table>

Since 2007, the Number of Hispanic Owned Businesses in the U.S. Has Grown 43%.

Source: Geoscape, Hispanic Businesses & Entrepreneurs Drive Growth in the New Economy; 2014 Annual Report

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**Hispanic Owned Small Businesses in the Tucson Area Have Grown**

Hispanic (18+) Share of Small Business Owners in the Tucson Area

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Share (%)</td>
<td>22%</td>
<td>29%</td>
</tr>
</tbody>
</table>

+34%

Hispanic Small Business Owners in the Tucson Area Make More Money

Household Income Level of Hispanic (18+) Small Business Owners

- **65%** Less Than $50K
- **31%** $50K-$99K
- **24%** $100K or More
- **27%** $100K or More

Hispanic (18+) Small Business Owners Are Above the Market Average When it Comes to Having a Household Income of $100,000 or More


Scarborough respondent level for Hispanic Small Business Owners (27) under suggested threshold of 70.
**SEGMENTATION**

The Hispanic population is concentrated in Southern Arizona

Source: Nielsen Segmentation & Market Solutions (SMS), Pop Facts 2015

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The Tucson Area is a Densely Populated Hispanic Market!

Source: Nielsen Segmentation & Market Solutions (SMS), Pop Facts 2015

**PEN is Penetration**
Average Hispanic Household Income higher in northern **Tucson Area**

Source: Nielsen Segmentation & Market Solutions (SMS), Pop-Facts 2015

**PEN** is Penetration
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Better healthcare for you. Now, doctors who practice at TMC have access to the world-renowned expertise of Mayo Clinic specialists.

At no additional cost, patients with complex medical cases benefit from having their own specialist collaborate with Mayo specialists to develop the best course of action for treatment. It’s part of TMC’s commitment to bring you the best healthcare – anywhere. When it comes to your health, you have choices to make.

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- A vast network of free ATMs throughout Tucson and the US
- One low rate for the loan you need—no matter your credit score.*
- Apply and close your loan all online with our new eSign.**

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The State of Southern Arizona's Hispanic Market

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