

ABSTRACT

CAMPBELL, NATALEE MARIE. Marketing to the U.S. Hispanic Consumer: Apparel Preferences and Strategies. (Under the direction of Dr. Traci A. M. Lamar.)

The Hispanic population is the largest and fastest-growing minority group in the United States. Given its size and growth rate, the Hispanic market, as a whole, has grown in importance. The purpose of this study was to learn more about the U.S. Hispanic market in regards to apparel preferences and to discover how these products were being promoted to the Hispanic consumer.

The literature suggests that the growth of the U.S. Hispanic market will lead to a greater demand for apparel. However, there is not much known about Hispanics' apparel design and style preferences. Additionally, there are not currently many retailers who targeted this market specifically, so marketing strategies were not well documented.

The methods used in this research encompassed smaller component investigations. Those component investigations included a pilot survey, visual content analysis of photographs, content analysis of Spanish-language television advertisements, and apparel store evaluations. After analysis, results provided insight to U.S. Hispanic consumers' preferences for design attributes of apparel worn in everyday situations. Results also identified methods used by the apparel retailers who were actively engaged in marketing to Hispanics through television and in stores.

This was important research for apparel retailers, as it provided a better understanding of the apparel-design preferences of U.S. Hispanic consumers as

well as determined opportunities for apparel retailers targeting the U.S. Hispanic market. For further research, the methodology used in this project may also be expanded to other geographical areas of the United States where television advertisements, photographs, and store evaluations could be conducted. Also, a more direct interaction with respondents could give more qualitative information enhancing the depth of understanding U.S. Hispanic consumers.

Marketing to the U.S. Hispanic Consumer: Apparel Preferences and Strategies.

by
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Biography

The author, Natalee Campbell, was born March 3, 1980 to Dan and Nattaya Campbell in Austin, Texas. When she was 12 years old her family moved to North Carolina where she attended Garner Senior High School in Garner, North Carolina. After graduating from high school in 1998, Natalee began her undergraduate studies at North Carolina State University at the College of Textiles. Since then, she graduated in May 2002 with her Bachelor's of Science degree in Textile and Apparel Management. After three years in the work force, Natalee decided to return to her alma mater to pursue her Master's degree in Textile Technology Management. She plans to graduate in December 2008.

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Chapter I: Introduction

The United States is the fastest-growing developed country in the world, growing at a rate of nearly one percent a year; this rate is as fast as, or faster than, that of many developing countries (Haub, 2006). The U.S. population officially reached 300 million on October 17, 2006 (Bernstein, 2007). Now, the United States is the third country in the world to reach a population of 300 million people, behind those of China and India (Nasser, 2006). As of May 1, 2008, the U.S. total population reached 301.6 million, and 102.5 million made up the nation's minority population. The nation's largest minority group consisted of Hispanics, followed by Blacks, Asians, American Indians and Alaska Natives, and Native Hawaiians and Other Pacific Islanders. Hispanics comprised 15.1% of the nation's total population—approximately 45.5 million people. The growth rate between July 1, 2006 and 2007 was 3.3%, or 1.4 million people, which was higher than any other ethnic group in the United States (Bernstein, 2008).

The Hispanic population will be a key consumer of apparel products. With the market growing very rapidly, the apparel industry needs to respond to this opportunity. However, not much is known of the design and style preferences regarding apparel for Hispanic consumers. This research explores preferences of Hispanic consumers and examines apparel retailers targeting this market. This

Rationale

The Hispanic population is the largest and fastest-growing minority group in the United States. Given its size and growth rate, the Hispanic market, as a whole, has grown in importance, reflecting the segment's rising numbers, economic status, and buying power. This growth leads to a greater demand for apparel by Hispanic consumers, but there is not much known about Hispanics' apparel design and style preferences. Additionally, there are not many retailers who target this market specifically; so marketing strategies are not well documented.

Spanish is considered the primary language of Hispanics; therefore, to appeal to this market, it is expected that apparel retailers would advertise in Spanish. Advertising in Spanish should give retailers an advantage over those who do not and should give them an increased opportunity to gain customers from this powerful market. There are great opportunities for apparel retailers to grow their businesses by appealing to the Hispanic market.

Purpose of Study

The purpose of this study is to obtain a more complete understanding of design and style preferences for apparel worn by U.S. Hispanics and to discover how these products are being promoted to the Hispanic consumer. The first goal is to develop a profile of the U.S. Hispanic consumer through literature review and

secondary data. The second goal is to investigate what apparel design attributes appeal to Hispanic consumers by examining what they wear in everyday situations through a visual content analysis of photographs. Once this analysis is completed, conclusions are drawn about design and style preferences of Hispanic consumers. The third goal is to identify and examine apparel retailers who market apparel to Hispanics through television and in stores. The second and third goals are the research objectives for this study. On the basis of the results of this research, attempts are made to determine opportunities for targeting the U.S. Hispanic market.

Research Objectives

Guiding this research are two research objectives:

- Research Objective One: to investigate preferences for apparel design attributes by examining what Hispanic consumers wear in everyday situations.
- Research Objective Two: to explore apparel retailers who are targeting Hispanic consumers:
 - a. Through television and those retailers' approach to the advertisement.
 - b. Through those retailers' approach to in-store product presentation.

Limitations

The study is limited in the following ways:

1. The Hispanic population continues to grow and change; consequently, it is difficult to keep information current.
2. The data recorded are limited to the three cities visited during the study: Austin, Texas; Miami, Florida; and Raleigh, North Carolina; and they do not constitute a comprehensive representation of the U.S. Hispanic population.
3. The visual content analysis and the apparel store evaluation samples were selected on the basis of the researchers' beliefs that the participants were Hispanic; there is the possibility that not all participants were of Hispanic origin.
4. The visual content analysis sample did not have an equal number of participants per age group from each city photographed; therefore, the random selection of 25 from each city was limited to the number of photographs taken.
5. The areas where photographs were taken and where stores were evaluated were limited to the locations that researchers were able to find in each city.
6. The television content analysis findings relate to advertising on prime-time television at specific times and over a specific period. The advertisements were drawn from only one city, Raleigh, NC, and cannot be regarded as a representative of the United States. Thus, the findings cannot be generalized to all television advertising.
7. The apparel store evaluations were limited to stores that researchers witnessed Hispanics entering; other stores may have been shopped but were not recorded.

Chapter II: Review of Literature

This chapter is organized around three topics of relevance to this study. First, the chapter presents an overview of the Hispanic population in the United States—from demographic and psychographic information to product demands. It also includes literature that describes Hispanic income, buying power, buying patterns, and behavior, all of which show the strength of this growing minority group. Second, the chapter provides a review of industry efforts to target this market and examples of how apparel companies have attempted to gain exposure and recognition by the Hispanic market. After covering these topics, the chapter concludes with information on the research method of content analysis as defined by existing literature, information which is applied to television commercials and photographs of Hispanics.

Hispanics in the United States

The term *Hispanic* is used as a broad form of classification in the U.S. census, in local and federal employment, and in business market research. This term cannot fully encompass the diversity of people who fall into this category. Often the term *Hispanic* is used synonymously with the word *Latino* and *Latin*; they

are similar in meaning but are not completely identical (U.S. Census Bureau, 2007b). The U.S. government defines *Hispanic* or *Latino* as follows:

A person of Mexican, Puerto Rican, Cuban, South or Central American or other Spanish culture or origin regardless of race. Thus, Hispanics may be any race (U.S. Census Bureau, 2007b).

More than 20 countries are the countries of origin for the Hispanic culture. They are located in North America, Central America, and South America, which are also known as Latin America (refer to Appendix A) (U.S. Census Bureau, 2007b).

Demographics

According to projections by the U.S. Census Bureau, by 2050, 102.6 million Hispanics, 24.4% of the nation's total population, will be living in the United States. The Hispanic population has increased by more than 50% since 1990—from 22.4 million to over 42 million. As of July 1, 2006, Hispanics made up 15%, or 44.3 million, of the total population in the United States (U.S. Census Bureau, 2007c).

According to the Population Reference Bureau, this rate of rapid population growth is due to two factors: a relatively high birth rate and high rates of immigration.

Women in the United States average about two children each, and 1.2 million people immigrate into the country annually. These two factors interact within the U.S.

Hispanic population (Haub, 2006).

In 2004, the U.S. Census Bureau conducted the American Community Survey (ACS) of the Hispanic and Latino population; the survey reported the following information about Hispanic origin. The largest population group of Hispanics was of Mexican origin (64%); the second largest was of Puerto Rican origin (9.6%); and the third largest was of Central American origin (7.2%). The other population groups included were of South American origin (5.5%) and of Cuban origin (3.6%); the remaining 6.7% were of other Hispanic/Latino origin (see Table 1) (U.S. Census Bureau, 2007b).

Table 1: Hispanic Population by Type of Origin: 2004

Type of Origin	Population	Percent of Hispanic Population
Hispanic or Latino	40,459,196	100.0
Mexican	25,894,763	64.0
Puerto Rican	3,874,322	9.6
Cuban	1,437,828	3.5
Dominican	1,051,032	2.6
Spanish	358,570	0.9
Central American	2,901,679	7.2
South American	2,215,503	5.5
All other Hispanic or Latino	2,725,499	6.7

Note: From U.S. Census Bureau. (2007b). The American Community—Hispanics: 2004. Available online at <http://www.census.gov/prod/2007pubs/acs-03.pdf>

Of the nation’s total Hispanic population, 49.2% live in California or Texas, and the number of Hispanics exceeds 35% of each state’s total population.

California is home to 12.4 million Hispanics, and Texas is home to 7.8 million Hispanics. New Mexico has the highest proportion of Hispanics (43%) (U.S. Census

Bureau, 2007b). In the Southwest, most Hispanics are of Mexican or Mexican-American origin; in the Southeast, most are of Cuban origin; in the Northeast, most are of Puerto Rican and Dominican origins; the remainder are of Central American and South American origins (Adhorre Marketing, 2007a).

The Hispanic population is much younger than the non-Hispanic white population. The ACS reports that about 1 out of 3 Hispanics is a child (under 18 years of age), compared with 1 out of 5 non-Hispanic whites. Also, there are fewer Hispanics 65 years of age and older (about 5%), compared with about 15% of non-Hispanic whites (see Figure 2) (U.S. Census Bureau, 2007b).

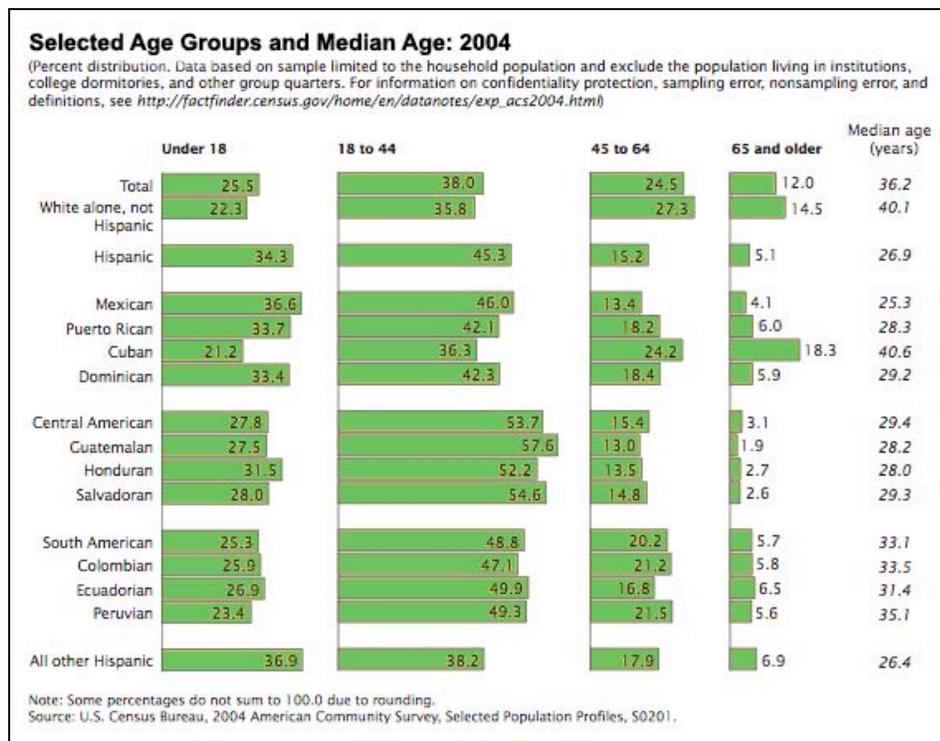


Figure 2: Selected Age Groups and Median Age: 2004, by the ACS

Note: From U.S. Census Bureau. (2007b). The American Community—Hispanics: 2004. Available online at <http://www.census.gov/prod/2007pubs/acs-03.pdf>

In 2006, the median age of Hispanics was 27.4 years, which is much younger than the median age of the population as a whole (36.4 years) (Bernstein, 2007). This younger population contributes to the high birth rate of 3.51%, which is twice the national average (Adhorre Marketing, 2007a). Regarding the language spoken in the home, the ACS found that among Hispanics aged five years and older, only 22.8% speak only English; the remaining speak English either “very well” or “less than very well,” and speak another language at home. In comparison, more than 94% of non-Hispanic whites aged 5 years and older speak only English in the home, and about 6% speak a language other than English (U.S. Census Bureau, 2007b). According to the 2003 Yankelovich Multicultural Monitor, 84% of Hispanics surveyed agreed that “all immigrants should learn English if they plan to stay in this country (the United States)” and 62% agreed that “the Spanish language is more important to them now than it was five years ago.” It seems that Hispanics are ambivalent regarding English and Spanish. English is necessary to living in the United States, but Spanish is part of the Hispanic heritage and culture and grows in importance (Korzenny & Korzenny, 2005).

Today, there are more than 10 million Hispanic households in the United States, and it is expected that the number will rise to 13.5 million by 2010—up from less than 6 million in 1990. Of these 10 million households, 38% are currently headed by someone under the age of 35, and 25% are headed by someone between the ages of 35 and 44. The national average for homes with heads under

the age of 35 is currently 23%, which is much lower than the average for Hispanic households (Adhorre Marketing, 2007a). Hispanic family households tend to be larger than those of non-Hispanic whites. In 2002, 26.5% of Hispanic family households consisted of five people or more. In contrast, only 10.8% of non-Hispanic white family households were this large (La Cruz & Ramirez, 2003). Hispanic households are more likely to be family households than non-Hispanic white households. The ACS reported that 77.2% of Hispanic households and 65.9% of non-Hispanic white households are family households (U.S. Census Bureau, 2007b).

Psychographics

Traditionally, the Hispanic family is a close-knit group, which includes the immediate family as well as the extended family. The family ties are very strong, and in most families, the father is the head of the household and the mother is responsible for the home. Families frequently meet to celebrate any occasion—such as holidays, birthdays, and graduations. Appearance is also important to Hispanics and shows a sense of honor, dignity, and pride. They wear formal attire to church, parties, social gatherings, and work. However, tennis shoes and jeans are becoming more popular among women, particularly in informal settings. Hispanics tend to be more relaxed and flexible about time and punctuality; it is acceptable to be 30 minutes late, or more, to an event (Clutter & Nieto, 2001).

Since Hispanic families are close-knit groups, Hispanics value their family relationships and spend most or all of their leisure time with other Hispanics. They also have great enthusiasm for sports such as soccer and baseball, for their educational aspirations, and for their love of music and the arts (Livingston, 1992). Regarding sports, cuisine, and political beliefs, Hispanic groups have varied tastes. The most popular sport among Mexicans, El Salvadorans, and Nicaraguans is soccer, while Dominicans, Puerto Ricans, and Cubans prefer baseball. Most Latin American cuisines include rice and beans, but corn is the staple of the Mexican diet, and plantains and sweet potatoes are the staple foods in Cuba and Puerto Rico (Hispanic Americans, 2007).

A cultural event important to the Hispanic community was initiated in September 1968, when Congress authorized President Lyndon B. Johnson to proclaim National Hispanic Heritage Week. Later, in 1988, the observance was expanded to a month-long celebration: September 15—October 15. The starting date, September 15, was chosen because it is the anniversary of the independence of five Latin American countries: Costa Rica, El Salvador, Guatemala, Honduras, and Nicaragua. In addition, Mexico and Chile celebrate independence days on September 16 and September 18, respectively (U.S. Census Bureau, 2007c).

Religion plays a significant role in the daily lives of Hispanics. The largest religious affiliation is Christianity, specifically Roman Catholicism. In the United States, two-thirds of Hispanics (68%) are Roman Catholics. In recent years, there

has been an increase in other religious denominations within the Hispanic community, specifically, several Protestant denominations (Pew Hispanic Center, 2007). The church greatly influences family life and community affairs, giving spiritual meaning to Hispanics' culture. In the local community, it is customary for Hispanics to celebrate the community's patron saint's day with greater importance and ceremony than personal birthdays (Clutter & Nieto, 2001).

Even though Hispanics have accounted for half of the nation's population growth in the past four years, they only provided one-tenth of the increase in all votes between the 2000 and the 2004 presidential elections. Two-thirds of Hispanics say that their religious beliefs are an important influence on their political thinking. Also, depending on their Hispanic origin, their political views differ. Many Cubans and Columbians are more conservative in their political ideologies and support the Republican Party, while Mexicans, Puerto Ricans, and Dominicans lean more toward the Democratic Party. Mexicans alone make up more than 60% of Hispanics in this country, so the Democratic Party is far stronger than the Republican Party. However, because of the Catholic and more conservative values of many Hispanics, there is a potential source of growth for the Republican Party (Pew Hispanic Center, 2007).

Relatively unknown is a flag representing the countries of Hispanic America, their people, history, and shared cultural legacy. The flag was created in October 1932 by Ángel Cambor, captain of the Uruguayan army. It symbolizes the Spanish

race on the American continent. It was adopted by the all the states of Latin America during *La Conferencia Panamericana* (The Pan-American Conference) in Montevideo, Uruguay. The white background represents peace; the Inti, the sun symbol and the sun god in Inca mythology, symbolizes the light shining on the American continent; and the three crosses represent Christopher Columbus's caravels (the *Niña*, the *Pinta*, and the *Santa María*) (see Figure 3). The motto of the flag is *Justicia, Paz, Unión y Fraternidad* (Justice, Peace, Union, and Fraternity) (Hispanic America, 2006).

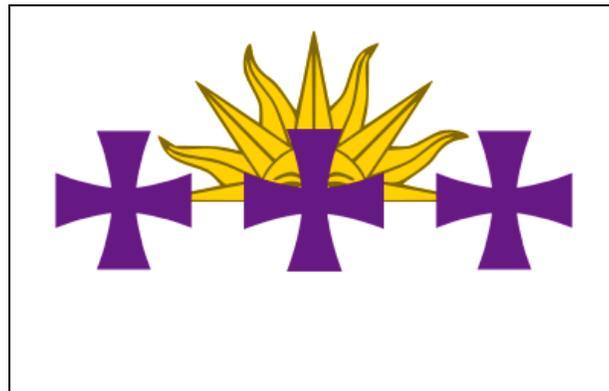


Figure 3: The Flag of Hispanic America

Note: From Wikipedia: The Free Encyclopedia. (2006). Hispanic America. Available on-line at http://en.wikipedia.org/wiki/Hispanic_America#cite_note-flag-0

Hispanics are found in over 20 countries in North America, Central America, South America, and Spain. Placing all Hispanics into one segment or group implies that Hispanics are all homogeneous—namely, that they all have the same needs and desires within their ethnic group. And yet Hispanics are found throughout the United States, with each region made up of Hispanics from many countries of origin.

For instance, Florida has a large Cuban community; New York City has Puerto Rican and Dominican communities; and the southern United States and the Los Angeles area have a predominately Mexican community (Adhorre Marketing, 2007a). Many authors emphasize the need to distinguish among these subgroups of Hispanics according to their country of origin since the usual argument is that all Mexicans, Puerto Ricans, Dominicans, and Cubans are homogeneous within their respective subgroups. However (these authors maintain), Hispanics are so numerous that they should be divided into subgroups for advertising and marketing purposes. But identifying the attributes for each of the subgroups will be very difficult (Fennell, Jimenez, Piron, & Saegert, 2006).

Income and Buying Power

The number of U.S. Hispanics is growing faster than that of any other racial or ethnic group in the country. With such a rapid growth rate, this population will have a large impact on the U.S. economy in the future. For instance, the Hispanic median household income rose 20% between 1996 and 2001—from \$27,997 to \$33,565. The median income of all households rose only 6%—from \$39,869 to \$42,228 (Lintott, 2004). This suggests that the even though Hispanics earn less income than the median income of all households in the United States, this minority is greatly improving. More recently, the U.S. Census Bureau reports that the median income of Hispanic households has remained statistically unchanged between 2005 and 2006 (\$37,800) (U.S. Census Bureau, 2007c).

The rise in income is related to the improved levels of education and employment of the Hispanic population. From 2000 to 2003, the number of employed Hispanics grew by 450,000, while the overall job market lost nearly 1 million employees (Downey, 2003). Also, between 1997 and 2002, the number of Hispanic-owned businesses grew by 31%—to more than 1.6 million businesses—which is triple the 10% rate of growth for all U.S. businesses. Hispanic businesses generated \$222 billion in 2002—up by 19% from 1997 (U.S. Census Bureau, 2007c).

According to a study by the Selig Center for Economic Growth at the University of Georgia's Terry College of Business (2007), Hispanics will control about \$862 billion in spending power in 2007. In 1990, Hispanic buying power was \$212 billion; it then rose to \$489 billion in 2000 and to \$862 billion in 2007; it is estimated to be \$1.2 trillion in 2012. The 2007 estimate will exceed the 1990 buying power by 307% and the 2012 estimate will exceed the 2007 buying power by 46%. This increase is substantially higher than either the 125% increase in the non-Hispanic buying power or the 134% increase in the buying power of all consumers. It is estimated that in 2012, Hispanics will account for 9.7% of all U.S. buying power—which is up from only 5% in 1990 (Humphreys, 2007). Increases such as these will draw more attention to the U.S. Hispanic market, resulting in a higher demand for investigating how to target this market successfully.

Buying Patterns and Behaviors

The spending habits of Hispanics are not the same as those of the average U.S. consumer. Cotton Incorporated's Lifestyle Monitor™ is a national research study that assesses consumers' attitudes and behaviors toward apparel and home fabrics. One of those studies found that even though consumer's favorable attitudes toward shopping are declining, expenditures on apparel continue to grow. Overall, consumers are spending 35% more on apparel in 2001 than in 1994. Hispanic consumers spend an average of \$1,282 on clothing (\$313 more than the average consumer) in one year (Cotton Inc., 2002).

A more recent study by Consumer Expenditure Survey of 2005 (2007) indicated that Hispanic consumers spent about 85% as much as the average non-Hispanic or non-Latino consumer. Even though Hispanics have a lower median income, they spend more on apparel and services than non-Hispanic consumers. In 2005, the Hispanic average annual expenditure for apparel and services was \$2,195, or 18.6% more than that of non-Hispanic consumers. The Hispanic average annual expenditure for apparel and services increased by 25% during the last two years (Consumer Expenditures Report, 2007).

Cynthia Webster's study of the purchasing involvement between Anglos and Hispanics and among Hispanic groups with varying levels of subcultural identification (Spanish-speaking, bilingual, and English-speaking Hispanics) found high consumer purchasing involvement in wearing apparel (1990). Also, ethnic

identification does not have a significant effect on the purchasing involvement. The ethnic identification regarded the effects of language, the effects of language after removing or adjusting for social class effects, and the effects of language after removing income effects. Table 2 shows the results of Webster's study. It shows that for purchasing involvement in wearing apparel, bilinguals are closer to that of Anglos and that among the Hispanic groups, bilinguals tend to show a higher level of involvement. Webster suggests that in some cases (e.g., wearing apparel), Anglos and all language-based Hispanic groups can be considered as one homogeneous market in terms of purchasing involvement (1990).

Table 2: MANOVA/ANOVA on Involvement with Goods/Services

	Anglo-Americans (n=152)	English (n=152)	Bilingual (n=95)	Spanish (n=73)	F	F _{LC} *	F _{LI} *
Involvement with:							
Food products	3.26**	2.85	2.86	3.21	4.87 ^a	4.00 ^a	4.02 ^a
Cosmetics/toiletries	3.91	3.85	4.22	4.97	5.90 ^b	6.02 ^b	6.51 ^b
Small appliances (e.g., toasters)	3.78	3.75	3.81	3.68	1.71	1.21	1.08
Major appliances (e.g., clothes washers)	5.71	5.54	5.22	4.21	4.76 ^b	3.06 ^a	4.15 ^a
Televisions/stereos	4.89	3.01	4.11	3.00	4.33 ^a	1.58	1.79
Wearing apparel	5.01	4.78	4.98	4.84	2.20	3.07 ^a	4.15 ^a
Furniture	5.23	5.21	5.20	4.63	3.95 ^a	2.28 ^a	3.11 ^a
Automobiles	6.10	6.01	5.40	4.85	4.36 ^a	2.73	2.64
Services (e.g., car repair)	3.54	3.62	3.91	3.89	1.46	1.51	1.53
Professional services	6.53	6.45	5.33	4.03	13.06 ^b	4.64 ^a	3.91 ^a
Purchasing/renting home	6.71	5.90	4.89	4.65	8.90 ^b	4.67 ^a	4.20 ^a
Wilks' Lambda					.510 ^b	.497 ^a	.489 ^a

a_p ≤ .05

b_p ≤ .01

* These two F columns represent the effect of ethnicity after removing the possible effects of social class (C) and income (I).

** Item involvement was measured with seven point scales where seven equals high purchasing involvement and one equals low purchasing involvement.

Note: From Cynthia Webster. (1990). Reaching the burgeoning Hispanic market.

Webster (1990) concludes that if a product is one that entails high consumer purchasing involvement, such as the purchasing of wearing apparel by high Hispanic identifiers, then individuals are more likely to carefully consider information concerning the product and to devote more time to evaluating it. This response would tend to lead to a strong provider preference and repeat purchase behavior (Webster, 1990).

A study by J. A. F. Nicholls, Sydney Roslow, and Lucette B. Comer (1995) compared Hispanic and Anglo patrons of an upscale mall. It was found that Hispanics spent more time than Anglos at a mall; they traveled farther than Anglos to reach a mall and were more likely than Anglos to end up buying something even if they were only browsing (Nicholls, Roslow, & Corner, 1995). According to Cotton Incorporated's Lifestyle Monitor™, Hispanic female respondents spend more time shopping for apparel than Caucasian and African-American female respondents. Hispanic female respondents recorded an average of 135.1 minutes shopping, Caucasian female respondents 89.4 minutes, and African-American female respondents 109.27 minutes (Cotton Inc., 2005a). Hispanics also spent more money and visited more stores than non-Hispanics and were more likely than non-Hispanics to have a shopping companion (Nicholls, Roslow, & Corner, 1995).

Cotton Incorporated's Lifestyle Monitor™ revealed that young Hispanic women are trendsetters. They also like to jump on a trend as it is happening rather than when it is phasing out. Hispanic women love to shop, do not hesitate to buy

those must-have items, and spend more on fashion and beauty than most other market segments. They shop more, too: 2.1 times per month, in comparison with Caucasian women, who shop 1.8 times per month. Looking their best is very important to Hispanic consumers; it reflects their achievement, their success, and their families. So regarding comfort versus fashion, Hispanic women aged 25–34 are the ethnic group most willing to look their best despite the discomfort involved in doing so (Cotton Inc., 1999).

The fourth annual Hispanic Opinion Tracker (HOT) 2005 survey reported that 56% of U.S. Hispanics polled said, “I love to shop,” compared with 39% of the general population. Hispanics are spending almost twice as much as the general population on clothing and accessories and are more likely to go shopping and pay cash rather than use credit cards for their purchases. The HOT survey also found that the top three stores Hispanics shop are Wal-Mart, J.C. Penney, and Sears (2005 Hispanic Opinion Tracker, 2005).

GfK Omnibus Services, a division of GfK Custom Research North America, announced the results of its 2006 Hispanic OmniTel Retail Study. The study found that Wal-Mart was by far the favorite store where Hispanics like to shop. Hispanics also cited the same priorities that other Americans have when choosing retailers. Respondents wanted a retailer that is convenient, has low prices, and has a wide range of merchandise. Other critical priorities unique only to the Hispanic market include store employees speaking Spanish, products relevant to Hispanic

consumers, and Spanish-language signage. The types of stores where Hispanics prefer to shop are national discount chain stores (Wal-Mart or Target), local stores that specialize in serving Hispanic and Latino customers, national home improvement stores (Lowe's or Home Depot), and national mid-priced department stores (Kohl's, Sears, or J.C. Penney) (Adhorre Marketing, 2007b).

Hispanic Demands

Product Attributes

The type of products consumers purchase for themselves or others is largely determined by the consumers' size and shape. The most predominant body shapes among Hispanic women are the rectangle, followed by the inverted triangle. There are also more Hispanic women than any other ethnicity classified as "top hourglass" shapes. A common trend for Hispanic women's body shapes are relatively large bust measurements in comparison with waist and hip measurements (Newcomb, 2005).

The clothing size most often chosen by Hispanic women was "medium," followed by "large," which was the same preference as that of the total population. However, a smaller percentage of Hispanic women reported wearing "petite" and "tall" clothing sizes than the overall population. Regarding height, Hispanic women had an equal representation in the "petite" (5'2" and under) and the "regular" (5'2 ½"–5'6 ½") categories—approximately 48% percent each. Less than 5% of the entire sample belonged to the "tall" (5'7" and over) category. The "petite" category

had the highest percentage of Hispanic women among any ethnic group (Newcomb, 2005).

Benefits & Styling (Design) Characteristics

Hispanics have a strong interest in being fashionable and brand-conscious. In particular, the female Hispanic shopper is highly cognizant of trend and style and likes to shop for fashion. According to Cotton Incorporated's Lifestyle Monitor™, Hispanic females spend significantly more time shopping than Caucasian and African-American females. Fifty-seven percent of Hispanic females preferred clothing that looked better on them over clothing that was comfortable for an evening of dinner and dancing. This preference was much higher than that of Caucasian females (45%) and African-American females (46%) (Cotton Inc., 2005b).

For Hispanics, shopping tends to be a family affair. A Simmons Market Research study polled 1,349 Hispanics, along with other ethnicities, and found that more than a third (36%) of the Hispanics say they prefer shopping with their families and that 30% report they like shopping with their children. Compared with the total population, 29% percent of Hispanics prefer shopping with their families, and 26% like shopping with their children. Hispanics enjoy shopping together and seek advice from their families and friends. A quarter of the Hispanics polled reported that their children have a significant impact on the brands they buy (Fetto, 2003). Not much is known about the style/design preferences of Hispanics but what is known is that Hispanics are fashion conscious, preferring fashionable clothes rather than classic

clothes. They place emphasis on brand, style, color, and embellishments, such as reds, lace, and beading (Fetto, 2003).

Statistics from Cotton Incorporated's Lifestyle Monitor™ regarding male denim purchases show that African-American males own 10.7 pairs of jeans, Hispanic males own 9.5 pairs, and Caucasian males own 7.3 pairs. Regardless of race or ethnicity, the majority (74%) of shoppers "enjoy" or "love" wearing denim (Cotton Inc., 2006). In addition, when buying a good-fitting pair of denim jeans, Caucasian men pay the least (\$32.04), and Hispanic men pay much more (\$40.82) (Cotton Inc., 2005a). Hispanic women show the strongest preference (80%) for wearing denim jeans rather than casual slacks. Hispanic women rank second in owning pairs of jeans (10.7 pairs), after African-American women (10.9 pairs). Furthermore, out of all racial or ethnic groups, Hispanic women are willing to spend the most for a pair of good-fitting denim jeans (\$38.02) (Cotton Inc., 2006).

Advertising to the Hispanic Market

Hispanics, like any other population segment, can be reached through advertising media. Research has suggested that Hispanics hold a favorable attitude toward advertising (Deshpande et al., 1986) and that Hispanic-targeted advertising has a significant impact on sales (Torres & Gelb, 2002). Also, a study by Cynthia Webster (1991) found that Hispanic consumers value advertising as an important

source of information. Another study found that Hispanic consumers generally have positive attitudes toward direct marketing advertising, such as direct mail or telemarketing (Krogaonkar, Karson & Lund, 2000). J. A. F. Nicholls and Peter Roslow (1996) found that for Hispanic viewers, Spanish-language television spots were significantly more influential on purchasing attitudes than English-language spots for both Spanish-dominant and bilingual Hispanics (Nicholls & Roslow, 1996).

Common Mistakes

In a study by Stuart Livingston (1992) regarding marketing to Hispanics in the United States, the common mistakes which marketers make when advertising to Hispanics fall into two categories. First, marketers try to adapt marketing strategies that were successful with other groups to the Hispanic market. Second, marketers believe that the same marketing campaign will work for all Hispanics, whether they are Cuban, Puerto Rican, or Chilean. According to Livingston, it is usually not a good idea to simply translate English ads into Spanish. This can lead to embarrassing results and waste millions of dollars. One notable example is an attempt by General Motors to sell Chevrolet Novas to Hispanics during the early 1980s. This marketing attempt failed because *no va* means “it doesn’t go” in Spanish (Livingston, 1992).

Trying to create an advertising campaign that is generic enough to appeal to all the subgroups of the Hispanic market can be difficult. Treating the U.S. Hispanic market as homogeneous is a big mistake. Acculturation levels, language

preferences, and country of origin make for unique subgroups within the segment. Less-aculturated Hispanics seek products that are familiar and that remind them of their home country; in addition, they usually do not speak much English. The Hispanic community is made up of more than 20 Spanish-speaking nationalities, each with its own national holidays, cultural characteristics, foods, traditions, and values. Furthermore, even though all Hispanics speak the same language, individual words and phrases may vary in meaning (Livingston, 1992).

Determining what language to advertise in can be difficult for advertisers. Different generations and different languages can coexist in the same household. Hispanic households can be Spanish dominant, English dominant, bilingual, or a combination of these. The English-speaking segment of the Hispanic market cannot always be addressed through English media campaigns. Therefore, it is important for marketers to do thorough research before making any language decisions (Korzenny & Korzenny, 2005).

Targeting the Hispanic Market

Amanda Lintott (2004) suggests that the first step in successfully reaching this demographic is understanding them: who they are, where they come from, and how they live. Some of the factors that have influence are levels of acculturation, income, and size of household. Lintott found that acculturated U.S. Hispanics will behave like Americans but that less-aculturated Hispanics may need specific targeting with Spanish-language media (Lintott, 2004).

Advertisers are faced with the dilemma of determining the language preference of the Hispanic consumer for their advertisements. They have to determine whether or not to communicate their message in Spanish, English, or both. Most marketers assume that they will eventually catch Hispanic consumers as they become more acculturated. But it is important for marketers to understand that differences in language and in shopping preferences exist among Puerto Ricans living in New York City; Cubans living in Miami; and Mexicans, Central Americans, and South Americans living in the southwestern United States (Livingston, 1992). Over 80% of Hispanics say they identify themselves by their country of origin, or as “Latino” or “Hispanic.” The U.S. Hispanic population is part of a common ethnic group, but most Hispanics associate themselves more with their nationality (Lintott, 2004). Careful research is necessary to understand the special needs of Hispanics, the cultural nuances of their communities, and the inclination of recent immigrants to seek familiar sights, sounds, and smells of their native countries. New immigrants may read Spanish-language newspapers or watch Spanish-language television while looking for a translator to help them adjust to living in the United States and to provide familiar voices and common interests (Livingston, 1992).

One method of initiating a more noticeable presence in the Hispanic market is to sponsor grass-roots programs in Hispanics’ communities—such as investing in college scholarship programs; sponsoring athletic teams; funding literacy programs; or helping to promote public festivals, fairs, or other events (Livingston, 1992).

Another effective method is network marketing, in which marketers approach Hispanics via a social network. It was reported that almost a third of Hispanic women in the United States have been associated with a network marketing effort. Companies like Avon, Tupperware, Shaklee, and others have been very successful approaching Hispanics via a social network for commercial purposes. In Latin America, the idea of buying from relatives and friends is traditional and well accepted (Korzenny & Korzenny, 2005).

People en Español's fourth annual Hispanic Opinion Tracker survey reported that 75% of all Hispanics feel loyalty to retailers who advertise to them in Spanish. Furthermore, 58% of Hispanics have purchased a retail product after receiving free samples in comparison with 44% of the general population. Additionally, the HOT survey reported that Hispanics view celebrities as key influencers; in fact, 36% of Hispanic women have purchased fashion-related items used by celebrities in the media, compared with 13% of the general population. The top four Hispanic female celebrities who influence Hispanic women's choices in fashion and style are Jennifer Lopez, Thalía, Salma Hayek, and Paulina Rubio (2005 Hispanic Opinion Tracker, 2005).

The most convenient way to reach the Hispanic population is through Spanish-language media outlets such as television, radio, print, and the Internet. In a study by Felipe Korzenny regarding "English and Spanish TV exposure by first language" according to the question, "What was the first language you learned to

“speak as a child?” Hispanics who learned Spanish first watch about half of their television in English and half in Spanish. Compared with those of other ethnicities, these media outlets benefit from the fact that language, in addition to culture, defines their target demographic group (Korzenny & Korzenny, 2005). This fact is a huge advantage over the Asian media, which broadcast to so many nationalities and ethnicities that speak different languages. People from Mexico, Puerto Rico, Cuba, and the countries of Central America, South America, and the Caribbean can, for the most part, understand and read Spanish-language media. Consequently, the national networks Telemundo and Univision can broadcast to an audience with varied national backgrounds and still be successful (Spanish Language Press, 2005).

Following the Hispanic growth in population, Hispanic media have also increased with new daily and weekly newspapers, as well as new magazines and broadcast outlets (Spanish Language Press, 2005). With more Hispanic media outlets, spending on advertising is also increasing. Total spending on advertising by Spanish-language media reached \$5.59 billion in 2006—an increase of 14.4% over 2005 (see Table 3). Every medium reported growth; spot radio had the largest increase (31%), followed by cable television (which rose by 20% over the year before (Spanish-Language Advertising, 2007).

Table 3: Spanish-Language Media Advertising Spending 2005 vs. 2006

Media Type	2005 (\$ million)	2006 (\$ million)	% Change
Network TV	2,567.5	2,931.6	14.2
Local TV	1,425.2	1,549.6	8.7
Local Radio	565.1	739.2	30.8
National Magazine	124.5	142.8	14.7
Cable TV	104.3	125.5	20.3
Local Newspaper	105.9	110.4	4.3
Total	4,892.5	5,599.2	14.4

Note: From Nielsen Monitor Research. (2007). Spanish-Language advertising rose 14.4% in 2006. Available on-line at <http://www.nielsenmedia.com/nc/portal/site/Public/menuitem.55dc65b4a7d5adff3f65936147a062a0/?vgnnextoid=d4d4b821c9e42110VgnVCM100000ac0a260aRCRD>

Apparel Retailer's Marketing Efforts Toward the Hispanic Market

When assessing the spending power, the average annual expenditure on apparel, and the spending habits of the U.S. Hispanic consumer, one can explain the reasons why major industries have such an interest in this market. The major challenges for apparel firms are to develop strategies to target this market successfully and entice it to buy their products. In 2006, total spending on advertising by Hispanic media reached \$3,768.7 million, increasing by 10.8% over 2005. Each medium—television, radio, and print—reported increased growth (Hispanic Fact Pack, 2007).

The top companies with apparel products advertising in Hispanic media include Sears, Wal-Mart, J.C. Penney, Target, and Macy's. Table 4 shows the top five apparel retailers advertising in Hispanic media for 2006. This information was

compiled by TNS Media Intelligence, the leading provider of strategic advertising intelligence for media formats ranging from television, radio, and print to the Internet and outdoor advertising.

Table 4: Top Apparel Retailers Advertising in Hispanic Media, 2006*
By measured U.S. media spending

Rank out of Top 50	Rank	Marketer	2006 Ad Spending	% Chg
8	1	Sears Holding Corp.	83,134.5	-2.2
11	2	Wal-Mart Stores Inc.	66,062.5	3.6
31	3	J.C. Penney Co.	32,541.9	28.8
34	4	Target Corp.	31,473.7	42.1
43	5	Macy's	24,265.2	102.6

* Dollars in thousands. Media are taken from TNS Media Intelligence and represent the sum of broadcast TV networks, Galavision (cable), Spanish-language magazines (including four PIB-monitored Spanish-language magazines), Spanish-language newspapers, and Spanish-language spot TV.

Note: From Advertising Age. (2007). Hispanic Fact Pack; Annual guide to Hispanic marketing & media 2007 edition. Available on-line at http://adage.com/hispanic/article?article_id=119426

Sears Holding Corporation (Sears, Kmart, and so forth) spent the most in Spanish-language advertising (\$83.1 million). Behind Sears Holding Corporation was Wal-Mart Stores Incorporated, which increased their advertising spending by 3.6% to \$66.0 million in 2006. Other companies that advertise considerably in Hispanic media are J.C. Penney Company, with a 28.8% increase in 2006, and Target Corporation, with a 42.1% increase in 2006. Macy's had the largest increase (102.6% over the previous year), spending \$24.3 million on Spanish-language media (Hispanic Fact Pack, 2007).

TNS Media Intelligence also calculated spending on advertising by category (see Figure 4). The automotive category spent the largest amount on advertising in Hispanic media (\$699 million), followed by the retail category (\$592 million), an increase of 16% over 2006 (Hispanic Fact Pack, 2007).

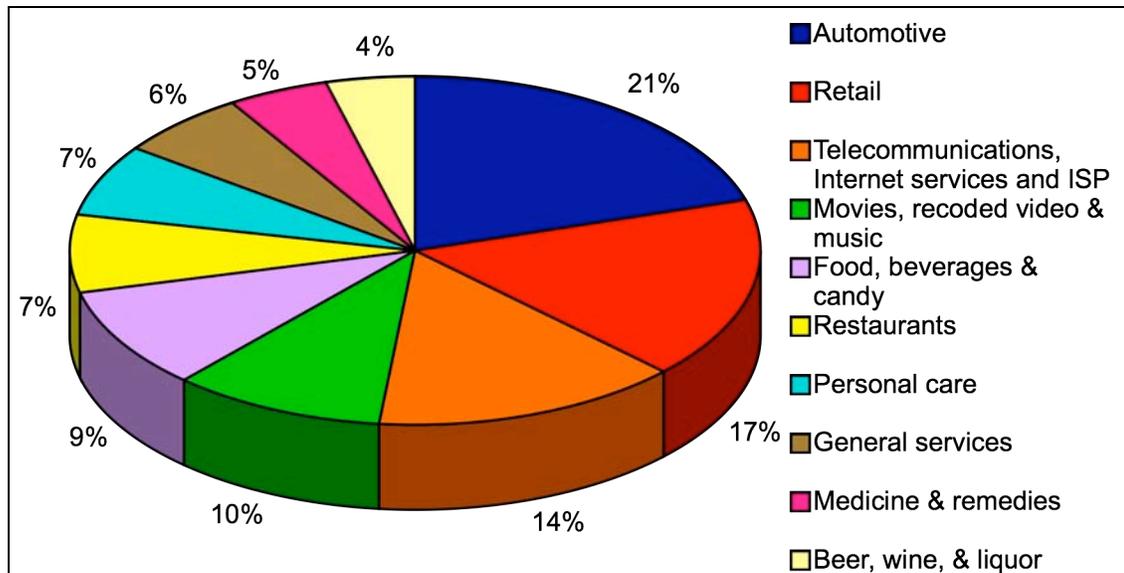


Figure 4: Spending on Advertising by Category in Hispanic Media, 2006*

* Dollars in thousands. Media are taken from TNS Media Intelligence and represent the combined media totals for TV from broadcast TV networks, Galavision (cable) and Spanish-language spot TV stations, for print from Spanish-language magazines (including four PIB-monitored Spanish-language magazines), and Spanish-language newspapers. Categories are aggregated by the age of the advertising. Only the top 10 categories are shown. Appendix B shows actual figures.

Note: From Advertising Age, (2007). Hispanic Fact Pack; Annual guide to Hispanic marketing & media 2007 edition. Available on-line at http://adage.com/hispanic/article?article_id=119426

The following is a review, in descending order, of the top five apparel companies' strategies for targeting U.S. Hispanic consumers.

Macy's

After Federated Department Stores acquired Hecht's and converted those stores to the Macy's nameplate, Macy's launched a new advertising and marketing

campaign across the nation. Advertising included national broadcast and cable television, local newspapers, local and national magazines, targeted radio spots, outdoor billboards, and an extensive online advertising approach. To reach the Hispanic consumer, a Spanish-language adaptation of the print advertisements and television commercials were produced, airing on September 7, 2006. In addition, Macy's Corporate Marketing and Division Marketing teams partnered with JWT Chicago and Latinvox, a New York-based agency specializing in reaching Hispanic consumers, to create advertisements. Latina actresses and models Zoe Saldana, Ana de la Reguera, and Patricia Velásquez have all been associated with the new marketing campaign (Macy's Inc., 2006).

Macy's carries a men's brand called Cubavera, one of Perry Ellis International's brands, to target the Hispanic male consumer. "The Cubavera brand translates the joy and evolution of Latin culture into apparel." The brand incorporates the authentic fundamental from the traditional *guayabera*, combining it with innovative fabrics and design. The line includes its signature shirts, a variety of suit separates, and shirt jackets. Macy's has also hosted numerous events where Latino celebrities such as Miami Dolphins star Channing Crowder promote the brand and sign autographs. Meanwhile, with a minimum purchase of \$50 of Cubavera Sportswear, shoppers will receive gifts and meet the celebrity. These events were hosted in cities with large populations of Hispanics—Houston, New York City, Miami, and Los Angeles (Cubavera, 2007).



Figure 5: Cubavera Advertisement

Note: From Perry Ellis International. (2007). Company Web site. Available on-line at <http://www.pery.com/cubavera.htm>

In 2001, Macy's premiered JLO by Jennifer Lopez, a sporty and chic sportswear line designed by singer and actress Jennifer Lopez. She has been credited as the trend starter of celebrity fashion brands. This junior-oriented line spans eleven different categories—from clothing, fragrances, and accessories to watches and shoes. Also in 2001, Jennifer Lopez joined forces with Andy Hilfiger to form the JLO brand holding company, SweetFace Fashion Company, a complete lifestyle brand (Pliagas, 2004). Lopez went on to introduce SweetFace, a higher-end collection, in 2005. Then Lopez developed JustSweet to fill the gap between JLO and SweetFace. JustSweet is an affordable young-at-heart line with fun and colorful designs (Lo, 2007). The line JLO by Jennifer Lopez will have a collection for fall

2008 (Shop JLO, 2008). The following pictures are examples of the three lines by Jennifer Lopez (see Figure 6).



JLO by Jennifer Lopez
Fall 2005

JustSweet
Spring 2008

SweetFace
Fall 2006

Figure 6: SweetFace Fashion Company Lines by Jennifer Lopez

Note: From *New York Magazine*; Fashion. (2007). *Jennifer Lopez*. Available on-line at <http://nymag.com/fashion/fashionshows/designers/bios/jenniferlopez/>

On July 9, 2007, Macy's South, a division of Macy's Incorporated, announced their partnership with Mexico City-based apparel brand NaCo,[®] offering "Latina" shoppers the brand's exclusive junior summer apparel line in over 17 select Macy's South retail stores throughout Texas and Atlanta. Two classmates at the Art Center College of Design in Pasadena, California, Edoardo Chavarin and Robby Vient founded the NaCo[®] brand in 1999. The word *naco* is an adjective-noun combination used in Mexico to describe some kind of tackiness and/or lack in an

individual or an object. The objective of the partnership with Macy's was to draw on the young, urban-chic "Latina" shopper demographic seeking to express cultural identity through fashion. Figure 7 is an example of a Naco® advertisement for Macy's. NaCo® offers T-shirts that are unique and that send a creative and humorous message directly to the Mexican community (NaCo News, 2007).



Figure 7: NaCo® Advertisement for Macy's

Note: From NaCo News, (2007) *Macy's partnership with Mexico based apparel line "NaCo.®"*. Available on-line at <http://www.usanaco.com/news/default.asp?contentID=609>

There has been some controversy regarding one of NaCo®'s shirts carried by Macy's South—so much controversy that Macy's issued an apology and pulled the shirt from stores in Georgia and Texas within weeks of release. The new line of shirts was supposed to cater to Hispanic customers, but it actually ended up offending them—in particular, a T-shirt that read, "Brown is the New White." It is still

unclear whom the T-shirt offended; there is speculation that Hispanic shoppers were offended, but there is no certainty about which Hispanic shoppers were offended— younger, older, Cuban, Mexican, Puerto Rican, fifth-generation, or hyphenated-American (Garza, 2007).

Target Corporation

In 1999, Target Corporation followed in the steps of Sears and began to refashion its merchandise mix in heavily Hispanic markets in the United States by developing special marketing events and launching its own Hispanic magazine, *Familia* (Coleman, 1999). In areas with large Hispanic communities, Target increased the number of its petite sizes, carried more small-size shoes, installed bilingual signage, and hired more bilingual workers. All Target stores have also expanded the children's department and moved it from the back wall corner to front and center. Target continues to show its support of the Hispanic community through funding and sponsoring cultural organizations, programs, scholarships, and other events (Coleman, 1999).

Target's own youth-oriented Xhilation and casual Utility clothing brands have been popular with Hispanics. Last year, as part of its annual celebration for Hispanic Heritage Month, Target offered a variety of unique Latino-designed merchandise. The exclusive merchandise was designed in collaboration with Mexico's popular NaCo® brand under the USA-Dos label (see Figure 8). Target also carried baby products by Los Pollitos Dicen, accessories by Agatha Ruiz de la Prada, jewelry by

Kathy and Patrick Murillo, and handmade handbags by Nahuiollin. Unfortunately, these items were only available for one week at Target stores (Target Multicultural, 2007).



Figure 8: USA-Dos T-shirts from Target

Note: From Target Multicultural: Hispanic Initiatives. (2007). Target celebrates Hispanic Heritage Month with exclusive Latino-designed merchandise. Company Web site. Available on-line at <http://pressroom.target.com/pr/news/multicultural/hispanic/hispanic-heritage-month-2007.aspx>

At the Voz Latina Hispanic Marketing Conference in April 2007, Greg Cunningham, Group Marketing Manager at Target, spoke about how Target transformed 200 stores in specific locations populated mostly by Hispanics with Spanish signage and team members who speak Spanish. He also described how they are translating their commercials into Spanish, keeping in mind that a literal translation can be wrong. Target, Cunningham said, changed the commercial to fit the Hispanic market but kept the original message intact. For example, in its television advertisement that uses a remake of the Beatles song “Hello Goodbye” in

the background, Target changed the music to be more appealing to the Hispanic market. In the Spanish version, Target kept the same singing voice as that of the English version, but it changed the music to give it a more Latin feel, using Spanish guitars. Target also changed the original “Hello Goodbye” to “Hola!” (G. Cunningham, personal communication, April 26, 2007).

J.C. Penney Company

As one of America’s leading retailers, J.C. Penney offers a wide assortment of national, store, and exclusive brands, which reflect the company’s commitment to providing customers with style and quality at a smart price (J.C. Penney, 2007). J.C. Penney has a long history of connecting with the Hispanic market. Using U.S. Census data and its own market research, J.C. Penney identified several Hispanic-designated stores and applied some changes to cater more to that market. Changes included bilingual signage, gift cards and credit applications, and stocking more colors and sizes (Cardona, 2005). On another note, J.C. Penney’s customer Web site has a help section that has been translated into Spanish specifically for its Hispanic customers (J.C. Penney, 2007).

In April 2003 J.C. Penney launched the brand The Havanera Co. in 224 of their stores. The Havanera Co. brand is another Latin-inspired sportswear brand by Perry Ellis International, which is created with rich fabrics and nostalgic details. During the holiday season after the April 2003 launch, another 100 stores received the new brand. By the following year, more than 500 stores carried The Havanera

Co. brand. The Latin musician Tito Puente Jr. is the company's spokesperson; he wears the apparel while on tour and makes in-store appearances on important days such as Father's Day and at Hispanic celebrations (Targeting: Havanera adds spice to J.C. Penney apparel, 2003).



Figure 9: Advertisement for The Havanera Company

Note: From Perry Ellis International. (2007). Company Web site. Available on-line at <http://www.pery.com/havanera.htm>

As the exclusive retail sponsor of the Academy Awards®, J.C. Penney launched its new brand positioning campaign, with the slogan “Every Day Matters,” on February 25, 2006. A few days before, on February 22, 2006, J.C. Penney also sponsored *Premio lo Nuestro a la Musica Latina*, the longest-running and most popular award show for the U.S. Hispanic audience. The retailer created an advertisement exclusively for J.C. Penney’s Hispanic customer, translating the

slogan to “*Cada Dia Cuenta*” to air on the country’s Spanish-language television network, Univision (J.C. Penney Company News, 2007, February 13).

Following the launch of the company’s new brand positioning campaign, “Every Day Matters,” J.C. Penney sponsored *Nuestra Belleza Latina*, a reality television show on Univision. Twelve Hispanic women from all over the country move into a Miami mansion for a competition. J.C. Penney provided clothing, accessories, jewelry, and home furnishings for the house and the contestants. The winner received a one-year Univision contract and \$40,000 from J.C. Penney, along with other prizes (J.C. Penney Company News, 2007, April 3).

J.C. Penney also exclusively sponsored the broadcast special *The Christmas Gift* on Univision, with Alejandro Fernandez, one of Mexico’s most renowned artists. In addition, the retailer selected one of Fernandez’s latest songs for its Hispanic holiday marketing campaign of television commercials in November 2007 (J.C. Penney and Univision present *The Christmas Gift*, with Alejandro Fernandez, 2007).

Wal-Mart Stores Incorporated

Hispanic Americans choose Wal-Mart as the store that does the best job of catering to the Hispanic or Latino consumer, according to the GfK Omnibus Services Study (Adhorre Marketing, 2007b). Wal-Mart Stores Incorporated is the largest retailer in the world and the second-largest corporation (behind Exxon Mobil). Its operations are comprised of three retailing subsidiaries: Wal-Mart Stores Division U.S., Sam’s Club, and Wal-Mart International. Wal-Mart Stores Division U.S. is Wal-

Mart's largest subsidiary, accounting for 65.6% of fiscal 2007 net sales (Wal-Mart Stores Inc., 2007b).

Wal-Mart is the leading employer of minorities in the United States and employs more than 165,000 Hispanic associates. So when a Hispanic consumer goes to Wal-Mart, that consumer is among family and friends, thanks to Wal-Mart's hiring efforts. In addition, Wal-Mart's Board of Directors includes two Hispanic members out of fifteen, and more than 25% of Wal-Mart's managers and officials are minorities, including Hispanics (Wal-Mart Stores Inc., 2007a). Furthermore, with a large percentage of the U.S. Hispanic market emigrating from Mexico, Wal-Mart's 697 *Wal-Mart de Mexico* stores and restaurants in Mexico expose immigrants to its brand before they arrive in the United States (Zimmerman, 2005).

In 2004, Wal-Mart began printing its monthly circular in English and Spanish. However, Wal-Mart was late to the game compared with the likes of Sears and Target, which began aggressively targeting the Hispanic market in 1993 and 1999, respectively. Like Sears, with its *Nuestra Gente*, and like Target, with its own Hispanic magazine, Wal-Mart launched its own quarterly Hispanic magazine, *Viviendo (Living)* (see Figure 10), in 2004. It is distributed for free at over 1,300 stores frequently shopped by Hispanics. *Viviendo* features profiles of Latino leaders and celebrities and highlights Wal-Mart's line of products and services aimed at the Hispanic market and written in Spanish and English (Zimmerman, 2005). Since then, Wal-Mart has launched several new programs aimed at reaching Hispanics.



Figure 10: Wal-Mart's Free Hispanic Magazine

Note: From Marcos Moure. (2006). Marcos Moure company Web site. Available on-line at <http://marcosmoure.com/index/index.html>

Wal-Mart teamed up with Sprint Corporation and several other companies to offer a new prepaid wireless service specifically targeted to Hispanics. Furthermore, Wal-Mart began stocking a line of bathroom and tabletop accessories from New York restaurateur and cookbook author Zarela Martinez, whose designs are inspired by Mexican folk art and culture. The financial services department at Wal-Mart offers cut-rate fees on money wire transfers, a big lure for immigrants who support family back home (Zimmerman, 2005). Wal-Mart also offers check cashing and prepaid Visa cards aimed at people without bank accounts (Hudson & Campoy, 2007).

In October 2005, Wal-Mart introduced the line Metro7 with former Miss Universe Puerto Rican Dayanara Torres as its spokesmodel. The line aims to attract more affluent, fashion-conscious shoppers and will be available in 1,500 stores. The Metro7 line includes clothes, handbags, jewelry, and shoes (Fashion; Pickup Line, 2006). Wal-Mart has not developed any other apparel lines to specifically target Hispanic consumers.

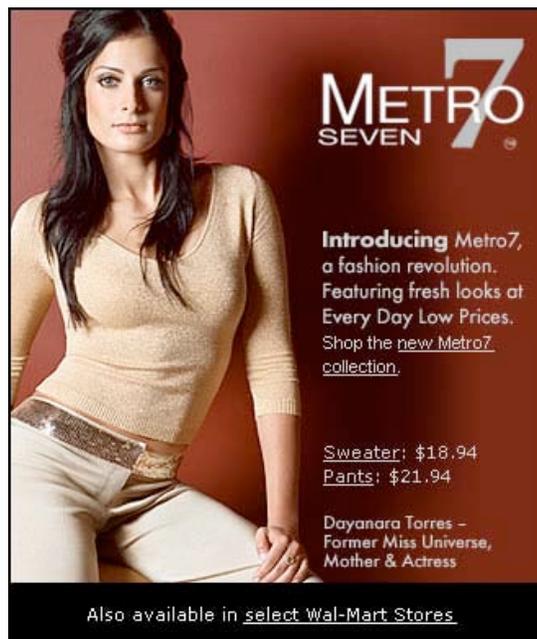


Figure 11: Wal-Mart's Metro7 Advertisement

Note: From Wal-Mart. (2007). Company Web site. Available on-line at <http://www.walmartstores.com>

Another way Wal-Mart is differentiating itself from other retailers is abandoning its one-size-fits-all approach to retailing. Instead of the cookie-cutter stores stocked with largely the same products, Wal-Mart introduced a program called “store of the community.” This concept divides Wal-Mart’s approximately 3,500 U.S. stores into six demographic groups. The six groups are as follows:

African-Americans, Hispanics, the affluent, empty nesters, suburbanites, and rural residents (Zimmerman, 2006).

In the “store of the community” program, local managers are given more say in what products to carry in order to tailor merchandise to each individual store’s demographic. Wal-Mart has also increased staff to follow trends in fashion, food, and consumer electronics (Zimmerman, 2006). Hispanics are one of the six key segments of the "store of the community" program. Wal-Mart opened a Hispanic store in January 2006 (Neff, 2006), which used locally relevant store designs, merchandise, and services that reflect the lifestyles and preferences of Hispanic consumers (Wal-Mart Stores Inc., 2007a). Stores have some obvious differences, such as more varieties of tortillas and other foods and flexible layouts to accommodate weekend farmer’s markets (Zimmerman, 2006). Some examples of Wal-Mart’s products are Lulu’s Desserts, which include gelatin and frozen fruit bars, and the Baby Abuelita doll, which was a toy during the company’s Three Kings Day celebration in 2007. In addition, Pollo Campero restaurants, rather than the typical American fast food restaurants, are featured in Wal-Mart stores (Wal-Mart Stores Inc., 2007a). There are also bilingual in-store signage, bilingual staff, and community involvement (Zimmerman, 2006).

Eduardo Castro-Wright, Executive Vice President–CEO of the Wal-Mart Stores division, reported that the Hispanic prototype in Houston is generating sales per square foot 7.6% above the rest of the retailer's Houston supercenters. Before

the conversion to a Hispanic “store of the community,” sales were around the regional average. Now the store's gross margin is 1.6 percentage points above that of the regional average, and pretax profits are up by triple digits (Neff, 2006).

Women's Wear Daily reported on a survey by Scarborough Research, which asked nearly 23,000 Hispanic consumers: "Where have you shopped over the past 30 days?" The retailer that was recalled the most was Wal-Mart (56%). H. Lee Scott, Chief Executive Officer of Wal-Mart, said, during the company's annual media conference, "Hispanics have a greater affinity for Wal-Mart than any identifiable segment of the U.S. population." He also pointed out that over a thousand Wal-Mart stores have predominantly Hispanic shoppers. "We are learning a great deal about Hispanic trends through our stores in Mexico and Central America," Scott stated. "We are also spending about \$45 million per year in Spanish-language advertising" (Hall, 2007).

Celia Clancy, Wal-Mart's general merchandise manager for women's and children's apparel, announced plans to tweak her product line in the United States to reflect the way Mexico's stores address the departments. She is teaming up with her Mexico-based colleagues to bring more Latino-flavored women's apparel to Wal-Mart's U.S. stores. Clancy said, "They do a better job in women's apparel, serving a higher level of fashion, we are partnering with our peers there and exciting things are coming up." (Zimmerman, 2005).

Sears Holdings Corporation

Sears Holdings is the nation's fourth-largest broad-line retailer and the leading home appliance retailer in North America (Sears Holdings Corporation, 2007). It was formed in 2005 by the merger of The Sears Roebuck Foundation with the Kmart Holdings Corporation and Land's End stores (Barbash & Barbaro, 2004). Of all apparel retailers, Sears Holdings Corporation spends the most on Spanish-language advertising (\$83.1 million) (Hispanic Fact Pack, 2007).

Sears

Sears began heavily targeting Hispanics in 1993 with the launch of a quarterly magazine called *Nuestra Gente*, (*Our People*) (Zimmerman, 2005). The magazine features articles about Hispanic celebrities alongside glossy spreads of Sears fashions and advertises Sears Craftsman tools with a column by the tool line's spokesman, Bob Vila. The magazine is free and distributed in stores, but subscriptions are available upon request (Coleman, 1999). By 1994, Sears stores began to cater to regional ethnic tastes, a strategy which was unheard of at the time. Such a strategy was considered costly and hard to manage. However, the company began adjusting the merchandise mix, advertising, and hiring Spanish-speaking sales help. Sears started its new strategy in the clothing department by changing the sizes available. The women's department needed a larger stock of smaller sizes and the men's department needed a larger stock of bottoms with smaller waists and shorter inseams. In addition, Sears replaced "USA" soccer shirts with jerseys

featuring teams from Latin America, replaced patterned underwear with black-and-white items, and reduced the number of two-piece swimsuits and increased the number of one-piece swimsuits. Sears even made adjustments in housewares. Sears replaced custom-made drapes with more sewing machines because it found that their customers preferred to make their own drapes. Sears also began to carry juicers, because homemade juice is popular among Hispanics (Steinhauer, 1997). Sears was one of the first retailers to market credit cards to Hispanics, thereby helping to build one of the most formidable U.S. databases of Hispanic consumers (Zimmerman, 2005). Sears was also one of the first American retailers to operate stores in Puerto Rico, where it has operated since 1937; Sears then moved into Mexico 10 years later. As a result, many Hispanics are already familiar with Sears when entering the United States (Coleman, 1999).

Since 1997, Sears has been considered one of the leading advertisers on the sponsorship of multicultural events, spending an estimated \$10 million. The company is credited with building a strong reputation among Hispanic consumers by community support through sponsorship (Fitzgerald, 1997). Sears has sponsored Hispanic high school students for internships with Sears, soccer tournaments, home maintenance and improvement outreach for the Latino community, and other opportunities to win money and prizes. Sears has also sponsored some of the largest Hispanic events—such as Gloria Estefan’s U.S. concert tour from 1996 through 1997; Mexican superstar Juan Gabriel’s tour in 1999; Christina Aguilera’s

first headline-grabbing tour in 2000; and the Sears Hispanic Concert Series, which sponsored various internationally renowned artists from 2002 through 2003 (Cobo, 2002). Sears has been able to extend sponsorships to include local, integrated marketing promotions and store appearances by entertainment stars. Radio promotions and in-store radio events are used to attract customers, to promote ticket sales and merchandise giveaways, and to attract customers into the store to enter and win local sweepstakes. In the end, such sponsorship gives Sears a positive association with musical entertainers (Radio Advertising Bureau, 2000).

In 1996, Sears created a mobile marketing vehicle called the Sears Fiesta Mobile,[®] which traveled among stores and events with a full sound system. At each stop, the Fiesta Mobile RV created entertainment and contests in conjunction with local radio stations to promote its business (Fitzgerald, 1997). More recently, in 2001, Sears Fiesta Mobile[®] teamed up with Cingular to bring “The Cingular Experience” to Hispanic events in 14 targeted Hispanic markets. At festivals and stores across the country, Sears promoted its credit card and its commitment to Hispanic communities. Cingular introduced the first Hispanic wireless Internet portal, *Mi Ventana Movil*, offered in the United States and at its own Spanish-language Web site (PRNewswire, 2001). Figure 12 shows the Sears Fiesta Mobile[®] RV with Cingular. Then, in 2003, Sears teamed up with America Online (AOL) and Hewlett-Packard (HP) for a 46-week nationwide tour (MediaPost, 2003).



Figure 12: Sears Fiesta Mobile® RV

Note: From PRNewswire. (2001). Cingular Wireless partners with Sears' Fiesta Mobile and launches nationwide customer campaign. Available on-line at <http://att.centralcast.net/cingularnewsarchive/Release.aspx?ID=2924>

In 1998, Sears began testing an apparel line named for the late Tejano pop singer Selena, as well as a line by Mexican-American designer Sandra Salcedo from Dallas, Texas (Coleman, 1999); however, neither line is currently offered at Sears. Sears attempted to launch its own Spanish-language Web site in 2000: www.Sears.com/todoparati in 2000. *Todo para ti* means “Everything for you.” However, the site had problems. Then Sears launched www.SearsEnEspañol.com, but this site has also had problems. The site is not easy to find: there is no link from the www.Sears.com Web site and the site does not advertise that there is a Spanish-language Web site. If a customer wants to view merchandise on the Spanish-language site, it redirects him/her to the English site, www.Sears.com

(Yunker, 2005). The links in Spanish are “Sears Optical,” “The Benefits of the Sears Credit Card, where you can apply for the card in Spanish, and “Customer Service.” Along the bottom of the Web page is a *Sears En Español* Press Release, “Privacy Policy,” “Terms and Conditions,” and “Children’s Privacy Policy” (see Figure 13).

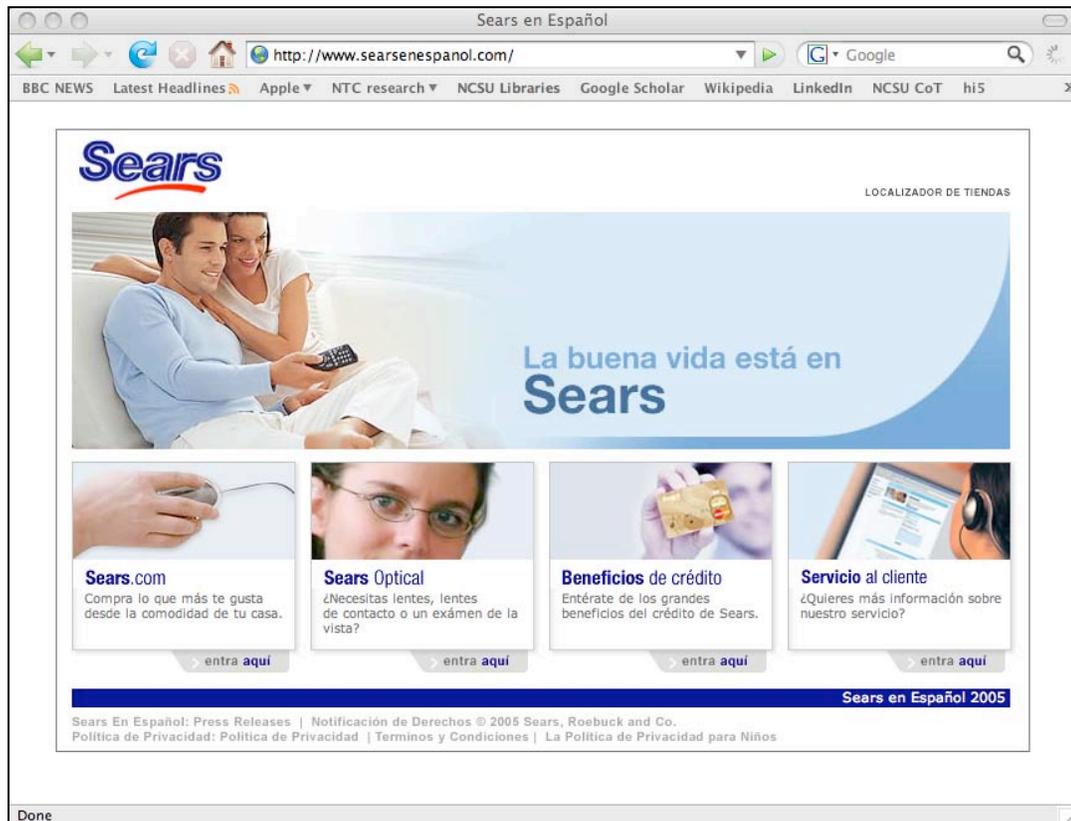


Figure 13: Sears en Español Web Site

Note: From *Sears en Español*. (2007). Company Web site. Available online at <http://www.SearsEnEspanol.com>

In 2003, Sears teamed up with Lucy Pereda, also known as the Hispanic Martha Stewart, to launch an apparel collection. Her career experience as a fashion model, designer and entrepreneur, journalist, producer, and author inspired her to create the line. The Lucy Pereda collection offers stylish, feminine clothing that

appeals to women of all backgrounds. Her women's apparel collection debuted in 227 Sears stores nationwide in September 2003 and then expanded to include shoes, handbags, jewelry, and sleepwear the following year (PRNewswire, 2003).



Figure 14: Lucy Pereda Line for Sears

Note: From Linda Pliagas. (2004). Hispanic celebrity fashion tycoons. Available on-line at <http://www.hispaniconline.com/magazine/2004/may/LaBuenaVida/index.html#top>

After less than two years of selling Lucy Pereda's apparel collection, Sears discontinued the line and introduced a new line called Latina Life. The line is a partnership with *Latina Magazine* and consists of clothing (size 2-20), shoes, purses, and accessories. The collection is designed with Hispanic women in mind and appeared in 425 Sears stores in the fall of 2005. Jones Apparel Group designs the collection under the fashion direction and counsel of *Latina Magazine* (Yerak, 2005). Latina Life was marketed nationwide through an integrated mix of Sears and *Latina*

Magazine cross-marketing and public relations efforts—including in-store signage, direct mail, seasonal magazine inserts, newspaper inserts in English- and Spanish-language publications, editorial features, fashion makeovers, and product information on Sears.com and Latina.com (Sears Press Release, 2005). Currently, there is no indication that Sears carries the Latina Life collection in its stores.

Kmart

Kmart was the first major discount retailer to create a Spanish-language magazine specifically for the Hispanic market. One million copies of *La Vida* were distributed in September 2002 in select markets with large Hispanic populations. The monthly magazine was an entertainment and lifestyle magazine with product offerings, features, and articles relevant to the Hispanic community. In addition to *La Vida*, Kmart's multicultural marketing campaign includes a Spanish-language weekly circular and newspaper, television, and radio advertising (Kmart Corporation News, 2002). Kmart's locations give the retailer a significant advantage over its rivals because about 60% of its stores are in urban areas—a much larger percentage than Wal-Mart and Target. In these urban areas, many Hispanics live and work. The company has been catering to the Hispanic community for a long time, and Hispanic customers account for about 17% of Kmart's total sales (Bhatnagar, 2003). Part of Kmart's multicultural merchandising campaign is a program called “store of the neighborhood,” in which Kmart stores target their merchandise specifically to the

consumer demographic. Kmart attempts to carry out this program in all of their stores (Kmart Corporation News, 2002).

Since Kmart's bankruptcy and merger with Sears in August 2003, Kmart introduced a new line called the Thalía Sodi Collection. The line was inspired by and designed in collaboration with Thalía Sodi, an extremely popular actress and singer from Mexico. The collection includes apparel for women and girls, as well as footwear, accessories, jewelry, intimates, hosiery, and bed-and-bath products (Kmart Corporation News, 2003). The Thalía Sodi Collection was designed primarily to cater to Kmart's growing Hispanic customer base and reflects Thalía's own personal style and attitude (Bhatnagar, 2003). The assortment includes colorful prints, logo-laden apparel, graphic T-shirts, embellished and embroidered denim, and brightly colored camises and lingerie (see Figure 15). The collection was released in 335 Kmart stores located in highly populated Hispanic communities (Kmart Corporation News, 2003). However, the collection currently cannot be found in stores or online.



Figure 15: Thalía Sodi Collection at Kmart

Note: From Thalía Sodi. (2007). Personal Web site. Available on-line at <http://www.thalia.com/2.0/>

In 2004, Kmart made a deal with Warner Brothers WB network in which characters in some of its shows wear Kmart apparel. Kmart also receives a callout during some of the episodes, and the celebrities make personal appearances on behalf of Kmart. For example, Joanna García of WB's *Reba* visited Kmart's Astor Place store in New York. Also that year, Kmart and the Hispanic television network Telemundo made a deal to air a series of television commercials with TV actresses Génesis Rodríguez and Rebecca Montoya. Both wore the Kmart brands Route 66 and Thalía Sodi. The commercials ran in key areas such as Los Angeles, New York City, Chicago, San Francisco, and Miami (O'Loughlin, 2004).

The following table summarizes the techniques that these retailers (Macy's, Target, J.C. Penney, Wal-Mart, Sears, and Kmart) have undertaken to advertise to the Hispanic market.

Table 5: Top 5 Apparel Retailer's Marketing Efforts Toward the Hispanic Market

	Macy's	Target	J.C. Penney
Print Advertisements	Circulars, local & national magazine ads, & newspaper ads	Hispanic magazine: <i>Familia</i>	National magazines
Television Advertisements	Spanish-language ads	Spanish-language ads	Spanish-language ads
Internet	None	None	There is a help section in Spanish.
In-store Mktg. & Spanish Assoc.	Does not advertise; provides neither of these.	Bilingual staff & signage in certain areas of the U.S.	Bilingual staff & signage in certain areas of the U.S.
Celebrity Endorsements	Zoe Saldana Ana de la Reguera Patricia Velásquez Channing Cowder Carlos Lee Jennifer Lopez	No Hispanic celebrity endorsements	Tito Puente Jr
Brands Targeted at Hispanic Market	Cubavera JLO - discontinued NaCo - discontinued	USA-Dos Los Pollitos Dicen Accessories by Agatha Ruiz de la Prada Jewelry by Kathy and Patrick Murillo Handmade bags by Nahuiollin - All discontinued	The Havanera Co.
Other Information	Has a store in Puerto Rico.	42% of team members are minorities; increased number of petite sizes and smaller shoe sizes.	Offers gift cards & credit applications in Spanish; stocks more sizes & colors; has stores in Puerto Rico & Mexico.
Hispanic Sponsorship and Funding	Funds and sponsors arts & culture programs, education programs, minority and women's issues, & a literacy & health multicultural program.	Funds and sponsors cultural organizations, education & arts programs, scholarships, and other events. Contributes to Hispanic Scholarship Fund.	Funds and sponsors Latin award shows, Spanish reality show, holiday specials, after school programs, & community programs. Contributes to Hispanic funds/charities.

Table 5: Continued

	Wal-Mart	Sears	Kmart
Print Advertisements	Hispanic magazine <i>Viviendo</i> & circulars	Hispanic magazine <i>Nuestra Gente</i> & circulars	Hispanic magazine <i>La Vida</i> & circulars
Television Advertisements	Spanish-language ads	Spanish-language ads	Spanish-language ads
Internet	None	Not able to shop/buy directly from site but has Sears Optical, Sears Credit Card & Customer Service in Spanish.	None
In-store Mktg. & Spanish Assoc.	Bilingual staff & signage in certain areas of the U.S.	Bilingual staff & signage in certain areas of the U.S.	Bilingual staff & signage in certain areas of the U.S.
Celebrity Endorsements	Dayanara Torres Zarela Martinez	Lucy Pereda	Thalía Sodi Génesis Rodríguez Rebecca Montoya Joanna García
Brands Targeted at Hispanic Market	Sprint Corp Metro 7 Line of bathroom and tabletop accessories by Zarela Martinez - discontinued	Lucy Pereda - discontinued Latina Life - discontinued	Thalía Sodi – discontinued Dora the Explorer
Other Information	Largest employer of minorities, money wire transfers at cut-rate fees, check cashing & prepaid Visa cards, has stores in Mexico.	Markets credit cards to Hispanics in Spanish, adjusted sizes available, smaller sizes & shorter inseams, has stores in Mexico & Puerto Rico.	Magazine -discontinued, has stores in Puerto Rico.
Hispanic Sponsorship and Funding	Funds and sponsors community programs, education & arts programs, disaster relief, scholarships, & other events. Contributes to Hispanic Scholarship Fund.	Funds and sponsors community programs, sports, musical events, scholarships, & helps renovate low-income homes.	Funds and sponsors programs for children's health & wellness. Contributes to the U.S. Hispanic Chamber of Commerce

Spanish-Language Media Outlets

The most convenient way to reach the Hispanic market is Spanish-language media outlets such as television, radio, print, and the Internet. Only a generation ago, the Hispanic media landscape did not have very many outlets. There were a handful of newspapers and radio stations, and one struggling television network. With the growing Hispanic population, media outlets also have to expand. Some trends among the Spanish-language media are as follows. The circulation of Spanish-language dailies has more than tripled since 1990; advertising revenue of these dailies has grown more than sevenfold since 1990; and ownership of Spanish-language television and radio has seen serious consolidation over the past decade—to the point where there may soon be only two real players in the market (Spanish Language Press, 2005).

Compared to other ethnicities, these news outlets benefit from the fact that language, in addition to culture, defines their target demographic group. Consequently, the national networks Telemundo and Univision can broadcast to an audience with varied national backgrounds and be successful (Spanish Language Press, 2005).

Spanish-language media can vary greatly from city to city, depending on the ethnic background, income, and education. In 2002, the Project for Excellence in Journalism's Local TV News Study found different kinds of news at different locations. In Miami, there is a large Cuban community, so the news had a

Caribbean flavor, with a distinct focus on Cuba. In New York City, there are Puerto Rican and Dominican communities, so the news was more cosmopolitan, with a focus on Puerto Rican and Dominican issues. The southern United States and Los Angeles area is predominately a Mexican community, so the news showed a particular interest in Mexican border issues. Such diversity makes the future of the national Spanish-language media unclear. Advertisers want to reach the entire population, but they question the programming consistency because the definition of *news* is different in each area of the country (Spanish Language Press, 2005).

Since 1990, Spanish-language newspapers have seen a sharp growth in circulation and in the number of daily newspapers published in the United States. According to the National Association of Hispanic Publishers, the number of Spanish-language newspapers sold in the United States has increased from less than 140,000 in 1970 to more than 1.7 million in 2002, and is still climbing (see Figure 16) (Spanish Language Press, 2005). The sharp increase in circulation from 1990 to 2002 coincides with the growth of the Hispanic population during the same time period. The opposite is true for English-language newspapers; their circulations have been declining by nearly one percentage point a year since 1990 (Spanish Language Press, 2005).

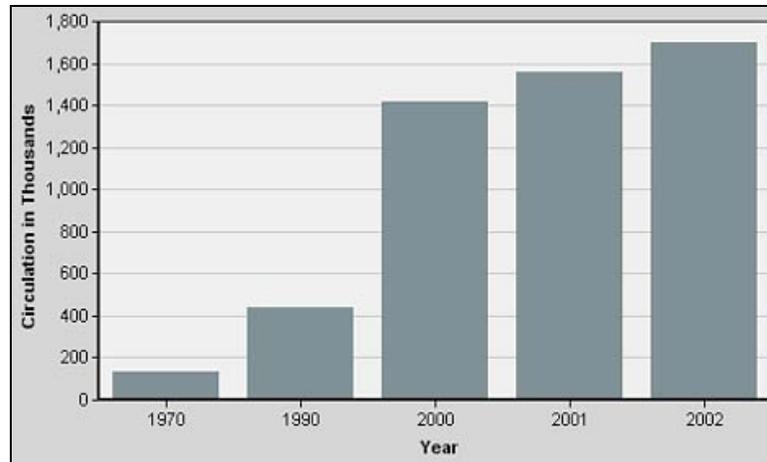


Figure 16: Spanish-Language U.S. Daily Newspaper Circulation

Note: From Spanish Language Press. (2005). The state of the news media 2004: An annual report on American journalism. Available on-line at http://www.stateoftheNewsmedia.org/printable_ethicalalternative_spanishpress.asp?media=9

Out of the more than 13,800 radio stations broadcasting around the country, 638 are Spanish-language stations (see Figure 17). The radio is the ideal medium for reaching Hispanic Americans at any time or in any place. Jeffery Liberman, President of Entravision Radio said, "U.S. Spanish-language radio once consisted of formats that only targeted first generation Hispanics. Our programming team has done an excellent job of creating new formats that also appeal to the diverse tastes of second and third generation Hispanics." Hispanics listen to radio about 19 hours per week, as compared with non-Hispanics, who listen to radio about 16 hours a week. When listening to Spanish-language stations only, Hispanics listen to radio almost 22 hours per week (Hispanic Radio Today, 2005).

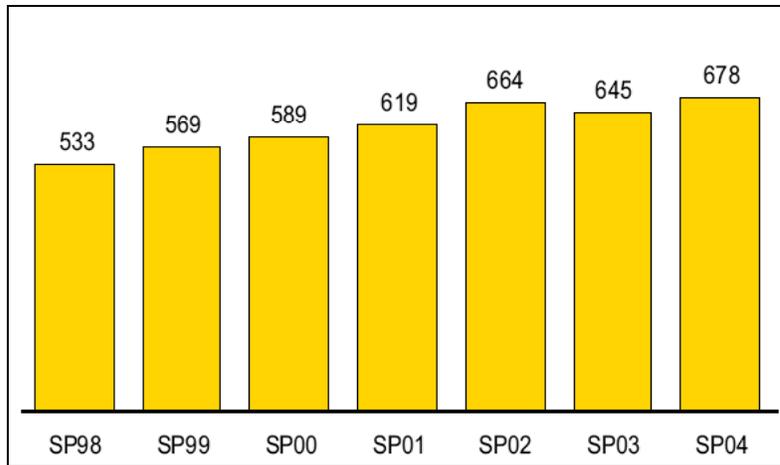


Figure 17: Number of Hispanic Radio Stations in the United States

Note: From Arbitron. (2005). Hispanic radio today: How America listens to radio. Available on-line at <http://www.arbitron.com/downloads/hispanicradiotoday05.pdf>

An AOL/Roper U.S. Hispanic study reports that Hispanics in the United States are adopting and relying on broadband and the Internet at an above-average rate. It is predicted that by 2010, 62% of U.S. Hispanics will have access to the Internet at home, which is up by 45% in 2004. A study by the UCLA Center for Communication Policy in 2003 found that Hispanics spend 11.6 hours per week online, compared with non-Hispanics, who spend 11.0 hours a week online. At home, Hispanics are spending 9.8 hours per week online, which is higher than the national average of 8.5 hours per week. Hispanics favor the Internet over other media because they can obtain more information about products and services through the World Wide Web than they can through television or print. Hispanics have also claimed that they would spend more time online and pay more attention to advertisements if they were in Spanish (Cox, 2004).

Of all the different types of media, Spanish-language television has the most significant presence among Hispanics. There are two networks aimed at the Hispanic audience, Telemundo and Univision. Saul Steinburg and Henry Silverman of Reliance Capital Group launched Telemundo in 1986. The network was made up of stations out of Miami, Los Angeles, and New York City. In 1998, it was sold to Sony for \$539 million; in 2002, the network was purchased by NBC for \$2.7 billion. Univision began as a small station in San Antonio in 1961. Today, Univision is the giant of Spanish-language television. When NBC was in the process of buying Telemundo, the value of Univision was estimated to be at least \$8 billion. Telemundo owns 15 stations and has 32 affiliates, compared with Univision's 50 stations and 43 affiliates (see Figure 18) (Spanish Language Press, 2005).

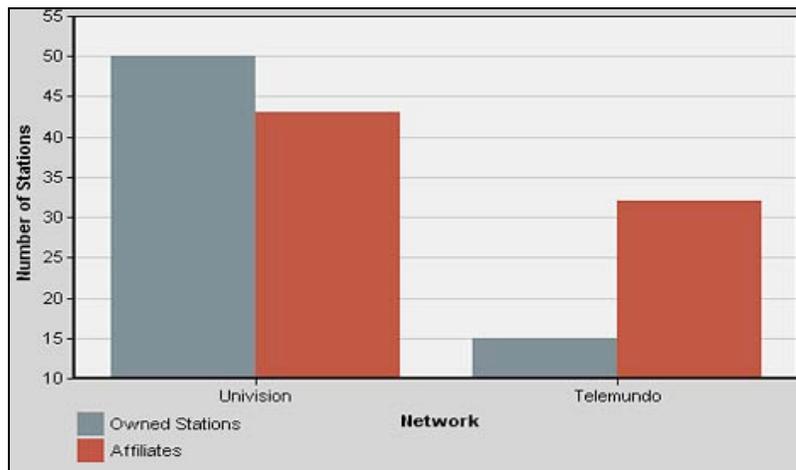


Figure 18: Spanish-Language TV Stations by Network

Note: From Spanish Language Press. (2005). The state of the news media 2004: An annual report on American Journalism. Available on-line at http://www.stateoftheNewsmedia.org/printable_ethicalalternative_spanishpress.asp?media=9

Spanish-Language Television

Spanish-language television and English-language television are similar. Both showcase news, entertainment, talk, specials, and sports. Most of the programming has the same general layout. For instance, the local news features current events that are local, national, and international, as well as weather and sports. However, the differences between Spanish-language television and English-language television are more apparent in the treatment of certain topics, especially crime, immigration, and Latin America (Alexandre & Rehbinder, 2002). Furthermore, in Spanish-language television, news reporters speak to and interview mostly Hispanic people, so no translation is necessary.

The television network used in this study is operated by the leading Spanish-language media company in the United States, Univision Communications Incorporated. The company operates four business segments—television, radio, music, and the Internet—and it entertains and informs more Hispanics each day than any other media company in the country (Univision Communications, 2007).

Univision Communications Incorporated

The leader in the Hispanic market is Los Angeles–based Univision Communications Incorporated. However, since NBC purchased Telemundo, it has become more of a competitor for Univision. NBC has pumped more than \$70 million into Telemundo’s news-gathering operations—for buying cameras, building sets, and adding newscasts in important markets. Telemundo also has access to NBC’s

extensive news-gathering operations that NBC already has in place in its news division and MSNBC. Telemundo can also tap into the network's satellite feeds and air its news footage. For instance, it was the first Spanish-language network to announce that the war in Iraq had begun. Telemundo sent five journalists to the Middle East, one to Baghdad itself. As a result, the network's viewership shot up 27% during the first two days of the war. Univision sent one small news team and their most popular anchor to the region and was able to get a series of exclusive interviews. Some wonder what Univision's coverage would have been like without Telemundo's prompt actions. Univision still has the larger news operation, scheduling seven hours of news programming on an average weekday, while Telemundo airs only three to four hours of news a day (Spanish Language Press, 2005).

Brief History

Univision's roots can be traced back to 1961 and a small station called KWEX in San Antonio, Texas. KWEX was the first Spanish-language UHF station in the United States. This station was part of Univision's predecessor Spanish International Network (SIN), which Univision still owns and operates today. In 1970, Univision became the first U.S. network to provide live coverage of the World Cup soccer championships. Then in 1976, Univision became the first U.S. broadcast television network to link its affiliates via satellite. Three years later, in 1979, the Galavision network was launched as the first Spanish-language cable network in the

United States. In 1981, Univision was able to receive programming from a foreign country via satellite. It was the first company in the United States authorized to do so (Univision Communications Inc., 2007).

The next big merger was made in 1992 by A. Jerrold Perenchio of Televisa and Venevision. Televisa is the world's largest producer of Spanish-language programming, and Venevision is a leading international producer of Spanish-language television. Perenchio acquired Univision from Hallmark Incorporated, an acquisition which brought together extensive broadcasting, programming, and production experience. Televisa and Venevision remain strategic partners helping make Univision the largest and one of the most-watched Spanish-language networks in the United States (Univision Communications Inc., 2007).

In September 1996, Univision went public under the symbol UVN on the New York Stock Exchange. In February 2001, Univision's stock was included in the S&P 500 index. Univision's next endeavor was the newly formed subsidiary Univision Online in September 2000. After its first year of operation, Univision.com became the number one Spanish-language Web site for U.S. Hispanics. In December 2001, Univision Online entered an extensive strategic content and marketing alliance with America Online Incorporated. This alliance gives Univision.com promotional opportunities throughout America Online properties, such as AOL, CompuServe, and Netscape. Univision.com has also made these partnerships with other market

leaders to help create special content areas to increase U.S. Hispanic Internet penetration (Univision Communications Inc., 2007).

In December 2000, Univision also acquired USA Broadcasting, which owned thirteen full-power television stations and minority interests in four additional full-power stations. This acquisition led to the development of a second television network, TeleFutura. In January 2002, the TeleFutura Network, a 24-hour Spanish-language television network was launched. After a year on air, TeleFutura was ranked the number two Spanish-language network (Univision Communications Inc., 2007).

Another interest of Univision is music. In April 2001, Univision Music Group, a music recording and publishing business of Spanish-language entertainment, was launched. Its first label was Univision Music; then in June 2001, Univision purchased a 50% interest in Disa Records, the second-largest independent Spanish-language record label in the world. About a year later, Univision acquired Fonovisa, the largest Latin independent label specializing in regional Mexican music. Today, Univision Music Group, with its three labels, is the leader in Spanish-language music in the United States and Puerto Rico and has a growing share in Mexico (Univision Communications Inc., 2007).

In December 2001, Televisa and Venevision, the most popular Spanish-language programming entities in the world, made a global alliance with Univision. Under this agreement, the Univision Network, the TeleFutura Network, and Galavision

have exclusive U.S. broadcasting rights to Televisa and Venevision programming through 2017. As part of the agreement, Televisa and Venevision increased their ownership interest of Univision. Univision also agreed to form a venture with Televisa to exploit, in the United States, Televisa's pay cable channels, including teen lifestyle, music video, and movie channels (Univision Communications Inc., 2007).

Probably one of the largest and most controversial acquisitions by Univision took place in June 2002. Univision acquired the Hispanic Broadcasting Corporation, the largest Spanish-language radio broadcasting company in the United States. This acquisition brought together the two leading Spanish-language media companies to create the premier media company serving U.S. Hispanics. More recently, on June 27, 2006, Univision announced its acquisition by Broadcasting Media Partners Incorporated, a large investor group. The transaction was completed on March 29, 2007 (Univision Communications Inc., 2007).

Presented below is net revenue information pertaining to Univision's television, radio, music, and Internet businesses.

Table 6: Net Revenue for Year Ending December 31*

	2006	2005	2004	2003	2002
Net Revenue:					
Television	\$1,605,720	\$1,360,694	\$1,261,840	\$1,098,276	\$1,014,223
Radio	381,547	359,107	328,392	83,595	—
Music	141,065	206,444	178,560	113,197	64,535
Internet	38,320	26,286	18,143	15,947	12,535
Consolidated	2,166,652	1,952,531	1,786,935	1,311,015	1,091,293

*Dollars in thousands

Note: From Univision Communications Inc. (2007). *2006 annual report*. Available on-line at <http://ir.univision.net/results.cfm>

Each segment of Univision Communications Incorporated has shown increases over the last five years, except for its music business, which decreased in 2006 as compared with 2005. The consolidated net revenues increased by approximately 98.5% over the five years (2002–2006). The largest increase occurred in 2003–2004, by 36.3%, but since then, the consolidated net revenues increased by 9.3% in 2004–2005 and by 11.0% in 2005–2006 (Univision Communications Inc., 2007).

Univision's principal business segment is television broadcasting, which consists of Univision, TeleFutra, and Galavision television networks. The television segment accounted for approximately 74% of the company's net revenues for the year ending December 31, 2006. The TeleFutra Network is the nation's newest 24-hour national Spanish-language network, reaching 89% of U.S. Hispanic television

households. This network is designed to “counter-program” traditional Spanish-language lineups and draw additional viewers to Spanish-language television. For example, TeleFutura broadcasts hit movies against prime-time “telenovelas,” talk shows against daytime “telenovelas,” and original “telenovelas” against news and talk shows. (“Telenovelas” are essentially soap operas in miniseries format.) TeleFutura also offers prime-time Hollywood movies dubbed in Spanish, original Spanish-language movies, prime-time game shows, sports, talk shows, and other programming (Univision Communications Inc., 2007).

Univision also owns Galavision Network, the nation’s leading Spanish-language cable television network. It was created to provide additional options for the 8 million U.S. Hispanic cable households it reaches. Galavision is the only Hispanic network to offer over 50 hours of live news, sports, variety, and entertainment programming each week (Univision Communications Inc., 2007).

The Univision Television Group owns and operates 18 full-power and 8 low-power television stations that form the core distribution for the Univision Network. Some of the key markets are Los Angeles, New York, Miami-Ft. Lauderdale, Houston, Chicago, Dallas-Ft. Worth, Austin, and Raleigh-Durham. It also owns and operates two full-power stations in Puerto Rico and owns and operates one non-Univision full-power station. Furthermore, the Univision Network is distributed through 66 broadcast television affiliates and 1,834 cable affiliates nationwide (Univision Communications Inc., 2007).

Univision Network

Univision Network is the most-watched television network (English- or Spanish-language), reaching 98% of all U.S. Hispanic households. Headquartered in Miami, Florida, Univision Network provides broadcast and cable affiliates with 24 hours per day of Spanish-language programming. Its programming includes “telenovelas,” such as blockbuster teen and family “telenovelas,” which is the most popular television genre among U.S. Hispanics of all ages. News programming is broadcast in the early morning, in the afternoon, during prime time, and in the evening. Other programming includes sports, entertainment, talk shows, and specials, such as the Latin Grammy Awards. Univision Network constantly receives superior ratings, thereby demonstrating its success in the Hispanic market (Univision Communications Inc., 2007).

The year 2006 marked the first full year the Univision Network ranked as the number five network in the country in prime time among all adults 18–34 and 18–49, as measured by Nielsen’s NTI. On nearly one out of every two nights of the fourth quarter of 2006, Univision attracted more total adult viewers between the ages of 18 and 34 than ABC, CBS, NBC, or FOX. Also during the fourth quarter, Univision increased its prime-time viewership by 6% among adults 18–34 and by 5% among adults 18–49 (Univision Communications Inc., 2007a). More recently, Univision signed a deal with Walt Disney and ABC to produce programs for the network. Programs will include a Spanish version of ABC’s successful series *Desperate*

Housewives to be called *Amas de Casa Desesperadas* (Univision Communications Inc., 2007b).

Observational Research

Observational research is a data collection method used in this qualitative research. Observation is the act of taking notice of some fact or occurrence around us. People are constantly making observations of activities and the behavior of others. However, two observer's accounts of events may reveal an interpretation of an incident quite differently from each other and often inaccurately (Touliatos & Compton, 1998).

Observational studies require the systematic noting and recording of events, behaviors, and artifacts (objects) in the social setting chosen for study (Marshall & Rossman, 1995). An investigator may observe behavior in carefully arranged and controlled environment or in naturally occurring conditions. Naturalistic observations are in the field, such as the home, school, or shopping center where a representative sample of behavior can be taken as it occurs naturally in everyday life. The role of the observer can be either as a non-participant or participant observer. A non-participant observer does not interfere with the research subjects; this prevents the observer from becoming a stimulus and affecting the behavior of the research

subjects. A participant observer takes part in the activities of the group (Touliatos & Compton, 1998).

The field notes the research records of the behavior and activities of individuals may be unstructured or structured in nature. In unstructured observation, the observer does not have predetermined ideas regarding what behaviors or events to record. The observer attempts to obtain a complete record of everything observed during a certain time period. Unstructured observations provides a vast amount of information, the data yielded are usually difficult to quantify for research purposes. However, this may lead to the identification of relevant variables to study in greater detail and the generation of hypotheses (Touliatos & Compton, 1998).

In structured observation, the observer knows in advance what facts are to be studied and/or what hypotheses are to be tested. This gives the investigator the ability to structure the observation beforehand by carefully defining all variables. The investigator should also develop a systematic plan to collect and record data obtained in any setting (Touliatos & Compton, 1998).

It can be difficult for the investigator to observe everything that occurs. The most pertinent aspects should be chosen and defined in advance. The behavior must be described clearly so that an investigator can distinguish between it and other similar responses. Using an observational protocol for recording observational data is necessary. This observational protocol may be a single page where descriptive notes, reflective notes, demographic information, or any other significant

information are recorded. The investigator can refer to the information at the end of the observation process (Creswell, 2003).

To increase the accuracy of observations, supplemental data collections techniques should be examined. Observations should be recorded objectively indicating what actually happened rather than what the observer thought the behavior represented. Observational aids include rating scales, checklists, observational systems, and mechanical aids (Touliatos & Compton, 1998).

The observational data collection method makes it possible to record behavior as it occurs firsthand, either in a controlled or natural setting. It avoids the dependence upon someone else's memory and interpretation of an event (Touliatos & Compton, 1998). Other advantages are, investigators can record information as it is revealed including unusual aspects noticed during observation. Also, observational data collection is useful in exploring topics that may be uncomfortable for participants to discuss (Creswell, 2003).

Some limitations associated with observational data collection methods include the investigator may be seen as intrusive, "private" information may be observed that the investigator cannot report, the investigator may not have good attending and observing skills, or certain participants may present special problems in gaining rapport (Creswell, 2003). Other limitations may include human perceptual errors, observer bias, reactivity, the absence of norms with which to compare data, and susceptibility to unreliability (Touliatos & Compton, 1998).

Content Analysis

Content analysis is a type of observational research. This data collection method is a standard methodology for analyzing communication content. Berelson (1952) defines *content analysis* as “a research technique for the objective, systematic, and quantitative description of the manifest content of communication.” For the purpose of objectivity, the categories of analysis need to be defined so precisely that different analysts may apply them and obtain the same results (Berelson, 1952). The investigator must ask the following questions: “[W]hat categories should be used? What criteria are to be used to decide that a content unit should be placed in one category rather than another?” (Kassarjian, 1977) The categories chosen relate to what is being investigated and what specific information relates to the scientific problem or hypothesis (Berelson, 1952). The investigator must also have a neutral point of view—that is, he/she must report without bias.

The content being analyzed should be systematic to the research being conducted. The only content or analyses to be considered must be relevant to the research. Any information that is partial, biased, or not related to what is being analyzed should be eliminated (Kassarjian, 1977). The criteria for each category should be very specific and should contribute to determining the outcome of the scientific problem or hypothesis. The investigator must abide strictly by the rules and requirements set forth for the categories and criteria used for analysis.

Quantification is a measurement of the extent of emphasis or omission of the data.

The data must agree with statistical methods for findings, interpretation, and inference (Kassarjian, 1977). Following these three requirements specifically for content analysis will be most useful for the research.

Visual Content Analysis

In observational research, film and photography is a supplemental data collection technique, which captures the daily life of the group under study. Films provide permanent documentation of the observation, which can be analyzed at the investigator's leisure and permit reliability checks. Research film methodology requires the documentation of the time, place, and subject of the filming, as well as the photographer's intent and interests (Marshall & Rossman, 1995).

Sorenson (1968) reported that there are three kinds of sampling in films: opportunity, programmed, and digressive (as cited in Marshall & Rossman, 1995, p. 91). "Opportunity sampling documents unanticipated or poorly understood phenomena as they occur. Programmed sampling involves filming according to a predetermined plan—deciding what, where, and when to film. Digressive sampling is deliberate searching beyond the obvious to the novel, to the places and events that are usually outside typical public recognition" (Marshall & Rossman, 1995, p91).

For the visual content analysis, in order to identify what people are wearing, the investigator uses a digital camera to capture the image. This methodology is common among trend insight agencies such as Worth Global Style Network (WGSN), Infomat Inc., and Trendwatching.com. All are providers of information on

consumer trends and insights into the fashion, design, and style industries. WGSN provides online research capabilities to subscribers of all the latest international style intelligence, trend analysis, and trend forecasting. Major international companies subscribe annually to WGSN, which gives them access to research, information and inspiration (Worth Global Style Network, 2008). Infomat Inc. covers street-style trends around the world through the use of photographs taken on the streets of London, Tokyo, St. Tropez, Taiwan, and other places to document a large mix of vibrant youth culture. The investigator also photographs stores, window displays, runways, and trade shows to determine consumer trends in fashion. A fashion search engine on the website gives access to over 35,000 international showrooms, retailers and manufacturers, trade show listings, new trend reports, and proprietary market specific research (InfoMat, 2007).

The use of digital photography to record what people are wearing was used in a study by Keen and Woodard (2006). The study was part of a research project that aimed to document “street” fashions in Nottingham, United Kingdom, as part of a Mass Fashion Observation by the School of Art and Design at Nottingham Trent University. The study argues that “in order to understand how fashion communities and style groupings emerge, it is necessary to look at how fashion is experienced and transmitted through collective approval.” The taking of photographs was initially used as a method of documentation; however, during the process, that changed when participants wanted to look at their images and critique them. Participants

believed that their photograph was being taken because their appearance was fashionable or their picture was going to be published somewhere, perhaps for modeling. Next, the images were displayed in public at the university, and information was gathered regarding how other people responded to the photographs. Keen and Woodard found that observers were both identifying and recognizing styles similar to themselves or others in their community. This allowed them to become viewers and participants of the local fashion community and reconfirmed their fashion community.

Television Content Analysis

Television is a major medium of advertising for all companies. Research done by TNS Media Intelligence, the leading provider of strategic advertising intelligence, found that spending for advertising in 2006 for Network TV was \$22.8 billion, a 2.5% increase over 2005. Cable TV spending on advertising increased by 3.4% to \$16.7 billion. TNS also found that Spanish-language media increased spending for advertising by 13.9% in 2006. This increase included expenditures for Hispanic network and cable TV, Hispanic spot TV, Hispanic magazines, and Hispanic newspapers (TNS, 2007).

In order to determine if apparel retailers are advertising in Spanish, the investigator needs a sample of television advertisements from the most-viewed Spanish-language network (Porter, 2003). The investigator can collect data from advertisements by using content analysis methods. Kassarian (1977) defines

content analysis as “a scientific, objective, systematic, quantitative, and generalizable description of communication content.” This approach is the standard methodology for analyzing communication content in advertising studies (Ji & McNeal, 2001).

Advertisements can be recorded so that the researcher can play back the recording and accurately evaluate each advertisement (Resnik & Stern, 1986). To determine the criteria to be examined for each advertisement, the researcher reviewed previous content analyses investigations of television advertisements (Kassarjian, 1977). Koudelova and Whitelock (2001) analyzed differences in television advertising in the United Kingdom and the Czech Republic in order to discuss the feasibility of standardized advertising across cultural borders.

Advertisements were categorized into 14 individual product categories, as used by Gilly (1988), and the frequency of the product category and the differences and similarities in the product categories were determined.

The study by Ji and McNeal (2001) analyzed how Chinese children’s commercials differed from those of the United States. The study recorded the brands advertised in the commercials and described how the content of the two sets of commercials differed. The differences included cultural, economic, and social conditions. Along with this information about the advertisement, the date, the time period, and the name of the program airing at the time of the advertisement were also recorded (Ji & McNeal, 2001).

Chapter III: Methodology

Research Purpose

The purpose of this research was to learn about U.S. Hispanic consumers' design and style preferences for apparel and to determine how retailers were promoting these products to Hispanics. In order to accomplish these objectives, first, a profile of U.S. Hispanics was prepared; second, data were obtained through the completion of smaller studies: a visual content analysis of photographs, a content analysis of Spanish-language television advertisements, and apparel store evaluations. In addition, secondary data were collected in three locations in the United States to supplement the apparel store evaluations. After the data were collected and the results were analyzed, conclusions were drawn and opportunities for targeting the Hispanic market were identified.

Research Objectives

Framing this research were two objectives. The approach to achieving these objectives will be covered in detail in the data analysis section of this chapter.

- Research Objective One: to investigate preferences for apparel design attributes by examining what Hispanic consumers wear in everyday situations.

- Research Objective Two: to explore apparel retailers who are targeting Hispanic consumers:
 - a. Through television and those retailers' approaches to the advertisement.
 - b. Through those retailers' approaches to in-store product presentation.

The data utilized for this study originated from literature and secondary sources combined with a series of smaller component investigations. Those component investigations included a visual content analysis of photographs, a content analysis of Spanish-language television advertisements, and apparel store evaluations. These are detailed in the next sections.

Location Selection

The selection of the locations used to conduct this research was important to determine because researchers wanted to obtain a representative and diverse sample of Hispanic consumers. This was critical because researchers wanted the results of this study to be applicable to other areas and not just one area in the United States. The three cities where research was conducted were Austin, Texas; Miami, Florida; and Raleigh, North Carolina. The following is background information on these three locations.

Austin, Texas

Austin is the capital of the state of Texas. The city is located in central Texas, is the fourth-largest city in Texas and the sixteenth-largest city in the United States (Austin City Connection, 2007). Texas has the second-largest Hispanic population of any state in the United States; California has the largest Hispanic population (U.S. Census Bureau, 2007b). According to Census 2000, the Hispanic population of Texas was approximately 6.7 million, or 31.9% of the total population of Texas. The Texas Hispanic population has grown by 53.6% from 1990 to 2000—a growth similar to that of the total U.S. Hispanic population, which has increased by 57.9%. This percentage indicated a growth of more than 2.3 million Hispanics in Texas over a period of 10 years (see Table 7) (Gibson & Jung, 2002; Guzmán, 2001). Census 2000 also recorded Austin’s Hispanic population as 30.5% of the city’s total (U.S. Census Bureau, 2007d).

Table 7: Hispanic Population: 1980, 1990, and 2000

Area	1980			1990			2000		
	Total Population	Hispanic Population		Total Population	Hispanic Population		Total Population	Hispanic Population	
		Number	%		Number	%		Number	%
United States	226,545,805	14,608,673	6.4	248,709,873	22,354,059	9.0	281,421,906	35,305,818	12.5
Texas	14,229,191	2,985,824	21.0	16,986,510	4,339,905	25.5	20,851,820	6,669,666	31.9

Note: From “Historical census statistics on population totals by race, 1790 to 1990, and by Hispanic origin, 1970-1990, for the United States, regions, divisions, and states” by Gibson & Jung (2002); and “The Hispanic population; Census 2000 brief by Guzmán (2001).

The 2006 American Community Survey reported that the Hispanic population in Texas grew to 8,385,118. This number indicated an increase of 25.7% over six years, compared with the total population growth of Texas (12.7%) (U.S. Census

Bureau, 2007a). It was believed that the Hispanic population in Texas was increasing because more illegal immigrants from Latin America, primarily from Mexico, were looking for work. Hispanics were settling in south, south-central, and west Texas and were a significant portion of the residents in the cities of Dallas and Houston. In addition, Austin was named three times by *Hispanic Magazine* as the best city in America in which Hispanics could live and work (Austin is tops for Hispanic population, 2007).

Miami, Florida

Miami is situated in southeastern Florida and is the largest city within the south Florida metropolitan area and the largest metropolitan area in the southeastern United States. Florida has the fourth-highest overall population in the United States and the third-highest Hispanic population (City of Miami, 2007). According to Census 2000, Miami's Hispanic population was 65.8% of the city's total (U.S. Census Bureau, 2007d). Cubans were the state's largest foreign-born population, comprising 52% of the Hispanic population. Miami is known as the Gateway to Latin America and attracts many foreign-born people, resulting in a large Latin American population. This includes Cubans, Nicaraguans, Columbians, Venezuelans, Puerto Ricans, Argentineans, Ecuadorians, Brazilians, Dominicans, Haitians, and Mexicans (City of Miami, 2007).

Census 2000 reported that the Hispanic population of Florida was 16.8% of its total population, or approximately 2.7 million. Florida's Hispanic population grew

by 70.4% from 1990 to 2000—an increase of more than 1.1 million Hispanics over 10 years. This increase was much higher than the U.S. total Hispanic growth rate of 57.9% during the same period (see Table 8) (Gibson & Jung, 2002; Guzmán, 2001).

Table 8: Hispanic Population: 1980, 1990, and 2000

Area	1980			1990			2000		
	Total Population	Hispanic Population		Total Population	Hispanic Population		Total Population	Hispanic Population	
		Number	%		Number	%		Number	%
United States	226,545,805	14,608,673	6.4	248,709,873	22,354,059	9.0	281,421,906	35,305,818	12.5
Florida	9,746,324	858,158	8.8	12,937,926	1,574,143	12.2	15,982,378	2,682,715	16.8

Note: From “Historical census statistics on population totals by race, 1790 to 1990, and by Hispanic origin, 1970-1990, for the United States, regions, divisions, and states” by Gibson & Jung (2002); and “The Hispanic Population; Census 2000 Brief by Guzmán (2001).

The 2006 ACS reported that the Florida Hispanic population grew to 3,642,989, a number which indicated a 35.8% increase over six years. This increase was almost three times as high as the total population growth of Florida (13.2%) (U.S. Census Bureau, 2007a).

Raleigh, North Carolina

Raleigh is the capital of North Carolina and is located in the northeast-central region of the state. The city ranks second in population in North Carolina, after Charlotte. According to Census 2000, the Hispanic population of North Carolina was 4.7% of its total population, or 378,963. North Carolina’s Hispanic population grew by 393.9% between 1990 and 2000—an increase of 302,327 Hispanics over 10 years. This increase was more than six times as high as the U.S. total Hispanic growth rate of 57.9% during the same period (see Table 9) (Gibson & Jung, 2002;

Guzmán, 2001). Census 2000 also reported that Raleigh’s Hispanic population was 7.0% of the city’s total (U.S. Census Bureau, 2007d). The 2006 ACS reported that the Hispanic population in North Carolina grew to 597,382, a number which indicated a 57.6% increase over six years. The total population of North Carolina grew by only 10.0% (U.S. Census Bureau, 2007a).

Table 9: Hispanic Population: 1980, 1990, and 2000

Area	1980			1990			2000		
	Total Population	Hispanic Population		Total Population	Hispanic Population		Total Population	Hispanic Population	
		Number	%		Number	%		Number	%
United States	226,545,805	14,608,673	6.4	248,709,873	22,354,059	9.0	281,421,906	35,305,818	12.5
N Carolina	5,881,766	56,667	1.0	6,628,637	76,726	1.2	8,049,313	378,963	4.7

Note: From “Historical census statistics on population totals by race, 1790 to 1990, and by Hispanic origin, 1970-1990, for the United States, regions, divisions, and states” by Gibson & Jung (2002); and “The Hispanic Population; Census 2000 Brief by Guzmán (2001).

The largest concentration of Hispanics in North Carolina as of 2004 (71.1%) was found in the state’s metropolitan communities. These communities are located in areas along the I-40/I-85 corridor, which extends from Wake County in the east to Mecklenburg County in the southwest. Since 2000, Wake County’s Hispanic population has increased by more than 16,853 (49.6%). Only 28.9% of the state’s Hispanic population resides in non-metropolitan areas (Johnson & Kasarda, 2006).

Selection of Television Station

Spanish is the second most-spoken language in the United States, a statistic which provides the United States with the fifth-largest Spanish-speaking population

in the world (Shin & Bruno, 2003). Nicholls and Roslow (1996) found that Hispanic viewers were more persuaded to purchase products advertised in commercials in Spanish during Spanish-language programs than products advertised in similar commercials in English during English television programs. In addition, Hispanics were more likely to make better choices when information was presented in their own language (Nicholls & Roslow, 1996).

The Spanish-language television station chosen to watch advertisements is the Univision Network. This network is the most-watched television network, reaching 98% of all U.S. Hispanic households. The network is operated by the leading Spanish-language media company in the United States, Univision Communications Incorporated (Univision Communications Inc., 2007).

Research Objective One

Research objective one was to investigate preferences for apparel design attributes by examining what Hispanic consumers wear in everyday situations.

Data Collection

A visual content analysis of photographs was used to investigate apparel design attributes of Hispanic consumers in everyday situations. This study gathered information about preferences of Hispanic consumers for clothing attributes and features through observation of their attire worn in public. In the three cities selected, garments worn in public by consumers who appeared to be of Hispanic

origin were observed and recorded with a digital camera. The area where photographs were taken were areas where Hispanics frequent. The criteria used for judging who was of Hispanic origin included if the subject had dark hair, dark eyes, round face, olive or dark skin tone, and if Spanish was overheard while the subject was speaking.

It was necessary to observe a broad spectrum of Hispanic consumers informally and without their awareness. If verbal participation was included, biases could be introduced into our database—such as self-confidence and fashion-forwardness. Consequently, no verbal interaction occurred with those observed, and no personal information was obtained. The digital recording of the observations was necessary to record what consumers were wearing and will be evaluated at a later time.

After taking preliminary photographs in Raleigh, North Carolina, investigators developed the category instrument in order to analyze the images individually (see Appendix D). Also, when taking photographs, information regarding the photograph location, digital photograph number, approximate age group of subject, and supplemental information (i.e. with family or large group) were noted. This was completed for the additional photographs taken in Miami, Florida and Austin, Texas.

As photographs were taken, the images were downloaded and reviewed putting them into age groups; teen, young adult, or adult. Next, the images were cropped so that only the body was visible and any features of the face were altered.

The altered images replaced the originals. A database was created of the digital images. The gallery of images was used to analyze the clothing in respect to color, pattern, and style attributes.

Sample

All photographs were taken between April and August 2007, at different locations in Austin, Texas; Miami, Florida; and Raleigh, North Carolina. The locations selected in which to take photographs in each city were shopping environments and other areas frequented by Hispanics. See Appendix C for a list of photography locations. Two investigators worked together to determine attributes of images. In all, data sheets were completed for 452 photographs. Table 10 shows the age groups of photographs analyzed. The criteria investigators used for judging the age group for each subject include observing the subject’s appearance, actions, and the environment surrounding the subject prior to cropping the image. The environment surrounding the subject consists of the people with the subject and the location where the subject was. The age group for each image was determined before the image was cropped.

Table 10: Age Group Breakdown

City	Females			Males		
	Teen	Young Adult	Adult	Teen	Young Adult	Adult
Austin, Texas	7	34	36	4	21	35
Miami, Florida	9	36	44	4	26	30
Raleigh, NC	9	26	53	4	32	42
Total	25	96	133	12	79	107

Coding

The photographs were divided into male and female groups and then evaluated separately by tops, bottoms, or dresses. Each altered photograph was placed on a spreadsheet to be analyzed (see Appendix D). The spreadsheet used to examine the photographs consisted of the following information to be marked accordingly for each individual top, bottom, or dress.

- Age group: teen, young adult, or adult
- Fit proportions: very tight, tight, average, loose, very loose
- Color: solid or pattern
- Type of dress: active, casual, or dressy
- Embellishments: buttons, embroidery, fur, hardware, lace, rhinestones, or ribbons
- Type of clothing: dresses, tops, pants, skirts, outerwear, footwear, or hats

Additional information was included regarding what part of the piece or outfit was emphasized and what style/trend was observed. Each spreadsheet was given an outfit number that corresponded to the top and the bottom of an individual and what city the photograph was taken in.

Data Analysis

After the completion of all spreadsheets, four categories were analyzed more specifically to determine the characteristics of Hispanic preferences for clothing.

The categories were the following:

Fit: very tight, tight, average, loose, very loose.

Color: warm, cool, or neutral, and multicolor.

Type of dress: active, casual, and dressy.

Pattern: abstract, character, floral, geometric, logo, and other.

The following are examples of the five styles for the fit category. Examples of tight-fitted clothing for females (a, b) and males (c) are shown in Figure 19. Very tight-fitted clothing is extremely form fitting and curves close to the body.



Figure 19: Examples of Very Tight-Fitted Clothing

Figure 20 shows examples of tight-fitted clothing for females (a, b) and males (c, d).

Tight-fitted clothing fits the body well, showing off the figure.

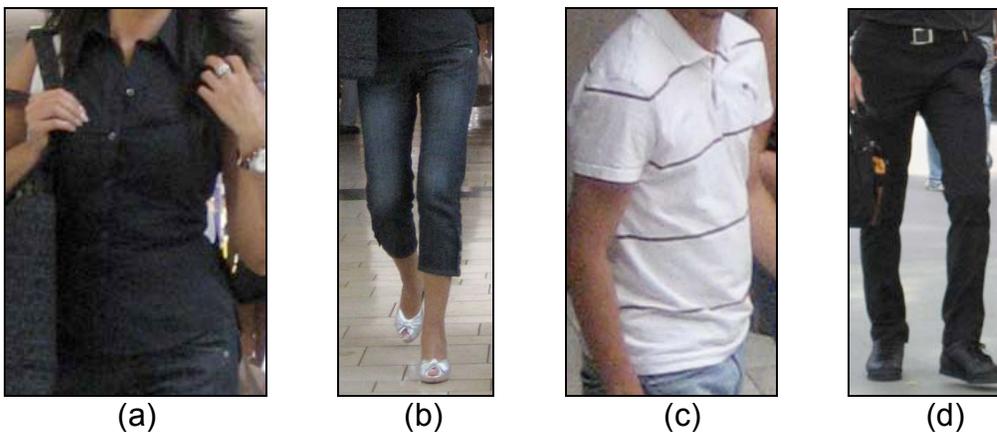


Figure 20: Examples of Tight-Fitted Clothing

Examples of average-fitted clothing for females (a, b) and males (c, d) are shown in Figure 21. Average-fitted clothing fits the body comfortably.

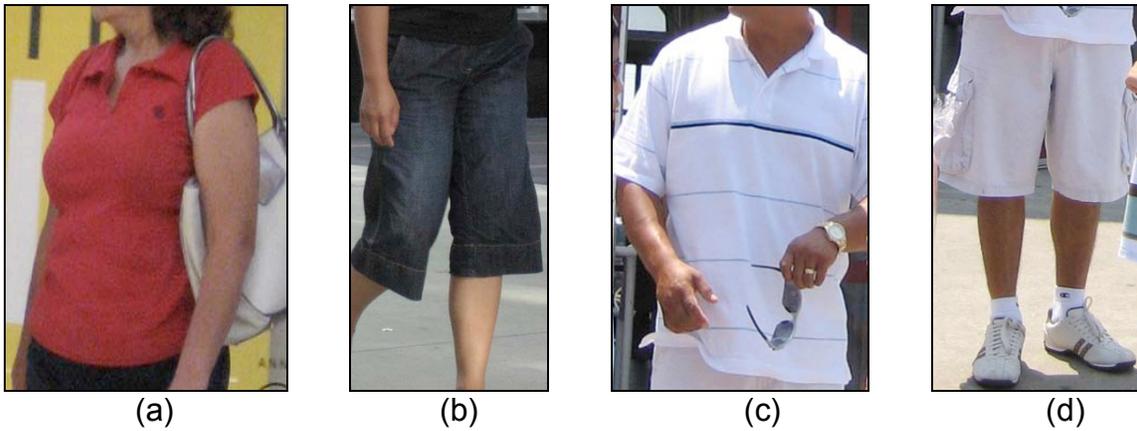


Figure 21: Examples of Average-Fitted Clothing

Figure 22 shows examples of loose-fitted clothing for females (a, b). Loose-fitted clothing fits the body slightly larger than average.

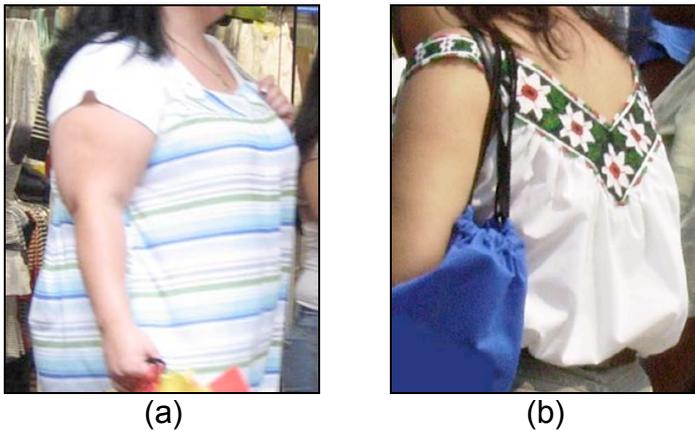


Figure 22: Examples of Loose-Fitted Clothing

Examples of very loose-fitted clothing for females (a, b) and males (c, d) are shown in Figure 23. Very loose clothing hangs baggily on the body and is oversized.

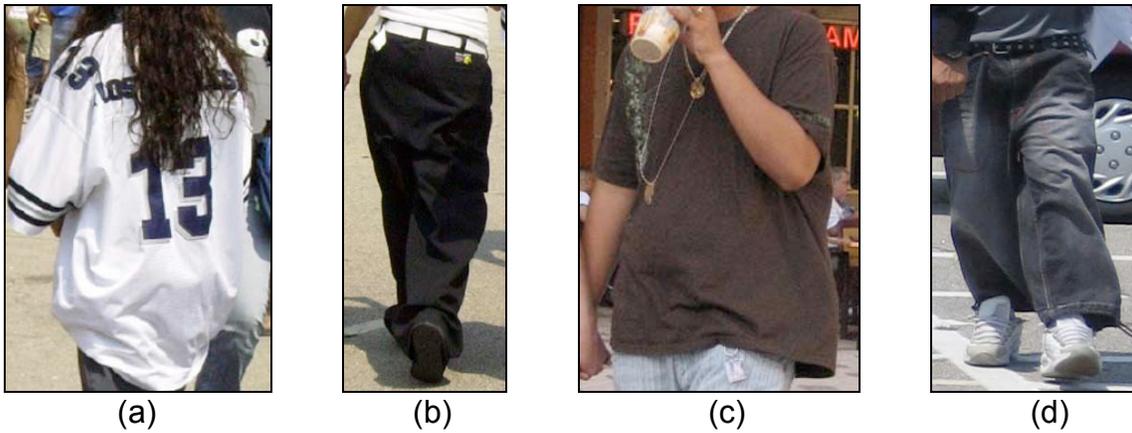


Figure 23: Examples of Very Loose-Fitted Clothing

The following are examples of the types of colors observed. Figure 24 shows examples of warm colored clothing for females (a, b) and males (c, d). Warm colors are red, pink, orange, and yellow.

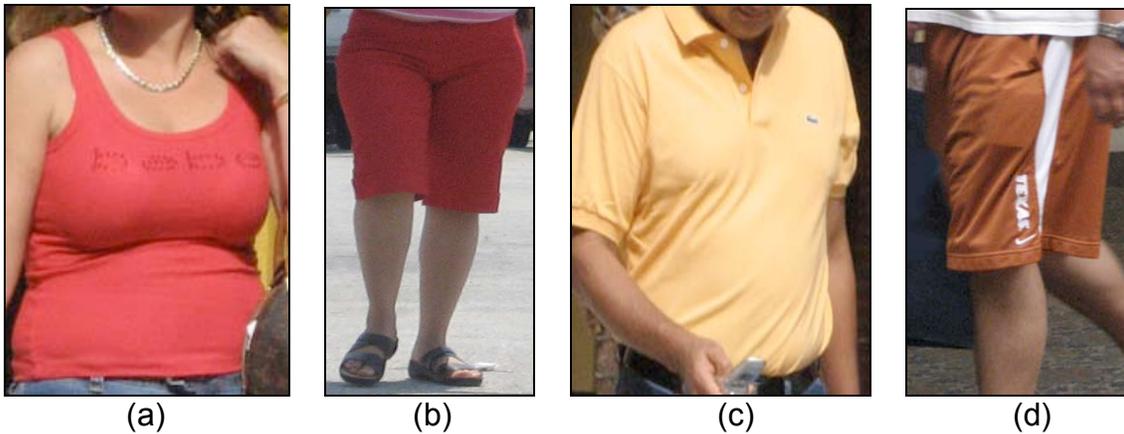


Figure 24: Examples of Warm Colored Clothing

Examples of cool colored clothing for females (a, b) and males (c, d) are shown in Figure 25. Cool colors are blue, green, and purple.

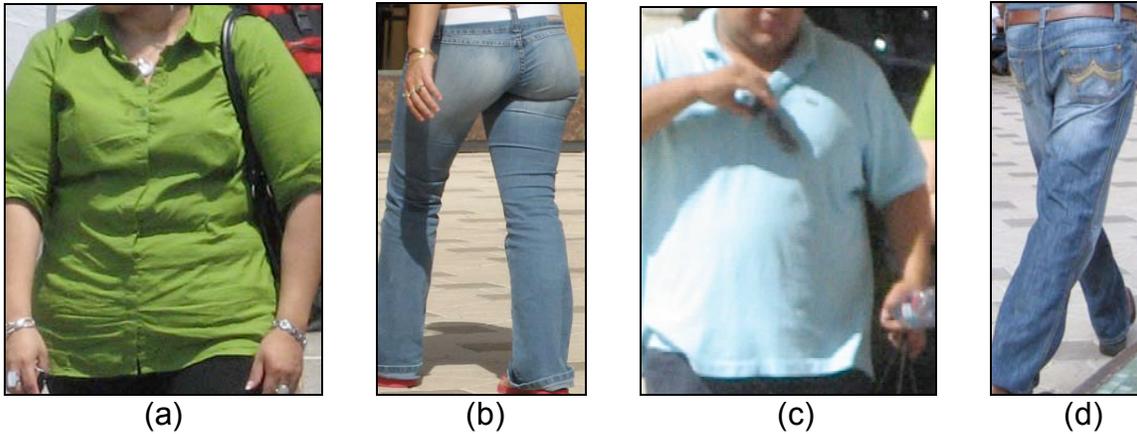


Figure 25: Examples of Cool Colored Clothing

Figure 26 shows examples of neutral colored clothing for females (a, b) and males (c, d). Neutral colors are white, ivory, beige, brown, black, and gray.



Figure 26: Examples of Neutral Colored Clothing

Multicolored clothing was also noted among females (a, b) and males (c, d), see Figure 27. A multicolored garment consists of two or more colors.

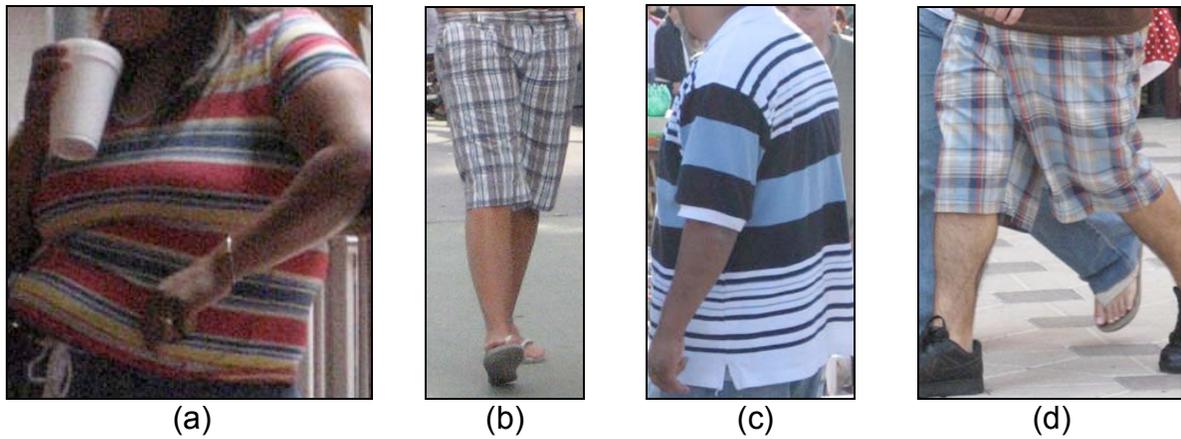


Figure 27: Examples of Multicolored Clothing

The following are the types of dress observed. Figure 28 shows examples of active clothing for females (a, b) and males (c, d). Active dress consists of clothing worn to exercise in.



Figure 28: Examples of Active Dress

Figure 29 shows examples of casual clothing for females (a, b) and males (c, d).

Casual dress consists of clothing worn on a day-to-day basis.



Figure 29: Examples of Casual Dress

Examples of dressy clothing for females (a, b) and males (c, d) are shown in Figure 30. Dressy consists of clothing worn for specific occasions, including business clothing.

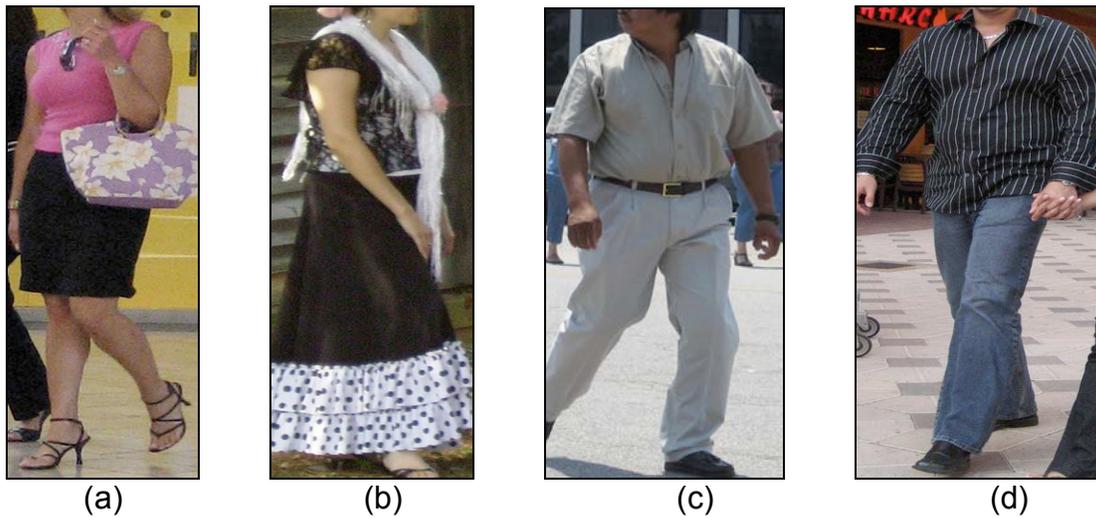


Figure 30: Examples of Dressy Clothing

Garments were categorized as either being solid or pattern. The following figures are examples of the different patterns observed. Figure 31 shows examples of abstract patterns for females (a, b).



(a)



(b)

Figure 31: Examples of Abstract Patterns

Figure 32 shows examples of a character pattern worn by a female (a) and male (b).



(a)



(b)

Figure 32: Examples of Character Patterns

Examples of floral patterns are shown in Figure 33 of females (a, b) and a male (c).



(a)



(b)



(c)

Figure 33: Examples of Floral Patterns

Figure 34 shows examples of geometric patterns worn by females (a, b) and males (c, d), such as polka dots (a) and geometric blocks (b) or color blocks (c, d).



(a)



(b)



(c)



(d)

Figure 34: Examples of Geometric Patterns

Another pattern observed are logos, which includes apparel or store brand logos, athletic team logos, school logos, and restaurant logos. Figure 35 shows examples worn by female (a) and males (b, c).



(a)



(b)



(c)

Figure 35: Examples of Clothing with Logos

Examples of other patterns observed worn by females (a, b, c) and males (d, e, f) are shown in Figure 36. Those include animal prints, tie-dye, camouflage, plaid and check patterns, horizontal and vertical stripes, and images.



(a)



(b)



(c)



(d)



(e)



(f)

Figure 36: Examples of Other Patterns Observed

The information gathered from the worksheets was tallied with respect to each category, for each city. The totals for each characteristic of each category were then calculated into percentages of the total number in the sample. This information showed the percentage of respondents for a particular city who wore a particular type or style of clothing.

Research Objective Two A

Research Objective Two A explored apparel retailers who were targeting Hispanic consumers through television and those retailers' approaches to the advertisement.

Data Collection

In order to determine which apparel retailers were targeting Hispanic consumers on television, a content analysis of Spanish-language television advertisements was conducted. Spanish-language television was recorded on the Univision Network in Raleigh, North Carolina, in three-hour blocks during prime-time television three days a week for five weeks. During the review of the advertisements, observations were recorded onto a worksheet for each hour. This process was completed for each of the 45 hours of television recorded. The information documented was the date and the show, the time period of the show, the product category and the product type of advertisement, and the specific language used in the advertisement. The following describes the sample of television advertisements and the coding used to interpret the advertisements in detail.

Sample

The sample of advertisements was recorded over a period five weeks—from November 14 through December 23, 2005, on WUVC Univision 40, in Raleigh, North Carolina. The advertisements were recorded in three-hour blocks during prime-time

television from 7:00 p.m. to 10:00 p.m. on Monday, Wednesday, and Friday. A total of 851 advertisements were recorded over 45 hours in 15 days.

Coding

During the advertisements, the following information was recorded: the product category, the specific product type, and the language used. All information was noted for each hour in a spreadsheet format (see Appendix E). The first criterion was to classify all advertisements into product categories and to determine the frequency of the product category. Table 11 lists the product categories used.

Table 11: Product Categories

1. Auto	7. Home Appliances/Furnishings
2. Drugs & Medicine	8. News
3. Electronics	9. Personal & Beauty Care
4. Entertainment	10. Retail Outlets
5. Food & Beverage	11. Services
6. Home Cleaning	12. Other

Note: From Koudelova & Whitelock. (2001). A cross-cultural analysis of television advertising in the UK and the Czech Republic.

The second criterion analyzed the brands advertised and defined the product type. Table 12 list the product types identified for the corresponding product categories.

Table 12: Product Types

1. Auto – cars or car dealer
 2. Drugs & Medicine – products
 3. Electronics – products and businesses specializing in electronics
 4. Entertainment – movie trailers, DVDs, music CDs, magazine subscriptions, and video games
 5. Food & Beverage – products and businesses selling food and beverages
 6. Home Cleaning – products
 7. Home Appliances/Furnishings – businesses selling home appliances and furnishings
 8. News – Local and National News
 9. Personal & Beauty Care – products
 10. Retail Outlets – brands, discount, department or specialty store
 11. Services – financial, health, credit card, cell phone, long distance, cable television, Internet, insurance, lawyer’s office
 12. Other – volunteering, higher education, hospital
-

Note: From Koudelova & Whitelock. (2001). A cross-cultural analysis of television advertising in the UK and the Czech Republic.

The final criterion represented the language characteristic used in the advertisement. Advertisements used one of the four following features;

1. The advertisement was originally in English and voiced over, or its text was changed to Spanish (E – S).
2. English and Spanish were used in the same advertisement (E + S).
3. The advertisement used Spanish-speaking actors (SS).
4. The advertisement used a Spanish narrator (SN).

Additional information regarding the date, the time period, and the name of the program airing at time of the advertisement were recorded on the spreadsheet.

Other information was gathered through reviewing academic literature, business sources, and computerized databases to examine how those retailers were approaching their advertisements. An investigation into which apparel retailers were most active in advertising in Spanish-language media revealed the extent of their marketing efforts toward the Hispanic consumer.

Data Analysis

Once each advertisement was evaluated, the product category and the language of the advertisement were tallied for each week and for the total five-week period. Information was also documented regarding the number of advertisements aired per apparel retailer. Each apparel retailer's advertisement was marked for each day and each hour it aired, showing the number of advertisements a retailer aired during a particular day and hour. Additionally, the use of language in the advertisement was examined for each apparel retailer. This process revealed the advertising technique of each apparel retailer.

The information gathered when searching for those retailers' approaches to advertising to Hispanics listed the apparel retailers who invested the most money in Spanish-language media (Hispanic Fact Pack, 2007). The same retailers who advertised on television were the same as those identified in the literature, except for one apparel retailer.

Research Objective Two B

Research Objective Two B explored apparel retailers who were targeting Hispanic consumers through their approaches to in-store product presentation.

Data Collection

While taking photographs of Hispanic consumers for the visual content analysis, the stores that Hispanic consumers entered while shopping were recorded and then evaluated. To evaluate the stores, a store evaluation worksheet was created to record pertinent information describing the store. Information regarding the merchandise mix, the clothing styles available, the merchandise presentation, the price attributes, the brands offered, the location of the store, and the type of store were documented. This information was recorded in the same three cities where the visual content analysis was completed: Austin, Texas; Miami, Florida; and Raleigh, North Carolina. The following describes the samples taken from each city and the coding used to describe the evaluations more accurately.

Sample

Observations were taken between April and August 2007 at different locations in Austin, Texas; Miami, Florida; and Raleigh, North Carolina. The locations selected in each city were shopping environments and other areas frequented by Hispanics. (See Appendix C for a list of locations.) The worksheet used to record information for the evaluation of each store can be found in Appendix F.

Coding

Each store evaluation was labeled with the name of the store, its location, and the city and state. The worksheet used to evaluate the stores consisted of the following information to be marked accordingly for each store.

- Merchandise Mix: apparel and/or accessories: jewelry, shoes, handbags, and so forth.
- Clothing Styles: active, business, casual, formal, or loungewear – tops, bottoms, dresses, jackets, loungewear, and so forth.
- Merchandise Presentation: as outfits or separates, folded or hung, the use of mannequins, the use of fixtures, and so forth.
- Price Attributes: low (\$0 – \$50), midrange (\$51 – \$100), or high (more than \$100).
- Departments: men's, women's, and/or children's.
- Location: stand-alone, shopping center, or strip mall.
- Store Classification: specialty, department, or discount.
- Brands: Hispanic brands, Hispanic celebrity brands, and/or non-Hispanic brands.
- Marketing Techniques.
 - Advertising methods: television, newspaper, magazine, radio, circular, Internet, and/or mailers.
 - Promotional media: Web site, catalog, circular, direct mailer, and/or e-mail.
 - Store signage: English, Spanish, or both.
 - Sales associates: Hispanic, non-Hispanic, or both.
- Area Analysis.
 - Store Appearance: interior and exterior décor.
 - Pedestrian Traffic.
- Surrounding Environment: tenant mix, site visibility, transportation access.

Any other additional information regarding the store was noted, and a map of the shopping center was procured for future reference.

Data Analysis

After completing the store evaluations, specific information was analyzed more closely to explore the apparel retailers targeting Hispanics through their approach to in-store product presentation. The information for the following were totaled for each city: store classification, location, merchandise mix, clothing styles, departments, price attributes, merchandise presentation, store signage, sales associates, and advertising media. These figures were used to determine the characteristics of stores where Hispanics shopped. To analyze the stores further, a list of stores analyzed was compiled for each city and then compared to one another.

Chapter IV: Results

This chapter includes the results of all the components studied: the visual content analysis of photographs, the television content analysis of Spanish-language advertisements, and apparel store evaluations. The research began with a profile of Hispanics in the United States. Data were then collected in response to Research Objective One. The methodology of a visual content analysis was used to analyze photographs taken of Hispanics. Next, in response to Research Objective Two A, a content analysis of Spanish-language television advertisements was conducted, along with research on advertising spending by apparel retailers. Finally, to achieve Research Objective Two B, apparel store evaluations were conducted to explore apparel retailers' approaches to in-store product presentation.

Research Objective One

Research Objective One was to investigate preferences for apparel design attributes by examining what Hispanic consumers wear in everyday situations.

Visual Content Analysis of Photographs

Images taken of Hispanic males and females were analyzed more specifically to determine characteristics of Hispanic preferences of clothing through examining four categories. The categories were fit, color, type of dress, and pattern. The

following figures represent the data for each category for each city. Each figure was carefully examined, and distinctive points are bulleted below each figure to give more specific information about it. All data can be found in Appendix G.

Fit

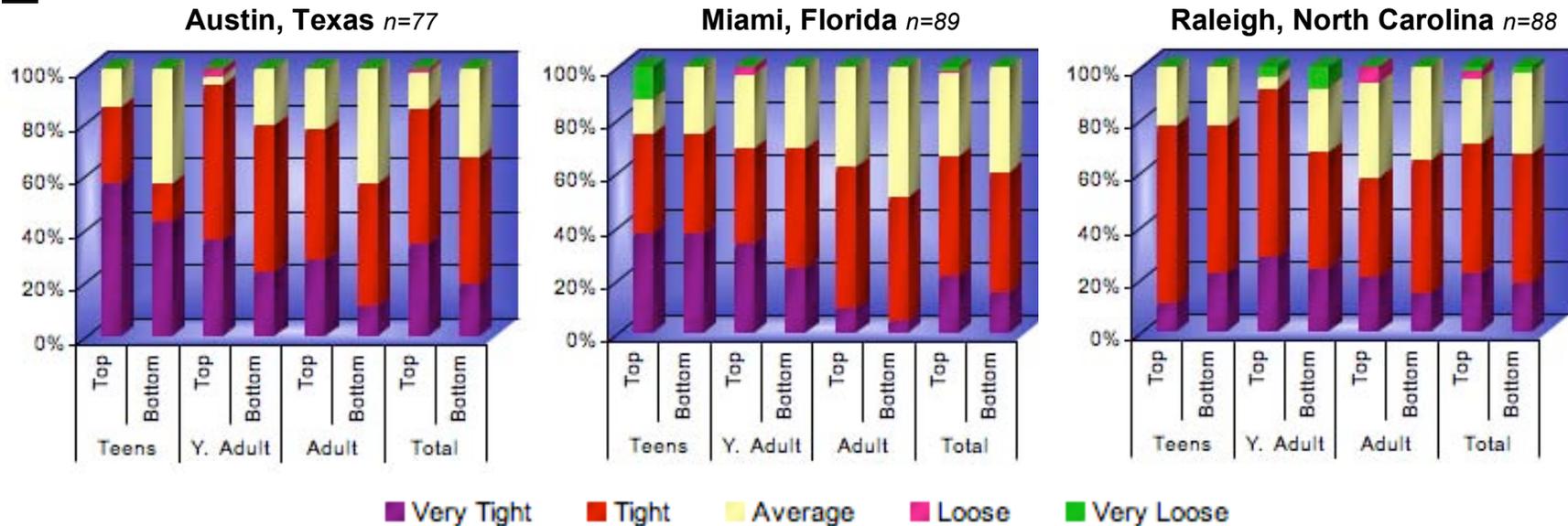


Figure 37: Female Fit Preferences of Clothing

- Only a small number wore loose and very loose clothing.
- Teens wore more very-tight fitted clothing than any other age group, followed by tight-fitted then average-fitted clothing.
- Austin and Raleigh young adults preferred tight-fitted tops and bottoms, and Miami young adults also wore very tight-fitted tops and average-fitted bottoms.
- Austin adults preferred tight-fitted tops and tight bottoms; Miami adults preferred tight tops and tight and average bottoms; and Raleigh adults preferred tight-fitted and average-fitted tops and tight bottoms.
- Overall in tight-fitted clothing was most preferred, followed by average-fitted clothing.

The fit of clothing that most Hispanic females wore were tight tops (48%) and tight bottoms (47%), followed by very tight-fitted tops (26%) and average-fitted bottoms (34%). Overall, all three cities had similar preferences of fit (see Table 13).

Table 13: Female Fit Preferences for All Ages for Each City

Cities	Very Tight		Tight		Average		Loose		Very Loose	
	Top	Bottom	Top	Bottom	Top	Bottom	Top	Bottom	Top	Bottom
Austin, TX	35%	20%	51%	45%	13%	33%	1%	0%	0%	0%
Miami, FL	21%	15%	45%	55%	31%	39%	1%	0%	1%	0%
Raleigh, NC	22%	18%	49%	49%	24%	30%	4%	0%	1%	2%
Total	26%	16%	48%	47%	23%	34%	2%	0%	1%	1%

Figure 38 shows examples of Hispanic females in Miami wearing tight-fitted clothing, the most common style of fit.



Figure 38: Photographs of Miami Hispanic Females Wearing Tight-Fitted Clothing

Left to right: teen, young adult, adult.

The least common style of fit was loose-fitted and very loose-fitted clothing. Such clothing was not worn by any age group for both the Austin and the Miami samples. However, Raleigh Hispanic consumers made up a small percentage of young adults who wore very loose clothing and of adults who wore loose clothing.

Fit

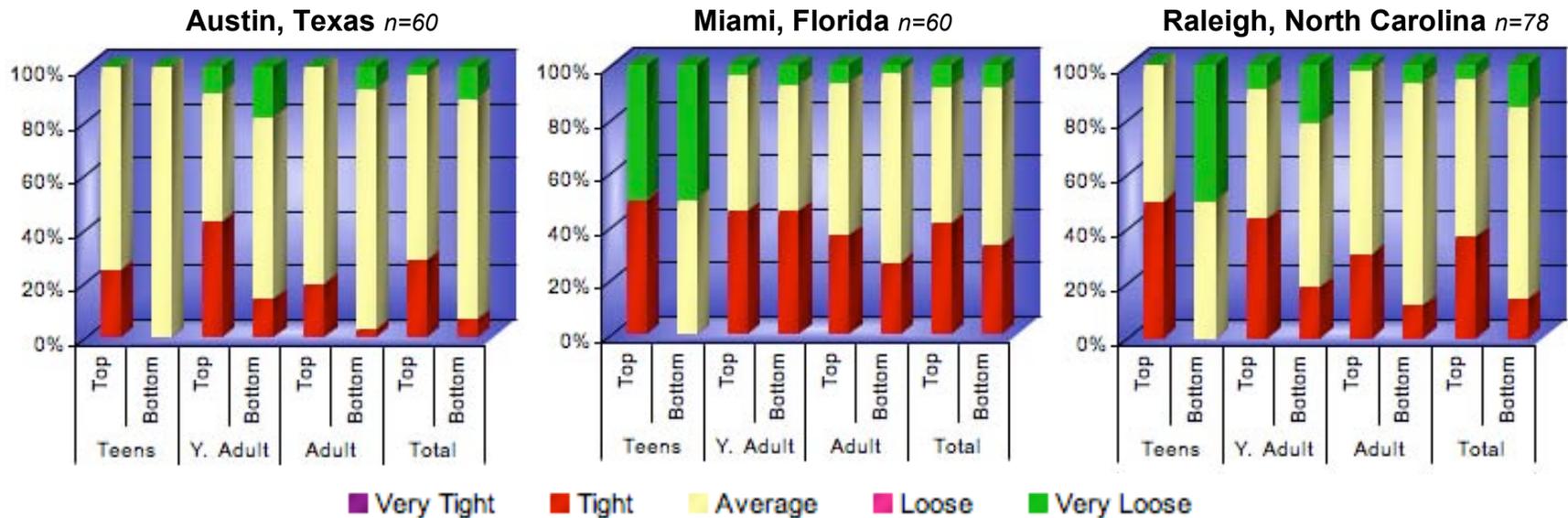


Figure 39: Male Fit Preferences of Clothing

- None wore very tight-fitted or loose-fitted clothing, and only a small percentage wore very loose clothing.
- Austin teens preferred average-fitted tops and bottoms; Miami teens were split between tight and very loose fitted tops and average and very loose fitted bottoms; and Raleigh teens were split between tight and average-fitted tops and very loose and average-fitted bottoms.
- All young adults wore tight and average-fitted tops and tight and average-fitted bottoms.
- Adults favored average-fitted tops and bottoms, and Miami adults wore more tight-fitted tops.
- Overall, average-fitted tops and bottoms were worn most.

The popular types of clothing worn by Hispanic male consumers were tight-fitted, average-fitted, and very loose-fitted clothing. Average-fitted tops and bottoms were worn more than half of all Hispanic males. In addition, tight-fitted tops were popular with Miami and Raleigh consumers, and tight-fitted bottoms were popular with Miami consumers (see Table 14).

Table 14: Male Fit Preferences for All Ages for Each City

Cities	Very Tight		Tight		Average		Loose		Very Loose	
	Top	Bottom	Top	Bottom	Top	Bottom	Top	Bottom	Top	Bottom
Austin, TX	0%	0%	28%	7%	68%	82%	0%	0%	3%	12%
Miami, FL	0%	0%	42%	33%	50%	58%	0%	0%	8%	8%
Raleigh, NC	0%	0%	37%	14%	58%	71%	0%	0%	5%	15%
Total	0%	0%	36%	18%	59%	70%	0%	0%	6%	12%

Figure 40 shows examples of average-fitted clothing, the most popular fit for each age group of Hispanic male consumers.



Figure 40: Photographs of Hispanic Males Wearing Average-Fitted Clothing
From left to right: Austin teen, Miami young adult, Raleigh adult.

The least popular fit was very tight-fitted and loose-fitted clothing. Such clothing was not worn by any males in this sample set. However, among all age groups, a small percentage of males wore very loose clothing, particularly very loose-fitted bottoms.

Color

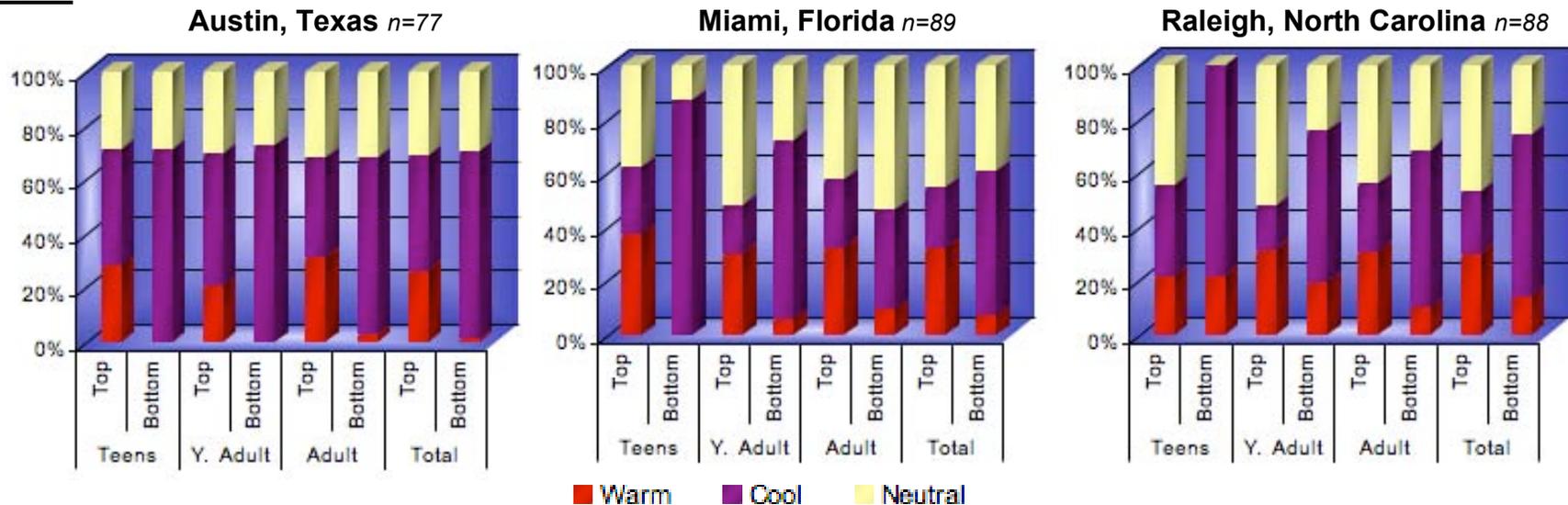


Figure 41: Female Color Preferences of Clothing

- Adults wore more neutral-colored tops and cool- and neutral-colored bottoms.
- The Austin sample set wore more cool-colored tops; the Miami and Raleigh sample sets wore more neutral- and warm-colored tops.
- Warm-colored bottoms were worn by very few and neutral-colored bottoms worn by most in the sample sets.
- The Raleigh sample set wore more multicolored tops than the other two cities.
- The Austin sample set wore more denim than the other two cities.

The color of clothing when totaled by city revealed differences between each city. Table 15 shows the relationships of color preferences for all ages for each city for Hispanic females.

Table 15: Female Color Preferences for All Ages for Each City

Cities	Warm		Cool		Neutral		Multi-color	
	Tops	Bottoms	Tops	Bottoms	Tops	Bottoms	Tops	Bottoms
Austin, TX	27%	1%	43%	69%	31%	29%	40%	3%
Miami, FL	32%	7%	23%	54%	45%	39%	38%	8%
Raleigh, NC	30%	15%	23%	60%	46%	26%	45%	13%

In Austin, most Hispanic female consumers wore cool colored tops and cool-colored bottoms. In Miami, consumers favored neutral-colored tops and cool-colored bottoms. Raleigh consumers wore neutral-colored tops and cool-colored bottoms. Additionally, warm-colored tops were the second popular color worn in Miami and Raleigh. Multicolored tops were worn by 45% of the Austin sample set and were fairly popular in the other cities, too. Figure 42 shows examples of Hispanic female consumers from the three cities.



Figure 42: Photographs of Hispanic Females

Left to right: Austin – cool top/cool bottom, Miami – warm top/cool bottom, Raleigh – neutral top/cool bottom.

Color

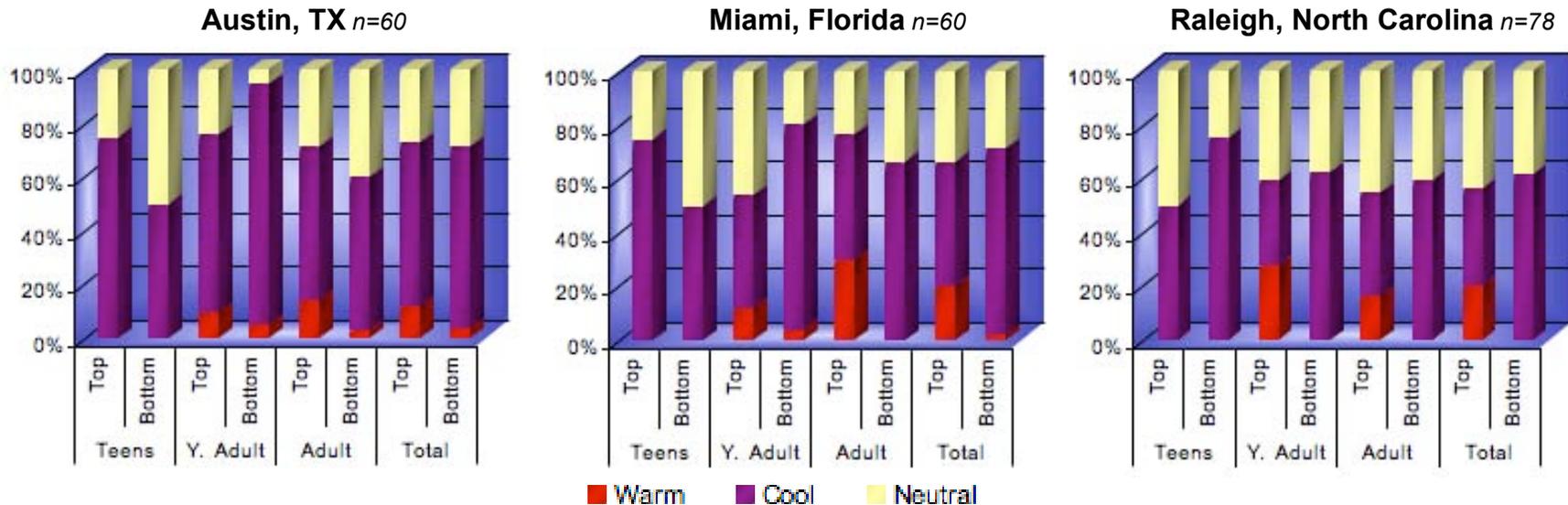


Figure 43: Male Color Preferences of Clothing

- Teens wore either cool- or neutral-colored tops and bottoms.
- Most young adults favored cool- and neutral-colored tops and bottoms, and a small number wore warm colors.
- Austin adults were more partial to cool-colored tops; Miami adults were split between warm- and cool-colored tops; and Raleigh adults wore neutral-colored tops; all wore cool- and neutral-colored bottoms.
- The Austin sample set wore more cool-colored tops; the Miami sample set wore both cool- and neutral-colored tops; and the Raleigh sample set wore more neutral-colored tops.
- Warm-colored bottoms were worn by very few and neutral-colored bottoms worn by most in the sample sets.
- The Raleigh sample set wore more multicolored tops than the other two cities.
- Denim was worn by more than 50% for all sample sets.

Both Austin and Miami Hispanic males wore cool-colored tops, and Raleigh Hispanic males wore more neutral colors. Table 16 shows the relationships of color preferences for all ages for each city of Hispanic males.

Table 16: Male Color Preferences for All Ages for Each City

Cities	Warm		Cool		Neutral		Multi-color	
	Tops	Bottoms	Tops	Bottoms	Tops	Bottoms	Tops	Bottoms
Austin, TX	12%	3%	62%	68%	27%	28%	27%	8%
Miami, FL	20%	2%	68%	47%	33%	28%	27%	5%
Raleigh, NC	21%	0%	36%	52%	44%	38%	44%	3%

Hispanic males in all cities favored wearing cool-colored bottoms, usually denim, followed by neutral-colored bottoms, usually khakis. In addition, Raleigh Hispanic males wore a higher percentage of multicolored tops. Multicolored tops worn by Hispanic males included some type of pattern, such as stripes, plaids, or an image, (see Figure 44).



Figure 44: Photographs of Raleigh Hispanic Males Wearing Multicolored Tops

Type of Dress

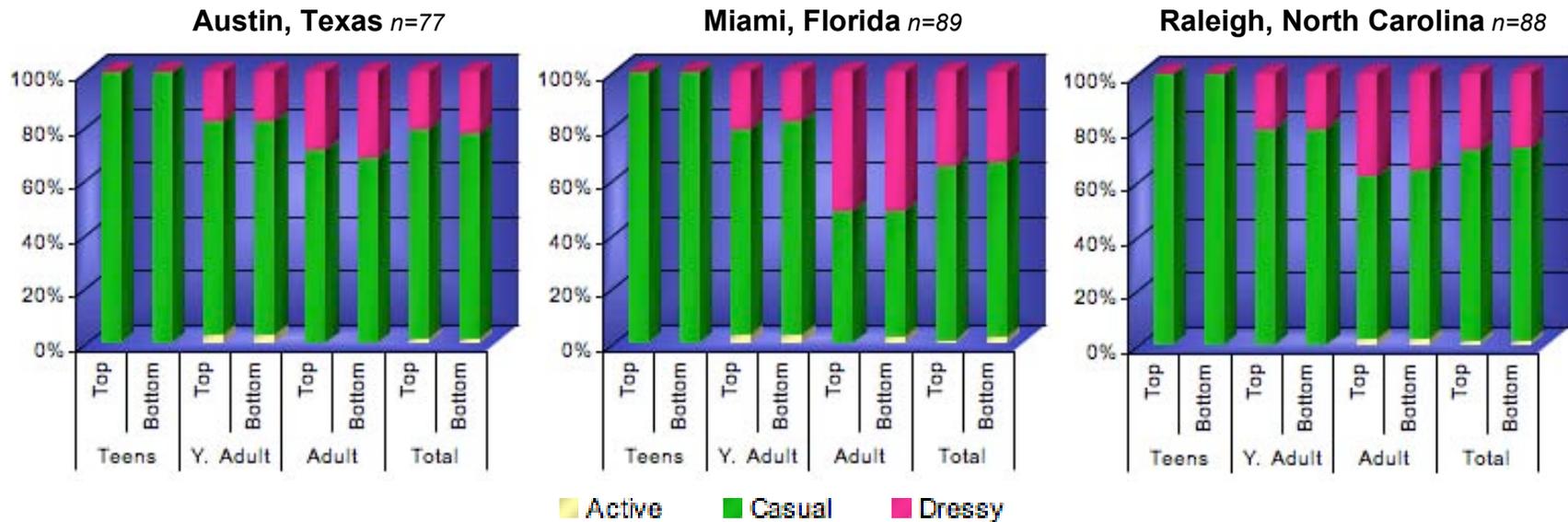


Figure 45: Female Types of Dress Preferences

- All teens were casually dressed.
- Most young adults were casually dressed, and a few were dressy.
- Most Austin and Raleigh adults were casually dressed, and a few were dressy.
- More than half of Miami adults wore dressy clothing.
- Adults wore a higher percentage of dressy clothing than teens or young adults.
- Active clothing was worn very little by all respondents.
- The Austin and Raleigh sample sets dressed casually; and the Miami sample set was close between casual and dressy.

Type of Dress

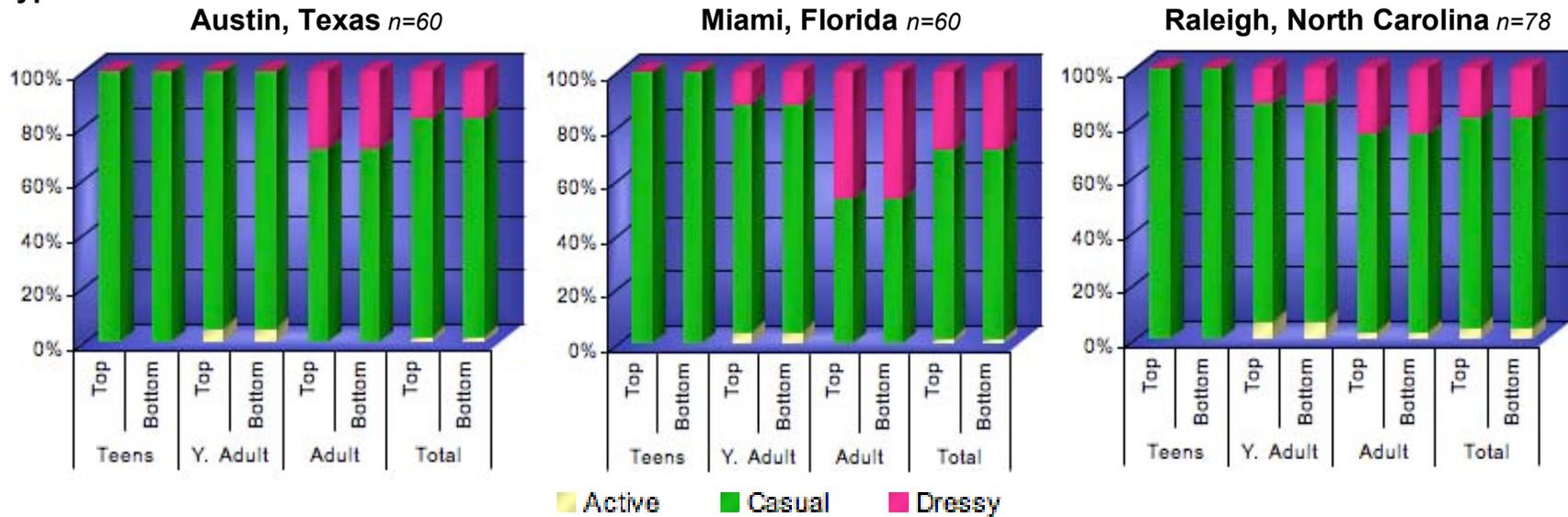


Figure 46: Male Types of Dress Preferences

- All teens wore casual clothing.
- Young adults were casually dressed; a small percentage wore active and dressy clothing.
- Adults were casually dressed and made up the highest percentage of those in dressy clothing.
- Active clothing was worn very little by all respondents.
- The Austin and Raleigh sample sets were dressed casually; and the Miami sample set was close between casual and dressy.

For the most part, the Austin and Raleigh male and female sample sets overwhelmingly preferred casual clothing. The Miami male and female sample sets were close between casual and dressy clothing. In addition, Adults from all cities, both male and female, wore dressy clothing more than the other age groups. Miami was the only city in which the percentage of adult females wearing dressy clothing (51%) was greater than the percentage of adult females wearing casual clothing (47%). Adult males were also very close—47% dressy and 53% casual. In Austin, the type of dress favored was 69% casual and 31% dressy for adult females and 53% dressy and 47% casual for adult males. In Raleigh, female adults leaned more toward casual clothing: 63% casual and 35% dressy. Raleigh adult males wore more casual clothing (74%) than dressy clothing (24%).

Figure 47 and Figure 48 show examples of Hispanic adults from Austin, Miami, and Raleigh wearing dressy clothing.



Figure 47: Photographs of Adult Hispanic Females Wearing Dressy Clothing
Left to right: Austin, Miami, Raleigh.



Figure 48: Photographs of Hispanic Males Wearing Dressy Clothing
Left to right: Austin, Miami, Raleigh.

All young adults, both male and female, favored dressing casually; however, in Miami more young adults dressed in dressy clothing compared with those in Austin and Raleigh. In addition, teens in all cities wore casual clothing.

Pattern

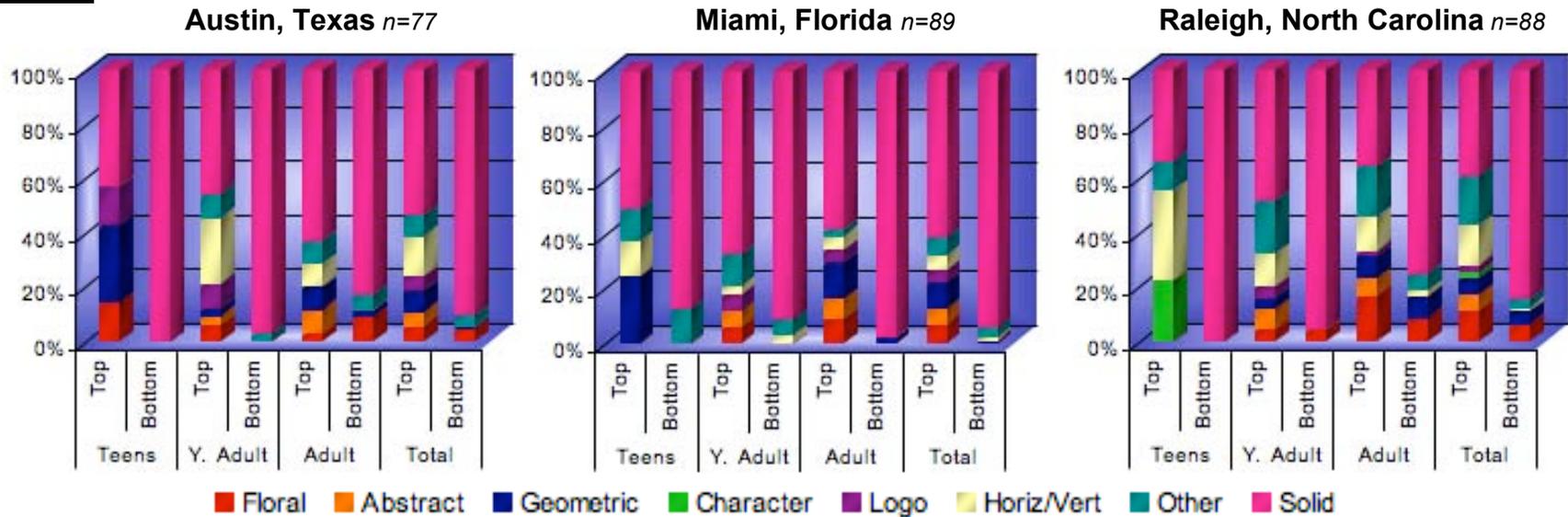


Figure 49: Female Pattern Preferences of Clothing

- Other represents tie-dye, animal print, images, camouflage, and plaid patterns.
- The logos worn were apparel or store brand logos, athletic team logos, and school logos.
- Austin teens and young adults wore more pattern clothing than adults.
- Hispanics of all ages in Raleigh wore more pattern tops than solid tops.
- Solid bottoms were worn by more than half of the sample set.

Clothing pieces were described as being either solid or pattern. Pattern included floral, abstract, or geometric designs, as well as any characters, logos, or images on the clothing. Each city had different preferences of solid and pattern tops. Austin females were closely split: 53% pattern and 47% solid. Miami females favored wearing solids; Raleigh Hispanics favored wearing patterns; most Hispanics of all ages in all three cities favored wearing solid bottoms.

In Austin, the most popular patterns included geometric designs and horizontal/vertical stripes. Teens and young adults wore more pattern tops than adults did. In Miami, the most popular patterns were floral and geometric designs for tops. Half of the teens wore patterns, and less than half of the young adults and adults wore patterns, preferring solids instead. In Raleigh, however, females preferred patterns to solids. More than half of each age group wore patterns. The most popular patterns were horizontal and vertical stripes and floral designs. Figure 50 shows an example of each of the different subcategories of patterns photographed.



Floral pattern (Raleigh)



Abstract pattern (Austin)



Geometric pattern (Miami)



Logo (Austin)



Other/Animal print (Raleigh)



Horizontal stripes (Miami)

Figure 50: Photographs of Hispanic Females Wearing Pattern Tops

Pattern

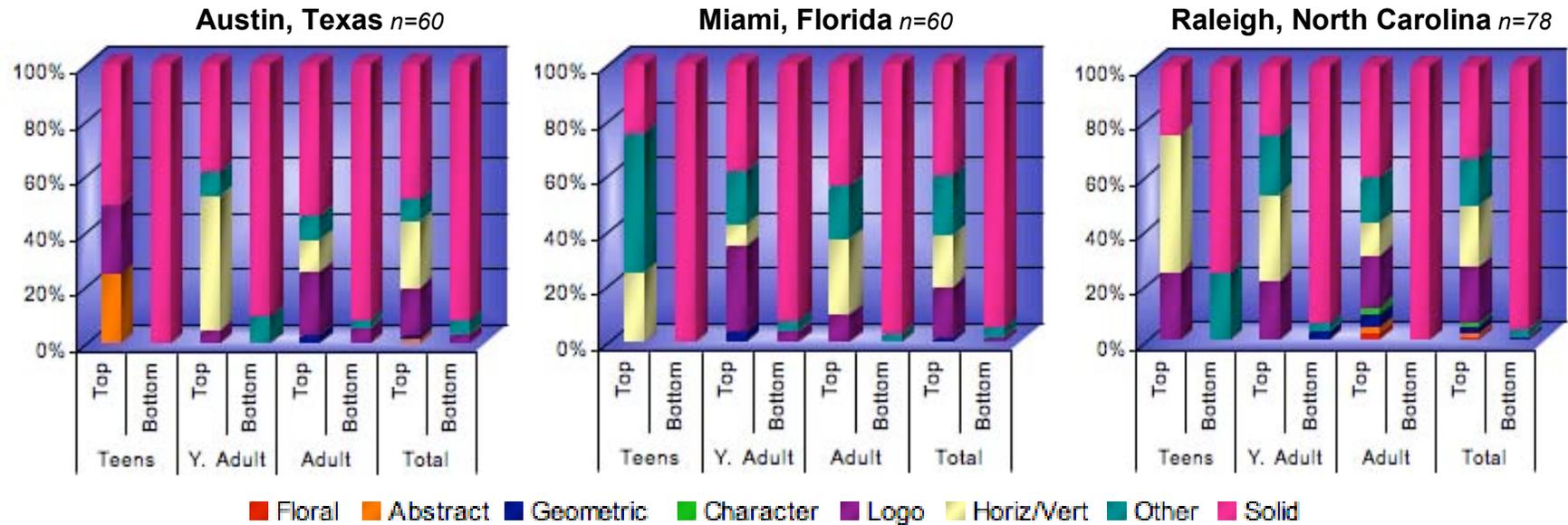


Figure 51: Male Pattern Preferences of Clothing

- Other represents plaid and check patterns, camouflage, and images.
- The logos worn were store brand logos, apparel brand logos, athletic team logos, and restaurant logos.
- All ages wore more pattern tops than solid tops.
- More than half of each sample set wore solid bottoms.

Clothing pieces were described as being either solid or pattern. Pattern included floral, abstract, or geometric designs, horizontal and vertical stripes, as well as any characters, logos, or images on the clothing. More Hispanic males wore pattern tops than solid tops in all three cities. Among all age groups in all three cities, the most popular patterns were horizontal and vertical stripes, logos, and images on tops. The logos observed were store brand logos, apparel brand logos, sports team logos, and school logos. Almost 100% of males in all three cities wore solid bottoms. The small percentage of pattern bottoms included plaid and camouflage bottoms. Figure 52 shows an example of each of the different subcategories of patterns photographed.



Floral pattern (Raleigh)



Abstract pattern (Austin)



Geometric pattern (Miami)



Sports logo (Miami)



Vertical stripe pattern (Austin)



Guitar image (Raleigh)

Figure 52: Photographs of Hispanic Males Wearing Pattern Tops

Research Objective Two A

Research Objective Two A explored apparel retailers who were targeting Hispanic consumers through television and those retailers' approaches to the advertisement.

Television Content Analysis

There were 851 advertisements recorded and evaluated over the five-week period. Each week there were approximately 166 – 175 advertisements, which equaled between 16 and 23 advertisements per hour. The product categories of each advertisement were recorded. Figure 53 below shows the percentage of the advertisements per product category.

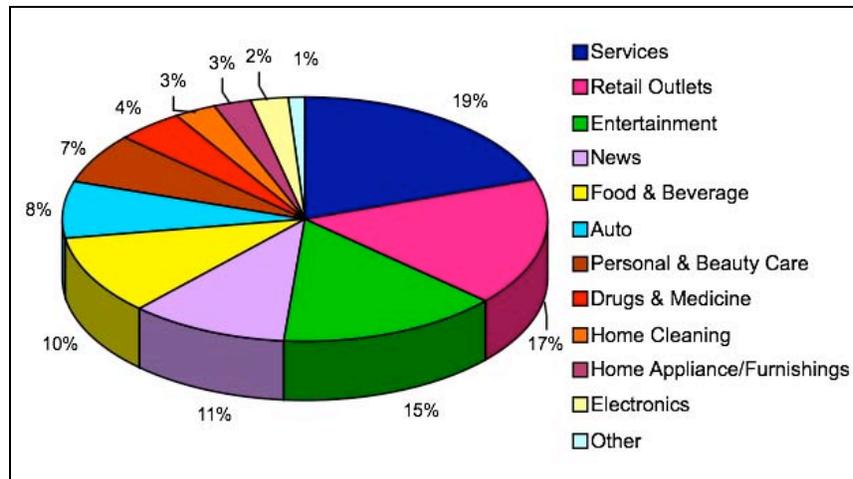


Figure 53: Percentage of Advertisements per Product Category

The top five product categories advertised were Services (19%), Retail Outlets (17%), Entertainment (15%), News (11%), and Food & Beverage (10%).

Number of Advertisements

Retail Outlets accounted for 17% of the total, or 146 advertisements. The only apparel retail outlets advertised were Sears and J.C. Penney’s (department stores) and Target and Wal-Mart (discount department stores). Table 17 details the total number of advertisements for each retailer for the days and times recorded.

Table 17: Number of Advertisements for Apparel Retailers Recorded

	Department Stores			Discount Department Stores		Total
	Sears	J.C. Penney	Total	Target	Wal-Mart	
Mondays						
7-8	9	3	12	1	5	6
8-9	5	2	7	2	4	6
9-10	6	1	7	1	1	2
Wednesdays						
7-8	5	2	7	4	6	10
8-9	3	1	4	3	7	10
9-10	7	0	7	4	0	4
Fridays						
7-8	6	3	9	0	6	6
8-9	6	5	11	1	3	4
9-10	5	4	9	1	3	4
Total	52	21	73	17	35	52

There were only two apparel brands advertised: Hanes His/Her Way and Fruit of the Loom, which were identified in the Retail Outlets category. Other retailers advertised were Payless, Toys “R” Us, Best Buy, and El General Boots. In all, a retail outlet was advertised between one and five times per hour each day. Of all apparel retailers, Sears advertised the most (52 commercials), followed by Wal-Mart (35 commercials). The two department stores advertised more frequently on Mondays and Fridays, between seven and eight o’clock, and the two discount

department stores advertised more frequently on Wednesdays, between seven and nine o'clock.

The Language Used in Advertisements

The characteristics of the language used per advertisement studied are shown in Figure 54. The largest group, with 467 advertisements, consisted of advertisements that used Spanish-speaking actors (SS). The next group, with 245 advertisements, consisted of advertisements that used Spanish narrators (SN). These advertisements used a variety of different actors or used no actors at all. The third group, with 116 advertisements, consisted of advertisements that used both Spanish narration and Spanish-speaking actors (SN + SS). There were a very small number of advertisements which were originally in English with Spanish voice-over or with text translations into Spanish (E - S) or with English and Spanish in the same commercial (E + S). The advertisements originally in English with the Spanish voice-over or with the text translations into Spanish involved non-Hispanic actors. The advertisements were somewhat generic, created to target a wide audience.

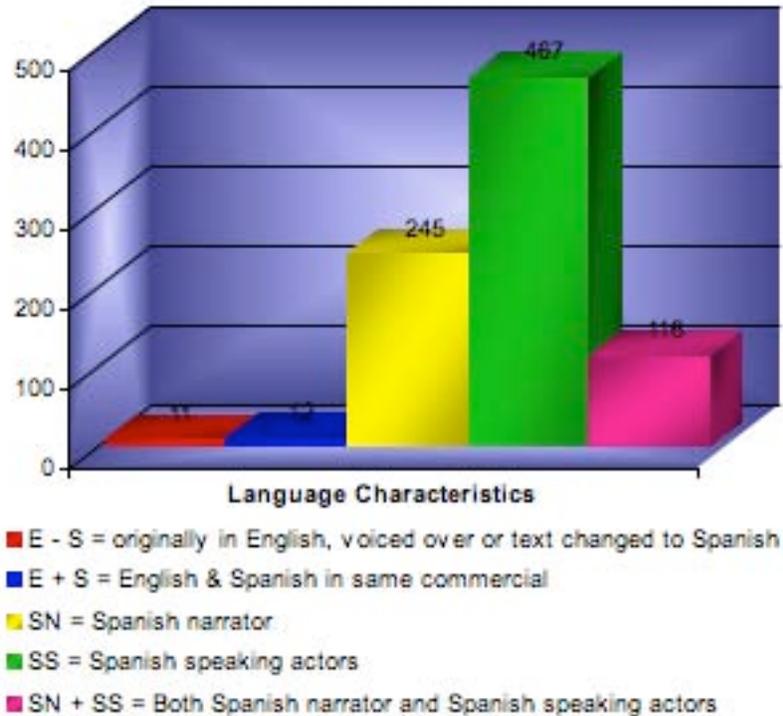


Figure 54: The Use of Language per Advertisement

Retailers approached the advertisement differently with only a little overlap between them. (See Table 18: Use of Language per Advertisement for Apparel Retailers Recorded.) Sears had the most advertisements (52) and used Spanish narrators for 90% of them; the remaining retailers used both Spanish narrators and Spanish-speaking actors. Wal-Mart had the second-largest number of advertisements (35)—all of which used Spanish-speaking actors. Next was J.C. Penney, which had 21 advertisements, all of which were originally English advertisements with Spanish voice-overs. Target had the least number of advertisements (17), but 70% of them were advertisements using both English and Spanish, and 30% of them used Spanish narrators.

Table 18: Use of Language per Advertisement for Apparel Retailers Recorded

	Department Stores		Discount Department Stores		Total
	Sears	J.C. Penney	Target	Wal-Mart	
E – S	-	21	-	-	21
E + S	-	-	12	-	12
SS	-	-	-	35	35
SN	47	-	5	-	52
SN + SS	5	-	-	-	5

Spanish-Language Advertising

An investigation into which apparel retailers were most active in advertising in Spanish-language media resulted in the same companies mentioned earlier in the television content analysis of advertisements with the addition of two other retail stores. The apparel retailer spending the most was Sears Holding Corporation, made up of Sears and Kmart. Next was Wal-Mart Stores Incorporated, followed by J.C. Penney Company, Target Corporation, and Macy's. All these retailers have similar strategies for marketing their brands toward the Hispanic market. Table 5 in Chapter Two summarized the techniques these retailers have undertaken to advertise to the Hispanic market. The most consistently used techniques in advertising to that market are print and television advertisements, in-store marketing, and Spanish-speaking sales associates. Retailers are also handing out Hispanic magazines which feature profiles of Latino leaders and celebrities next to advertisements highlighting expanding lines of products and services geared to

Hispanics. Hispanic celebrities have been developing apparel lines over the past few years; however, apparel lines are competitive. Occasionally celebrities contribute to designing their own lines, or they are the spokesperson for a line or brand.

Research Objective Two B

Research Objective Two B explored apparel retailers who were targeting Hispanic consumers through their approach to in-store product presentation.

Apparel Store Evaluations

There were 34 stores evaluated in Austin, Texas; 30 in Miami, Florida; and 40 in Raleigh, North Carolina. The 104 stores evaluated were comprised of discount stores, department stores, or specialty stores. The stores were categorized as stand-alone, shopping centers/malls, strip malls, or other. Table 19 below shows the breakdown of the classification and location of stores analyzed per city.

Table 19: Store Classification and Location of Stores Analyzed

Cities	Store Classification			Location			
	Disc.	Dept.	Spec.	Stand Alone	Shopping Mall	Strip Mall	Other
Austin, TX	2	6	26	2	32	0	0
Miami, FL	6	3	21	0	23	3	4
Raleigh, NC	8	10	22	1	32	7	0
Total	16	19	69	3	87	10	4

The four stores categorized as other were all located in buildings along streets next to other stores, businesses, restaurants, and residential buildings. Figure 55 is an example of a women's clothing store Located along SW 8th Street in Miami, Florida.



Figure 55: Women's Clothing Store in Miami, Florida

* Address 1792 SW 8th St Miami, FL 33135

All apparel stores carried accessories, and 90% of them also carried footwear. Out of the 104 stores, 96% carried women's clothing, 63% carried men's clothing, and 37% carried children's clothing. The styles of clothing carried in stores were categorized into five styles: active, business, casual, formal, and loungewear. All stores carried casual wear; 92% carried active wear; 88% carried loungewear; 54% carried business wear; and 36% carried formal wear (see Table 20).

Table 20: Departments and Clothing Styles of Stores Analyzed

Cities	Departments			Clothing Styles				
	M	W	C	Active	Bus.	Casual	Form.	Loun.
Austin, TX	20	34	10	33	17	34	8	31
Miami, FL	16	26	9	23	14	30	12	21
Raleigh, NC	30	40	19	40	25	40	17	39
Total	66	100	38	96	56	104	37	91
% of Total	63%	96%	37%	92%	54%	100%	36%	88%

The presentation of merchandise in the stores analyzed consisted of pairing clothing in outfits or as separates, folded or hung, and with the use of mannequins or fixtures. All stores hung merchandise and presented them as separates. All but one used fixtures, and 92% of them paired clothing in outfits. Figure 56 shows a store where merchandise is hanging on fixtures where the clothing is separated by the type of clothing—namely, tops, skirts, pants, and so forth.

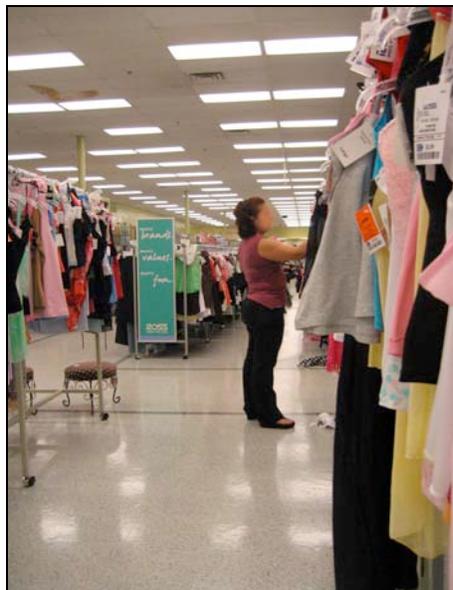


Figure 56: Discount Store in Austin, Texas, with Merchandise Hanging on Fixtures Separated by Type of Clothing

Figure 57 shows more examples of merchandise presentation in two stores in Miami, Florida. Each uses mannequins to display merchandise, and fixtures can also be seen to house hanging merchandise.



Entrance of a women's specialty retailer in Miami, FL: the use of mannequins, folded merchandise on tables, hanging merchandise on fixtures, merchandise sorted as separates and as outfits.



Window display of a men's specialty retailer in Miami, FL: the use of mannequins and shoe display. In the background, one can see merchandise hanging on fixtures.

Figure 57: Examples of Merchandise Presentation

Table 21 gives price attributes and details of merchandise presentation in the stores analyzed. Of the 104 stores, only 28 of them carried merchandise that cost more than \$100, and 70 of them carried merchandise that cost up to \$100. Thirty-four of the stores analyzed carried merchandise all under \$50.

Table 21: Price Attributes and Merchandise Presentation in Stores Analyzed

Cities	Price Attributes			Merchandise Presentation					
	Low	Mid	High	Outfit	Sep.	Folded	Hung	Mann.	Fixt.
Austin, TX	34	19	10	33	34	31	34	32	34
Miami, FL	30	20	4	24	30	23	30	24	29
Raleigh, NC	40	31	14	39	40	34	40	33	40
Total	104	70	28	96	104	88	104	89	103

The type of store signage was also recorded. Ninety-one stores used only English signs, thirteen stores used both English and Spanish signs, and none of the stores used only Spanish signs. Figure 58 and Figure 59 show examples of Spanish-language signage in stores.



Figure 58: Spanish-Language Signage at Target in Miami, Florida



Sign located at entrance



Sign describing department

Figure 59: Spanish-Language Signage at Department Stores in Raleigh, North Carolina

The sales associates in the stores were primarily Hispanics and non-Hispanics (72 stores). Twenty-four stores had no Hispanic sales associates, and eight stores had only Hispanic associates (see Table 22).

Table 22: Store Signage and Sales Associates in Stores Analyzed

Cities	Store Signage			Sales Associates		
	English	Spanish	Both	Hispanic	None	Both
Austin, TX	31	0	3	1	3	30
Miami, FL	21	0	9	7	1	22
Raleigh, NC	39	0	1	0	20	20
Total	91	0	13	8	24	72

The advertising media used by apparel retailers included television, radio, print, and the Internet. Table 23 lists the totals of the advertising media used by the different types of stores. These advertising media were all in English. The stores that advertised in Spanish were Melrose, Ross, Macy's, Target, J.C. Penney, Wal-Mart, and Sears.

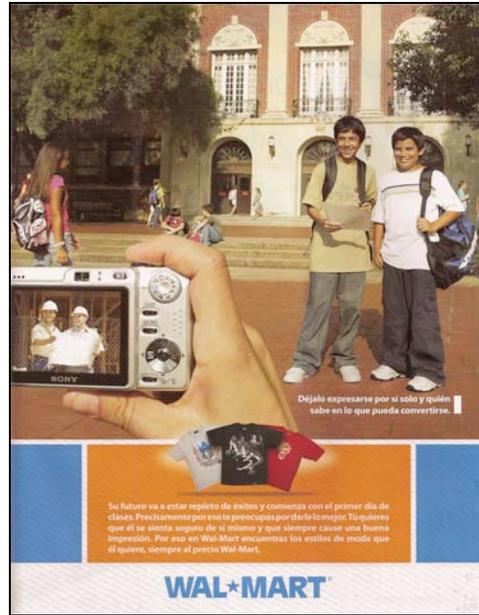
Table 23: Advertising Media of Stores Analyzed

Type of Store	Advertising Media				Total # of Stores
	TV	Radio	Print	Internet	
Discount	15	2	11	15	16
Department	18	8	18	19	19
Specialty	17	0	33	54	69
Total	50	10	62	88	104

The following two figures are examples of print advertisements found in popular Hispanic magazines (see Figure 60 and 61). Other stores advertising in these magazines are Target, Gap, and Fashion Bug.



From *People En Español Magazine*



From *Latina Magazine*

Figure 60: Print Advertisements of Discount Stores in Hispanic Magazines

Note: Advertisements are from the following. Marshalls. (2007, May). Advertisement. *People En Español*, 130. Wal-Mart (2007, September). Advertisement. *Latina*. 11 (10), 117.



Figure 61: Print Advertisement of Kohl's in *Vanidades Magazine*

Note: Advertisement from Kohls. (2008, May). Advertisement. *Vanidades*. 48 (11), 51.

The Internet was the advertising medium used by most stores, followed by print, television, and radio. Since the Internet was the most used advertising medium, information was collected on whether or not customers could purchase from the stores' Web sites. Of 104 stores, 88 had Web sites, and 71 of the Web sites allowed customers to make purchases. The remaining 17 Web sites gave information about the stores and the company, promotions, new items, options to sign up for a store credit card and to join the mailing list.

Brands were also recorded at each of the stores. Researchers were able to identify two Hispanic apparel brands, Panabrisa and NaCo, in La Epoca department store in Miami, Florida. Panabrisa designs a men's shirt style called guayabera, which was popular in Latin America, the Caribbean, Southeast Asia, and the West Indies. It was also referred to as a Mexican wedding shirt. NaCo is a brand by a Mexican clothing company that primarily designs T-shirts, along with other apparel and accessories with phrases in Spanish. Figure 62 and Figure 63 show examples of these two brands in La Epoca department store in Miami.



Figure 62: Panabrisa Guayabera Shirts in La Epoca Department Store in Miami, Florida



Figure 63: NaCo T-Shirts in La Epoca Department Store in Miami, Florida

Other brands recognized were the Cubavera brand at Macy's department store and Daisy Fuentes at Kohl's department store. Cubavera is a brand by Perry Ellis International and is only offered at Macy's. It takes the traditional guayabera and incorporates innovative fabrics and designs. The Daisy Fuentes line sold exclusively at Kohl's and was designed by Latina fashion model and TV personality Daisy Fuentes. Figure 64 shows examples of both brands in stores.



Cubavera at Macy's in Raleigh, NC



Daisy Fuentes at Kohls in Cary, NC

Figure 64: Cubavera and Daisy Fuentes Brand Clothing

Chapter V: Discussion, Conclusions, and Future Research

Brief Review of the Study

The purpose of this study was to obtain a more complete understanding of design and style preferences for apparel worn by U.S. Hispanic consumers and to discover how these products are being promoted to the Hispanic consumer. This objective was accomplished by developing a profile of the U.S. Hispanic consumer, by exploring apparel design attributes of garments worn by U.S. Hispanic consumers in everyday situations, and by identifying and examining apparel retailers who were engaged in marketing to U.S. Hispanics through television and in stores. The three cities visited were Austin, Texas; Miami, Florida; and Raleigh, North Carolina. Each state has unique qualities for having been chosen. Texas is the second-largest state for Hispanic buying power (\$140.2 billion in 2006), following California (\$214.5 billion), and Florida is the third-largest state for Hispanic buying power (\$82.2 billion). From 1990 through 2006, North Carolina had the second-highest rate of growth for Hispanic buying power (1,041.6 percent), following Arkansas (a 1,174.4 percent rate of growth) (Humphreys, 2006). Methods used included a visual content analysis of photographs, a content analysis of Spanish-language television advertisements, and evaluations of apparel stores targeted at Hispanic consumers. After data analysis,

conclusions were drawn with respect to the design and style preferences of Hispanic consumers. On the basis of these conclusions, opportunities for targeting the U.S. Hispanic market were identified. Framing this research were two research objectives:

- Research Objective One: to investigate preferences for apparel design attributes by examining what Hispanic consumers wear in everyday situations.
- Research Objective Two: to explore apparel retailers who are targeting Hispanic consumers:
 - a. Through television and those retailers' approaches to the advertisement.
 - b. Through those retailers' approaches to in-store product presentation.

Discussion of Results

Research Objective One

The investigation of preferences for apparel design attributes was conducted through a visual content analysis of Hispanic consumers in everyday situations. The categories examined were fit, color, type of dress, and pattern.

Regarding the fit of clothing, Hispanic females of all ages in all three cities preferred tight-fitted clothing, followed by either very tight-fitted or average-fitted clothing. For Hispanic males, the fit of clothing favored was average fits of tops with average-fitted bottoms. Overall, Hispanics do not usually wear clothing too large for

them. They prefer clothes that fit closely—and sometimes snugly—to accentuate the figures of Hispanic females.

For Hispanic females, the trend for the second category, color, varied by city. In Austin, cool-colored tops were the most prevalent; in Miami and Raleigh, neutral- and warm-colored tops were the most prevalent. Consumers in each city had different preferences for color of tops, but all favored cool-colored bottoms, followed by neutral-colored bottoms. Retailers should consider these varying preferences and offer a wide variety of colors as well as target certain colors to certain areas of the country. One of the dominant aspects of the cool-colored bottoms was that approximately 50% of the sample wore denim bottoms. This percentage offers retailers another opportunity to expand their denim market to Hispanic consumers. Like Hispanic females, Hispanic males preferred cool-colored bottoms in all three cities. They also preferred denim bottoms in all three cities. Hispanic males preferred colored tops similar to those of Hispanic females. Austin and Miami consumers preferred cool-colored tops; Raleigh consumers were split closely between cool- and neutral- colored tops. Hispanic males did not frequently wear colors that drew attention to themselves—such as vibrant colors; rather, they usually wore dull colors. However, Raleigh had the largest percentage of males who wore multicolored tops.

The preference for the type of dress worn by Hispanics was different for each age group. Both male and female teens liked to dress casually; young adults

avored dressing casually, but a small percentage of them dressed in dressy and active clothing. Very few Hispanics dressed in active clothing, perhaps because they believe that their appearance in public is important and reflects their honor, dignity, and pride (Clutter & Nieto, 2001). Adults also dressed casually, but more of them favored dressy clothing than any other age group. Hispanic adults appeared to be more concerned about their appearance in public than young adults and teenagers, so age had a large effect on what Hispanics wear. Miami was the only city of the three in which Hispanic male and female adults almost equally preferred casual and dressy clothing. The location, the environment, and the surroundings of Hispanics' communities affected what they wore.

For the last category, pattern, clothing pieces were described as solid-colored or patterned. Patterns included floral, abstract, or geometric designs, as well as any characters, logos, or images. In all three cities, three-quarters of the Hispanic females surveyed preferred solid-colored bottoms. In Austin, the number of solid-colored and patterned tops observed were almost even. The most popular patterns were geometric shapes like polka dots and horizontal stripes. In Miami, Hispanic females preferred solid-colored tops over patterned tops. In Raleigh, however, females preferred patterned tops over solid-colored tops. There were also more varieties of patterns worn in Raleigh than the other cities. The most popular patterns were horizontal and vertical stripes. Hispanic females in Austin and Raleigh enjoyed wearing patterned tops more than Hispanic females in Miami. Retailers should

consider the type of patterns they sell in different areas of the country, along with the popular colors for each area, as mentioned earlier.

More than half of Hispanic males in all three cities preferred wearing patterned tops. The types of patterns that were most often observed were tops with logos or images on them and horizontal or vertical stripes. Hispanic consumers, especially males, are attracted to patterned apparel. Apparel retailers should include a variety of patterns, along with solids, thereby providing Hispanic consumers with an assortment to choose from. When designing patterns, apparel retailers should also consider the colors Hispanics prefer as well as the types of patterns. Many Hispanics wear logos, probably because of their strong loyalty and attachment to brands (Livingston, 1992). Hispanic males were more conservative than Hispanic females regarding the type of bottoms they wore. Nearly 100% of Hispanic males wore solid bottoms. The small percentage of patterns worn included plaid and camouflage bottoms.

Research Objective Two A

The apparel retailers targeting the Hispanic market through television were determined through conducting a content analysis of Spanish-language television advertisements. In addition, the apparel retailers' approaches to the advertisement were determined. Apparel retailers advertised in Spanish in ways similar to how they advertised in English. The advertisements attempted to persuade potential customers to purchase or consume more of a particular brand of product or service.

Apparel retailers were not making any clear distinctions between the Hispanic market and the mainstream market. For example, fewer apparel brands or products were promoted in Spanish than in English; in addition the apparel brands or products promoted on the English-language networks did not always have a Spanish-language counterpart. Again, apparel retailers, in their advertising strategies, were not recognizing the viability of the Hispanic market.

As the advertisements were being evaluated, the following information was noted. In programmed shows and news programs, apparel products worn were those reflecting current trends and styles. In some shows, however, traditional Hispanic cultural dress was used in a storyline. Also in show programming, the clothing some characters wore was brightly colored, revealing, and form-fitting. Apparel worn on news programs was somewhat revealing, showing legs and cleavage, but the apparel was trendy business attire. Thus, for Hispanics, appearance was important to the way they were perceived by the public.

Only a handful of apparel retailers advertised in Spanish—such as Sears, Wal-Mart, J.C. Penney, and Target. In addition, only three brands were advertised: Hanes His/Her Way, Fruit of the Loom, and El General, a brand of boots. All advertised with either Spanish-speaking actors or Spanish narration or both. Sears advertised the most, followed by Wal-Mart, J.C. Penney, and Target.

Regarding how apparel retailers approached advertisements, the advertisements in Spanish were aired mainly with Hispanic actors speaking Spanish.

Other advertisements were English-language advertisements but with Spanish voice-overs or advertisements that used both Spanish narration and Spanish-speaking actors. Spanish-speaking celebrities, such as athletes or actors, were used to advertise certain products. For example, a popular prime-time television actress advertised L'Oreal Paris hair care. There are many ways for retailers to advertise their products to Hispanic consumers. Choosing the right way is essential to creating a successful advertising campaign.

Advertising in Spanish on Spanish television is the most advantageous strategy for reaching Hispanic consumers. Spanish television appeals to Hispanics because it offers programming in their native language. But before advertising, advertisers should thoroughly research their target consumers and make sure they do not offend them or misrepresent themselves when they translate advertisements from English into Spanish. Often advertisements have been wrongly translated, resulting in serious declines in sales of goods and services. In addition, advertisers should consider hiring bilingual employees and using Spanish signage. Including printed advertisements such as ad circulars, mailers, and magazines will be effective in advertisers' marketing campaigns.

Sears has advertised mostly with Spanish narration and occasionally with Spanish narration and Spanish-speaking actors. Wal-Mart has advertised heavily in Spanish; as a result, it has a strong reputation and brand loyalty among Hispanic consumers. Largely because of its Spanish-language advertising strategy, Wal-Mart

has become the top retailer in the world (2006 Global Powers of Retailing, 2006).

Advertisements by J.C. Penney were English-language advertisements with Spanish voice-overs. Target was the only retailer to advertise both in Spanish and English; it also aired advertisements with Spanish narration. Each retailer had a different approach to advertising to the Hispanic market through Spanish-language advertisements. It was difficult to determine whether one approach was more effective than another.

The apparel retailer who spent the most on Spanish-language advertising was Sears Holding Corporation (which is made up of Sears and Kmart), followed by Wal-Mart Stores Incorporated, J.C. Penney Company, Target Corporation, and Macy's. All these retailers had similar strategies for marketing their brands toward the Hispanic consumer. The methods these retailers employed to advertise to the Hispanic market included print and television advertisements, in-store marketing, and Spanish-speaking sales associates. Some retailers also handed out Hispanic magazines featuring profiles of Latino leaders and celebrities alongside advertisements highlighting expanding lines of products and services geared toward Hispanic consumers.

Furthermore, using Hispanic celebrities in advertisements will bring immediate attention to the products advertised. Apparel retailers have collaborated with such celebrities to create apparel lines or have used them as spokespersons for particular brands. Celebrities contribute to branding the apparel as part of their

lifestyle in a way that appeals to Hispanic consumers and sometimes non-Hispanic consumers. In targeting the U.S. Hispanic market, apparel retailers should also take a greater financial interest in advertising to that market. They can begin such a strategy by taking a small percentage of their advertising budget and using it for advertising in Hispanic media.

Research Objective Two B

To examine the approaches to in-store product presentations of apparel retailers who are targeting Hispanics, apparel store evaluations were conducted of stores where Hispanic consumers shop. Most other researchers cite discount stores as the most favorite places where Hispanics shop. This study revealed that Hispanic consumers shopped not only at discount stores but also at department stores and specialty stores. In areas like Miami, Florida, where Hispanics make up more than half of the total population, there were many specialty stores that carried merchandise at discount prices—all merchandise under \$50. In Miami, Hispanics make up 50% more than Austin's percentage of Hispanics and nine times more than Raleigh's percentage of Hispanics. As a result, Miami had more stores targeted at the Hispanic market in shopping malls, strip malls, and other areas.

It was common for apparel stores to carry accessories as well as footwear; this strategy gave consumers the ability to shop for an outfit rather than just pieces. Almost all stores observed carried women's clothing—with children's clothing carried the least out of all the stores observed. Some stores carried men's clothing,

women's clothing, and children's clothing; others carried just women's clothing. However, few stores carried just men's clothing. Consequently, there is an opportunity to target Hispanic males specifically in a specialty-store environment.

Hispanics shopped at stores carrying casual wear, active wear, and loungewear. Half of the stores where they shopped carried business wear and about one-third carried formal wear. On a day-to-day basis, Hispanics shopped mostly for casual clothing, the type of clothing worn in everyday situations. Since Hispanics wear mostly casual clothing, they preferred to shop at stores that sell casual clothing. The study also revealed that Hispanics shopped at stores with a lower price point—\$50 or less. These stores included discount stores and some specialty and department stores. This finding indicates that price point played an important role in the stores where Hispanics preferred to shop.

The presentation of merchandise in stores consisted of pairing clothing in outfits or as separates, folded or hung, and with mannequins or fixtures. Hanging merchandise as separates and in outfits was common in many of the stores where Hispanics shopped. The fixtures were also used in almost all the stores. The hanging of merchandise and the use of fixtures contributed to a shopping environment that was easier to navigate. Discount stores and some specialty stores that offer merchandise for low prices presented clothing by hanging it on fixtures separated according to type of clothing. Research showed that Hispanics frequented stores using this technique of merchandise presentation. The simple

process of navigating fixtures in this way was appealing to Hispanics. It was not necessary for them to stop shopping and then fold merchandise before putting it away. Stores also used mannequins, particularly department stores and specialty stores. This merchandising technique helped to give consumers a visual image of current trends and how to pair an outfit together. The technique contributed to another successful product presentation, thus making shopping more effortless for Hispanics.

Another technique for reaching Hispanic customers was the use of Spanish-language signage in stores. Among the stores analyzed, only 13 of them used both English-language and Spanish-language signage; the rest used only English-language signage. Of the stores analyzed in Miami, 30% of them used Spanish-language signage, followed by 9% of stores in Austin, and 3% of stores in Raleigh. The next-best technique to Spanish-language signage was to employ sales associates who speak Spanish. Seventy-nine percent of the stores analyzed had Hispanic sales associates; twenty-one percent did not. The Raleigh stores made up the largest number of stores that did not have Hispanic sales associates. In contrast, only one store in Austin and one store in Miami did not have Hispanic sales associates. Of the 104 stores analyzed, 74 stores employed both Hispanic and non-Hispanic sales associates, 8 stores employed only Hispanic sales associates, and 22 stores employed no Hispanic sales associates. The use of Spanish-language signage and employing bilingual associates created an environment friendly toward

Hispanics. If more retailers adopted these techniques, Hispanics would be more comfortable in those stores and would travel further and more frequently to shop in them (Nicholls, Roslow, & Dublisch, 1996).

Of the stores analyzed, the advertising medium used most often was a Web site on the Internet. Only 15% of the stores analyzed had no Web site, and those stores were specialty stores and one discount store. The next-prominent advertising medium was print, followed by television. Radio was used the least by the stores analyzed. Department stores utilized television, print, and Internet advertising media the most, and some of them also used radio advertising. Discount stores primarily used television and the Internet and some print advertising. The specialty stores that advertised did so through the Internet; 78% of specialty stores had a Web site. However, these advertising media were all in English. The stores that advertised in Spanish were Melrose, Ross, Macy's, Target, J.C. Penney, Wal-Mart, and Sears. All of these stores used Spanish print advertising except Melrose, which had a Web site in both English and Spanish. Target, J.C. Penney, Wal-Mart, and Sears also used Spanish television advertising, and J.C. Penney and Sears each had a portion of their Web sites in Spanish. Having a Web site from which customers can purchase merchandise gives the apparel retailer an additional channel of distribution and the ability to reach even more consumers. Just having a Web site was also beneficial for the retailer as a means of promotion for the brand and store.

In order to have an advantage over competitors, apparel retailers need to advertise in Spanish. Television and print advertisements are consistently the most used media to advertise in. Department stores and some discount stores already have good practices in doing so. However, specialty retailers do not. The advertising medium that specialty apparel retailers used most was the Internet, which was the more difficult advertising medium to translate to Spanish. There is a great opportunity for specialty apparel retailers to reach the Hispanic market if they can choose a successful advertising medium.

There were only a handful of brands identified as Hispanic brands or brands designed by Hispanics. Hispanics shop for all brands, no matter if they are Hispanic brands or non-Hispanic brands. It is not necessary for apparel retailers to carry Hispanic brands. However, doing so would give Hispanics a reason to go to that particular store and shop. So carrying Hispanic brands does not hurt; in fact, it will give the retailer a competitive advantage over other retailers.

Future Research

This study provides the framework for further analyses of design and style preferences of the U.S. Hispanic market. The study was based on only three cities in the southern United States. There are other areas in the country which could contribute to this analysis of the Hispanic population. Each region of the United States is inhabited by Hispanics from different countries of origin, a factor which may alter design and style preferences of the different populations. Using a variety of cities from the different regions of the United States would broaden the investigation. According to the List of U.S. communities with Hispanic majority populations (2007), possible cities to investigate include the following:

Northeast

- Union City, New Jersey (82.3% of the population is Hispanic)

Midwest

- Chicago, Illinois (largest Hispanic population in the Midwest)

South

- San Antonio, Texas (largest city with a Hispanic majority)

West

- Huron, California (98.27% of the population is Hispanic)
- East Los Angeles, California (96.8% of the population is Hispanic)
- South Valley, New Mexico (76% of the population is Hispanic)
- Las Vegas, Nevada (New Hispanic immigrants are moving here; their population has increased by more than 100% in the last decade.)

Increasing the number of the locations where photographs are taken would contribute to the database of photographs of Hispanics. Areas to visit would be

supermarkets, churches, restaurants, or nightclubs which Hispanics frequent.

Photographs taken of Hispanics in everyday situations in these different areas would lead researchers to other stores where Hispanics shop. Consequently, the study would be broadened to show how other retailers approach store product presentation. The stores in these other areas may be different from the stores found in shopping centers; those stores may be more like specialty stores.

In addition to taking photographs and conducting store evaluations, researchers could speak to respondents. Researchers would determine the respondents' specific ethnic backgrounds (countries of origin) and other details about who they are, why they chose what they are wearing, and why they chose to shop at a particular store. The possibilities are endless if researchers decide to interact with the respondents. Another step in this investigation would be to conduct focus groups and/or surveys of Hispanic consumers. A more direct interaction would contribute more specific information about Hispanic design and style preferences of clothing. The analysis could be conducted in greater detail within each of the categories or by adding other subcategories.

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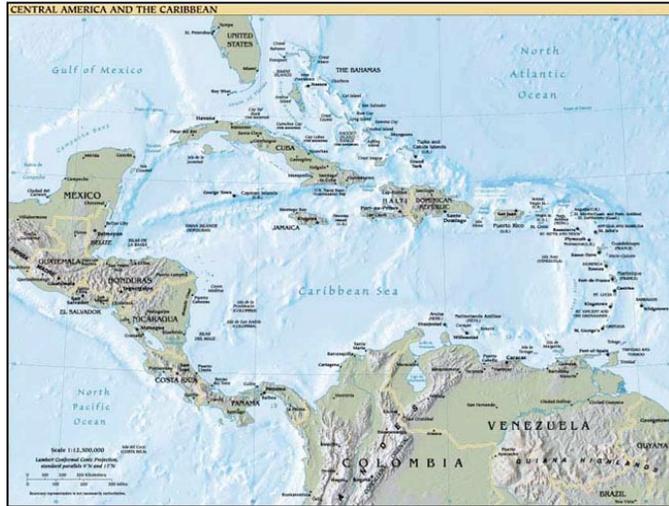
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Appendices

Appendix A: Maps

Map 1

Central America and the Caribbean
(The World Factbook, 2006)



Map 2

South America
(The World Factbook, 2006)



Appendix B: Advertisement Spending by Category in Hispanic Media

Rank	Category	2006 U.S.
1	Automotive	\$699,235
2	Retail	592,059
3	Telecommunications, Internet services, & ISP	500,368
4	Movies, recorded video, & music	348,872
5	Food, beverages, & candy	326,422
6	Restaurants	250,114
7	Personal care	235,639
8	General services	210,768
9	Medicine & remedies	168,057
10	Beer, wine, & liquor	140,239

* Dollars in thousands. Media from TNS Media Intelligence and representing the combined media totals for TV from broadcast TV networks, Galavision (cable), and Spanish-language spot TV stations, print from Spanish-language magazines (including four PIB-monitored Spanish-language magazines) and Spanish-language newspapers. Categories are aggregated by Advertisement Age. Only the top 10 are shown.

Note: From Advertising Age. (2007). Hispanic fact pack; Annual guide to Hispanic marketing & media 2007 edition. Available on-line at http://adage.com/hispanic/article?article_id=119426

Appendix C: Places Visited

Austin, Texas

June 13 – 15, 2007

Barton Creek Square Mall

Highland Mall

Photographs Taken:

Female – 77

Male – 60

Miami, Florida

April 26 – 28, 2007

Little Havana

Mall of the Americas

Sawgrass Mills

Photographs Taken:

Female – 89

Male – 60

Raleigh, North Carolina

May 2007

Cary Towne Center

Crabtree Valley Mall

July 1, 2007 – Carnival Carolina

September 10, 2006 – La Fiesta del Pueblo

Photographs Taken:

Female – 88

Male – 78

Appendix E: Sample Spreadsheet from Television Content Analysis

Date & Show	Time Period	#	Product Category	Product Type	Language Specifics	
Nov. 16 Wednesday Piel de Otono	7-8pm	1	Drugs & Medicine	Medicine	SS	
		2	Services	Long Distance Minutes	SN	
		3	Auto	Car	SN	
		4	Services	Financial Services	SS	
		5	Services	Health Services	SN	
		6	Retail Outlets	Department Store	SN	
		7	Services	Credit Card	SN & SS	
		8	Electronics	Specialty Store	SS	
		9	Entertainment	DVD	SN	
		10	News	Local	SS	
		11	Auto	Car Dealer	SS	
		12	News	National	SS	
		13	Food & Beverage	Fast Food Chain	SN	
		14	Retail Outlets	Specialty Store	SN	
		15	Services	Cable Television Services	SN & SS	
		16	Entertainment	Movie Rentals	SN	
		17	Retail Outlets	Discount Store	SS	
		18	Other	Volunteer Services	SN & SS	
		19	Entertainment	DVD	SN	
		20	Services	DSL Internet Services	SN	
		21	Home	Appliance/Furnishings	Furniture Store	SN
		22	Entertainment	DVD	DVD	SN

Appendix F: Apparel Store Evaluations

<p>NC State University College of Textiles</p>	<p>Hispanic Characterization System Store Evaluations</p>																									
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<input type="checkbox"/> Folded	<input type="checkbox"/> Other (specify) _____																									
<input type="checkbox"/> Hung																										
<p>Price Attributes (average per item)</p> <p><input type="checkbox"/> low (less than \$50)</p> <p><input type="checkbox"/> mid (between \$51 - \$100)</p> <p><input type="checkbox"/> high (more than \$100)</p>																										
<p>Brands</p> <table border="0" style="width: 100%;"> <tr> <td><input type="checkbox"/> Boricua Collection</td> <td><input type="checkbox"/> Havanera (Perry Ellis)</td> <td><input type="checkbox"/> Latina Life (Sears)</td> <td><input type="checkbox"/> Migrante</td> <td><input type="checkbox"/> Republica Trading Co.</td> </tr> <tr> <td><input type="checkbox"/> Compa</td> <td><input type="checkbox"/> Latin Laundry</td> <td><input type="checkbox"/> Los Pollos Dicen</td> <td><input type="checkbox"/> Na Co</td> <td><input type="checkbox"/> Ropa Vieja</td> </tr> <tr> <td><input type="checkbox"/> Cubavera (Perry Ellis)</td> <td><input type="checkbox"/> Other (specify) _____</td> <td></td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/> John Henry (Perry Ellis)</td> <td></td> <td></td> <td></td> <td></td> </tr> </table>		<input type="checkbox"/> Boricua Collection	<input type="checkbox"/> Havanera (Perry Ellis)	<input type="checkbox"/> Latina Life (Sears)	<input type="checkbox"/> Migrante	<input type="checkbox"/> Republica Trading Co.	<input type="checkbox"/> Compa	<input type="checkbox"/> Latin Laundry	<input type="checkbox"/> Los Pollos Dicen	<input type="checkbox"/> Na Co	<input type="checkbox"/> Ropa Vieja	<input type="checkbox"/> Cubavera (Perry Ellis)	<input type="checkbox"/> Other (specify) _____				<input type="checkbox"/> John Henry (Perry Ellis)									
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<p>Hispanic Celebrity Brands</p> <p><input type="checkbox"/> Daisy Fuentes (Kohls)</p> <p><input type="checkbox"/> Lucy Pereda (Sears)</p> <p><input type="checkbox"/> J - Lo (Macy's)</p> <p><input type="checkbox"/> Thalia (K-Mart)</p> <p><input type="checkbox"/> Other (specify) _____</p>																										
<p>Non - Hispanic Brands</p> <table border="0" style="width: 100%;"> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>															
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<p>Location</p> <p><input type="checkbox"/> Stand alone</p> <p><input type="checkbox"/> Shopping center</p> <p><input type="checkbox"/> Strip mall</p> <p><input type="checkbox"/> Other (specify) _____</p>																										
<p>Store Classification</p> <p><input type="checkbox"/> Discount</p> <p><input type="checkbox"/> Department</p> <p><input type="checkbox"/> Specialty</p> <p><input type="checkbox"/> Other (specify) _____</p>																										
<p>Marketing Techniques</p> <p>How they advertise</p> <table border="0" style="width: 100%;"> <tr> <td><input type="checkbox"/> Television</td> <td><input type="checkbox"/> Circular & Flyer</td> <td><input type="checkbox"/> Direct Mailer</td> </tr> <tr> <td><input type="checkbox"/> Newspaper</td> <td><input type="checkbox"/> Internet</td> <td><input type="checkbox"/> Word of mouth</td> </tr> <tr> <td><input type="checkbox"/> Magazine</td> <td><input type="checkbox"/> Other (specify) _____</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Radio</td> <td></td> <td></td> </tr> </table>		<input type="checkbox"/> Television	<input type="checkbox"/> Circular & Flyer	<input type="checkbox"/> Direct Mailer	<input type="checkbox"/> Newspaper	<input type="checkbox"/> Internet	<input type="checkbox"/> Word of mouth	<input type="checkbox"/> Magazine	<input type="checkbox"/> Other (specify) _____		<input type="checkbox"/> Radio															
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<p>Promotional media</p> <table border="0" style="width: 100%;"> <tr> <td><input type="checkbox"/> Website</td> <td><input type="checkbox"/> Circulars & Flyers</td> <td><input type="checkbox"/> E-mail</td> </tr> <tr> <td><input type="checkbox"/> Catalog</td> <td><input type="checkbox"/> Other (specify) _____</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Direct Mailers</td> <td></td> <td></td> </tr> </table>		<input type="checkbox"/> Website	<input type="checkbox"/> Circulars & Flyers	<input type="checkbox"/> E-mail	<input type="checkbox"/> Catalog	<input type="checkbox"/> Other (specify) _____		<input type="checkbox"/> Direct Mailers																		
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<input type="checkbox"/> Direct Mailers																										
<p>Signage in store</p> <p><input type="checkbox"/> Spanish</p> <p><input type="checkbox"/> English</p> <p><input type="checkbox"/> Both</p>																										
<p>Sales associates</p> <p><input type="checkbox"/> Hispanic</p> <p><input type="checkbox"/> Not</p> <p><input type="checkbox"/> Both</p>																										

Area Analysis

Store Appearance

Interior

Exterior

Pedestrian Traffic

Surrounding Environment

Tenant Mix

Site Visibility

Transportation Access

Other Information

Appendix G: Visual Content Analysis Data

Fit Preferences

Females		Austin, Texas					Miami, Florida					Raleigh, North Carolina				
		Very Tight	Tight	Avg.	Loose	Very Loose	Very Tight	Tight	Avg.	Loose	Very Loose	Very Tight	Tight	Avg.	Loose	Very Loose
Teens	Top	4	2	1	0	0	3	3	1	0	1	1	6	2	0	0
	Bottom	3	1	3	0	0	3	3	2	0	0	2	5	2	0	0
Y. Adult	Top	12	19	1	1	0	11	12	9	1	0	7	16	1	0	1
	Bottom	8	18	7	0	0	8	15	10	0	0	6	11	6	0	2
Adult	Top	10	17	8	0	0	4	23	16	0	0	10	18	17	3	0
	Bottom	4	16	15	0	0	2	20	21	0	0	7	24	17	0	0
Total	Top	26	38	10	1	0	18	38	26	1	1	18	40	20	3	1
	Bottom	15	35	25	0	0	13	38	33	0	0	15	40	25	0	2

Males		Austin, Texas					Miami, Florida					Raleigh, North Carolina				
		Very Tight	Tight	Avg.	Loose	Very Loose	Very Tight	Tight	Avg.	Loose	Very Loose	Very Tight	Tight	Avg.	Loose	Very Loose
Teens	Top	0	1	3	0	0	0	2	0	0	2	0	2	2	0	0
	Bottom	0	0	4	0	0	0	0	2	0	2	0	0	2	0	2
Y. Adult	Top	0	9	10	0	2	0	12	13	0	1	0	14	15	0	3
	Bottom	0	3	14	0	4	0	12	12	0	2	0	6	19	0	7
Adult	Top	0	7	28	0	0	0	11	17	0	2	0	13	28	0	1
	Bottom	0	1	31	0	3	0	8	21	0	1	0	5	34	0	3
Total	Top	0	17	41	0	2	0	25	30	0	5	0	29	45	0	4
	Bottom	0	4	49	0	7	0	20	35	0	5	0	11	55	0	12

Color Preferences

Females		Austin, Texas					Miami, Florida					Raleigh, North Carolina				
		Warm	Cool	Neu.	Multi	Denim	Warm	Cool	Neu.	Multi	Denim	Warm	Cool	Neu.	Multi	Denim
Teens	Top	2	3	2	5	0	3	2	3	2	0	2	3	4	2	2
	Bottom	0	5	2	0	5	0	7	1	1	6	2	7	0	0	7
Y. Adult	Top	7	16	10	12	0	10	6	17	12	1	8	4	13	13	1
	Bottom	0	24	9	1	23	2	22	9	5	20	5	14	6	3	11
Adult	Top	11	13	11	13	2	14	11	18	18	0	15	12	21	22	2
	Bottom	1	23	11	8	18	4	16	23	1	13	5	28	15	8	25
Total	Top	20	32	23	30	2	27	19	38	32	1	25	19	38	37	5
	Bottom	1	52	22	9	46	6	45	33	7	39	12	49	21	11	43

Males		Austin, Texas					Miami, Florida					Raleigh, North Carolina				
		Warm	Cool	Neu.	Multi	Denim	Warm	Cool	Neu.	Multi	Denim	Warm	Cool	Neu.	Multi	Denim
Teens	Top	0	3	1	1	0	0	3	1	1	0	0	2	2	2	0
	Bottom	0	2	2	0	2	0	2	2	0	2	0	3	1	0	3
Y. Adult	Top	2	14	5	10	0	3	11	12	3	0	9	10	13	17	0
	Bottom	1	19	1	2	17	1	20	5	2	17	0	20	12	2	20
Adult	Top	5	20	10	5	0	9	14	7	12	0	7	16	19	15	0
	Bottom	1	20	14	3	17	0	20	10	1	15	0	25	17	0	28
Total	Top	7	37	16	16	0	12	28	20	16	0	16	28	34	34	0
	Bottom	2	41	17	5	36	1	42	17	3	34	0	48	30	2	51

Type of Dress Preferences

Females		Austin, Texas			Miami, Florida			Raleigh, North Carolina		
		Active	Casual	Dressy	Active	Casual	Dressy	Active	Casual	Dressy
Teens	Top	0	7	0	0	8	0	0	9	0
	Bottom	0	7	0	0	8	0	0	9	0
Y. Adult	Top	1	26	6	1	25	7	0	20	5
	Bottom	1	26	6	1	26	6	0	20	5
Adult	Top	0	25	10	0	21	22	1	29	18
	Bottom	0	24	11	1	20	22	1	30	17
Total	Top	1	58	16	1	54	29	1	58	23
	Bottom	1	57	17	2	54	28	1	59	22

Males		Austin, Texas			Miami, Florida			Raleigh, North Carolina		
		Active	Casual	Dressy	Active	Casual	Dressy	Active	Casual	Dressy
Teens	Top	0	4	0	0	4	0	0	4	0
	Bottom	0	4	0	0	4	0	0	4	0
Y. Adult	Top	1	20	0	1	22	3	2	26	4
	Bottom	1	20	0	1	22	3	2	26	4
Adult	Top	0	25	10	0	16	14	1	31	10
	Bottom	0	25	10	0	16	14	1	31	10
Total	Top	1	49	10	1	42	17	3	61	14
	Bottom	1	49	10	1	42	17	3	61	14

Pattern Preferences

Females		Austin, Texas								Miami, Florida								Raleigh, North Carolina							
		Flor.	Abst.	Geo.	Char.	Logo	H/V	Othr.	Solid	Flor.	Abst.	Geo.	Char.	Logo	H/V	Othr.	Solid	Flor.	Abst.	Geo.	Char.	Logo	H/V	Other	Solid
Teens	Top	1	0	2	0	1	0	0	3	0	0	2	0	0	1	1	4	0	0	0	2	0	3	1	3
	Bottom	0	0	0	0	0	0	0	7	0	0	0	0	0	0	1	7	0	0	0	0	0	0	0	9
Y. Adult	Top	2	1	1	0	3	8	3	15	2	2	0	0	2	1	4	22	1	2	1	0	1	3	5	12
	Bottom	0	0	0	0	0	0	1	32	0	0	0	0	0	1	2	30	1	0	0	0	0	0	0	24
Adult	Top	1	3	3	0	0	3	3	22	4	3	6	0	2	2	1	25	8	3	4	0	1	6	9	17
	Bottom	3	0	1	0	0	0	2	29	0	0	1	0	0	0	0	42	4	0	4	0	0	1	3	36
Total	Top	4	4	6	0	4	11	6	40	6	5	8	0	4	4	6	51	9	5	5	2	2	12	15	32
	Bottom	3	0	1	0	0	0	3	68	0	0	1	0	0	1	3	79	5	0	4	0	0	1	3	69

Males		Austin, Texas								Miami, Florida								Raleigh, North Carolina							
		Flor.	Abst.	Geo.	Char.	Logo	H/V	Othr.	Solid	Flor.	Abst.	Geo.	Char.	Logo	H/V	Othr.	Solid	Flor.	Abst.	Geo.	Char.	Logo	H/V	Othr.	Solid
Teens	Top	0	1	0	0	1	0	0	2	0	0	0	0	0	1	2	1	0	0	0	0	1	2	0	1
	Bottom	0	0	0	0	0	0	0	4	0	0	0	0	0	0	0	4	0	0	0	0	0	0	1	3
Y. Adult	Top	0	0	0	0	1	10	2	8	0	0	1	0	8	2	5	10	0	0	0	0	7	10	7	8
	Bottom	0	0	0	0	0	0	2	19	0	0	0	0	1	0	1	24	0	0	1	0	0	0	1	30
Adult	Top	0	0	1	0	8	4	3	19	0	0	0	0	3	8	6	13	1	1	2	1	8	5	7	17
	Bottom	0	0	0	0	2	0	1	32	0	0	0	0	0	0	1	29	0	0	0	0	0	0	0	42
Total	Top	0	1	1	0	10	14	5	29	0	0	1	0	11	11	13	24	1	1	2	1	16	17	14	26
	Bottom	0	0	0	0	2	0	3	55	0	0	0	0	1	0	2	57	0	0	1	0	0	0	2	75