

# **The Hispanic Market and its Use of Yellow Pages**

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## Hispanic Market

The Hispanic market offers major challenges to the Yellow Pages industry in the short term, but major opportunities for growth in the longer term. The Hispanic market is both growing significantly, but also changing in nature over time. Yellow Pages strategies must address immediate challenges, but must also lay the foundation for reaching this important population group in order to insure growing usage of Yellow Pages in the future.

### Size and Household Characteristics of the Hispanic Population

- The Hispanic population was 39.9 million as of July 1, 2003 and represented 13.7% of the nation's total population. Hispanics are the nation's largest race or ethnic minority. In 2010, there will be about 44 million Hispanics, or 14.6% of the population. (Census Bureau)
- There are 8.5 million Hispanic families. Of these, 63% include their own children under 18 years old. 68% of Hispanic families consist of a married couple.
- 29 million residents of the US speak Spanish at home. More than half of those who speak Spanish at home say they speak English very well.
- 40% of the Hispanic population was foreign-born in 2002.
- The median income of Hispanic households in 2003 was \$32,997, down 2.6% from 2002. This compares with \$43,318 for all households in the U.S (24% less).

### Make-up

- 67% of Hispanic-origin people are of Mexican background. 14% are of Central and South American backgrounds, 9% Puerto Rican, 4% Cuban, and 7% other Hispanic origins. (Census Bureau)
- 3 out of 4 Hispanics live in 7 states: California, Texas, New York, Florida, Illinois, Arizona, and New Jersey. 50% of the Hispanic-origin population lives in California and Texas. California is home to 11.9 million Hispanics and Texas to 7.3 million.
- 43% of New Mexico's population is Hispanic, the highest of any state. California and Texas are next at 34% each.

### Education

- The percentage of Hispanics with a good education is increasing rapidly:
  - 57% of Hispanics 25 and over had at least a high school education in 2003, up from 53% in 1993.
  - 11% of Hispanics 25 and over had a bachelor's degree or higher in 2003, up from 9% in 1993.

- 74% of native residents of Hispanic origin completed high-school (vs 45% for foreign-born) and 14% of native residents completed college (vs 10% for foreign-born).
- 2.6 million Hispanics have at least a bachelor's degree, double the number from 1990 (1.1 million).

### **Economic Power**

- Hispanic American's disposable income grew in 2003 by 7.5%, outpacing the overall US disposable income, which grew only 2.8%. (Dept of Commerce, BEA)
- Buying power within the Hispanic population increased over the past 13 years by 215%. Buying power for Hispanics is expected to increase 42% in the next 5 years (7.3% per year). By contrast, non-Hispanic buying power is expected to grow 4.8%. (Selig Center for Economic Growth 2004; Interep 2004; Arbitron 2003)
- The Hispanic market accounted for \$700 billion in consumer spending in 2003, nearly 9% of total US disposable personal income. (Dept of Commerce, BEA)
- By 2010, Hispanic consumer spending is expected to reach \$1 trillion. (Chain Store Guide)
- Immigration is fueling growth, but Hispanics are also earning more money in the workforce – moving up from entry-level jobs. (Selig Center for Economic Growth, U of Georgia, 2004)

### **Spending / Shopping**

- Hispanics spend more on groceries, footwear, men & boys clothing, children's clothing, phone service, and furniture on a per HH basis, and less on healthcare, entertainment, reading materials, education, personal insurance, and tobacco. (Selig Center for Economic Growth, U of Georgia, 2004)
- Only 20.5% of Hispanics cite discount stores as the retail channel they shop most often for women's clothing compared with 29.5% for Whites. Overall, Hispanics are far less inclined to shop at discount stores than Whites across all merchandise categories. (Bigresearch 2004)
- Hispanics represent 15% of movie-ticket sales, higher than their share of the population. (USA Today 2003)

### **Marketing to Hispanics**

- It is not enough to identify members of the Hispanic cohort merely as Hispanics. Country of origin plays a significant role in buying behavior. Hispanics want those brands that make them feel closer to home. (Chain Store Guide 2004)
- 71% of Hispanics say they are more inclined to buy brands that specifically target them. (Yankelovich Hispanic Monitor 2002)

- The Hispanic segment places enormous weight on the consistent delivery of high quality customer support in Spanish. When selecting and continuing to do business with a banking, insurance, credit card, or telecom provider, “High quality customer service in Spanish/fully bilingual” is significantly more important than “retail location”, “awareness of Spanish advertising”, “Hispanic community support”, and “recommendations by family/friends.” Nine in ten Hispanics state that a positive customer service experience influences their decision to continue doing business with a given service brand. Positive word-of-mouth is common as 6 in 10 Hispanics with a positive customer service experience tell an average of 7 family members and friends. (Santiago Solutions Group 2003)
- Commercials in Spanish are 61% more effective at increasing awareness than those in English. Commercials in Spanish are 57% more likely to be recalled than those in English; commercials in Spanish are 4.5 times more persuasive than those in English (Roslow Research Group 2002)
- 69% of Hispanics believe they get more information about a product when it is advertised to them in Spanish than in English. (Roslow Research Group 2002)
- Hispanics consume different media simultaneously at much higher rates than Whites. (Bigresearch 2004)

### **Internet**

- Both the amount of time spent online and the number of Web pages viewed by the average Hispanic user increased dramatically in 2003. Hispanic Internet users spent an average of 26.5 hours online in September 2003, up 24% versus 21.4 hours in October 2002. The average Hispanic user visited 2,791 Web pages in September 2003, an increase of 30% over the previous year. (comScore Media Metrix 2003)
- 52% of Hispanics who use the Internet prefer to speak English, but 49% either prefer Spanish (21%) or use Spanish and English equally (28%). (comScore Media Metrix 2003)

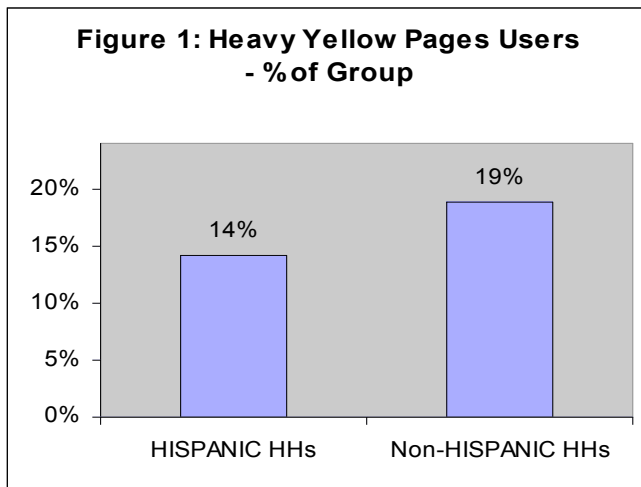
### **Hispanic Businesses**

- Annual revenue at each of the top 10 Hispanic-owned companies now exceeds \$400 million. Three years ago only half had revenue that high. (Hispanic Business magazine 2003)
- There are more than 1.1 million Hispanic-owned businesses in 2003, four times the number 2 decades ago. Nearly 27,000 have annual revenue of \$1 million or more (USA Today 2003).

## Hispanic Use of Yellow Pages<sup>1</sup>

Hispanics are less likely to be heavy users of Yellow Pages – 14% of Hispanics are heavy Yellow Pages users compared with 19% of non-Hispanics. Similarly, 24% of Hispanics never use Yellow Pages compared with 10% of non-Hispanics.

Those Hispanics that do use Yellow Pages, however, use the Yellow Pages 14% more often than non-Hispanics.



Source: Simmons 2004

*These data allow optimism for the future. If more Hispanics can be converted to being Yellow Pages users, the potential exists for a significant boost to Yellow Pages usage long term.*

Table 1 lists the top 10 headings more likely to be used by Hispanics than the total population. The headings tend to be related to food, routine transportation, child care, or weddings (Formal Wear).

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<sup>1</sup> All data about Hispanic use of Yellow Pages in this report are taken from Simmons 2004 data, which includes a sample of over 12,000 Hispanic households.

**Table 1: Headings with Greatest Relative Use by Hispanics<sup>2</sup>**

	<b>Index Hispanics Vs. Total US</b>
HH SUPPLIES: HOUSE CLEANING	158
APPAREL & ACC: FORMAL WEAR	147
TRAV & VAC: BUSES	142
SPRTS/LEISR: TOYS & GAMES	139
HH FURNISH: PICTURE FRAMES	134
OTHER SERV: CHILD CARE/PRESCHOOL	131
FOOD: BAKERIES	130
FOOD: SUPERMARKETS/GROCERS	122
SHOPPING: SHOPPING CENTERS	119
APPAREL & ACC: JEWELERS/JEWELRY	116

Source: Simmons 2004

### Region of Origin

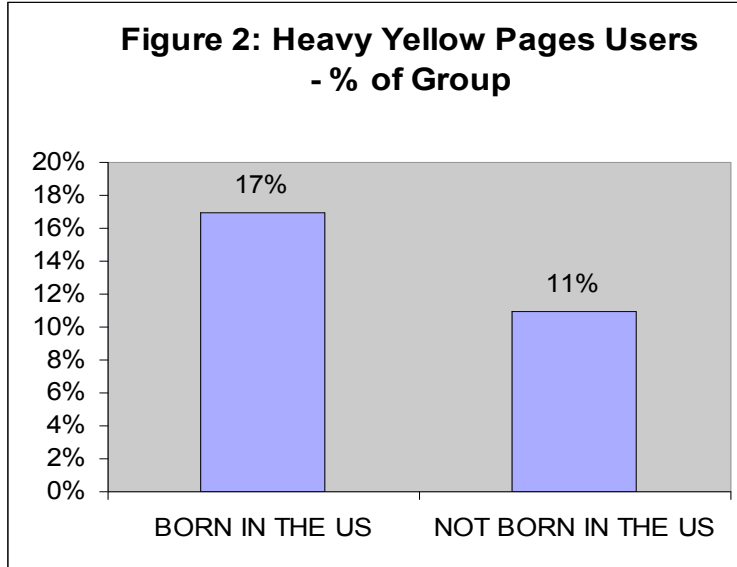
Hispanics of Mexican descent are somewhat more likely to be Yellow Pages users than other Hispanic ethnic groups. Hispanics of Mexican descent account for 56% of all Hispanics, but 63% of Hispanic heavy Yellow Pages users.

<sup>2</sup> Table 1 lists headings that are used by higher percentages of Hispanics than the general population. An alternative ranking of headings is by the “absolute” percentage of Hispanics that use headings. This ranking, listed below is closer to the ranking of headings based on total references. However, while higher percentages of households use these headings, the percentages are not significantly higher than those for the general population.

	<u>% of Hispanic Households</u>
DINING OUT: PIZZA	14.4%
AUTOMOTIVE: AUTO PARTS	9.7%
SHOPPING: DEPARTMENT/DISCOUNT STORES	9.4%
FOOD: SUPERMARKETS/GROCERS	8.7%
OTHER SERV: DENTISTS	7.8%
DINING OUT: RESTAURANTS - DELIVERY	7.8%
PERS CARE: BEAUTY SALONS	7.4%
AUTOMOTIVE: AUTO REPAIR	7.0%
SHOPPING: SHOPPING CENTERS	6.6%
DINING OUT: THEATERS & AMUSEMENTS	6.5%
FOOD: BAKERIES	5.9%
OTHER SERV: PHARMACIES	5.8%
ELECT EQP/SVC: CELLULAR TELEPHONES	5.1%
OTHER SERV: HOSPITAL/CLINICS	5.1%
TRAV & VAC: AIRLINE/AIRLINE TICKETS	5.1%
SHOPPING: HARDWARE STORES	4.5%
AUTOMOTIVE: AUTO DEALERS	4.3%
PERS CARE: CHURCHES	4.1%
TRAV & VAC: HOTELS/MOTELS	4.1%
SPRTS/LEISR: TOYS & GAMES	4.0%

## Born in US or Not

Of the total Hispanic population, those born in the US are significantly more likely to be Yellow Pages users – see Figure 2.



Source: Simmons 2004

*This bodes well for Yellow Pages in the future as more Hispanics become second and third generation US residents.*

While those not born in the US are much less likely to use the Yellow Pages (29% of those not born in the US do not use the Yellow Pages at all), the subset that do use Yellow Pages use it 24% more than average.

Table 2 lists the top 10 headings more likely to be used by Hispanics born in the US than the total population. The headings listed in bold (Formal Wear, Toys & Games, Child Care/Preschool, Supermarkets, Bakeries, and House Cleaning) are among the top 10 for those not born in the US as well. Headings unique to the born-in-the US group are related to entertainment and life events (weddings and funerals).

<b>Table 2: Top Headings for Hispanics Born in the US</b>	<b>Index Born-in-US Hispanics Vs. Total US</b>
<b>APPAREL &amp; ACC: FORMAL WEAR</b>	172
ELECT EQP/SVC: VHS/DVD SALES & RENTALS	158
DINING OUT: BANQUET FACILITIES	155
<b>SPRTS/LEISR: TOYS &amp; GAMES</b>	154
OTHER SERV: FUNERAL DIRECTORS	154
ELECT EQP/SVC: TELEVISION SETS/VCR'S	139
ELECT EQP/SVC: STEREO EQUIPMENT	138
BANK/FINAN: APARTMENTS	136
<b>OTHER SERV: CHILD CARE/PRESCHOOL</b>	133
<b>FOOD: SUPERMARKETS/GROCERS</b>	133
<b>FOOD: BAKERIES</b>	132
<b>HH SUPPLIES: HOUSE CLEANING</b>	131
HH FURNISH: MATTRESSES	131
TRAV & VAC: TAXICABS/LIMOUSINES	128

Source: Simmons 2004

Table 3 lists the top 10 headings more likely to be used by Hispanics not born in the US than the total population. The headings listed in bold (Formal Wear, Toys & Games, Child Care/Preschool, Supermarkets, Bakeries, and House Cleaning) are among the top 10 for those born in the US as well. Headings unique to the not-born-in-the US group are related to basic transportation, shopping, laundry, and household items.

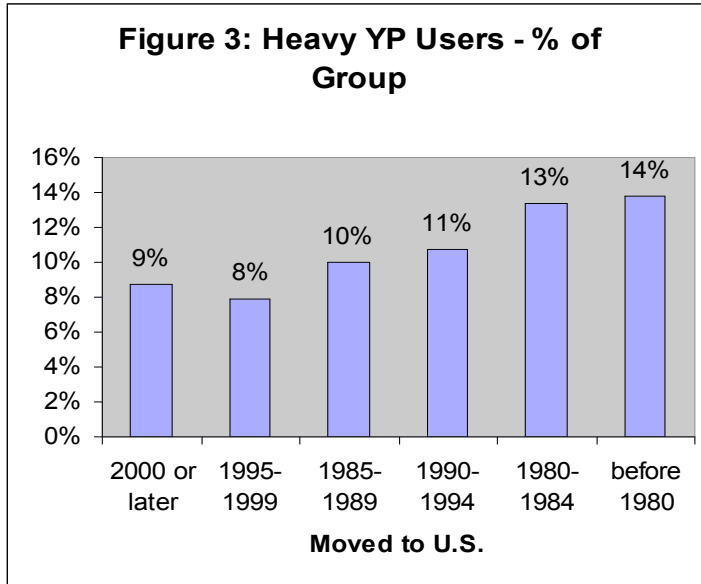
<b>Table 3: Top Headings for Hispanics Not Born in the US</b>	<b>Index Not-Born-in-US Hispanics Vs. Total US</b>
<b>HH SUPPLIES: HOUSE CLEANING<sup>3</sup></b>	187
TRAV & VAC: BUSES	184
HH FURNISH: DRAPERIES & WINDOW COVERINGS	156
<b>APPAREL &amp; ACC: FORMAL WEAR</b>	139
SHOPPING: SHOPPING CENTERS	133
HH FURNISH: PICTURE FRAMES	131
<b>FOOD: BAKERIES</b>	124
<b>SPRTS/LEISR: TOYS &amp; GAMES</b>	120
<b>OTHER SERV: CHILD CARE/PRESCHOOL</b>	113
<b>FOOD: SUPERMARKETS/GROCERS</b>	110
PERS CARE: DRY CLEANERS/LAUNDRY	110

Source: Simmons 2004

<sup>3</sup> References to the house cleaning heading by Hispanics not born in the US are most likely in search of employment opportunities.

## Where Born

The percentage of Hispanics not-born-in-the-US that are heavy Yellow Pages users goes up the longer they have been in the US, as shown in Figure 3.



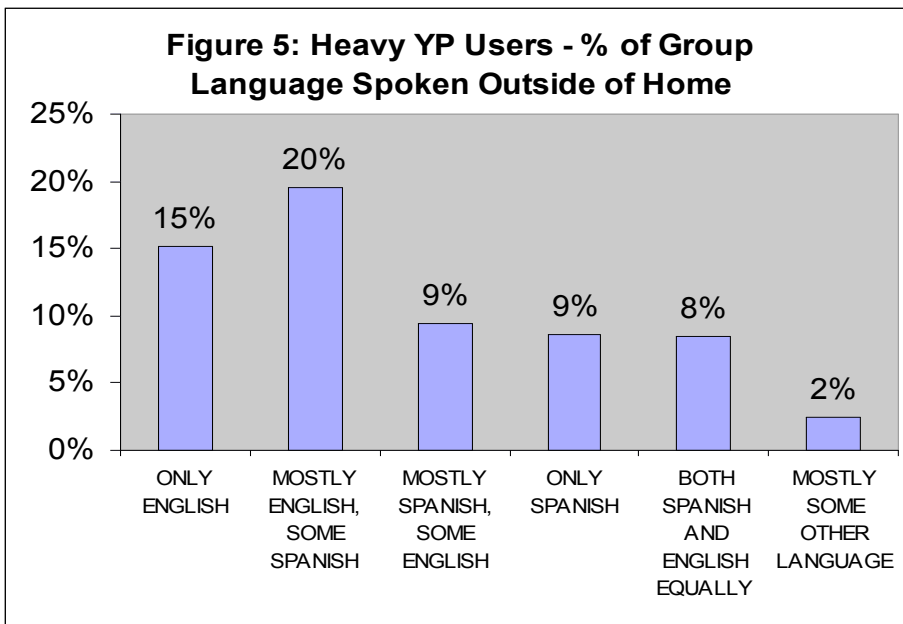
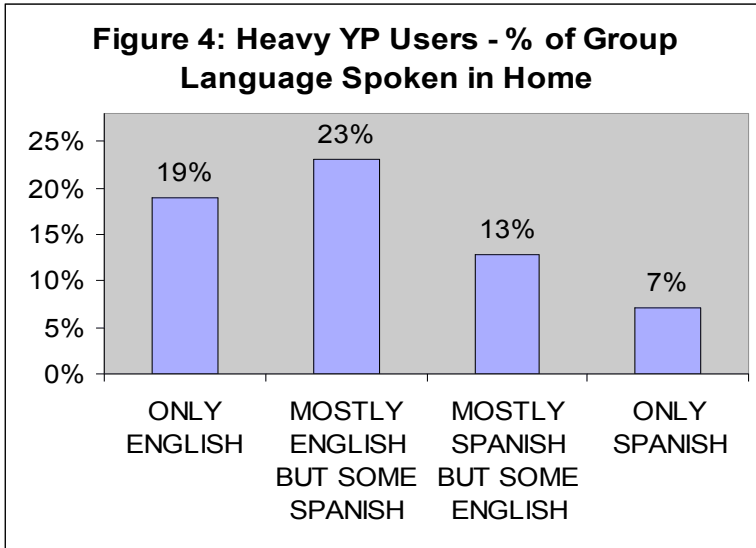
Source: Simmons 2004

Hispanics with either a mother or father born in the US tend to be strong users of Yellow Pages. ***Hispanics with at least one parent born in the US are 70% more likely to be heavy Yellow Pages users than those with neither parent born in the US, and 9% more likely than the total US adult population.***

*Again, this is great news for the future of Yellow Pages – the longer Hispanics live in the U.S., and the more that have parents born in the U.S., the higher is their Yellow Pages usage.*

## Language

Figures 4 and 5 shows the % of Hispanics that are heavy Yellow Pages users grouped by their language preferences at home and outside of home. The most likely group to use Yellow Pages heavily in both cases are those that speak “mostly English but some Spanish”, followed by those that speak only English. These two groups are twice as likely to be heavy Yellow Pages users as those that speak mostly or all Spanish.



Source: Simmons 2004

*As more Hispanics learn to speak and read English better, Yellow Pages usage can be expected to increase significantly.*

Attitudes Toward Spanish-Language Advertising

Table 4 shows Yellow Pages usage levels (as a percent of average) for those who agree and disagree with several statements about Spanish advertising. Those that are “loyal to companies that advertise in Spanish”, “think that Spanish language advertising impacts their decisions”, and “remember products advertised in Spanish better” also use the Yellow Pages more heavily than average.

**Table 4: YP Usage by Attitudes Toward Spanish Advertising**

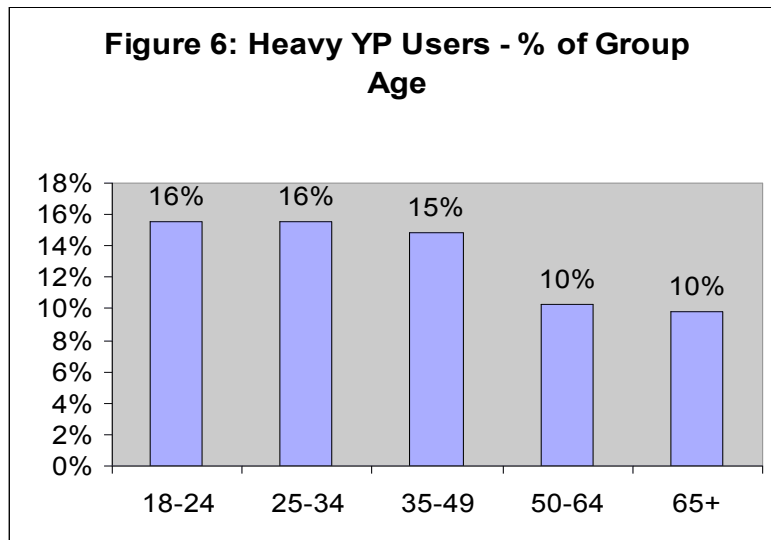
Attitude	YP Usage Level (100% = average)	
	Agree	Disagree
Loyal to Companies That Advertise in Spanish	123%	98%
Remember Products Advertised in Spanish	127%	90%
Spanish Language Advertising Important to Purchasing Decisions	144%	84%
Feel Respect for Company that Advertises in Spanish	120%	99%

Source: Simmons 2004

*These data strongly support the use of Spanish in Yellow Pages ads or the inclusion of Spanish sections of directories.*

Age

Hispanics under age 50 are considerably more likely to be heavy users of Yellow Pages than those over age 50 (Figure 6).



Source: Simmons 2004

While a lower percentage of Hispanics ages 18-49 are heavy users of Yellow Pages than the general population (16% vs 21%), those that do use the Yellow Pages use them at the

same frequency as those in the same age group for the total population. 77% of Hispanic adults, however, are in the 18-49 age group compared with 62% for the total population.

Work-at-Home

Similar to the general population, Hispanics that work at home are 50% more likely to be heavy Yellow Pages users. And, while work-at-homers for the total population tend to use Yellow Pages 30% more than average, Hispanic work-at-homers use Yellow Pages twice as much as average.

Household Income

16% of Hispanic households with incomes of \$60,000 or more are heavy users of Yellow Pages compared with 18% for the general population. For household with incomes under \$60,000, however, 12% of Hispanic households are heavy Yellow Pages users compared with 19% for the general population.

Of those Hispanics that use Yellow Pages, usage by households with incomes over \$150,000 is 54% higher than average.

Life Events

Life events and “out-of-the-ordinary” purchases are the major driver of usage for Hispanics, just as they are for the general population. Approximately 80% to 90% of Hispanic usage is attributable to purchases driven by life events and other non-routine events.

Table 5 shows the relative Yellow Pages usage levels by Hispanics experiencing or anticipating major events relative to Yellow Pages use by all Hispanics.

<b>Table 5: Relative YP Usage Levels for Various Events</b>	<b>YP Usage Level</b>
NEXT 12 MOS: YOUNGEST DAUGHTER GET MARRIED	221%
NEXT 12 MOS: YOUNGEST CHILD LEAVES HOME	214%
LAST 12 MONTHS: COLLECT FROM PENSION/SAVINGS/STOCK PLAN	213%
NEXT 12 MOS: YOUNGEST SON GET MARRIED	207%
LAST 12 MONTHS: YOUNGEST SON GOT MARRIED	192%
NEXT 12 MOS: SEPARATED/DIVORCED	192%
NEXT 12 MOS: MAKE LAST HOME MORTGAGE PAYMENT	185%
LAST 12 MONTHS: CHANGED JOBS-LOWER LEVEL/PAY	174%
ARE YOU CURRENTLY ENGAGED: YES	173%
LAST 12 MONTHS: FIRST TIME FINANCIAL INVESTMENT	168%
NEXT 12 MOS: DEATH IN THE FAMILY	165%
LAST 12 MONTHS: BUY NEW HOME (NOT FIRST HOME)	164%

LAST 12 MONTHS: FIRST CHILD WAS BORN	156%
LAST 12 MONTHS: CHANGED JOBS-TO SOMETHING DIFFERENT	152%
LAST 12 MONTHS: MAKE MAJOR HOME IMPROVEMENT	148%
LAST 12 MONTHS: BUY FIRST HOME	143%
LAST 12 MONTHS: SEPARATED/DIVORCED	143%
LAST 12 MONTHS: MOVED INTO PRESENT RESIDENCE	140%
LAST 12 MONTHS: YOUNGEST DAUGHTER GOT MARRIED	137%
LAST 12 MONTHS: OLDEST CHILD ENTERS SCHOOL	137%
NEXT 12 MOS: CHILD ENTER COLLEGE	136%
NEXT 12 MOS: LEASE OR BUY NEW CAR OR LIGHT TRUCK	135%
LAST 12 MONTHS: RETIRED/TOOK EARLY RETIREMENT	134%
NEXT 12 MOS: CHANGE JOBS-TO SOMETHING DIFFERENT	130%
NEXT 12 MOS: SECOND CHILD IS BORN	128%
NEXT 12 MOS: LOSE JOB-LAID OFF/OUT OF BUSINESS	128%
LAST 12 MONTHS: CHANGED JOBS-SAME LEVEL/PAY	126%
NEXT 12 MOS: MAKE MAJOR HOME IMPROVEMENT	126%
NEXT 12 MOS: REFINANCING YOUR HOME	126%
NEXT 12 MOS: YOUNGEST CHILD GRADUATES COLLEGE	126%
LAST 12 MONTHS: CHANGED JOBS-BETTER JOB	125%
LAST 12 MONTHS: YOUNGEST CHILD GRAD COLLEGE	124%
NEXT 12 MOS: BUY A USED CAR OR LIGHT TRUCK	124%
LAST 12 MONTHS: GRADUATION FROM SCHOOL	123%
LAST 12 MONTHS: YOUNGEST CHILD LEFT HOME	121%

\*100 = average use by Hispanics

### Shopping Behaviors and Attitudes

Appendix Table 2 shows the attitudes and shopping behaviors of Hispanic heavy Yellow Pages users. The subset of Hispanics most likely to be heavy users of Yellow Pages has many traits in common with the general population's heavy Yellow Pages users. This group enjoys shopping, and spends more time shopping than others. They are more likely to seek out new stores, and are drawn most by value, but will not avoid a good deal when they find one. Hispanic heavy Yellow Pages users are influenced by their kids and their neighbors in their purchase decisions, and like to keep up with trends in the market.

### **Summary Observations**

A clear pattern is evident in the data. Use of Yellow Pages by Hispanics tends to be polarized. A significantly larger percentage of Hispanics than the general population do not use Yellow Pages. Similarly, the percentage of Hispanics that are heavy users of Yellow Pages is smaller than for the general population (14% vs. 19%). On the bright side, however, Hispanic heavy Yellow Pages users use the Yellow Pages more frequently than average for heavy users from the general population.

This last observation offers promise of opportunity for growth over time for Yellow Pages. About 40% of Hispanics are immigrants. Usage of Yellow Pages is low for immigrants, for those with less education, and for homes that speak mostly Spanish. Usage increases, however, with education, with household income, with increasing years living in the U.S., and with increased mastery and use of English.

The trends observed among the Hispanic population – a rapid increase in the percent of high school and college graduates, household income growing faster than average, a growing segment of second and third-generation Hispanics in the U.S. – all are working to increase the numbers of Hispanics in the groups that use Yellow Pages heavily.

## Appendix Table 1: Hispanics and Other Media

Hispanics tend to be lower than average users of most traditional media. The tables below show the how Hispanics compare with the general population by usage quintiles (20% groupings) for most media.

	<b>Hispanic HH Index</b>
CABLE TV: QUINTILE 1 (highest)	68
CABLE TV: QUINTILE 2	55
CABLE TV: QUINTILE 3	73
CABLE TV: QUINTILE 4	<b>123</b>
CABLE TV: QUINTILE 5 (lowest)	<b>180</b>
MAGAZINE: QUINTILE 1 (highest)	67
MAGAZINE: QUINTILE 2	55
MAGAZINE: QUINTILE 3	62
MAGAZINE: QUINTILE 4	90
MAGAZINE: QUINTILE 5 (lowest)	<b>224</b>
NEWSPAPER(WKDAY & WKEND): QUINTILE 1	74
NEWSPAPER(WKDAY & WKEND): QUINTILE 2	56
NEWSPAPER(WKDAY & WKEND): QUINTILE 3	73
NEWSPAPER(WKDAY & WKEND): QUINTILE 4	101
NEWSPAPER(WKDAY & WKEND): QUINTILE 5	<b>195</b>
RADIO DRIVE TIME: QUINTILE 1 (highest)	71
RADIO DRIVE TIME: QUINTILE 2	94
RADIO DRIVE TIME: QUINTILE 3	83
RADIO DRIVE TIME: QUINTILE 4	102
RADIO DRIVE TIME: QUINTILE 5 (lowest)	<b>149</b>
RADIO ALL DAY: QUINTILE 1 (highest)	76
RADIO ALL DAY: QUINTILE 2	84
RADIO ALL DAY: QUINTILE 3	92
RADIO ALL DAY: QUINTILE 4	90
RADIO ALL DAY: QUINTILE 5 (lowest)	<b>157</b>
TV PRIME TIME: QUINTILE 1 (highest)	58
TV PRIME TIME: QUINTILE 2	82
TV PRIME TIME: QUINTILE 3	107
TV PRIME TIME: QUINTILE 4	<b>133</b>
TV PRIME TIME: QUINTILE 5 (lowest)	<b>120</b>
TV EARLY & LATE FRINGE: QUINTILE 1 (highest)	65
TV EARLY & LATE FRINGE: QUINTILE 2	94
TV EARLY & LATE FRINGE: QUINTILE 3	97
TV EARLY & LATE FRINGE: QUINTILE 4	111
TV EARLY & LATE FRINGE: QUINTILE 5 (lowest)	<b>134</b>

TV ALL DAY: QUINTILE 1 (highest)	64
TV ALL DAY: QUINTILE 2	79
TV ALL DAY: QUINTILE 3	111
TV ALL DAY: QUINTILE 4	114
TV ALL DAY: QUINTILE 5 (lowest)	<b>131</b>
OUTDOOR: QUINTILE 1 (highest)	85
OUTDOOR: QUINTILE 2	83
OUTDOOR: QUINTILE 3	87
OUTDOOR: QUINTILE 4	108
OUTDOOR: QUINTILE 5 (lowest)	<b>137</b>
HOME: INTERNET ACTIVE QUINTILE 1 (highest)	53
HOME: INTERNET ACTIVE QUINTILE 2	71
HOME: INTERNET ACTIVE QUINTILE 3	66
HOME: INTERNET ACTIVE QUINTILE 4	73
HOME: INTERNET ACTIVE QUINTILE 5 (lowest)	84
WORK: INTERNET ACTIVE QUINTILE 1 (highest)	56
WORK: INTERNET ACTIVE QUINTILE 2	75
WORK: INTERNET ACTIVE QUINTILE 3	63
WORK: INTERNET ACTIVE QUINTILE 4	74
WORK: INTERNET ACTIVE QUINTILE 5 (lowest)	79
YELLOW PAGES: QUINTILE 1 (highest)	74
YELLOW PAGES: QUINTILE 2	71
YELLOW PAGES: QUINTILE 3	66
YELLOW PAGES: QUINTILE 4	88
YELLOW PAGES: QUINTILE 5 (lowest)	<b>200</b>

Source: Simmons 2004

## Appendix Table 2: Shopping Attitudes and Behavior of Heavy Hispanic YP Users

The table below shows the attitudes and shopping behaviors of Hispanic heavy Yellow Pages users. The first column is an index indicating how likely heavy Hispanic Yellow Pages users were to agree with each statement compared with all Hispanics. Thus, 129 for “spend a lot of money on toiletries/cosmetics” means that heavy Hispanic Yellow Pages users are 29% more likely to agree with the statement than the average for all Hispanics. The second column indicates the Yellow Pages usage level for the group that agrees with the statement compared with all Hispanics. Thus, those that will go out their way to find new stores use the Yellow Pages 30% more often than average for Hispanics.

	<b>YP Heavy User Index</b>	<b>YP Usage Level</b>
I SPEND LOT MONEY ON TOILTRIES/COSMETICS	129	130%
OFTEN GO OUT OF MY WAY TO FIND NEW STRES	109	130%
USUALLY FIRST AMONG FRIENDS SHOP NEW STORE	121	125%
I PREFER TO SHOP WITH MY FRIENDS	128	125%
EVEN WHEN DON'T PURCHASE,ENJOY SHOPPING	114	116%
I GO SHOPPING FREQUENTLY	120	113%
I'M DRAWN TO STORES BY VALUE - DON'T SHOP BY SALES	127	124%
WILL TRAVEL UP TO HR OR MORE SHOP FAVORITE STORE	131	123%
WILL TRAVEL HR OR MORE FACTOTY OUTLET STORES	127	119%
COUPONS DRAW ME TO STORES I DON'T SHOP	116	114%
I ALWAYS LOOK OUT FOR SPECIAL OFFERS	119	113%
TEND TO SPEND LONG PERIODS TIME STORE BROWSG	120	116%
I TEND TO BUY THINGS SPUR OF THE MOMENT	127	113%
USUALLY READ INFO ON LABEL	113	111%
I HOLD OUT ON BUYING THINGS UNTIL SALE	124	117%
WILL BUY FROM NON-SPECIALTY STORES BECAUSE PRICE	109	117%
PREFER SHOPPING SPECIALTY STORES BC TEND CARRY BEST BR	112	115%
PREFER SHOPPING LOCAL STORES TO SHPNG NATIONAL CHAINS	107	112%

Source: Simmons 2004