

FOCUS: LATINO

THE U.S. LATINO MARKET FOR CABLE AND BROADBAND SERVICES, PROGRAMMING, AND TECHNOLOGY

2009 PROSPECTUS



From the Multicultural Division of
Horowitz Associates, Inc.

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FOCUS: Latino™ IX

The 2009 Study of the U.S. Latino Market for Cable and Broadband Services, Programming and Technology

FOCUS: Latino was the first, and the most comprehensive, study on the Hispanic market for cable programming and services, and it remains the benchmark study that is a must-have for cable networks and cable operators alike.

Focus: Latino IX™ is the ninth wave of this one-of-a-kind study series. The report provides in-depth analysis of Latinos sub-groups by age, sex, income, and the presence of children. Importantly, the study takes a detailed look at differences between language usage segments of this heterogeneous market.

The study compares the findings segmented by “Spanish-dominant,” “Bilingual” and “English-oriented” Latinos— the *key markers* of acculturation and of strategic importance when planning programming, marketing, advertising and distribution strategies for the Latino audience.

Moreover, the study analyzes media consumption by household composition factors, such as the presence of other people in the home who are Spanish dominant even when the head of household is English-oriented, and the presence of kids in the home.

The main topic areas covered in this study are:

- Penetration of **telecommunications services in the home (cable, satellite, Internet, broadband and telephone)**, including penetration of Verizon FiOS and AT&T U-verse; plans to switch to competing services for television, Internet and phone services;
- Penetration and usage of **advanced digital services** such as HDTVs, HDTV service, On-Demand, DVR and broadband-enabled portable devices;
- Penetration of and interest in **bundled services**;
- **Fluency with English and Spanish**, language spoken most in the home;
- **Programming and branding**: Favorite channels, viewership of specific genres, viewership of English language and Spanish language TV; viewership and perceived value of specific targeted channels;
- **Viewing of video content online**;
- **Viewing of video on portable devices**;
- **Demand for specific Spanish language and culturally relevant programming**;
- **Impact of the current economy on telecommunication spending**;
- Subscription, technology, and demographic **profiles**;
- Awareness, impact and plans surrounding the **Digital Transition of 2009**.

Data and analysis available by:

- Age and sex
- Income and Employment data
- Marital status and presence of children
- Type and ownership of family dwelling
- Household size and analysis of language usage of all members of the household
- Foreign Born vs. U.S. Born and length of time in the U.S.
- Country of origin
- Language use in the home

Study Design and Methodology:

600+/- interviews conducted among Latino heads of household. Markets included are the top Hispanic markets in the United States.

Hispanic ethnicity is determined by self-identification and interviews are conducted by bilingual interviewers in respondents' language of preference.

Respondents are interviewed in their preferred language. "Spanish-dominant" Hispanic respondents are referred to those Hispanics who report speaking only Spanish or mostly Spanish with some English at home. "Bilingual" Hispanics are defined as those who speak English and Spanish equally at home, and "English-oriented" Hispanic respondents are those speaking mostly English with some Spanish or English only at home.

Deliverables:

- A written, interpretative report based on primary research of 600+/- Latino consumers in PowerPoint Format;
- An executive summary including secondary data analysis of the Latino market in the U.S;

Schedule:

- Survey Data Collection: February, 2009.
- Report: May, 2009

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