Understanding the Dairy Opportunity Among Hispanic Consumers

Dairy Management Inc.

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Basis for Interest

Today there are about 47 million Hispanic residents in the U.S., making up about 15% of the total population, with an estimated spending power of $951 billion in 2008[1]. This demographic is important to U.S. industries, because the total Hispanic population is expected reach 96 million by the year 2040[2]. Furthermore, according to the US Census Bureau, Hispanic kids are predicted to represent 25% of America's youth by just 2020, making this demographic a critical base.

The past decade has brought shifts in the number of Hispanics that make up less acculturated, more acculturated, and U.S. born populations, with trends being largely dominated by immigration. Immigration rates have slowed in recent years and are predicted to level off in the short term. As U.S. born children age, (especially those in the 12-17 year-old demographic) and Hispanic immigrants acculturate to American purchasing habits, sales opportunities for U.S. industries will continue to evolve and grow.[3]

The percentage of foreign-born Hispanics in 2008 was 44%, with children making up only 12% of the total. Going forward, this percentage will be influenced by the slowing rate of immigration into the U.S., as well as the birth rate of Hispanics already here. Foreign-born Hispanic adults (18 years of age and older), make up 61% of total foreign-born Hispanics, and will be an important group to understand as they acculturate. This group will most likely to hold onto their traditions more strongly than those born in the U.S. The vast majority of new immigrants fall into the 18-45 age range.[4] This leads us to another important group to consider: children born in the U.S., and their influence on acculturation within the family.

The different subgroups within the U.S. Hispanic population share some common traits. As a whole, they are far more youthful than other population groups, and tend to have larger families. According to U.S. Census data, the median age for U.S. Hispanic consumers is 27 years old, versus 36 for the general population. Most U.S. Hispanics live in four states – California, Texas, Florida, and New York – though these populations are expanding into other regions of the country.

However, Hispanics are a highly diverse group with different beliefs, customs, experiences, and behaviors- and they move through the acculturation process differently. These cultural differences make it even more important for marketers to understand their audiences, and develop messages and programming that meet their unique needs.

Language Differences

More than half of U.S. Hispanic adults speak Spanish all or most of the time at home. Twenty percent speak only English, and a quarter speak both English and Spanish at home.[5] Among kids under 18 years old, Pew Research shows that half speak English, in addition to another language at home, and nearly a third speak only English at home. According to an IRI Hispanic Survey, most less-acculturated Hispanics read Spanish newspapers at least once a week, and watch at least an hour of Spanish language television per day, compared to only 20 percent of more acculturated Hispanics

[1] Marketing News, "Don't Just Translate. Relate." September, 15. 2009.
[2] 2008 U.S. Diversity Markets Report, Synovate
[3] 2008 U.S. Diversity Markets Report, Synovate
[4] 2008 U.S. Diversity Markets Report, Synovate
[5] 2008 U.S. Diversity Markets Report, Synovate

who consume Spanish language media to this extent. Univision, the country's No. 1 Spanish-language media company, owns KMEX-TV in Los Angeles, the single most-watched American TV station among adults 18-49, regardless of language. This emphasizes the power and importance of reaching less acculturated Hispanics, in particular, with meaningful, culturally-relevant messages in Spanish.

Country of Origin Impact
Several countries are represented in the U.S. Hispanic population with Mexican-Americans making up 2/3 of all U.S. Hispanics.

% of U.S. Hispanics by Country of Origin[6]	
Mexico	67%
Central America	9%
Puerto Rico	8%
South America	5%
Cuba	4%
Dominican Republic	3%
Other	4%

Marketers need to understand the demographics of a particular region and tailor messages and product offerings that meet the varied tastes and product preferences by country-of-origin.

Role of Acculturation
Acculturation is a dynamic process and is a significant driver of consumption behaviors, which is evident when we look at dairy. As consumers take on new habits, the most acculturated Hispanics mirror the general population in relevant shopping, consumption, media usage, etc.

Acculturation involves three important steps, which should be kept in mind as you read this paper:

1. Observation of the new culture
2. Reaction to the new culture
3. Adjustment to the new culture to function better in it [7]

These acculturation levels will be referenced throughout the paper as it relates to opportunities for dairy products. Keep this information in mind as you are considering possibilities for your business.

To acquire more insightful information on the needs and wants of the Hispanic population, it is important to keep in mind differences in behavior across levels of acculturation. Definitions of

[6] 2008 U.S. Diversity Markets Report, Synovate
[7] 2008 U.S. Diversity Markets Report, Synovate

Hispanic acculturation definitions vary slightly from research group to research group. For this paper, we broadly categorize acculturation levels as follows:

Foreign-Born, Less Acculturated Immigrants
In marketing to this group, it is very important to understand that they tend to have large families and lower incomes. But don't be discouraged by the income data. Buying quality products that please their families is very important, so these consumers can be excellent, brand-loyal customers.

Foreign-Born, More Acculturated Immigrants
Individuals in this group tend to share many traits with less acculturated immigrants. However, as they move along the acculturation continuum, their income often goes up and they start adopting certain aspects of U.S. culture. For example, their shopping habits change and they become more comfortable speaking English, even though Spanish is their native language.

U.S.-Born Hispanics/Most Acculturated
Many U.S.-born Hispanics are more similar in their attitudes and behaviors to non-Hispanics than they are to foreign-born Hispanics. Those dairy consumption similarities are discussed later under *Dairy Consumption and Acculturation Level*. While they may not have a strong emotional connection to their home country, many still favor Hispanic food traditions they learned from their parents.

For a more detailed description by research source, see the Glossary of Terms.

Hispanics and the Dairy Opportunity

Dairy Consumption and Acculturation Level

Foreign-born and U.S.-born Hispanics have vastly different dairy preferences, perceptions, and consumption patterns.

Dairy Consumption Comparisons[8]					
	Cheddar Cheese Penetration	Whole Milk Penetration	Gallons of Milk per Purchase	Drinkable Yogurt Penetration	Hispanic Cheese Penetration
Foreign Born	17%	60%	2.3	52%	50%
U.S. Born	63%	46%	1.3	27%	13%
Non-Hispanic	67%	44%	1.2	25%	2%

When looking at dairy consumption patterns of U.S.-born Hispanics, they tend to closely mirror consumption patterns of the general population. By and large, less acculturated Hispanics (foreign-born) appear to be completely different consumers than the U.S. general population and U.S.-born Hispanic consumers. More acculturated Hispanics fall somewhere in between these groups.

Given the growing importance and influence of Hispanics, Dairy Management, Inc., on behalf of American dairy farmers, embarked upon comprehensive exploratory efforts to better understand this fast-growing U.S. population segment. This work spanned levels of acculturation, countries of origin, and categories such as milk, cheese, and yogurt. Sound, research-based strategies, based on the insights presented here, could benefit the dairy industry.

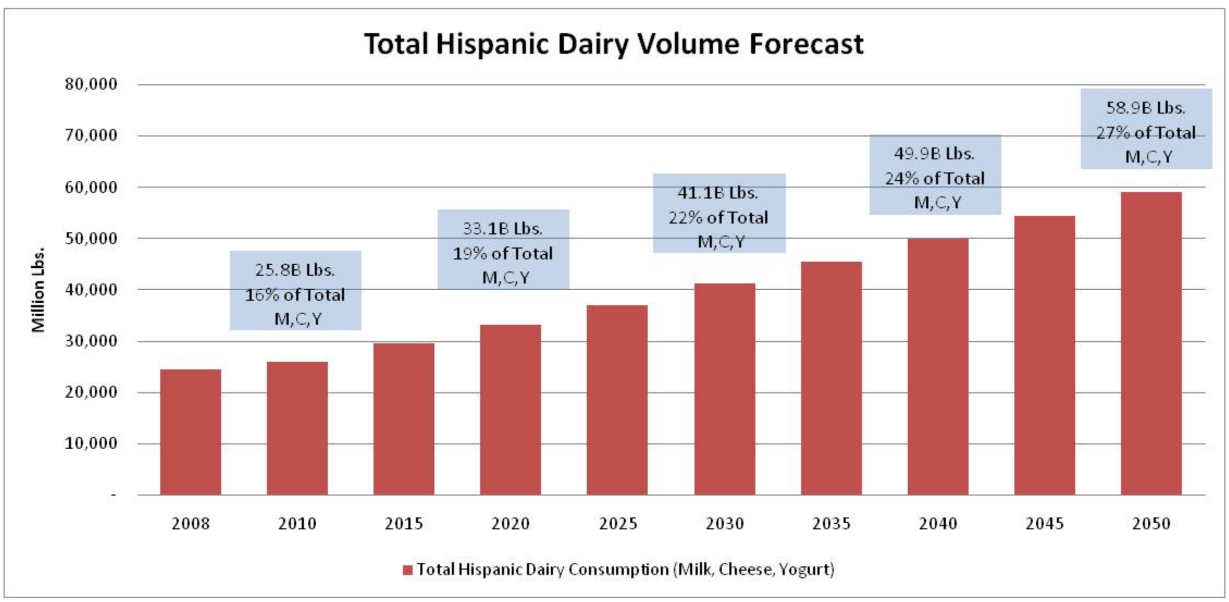
[8] The Nielsen Company, "Consumer Purchasing among Hispanics and Non-Hispanics in the Milk, Cheese and Yogurt Categories," Homescan Purchase Report, 2006.

The opportunity for the Dairy industry is to appeal to the unique dairy traditions Hispanics carry with them to the U.S., while recognizing the layering on of new habits. While total dairy consumption may be similar for Hispanics vs. the general population, the product mix and methods of use can be very different. The win for the Dairy industry will be achieved by capitalizing upon both these aspects.

Completely acculturated Hispanics' consumption and usage closely resembles non-Hispanics, therefore we see very little incremental volume opportunity. We consider the most viable primary target to be the less acculturated consumers; however it is important to also address needs of the "mid-level" acculturated group, as many of them share several of the same core traditional values as the less acculturated. Thus, marketing efforts may appeal to a significant portion of them as well.

The challenge is to create demand by addressing the more traditional needs of this subgroup through products, communication, and availability, while also meeting their newly acquired needs. Hispanics have a high affinity to dairy and their consumption is high when they first immigrate. But as they acculturate, their dairy consumption tends to drop off, especially for milk.

Sizing the overall opportunity among a group as diverse as Hispanics can be complex and elusive, however some assumptions were made based upon population and dairy consumption patterns by the three acculturation levels. These projections also assume a "steady state" of relatively low product innovation. Milk, cheese, and yogurt volume in 2010 will be approximately 25.8 billion pounds, or 16% of the total milk, cheese, and yogurt category. This percentage reaches 22% of the total categories, and close to 41 billion pounds of milk equivalent in 2030.



The upside of potential of growth by product category over time is yet unknown, however targeting the less acculturated to retain volume is key, especially in the cheese category.

		Baseline Volume Table in Milk Gallons, Cheese Pounds, and Yogurt Pints			
		Total Hispanic	Less Acculturated	More Acculturated	Most Acculturated
Milk Gallons	2008	886,471,291	414,288,314	219,891,279	252,291,698
	2030	1,492,508,988	697,517,267	370,220,349	424,771,372
Cheese Lbs.	2008	1,709,744,719	748,006,875	412,983,594	548,754,250
	2030	2,878,614,781	1,259,383,125	695,320,573	923,911,083
Yogurt Pints	2008	521,618,370	236,112,300	131,173,500	154,332,570
	2030	878,223,710	397,530,900	220,850,500	259,842,310

Even with the steady state of innovation in the dairy industry, natural gains exist for the milk, cheese, and yogurt categories. But by innovating to meet the needs of the Hispanic consumer, there is potential to realize greater volume share of Hispanics faster.

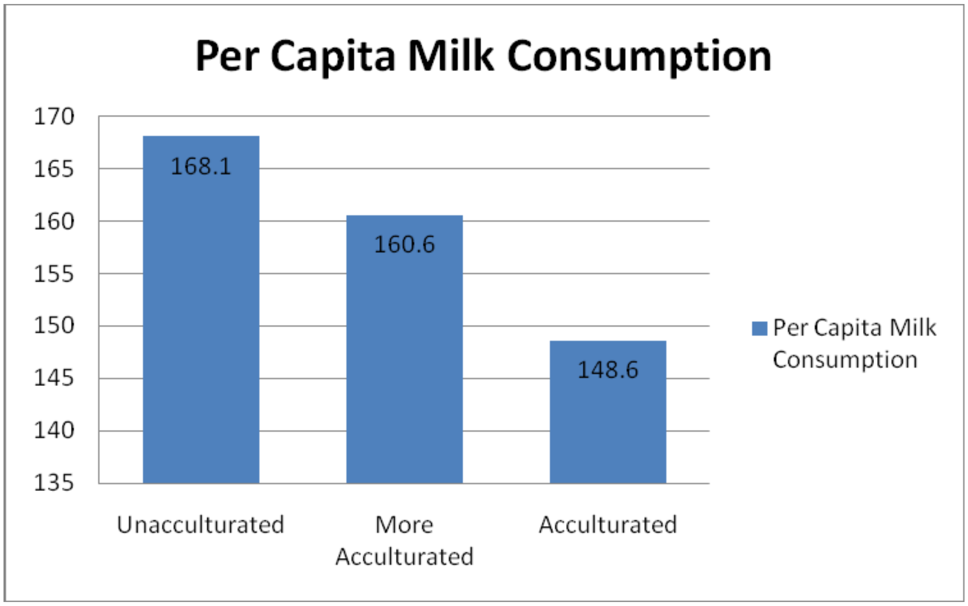
We also looked at in-market performance of two recent product launches for further understanding of potential– Frito-Lay Sabritas and Dannon Activia (consumption over-indexes among Hispanics). While Sabritas was clearly targeted to Hispanics, Activa experienced more of a mainstream launch. In both cases, however, the launches contributed to overall lifts in the respective categories in Hispanic-targeted stores, suggesting benefits that resonate with Hispanics can drive volume.[9]

In addition, a better understanding of dairy innovation efforts in Mexico– representing over 2/3 of Hispanic immigrants to the U.S.– may provide additional insight and input for innovation. Our limited concept work indicates that innovation can work among this target group. However, the concepts require further exploration to determine how much volume driven by these ideas would be incremental to the milk and cheese categories.

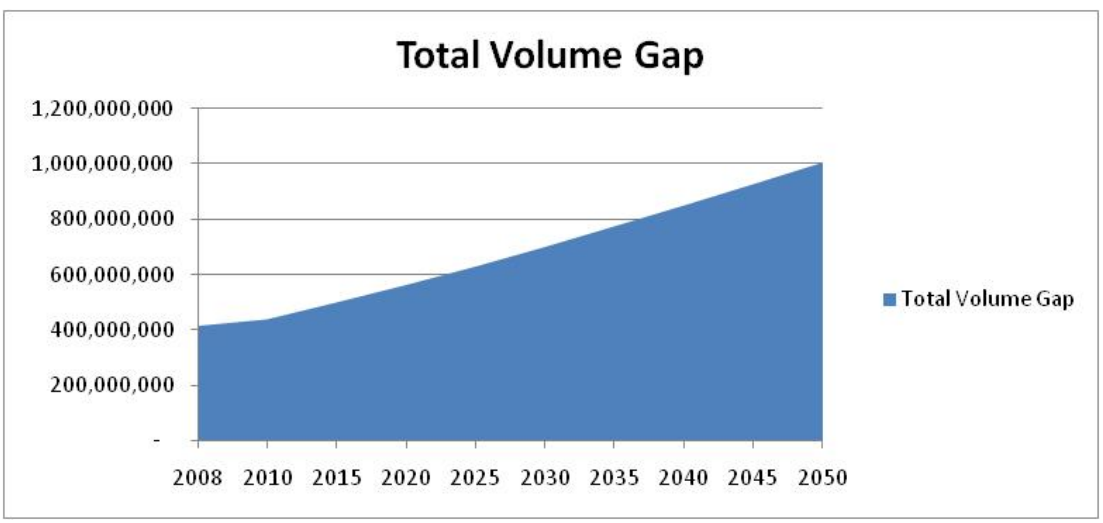
[9] IRI, Incremental Assumption Model, October 2009.

The Slippery Slope of Milk Consumption

Further, DMI studied the milk consumption patterns of various Hispanic subgroups and found as acculturation increases, milk consumption drops off.



The Milk Category may stand to lose 440 Million LBS of fluid in 2010 and 700 million pounds by 2030 if the industry continues to ignore the downward slope of milk consumption as acculturation ensues.



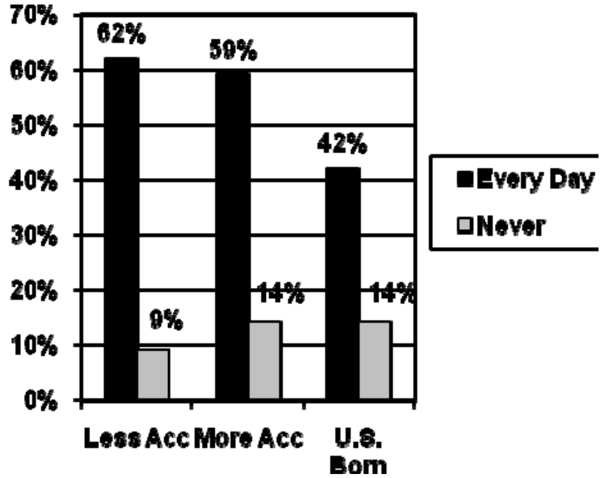
A Closer Look: Milk, Cheese, and Yogurt

Milk Consumption

Per capita milk consumption is much lower in Mexico than it is in the U.S.[10] However, U.S. Hispanics in total consume about the same amount of milk per capita as the general population.[11] This suggests that Hispanics are increasing their milk consumption when they arrive in the U.S.

Hispanics in total are more likely than non-Hispanics to say they drink more milk now than one year ago.[12] As Hispanics acculturate, however, their milk consumption decreases, and U.S.-born Hispanics drink much less milk than foreign-born.

How often do you drink white milk as a beverage? [13]



In fact, according to the National Eating Trends survey, milk is the number two at-risk food/beverage as Hispanics acculturate.[14] To further substantiate the decline in milk consumption with acculturation, panel data indicate that *Spanish-dominant households buy 59 percent more milk than English-dominant households.*[15] This may be attributable not only to the less acculturated Hispanics' propensity to drink milk, but the fact that they typically have larger households.

Milk consumption among Hispanic kids remains high; more than 70 percent of parents say their kids drink milk every day and nearly 80 percent say their kids like or love the taste of milk.[16] Most parents think their kids are drinking the right amount of milk and a small, yet significant, number of parents (especially U.S.-born) think their kids are drinking too much milk.[17]

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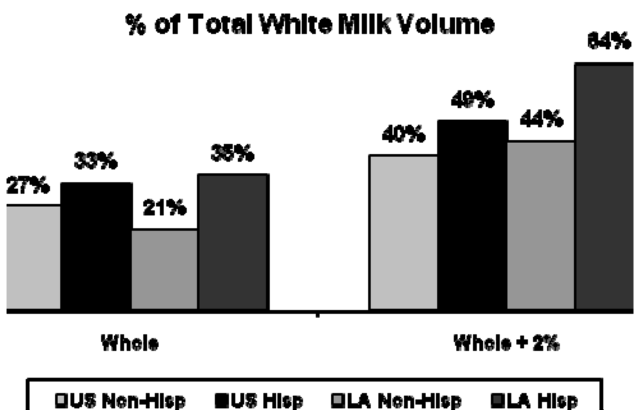
[10] USDA, IDFA Diary Facts 2005; Mexican Dept. of Agriculture.
[11] NHANES 1999-2002.
[12] Milk Opportunities Study, Phase III Hispanics, June 1, 2009.
[13] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[14] NPD Foodworld National Eating Trends, Hispanic Household 2-week Food Diary, 2004.
[15] The Nielsen Company, "Consumer Purchasing among Hispanics and Non-Hispanics in the Milk, Cheese and Yogurt Categories," Homescan Purchase Report, 2006.
[16] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[17] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.

Types of Milk
The majority of Hispanic consumers, particularly foreign-born Hispanics, simply prefer the taste of whole milk to the taste of lowfat milk. Sixty seven percent of less acculturated and 59 percent of more acculturated Hispanics say they prefer the taste of whole milk to lowfat milk.[18] However, this preference does decline with acculturation. Hispanics without kids and with higher incomes tend to prefer lowfat milk.[19]

Whole milk represents one third of the total white milk volume purchased by Hispanics nationwide. Almost 50 percent of the milk purchased by Hispanics nationwide is whole and/or 2%; compared to only 40 percent for non-Hispanics. In Los Angeles, which is more reflective of the less acculturated, the volume of whole and 2% milk purchased by Hispanics is even greater, at 64 percent.[20]



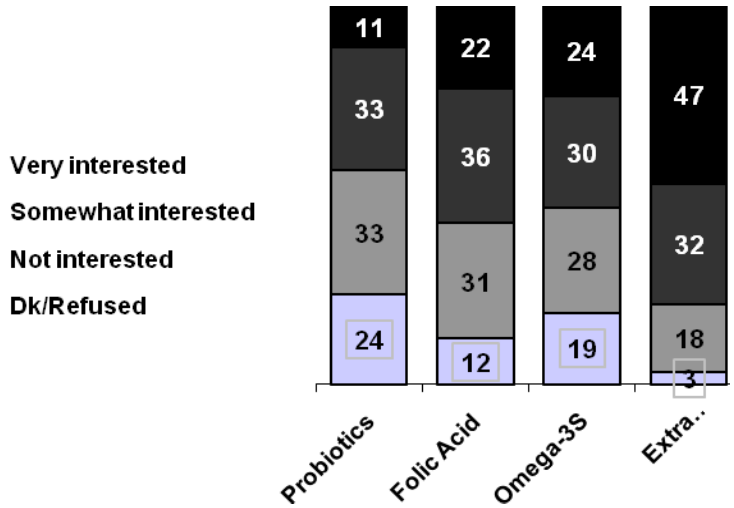
Perceptions of Whole Milk
Beyond taste preferences, misperceptions of lower fat milks also fuel higher consumption of fuller fat milk. There is a perception among many Hispanics that whole milk is more nutritious than lower fat varieties. Nearly 30 percent of less acculturated Hispanics think this is true.[21]

Consumer education is needed to inform Hispanics about milk nutrients and reinforce that lowfat milk has the same nutrient package as fuller fat varieties.

The Appeal of Fortified Dairy Products
While specific Concept Screens presented later will address this topic more thoroughly, A&U findings suggested fortification of milk might offer a more compelling reason to consume.

[18] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[19] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[20] The Nielsen Company, "Consumer Purchasing among Hispanics and Non-Hispanics in the Milk, Cheese and Yogurt Categories," Homescan Purchase Report, 2006.
[21] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.

How interested would you be in a dairy product that contains …?[22]



Once again, calcium emerges as the most desirable nutrient. Given the educational efforts in Mexico surrounding the importance of folic acid in the diets of pregnant and nursing mothers, it is not too surprising that 58 percent of respondents favored folic acid-fortified products.[23] It is important to realize that these results are driven by Hispanic consumers' current levels of dairy education, which we speculate is lower than the average U.S. consumer's. With more knowledge of additive nutrients like omega-3 or probiotics, it is possible that interest in these products would increase.

Freshness

Freshness and "natural" are highly valued food attributes among Hispanic consumers. The term fresh is often linked directly to a farm heritage, as many foreign-born Hispanics emigrated from rural areas where they drank milk from their own family farm, or purchased it from a local dairy or a milkman, el lechero.[24] As a result, more than 40 percent of less acculturated Hispanics say milk from their home country tastes better than the milk in the United States, reporting that it's "more natural," "fresher," or has "no chemicals/preservatives/is pure."[25] Almost a quarter of Hispanics say they've consumed organic milk and 18 percent say they've consumed hormone-free milk in the past 30 days, compared to 11 percent and 7 percent of the general population.[26] Not only is freshness an indicator of taste preferences, but it also sends health cues.

Preference for Brands

In 2007, seventy-five percent of less acculturated Hispanics made less than $30,000 a year[27] and 21 percent of Hispanics were in poverty.[28] Incomes rise with acculturation level, and among U.S.-born Hispanics. Even with lower incomes, less acculturated Hispanics are brand loyal and are most likely

[22] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[23] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[24] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[25] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[26] Milk Opportunities Study, Phase III Hispanic, June 1, 2009.
[27] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[28] U.S. Census Bureau. Income, Poverty and Health Insurance Coverage in the United States: 2007. Issued August 2008.

to buy branded milk. They are also most likely to buy on deal. Many less acculturated consumers search out sales and then stock up on their favorite brands. Less acculturated are not buying milk more often; instead, they are buying a higher volume per trip (more than 2 gallons on average).[29]

Latin American Dairy Traditions

Licuados or **batidos**, blended fruit and milk beverages often served at breakfast, are quite popular among many Hispanics. In focus groups across countries of origin (Mexicans, Puerto Ricans, Cubans, Dominicans), moms talked about the importance of ensuring that their families started the day right with this nutritious, delicious, satiating beverage. Unfortunately, this is a cultural dairy tradition that is compromised with the next U.S. generation. While an overwhelming 70 percent of foreign-born Hispanics said they drank a licuado at least once a week, only 38 percent of U.S.- born Hispanics said the same.[30]

Following licuados, the most often consumed traditional Hispanic dishes made with milk are **dairy desserts** (flan, tres leches, arroz con leche). Less acculturated Hispanics maintain these dairy traditions more so than U.S.-born Hispanics. Reportedly, dairy desserts are consumed daily or a few times a week by 36 percent of less acculturated Hispanics, versus 27 percent of U.S.-born Hispanics.

Atole, a corn-based drink sometimes made with milk, is consumed by one in five less acculturated versus one in 10 U.S.-born Hispanics. **Horchata**, a sweet, cinnamon-infused rice-based drink sometimes made with milk, is consumed by nearly a quarter of Mexicans daily or several times a week.[31] These concepts will be addressed later in the Innovations/Concept Screen section.

[29] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[30] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[31] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.

Milk Drinking Occasions & Competitive Beverages

Breakfast is the number one meal occasion for milk across acculturation levels, but with acculturation, Hispanics drink less milk at breakfast.[32] Most Hispanics are consuming milk at breakfast at home (78 percent), but some are consuming milk away from home (52 percent).[33] In general, Hispanics are less likely than the general market to drink milk with evening meals.[34]

Total Hispanics Beverage Consumption by Day Part (% of Meals Including) [35]			
	Breakfast	Mid-Day/ Lunch	Dinner
Coffee/Coffee Drink	33.7	NA	NA
Fruit Juice	26.2	$\boxed{5.3}$	$\boxed{3.3}$
Milk (Plain & Other)	$\boxed{16.0}$	14.0	15.6
Fruit Drinks & Sides	$\boxed{2.5}$	5.9	$\boxed{5.6}$
Soft Drinks	NA	19	$\boxed{16.7}$
Iced Tea	NA	8.5	9.8

$\boxed{\quad\quad}$ = over index vs. general population
= under index vs. general population

Hispanic consumers who said they've decreased their milk consumption over the past few years cited "I prefer to drink other beverages" and "it's not easy to drink [milk] when I'm away from home" as the second and third reasons why they drink less milk.[36]

Research shows that dairy consumption among U.S.-born Hispanics closely mirrors non-Hispanics, and as foreign-born Hispanics acculturate they start to take on U.S. eating habits.

The dairy industry might consider helping Hispanics continue to incorporate their love of traditional uses for milk through product innovation and communication messages, as well as promoting dinnertime milk-drinking habits among U.S.-born Hispanics and reinforcing the benefits of drinking milk over alternative beverages to both foreign- and U.S.-born Hispanics.

Milk Consumption at Restaurants
U.S. Hispanics purchase an average of four meals away from home each week, according to Restaurant & Institutions 2008 New American Diner Study. When it comes to dairy purchases at restaurants, nearly three-quarters of Hispanic moms say they rarely or never order milk for their kids at fast food restaurants, and of those, nearly 50 percent say they don't order milk more often because their kids prefer other drinks.[37] Fewer less acculturated Hispanics order milk for their kids at fast food

[32] NPD Foodworld, National Eating Trends, Hispanic Household 2-week Food Diary, 2004
[33] Milk Opportunities Study, Phase III Hispanics, June 1, 2009.
[34] NPD, At the Table with Hispanic Families, July, 2005.
[35] NPD, At the Table with Hispanic Families, July, 2005.
[36] Milk Opportunities Study, Phase III Hispanics, June 1, 2009.
[37] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.

restaurants compared to U.S.-born Hispanics (1 in 5 versus 2 in 5).[38] One hypothesis is that since less acculturated Hispanics eat out less than U.S.-born Hispanics, they consider it a "treat" and allow other drinks at the meal. When asked about milk flavors at fast food restaurants, two thirds of Hispanic children say they would be interested in having strawberry milk available. They also express higher interest in other flavors (e.g., mango or banana). [39]

Cheese

Hispanics in the U.S. consume about the same amount of cheese per capita as the total population[40]. While U.S. Hispanics expand their consumption and repertoire of cheese to be on par with the total U.S. population[41] cheese consumption in home countries, Mexico for example, is much lower than in the US[42], likely due to access and income levels.

Foreign-born Hispanics hold tight to their affinity for Latin American cheese styles, such as queso fresco and queso blanco, but they gradually and gladly adopt U.S. style cheeses, for reasons that will be addressed below. Given that U.S.-born Hispanics did not grow up eating Hispanic cheeses from Latin America, we would expect far less affinity for these cheese types.

Cheese Preferences Vary by Country of Origin and Level of Acculturation

Generally speaking, Hispanics are most passionate about their "authentic cheeses."[43] When asked to share how much they like or love a particular cheese, they showed a particular affinity for Queso Fresco and Queso Blanco, Mozzarella and American cheese.

% Hispanics Who Say They Like/Love by Cheese Type and Level of Acculturation[44]

	Total	Less Acc	More Acc	US-Born
Mozzarella	73%	69%	75%	78%
Queso Fresco	69%	77%	76%	55%
Queso Blanco	65%	73%	65%	56%
American	61%	54%	61%	68%
Cheddar	49%	35%	50%	64%
Monterey Jack	46%	36%	50%	54%

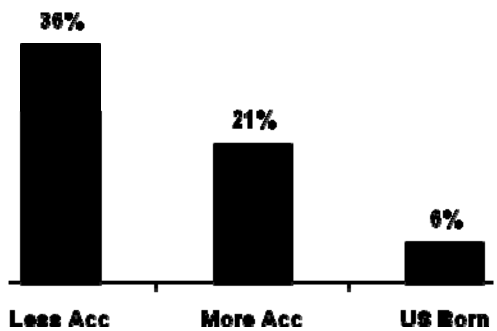
Cheese preferences also vary by country of origin. Mexicans come to the U.S. accustomed to eating mostly white, mild, and creamy cheese. Therefore, it's not surprising that Queso Fresco, Mozzarella and Monterey Jack are more popular among Mexicans than Hispanics from other Latin American countries. Queso Blanco/Queso de Freir is the top cheese choice among Cubans, South Americans and Dominicans.

[38] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[39] Gfk, 2007 Kids Milk Tracking Study. Executive Summary, September 2007.
[40] NHANES 1999-2002.
[41] NHANES 1999-2002.
[42] USDA, IDFA Dairy Facts 2005; Mexican Department of Agriculture.
[43] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[44] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.

% Hispanics Consuming Regularly by Cheese Type and Country of Origin[45]			
	Mexican	Puerto Rican	Cuban
American	32%	76%	36%
Mozzarella	29%	14%	23%
Queso Fresco	31%	3%	-
Monterey Jack	20%	5%	1%
Cheddar	11%	19%	14%
Queso Blanco / Queso de Freir	8%	11%	30%

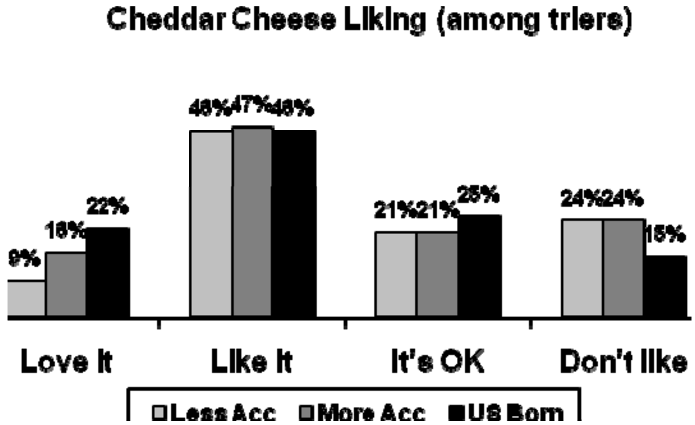
Alternatively, the firmer texture and sharper taste of Cheddar cheese are unfamiliar to foreign- born Mexicans. Trial is low.

% of U.S. Hispanics Who Have Never Tried Cheddar Cheese[46]



[45] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[46] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.

Among those who have tried Cheddar, few less acculturated say are positive towards it:[47]



Sixty-nine percent of less acculturated prefer mild cheese, while only 5 percent prefer sharp cheese.[48] Interestingly, Cheddar is eaten regularly by nearly 1 in 5 Puerto Ricans; and U.S.-born Mexicans cite it as a staple cheese.[49] Familiarity and acquired taste appear to be the differentiating factors. Cheddar is similar to Queso de Papa, a cheese common in Puerto Rico. U.S.-born Mexicans are exposed to Cheddar in the same way as non-Hispanics and it gradually becomes a cheese they adopt.

Foreign-born Hispanics are unfamiliar with the taste and uses for many U.S. cheeses and will need education and sampling to help accelerate the adoption of new cheeses.

Cheese Eating Occasions

Dinner is the most popular cheese usage occasion for both Hispanics and non-Hispanics, and combined lunch and dinner consumption total about 80 percent of the usage occasions.[50] Hispanics are much more likely than non-Hispanics to consume cheese at breakfast. As they acculturate, breakfast usage decreases;[51] therefore, the industry may benefit from reinforcing breakfast cheese usage among Hispanics.

Retail Learning

While 98 percent of Hispanics say they are very or somewhat satisfied with the cheese available where they shop, the category could see an increase in incremental sales by implementing the right retail distribution growth strategy for Hispanic cheese. For example, as Hispanics acculturate, they are less likely to shop in Hispanic grocery stores,[52] but they still like and want to purchase authentic cheese.[53] Additionally, U.S.-born Hispanics are less satisfied with the Hispanic cheese variety where

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[47] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[48] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[49] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[50] NPD Hispanics at the Table, July 2005
[51] NPD Hispanics at the Table, July 2005
[52] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[53] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.

they shop, citing a limited selection in the traditional grocery store.[54] Data from IRI Store Group Analysis suggests that when more Hispanic cheese is stocked, the entire cheese category grows.[55] Non-Hispanic stores represent the greatest dollar opportunity.

Hispanics are more likely than non-Hispanics to buy block cheese, especially less acculturated.[56] Purchase data in the Los Angeles market show that 84 percent of Spanish language-dominant Hispanics purchase it.[57] Even the majority of U.S.-born Hispanics say they prefer to buy block cheese and then slice or shred it themselves,[58] which suggests they may value the fresh taste and show their love by preparing meals made without shortcuts. However, 4 in 10 U.S.-born Hispanics say they often use convenience products to make meal prep easier.[59]

Potential Packaging Opportunity
In focus groups, Hispanic consumers in the U.S. said that Queso Fresco has a short shelf life and packaging is hard to open and difficult to re-close.[60] One study showed that 25 percent of purchasers said they often end up throwing away some Queso Fresco because it spoils before they use it all. This number rises to 33 percent among U.S.-born Hispanics who may not use Queso Fresco as quickly as foreign-born consumers do.[61]

Changes in product technologies and packaging configurations could address product spoilage.

Hispanic Cheese Consumption via Pizza Eating
The most acculturated U.S. Hispanics eat pizza almost on par with the general population, while the least acculturated lag behind in per capita pizza consumption.[62] Looking at consumption of frozen retail pizza versus restaurant pizza, frozen pizza eating occasions are three times higher among the most acculturated Hispanics than the least acculturated, while restaurant-prepared pizza is consumed with nearly the same frequency regardless of acculturation level.

The industry could benefit from targeting less acculturated Hispanics with frozen pizza options and marketing messages that address their needs.

Yogurt
Yogurt seems to be a stronger part of Hispanic dietary traditions than of U.S. traditions. In Latin American countries, yogurt was one of the only sectors to see value growth over the 1998-2002 period. Yogurt is a highly innovative category and product introductions continue to grow. Despite higher pricing, flavored, fruited and drinking yogurts are showing preference among Latinos in their countries of origin.

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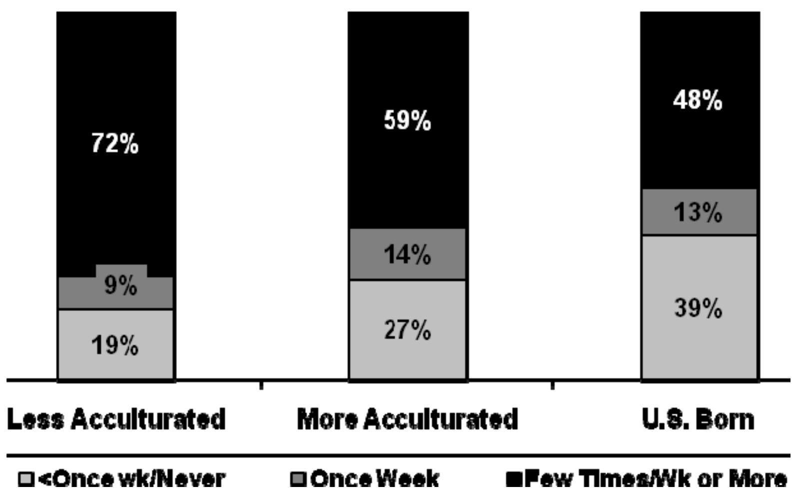
[54] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[55] DMI Hispanic Store Group Analysis, IRI, June 2007.
[56] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[57] The Nielsen Company, "Consumer Purchasing among Hispanics and Non-Hispanics in the Milk, Cheese and Yogurt Categories," Homescan Purchase Report, 2006.
[58] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[59] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[60] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[61] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[62] NPD, Cohort Aging Analysis and Consumption Forecast, Pizza, November 2008.

In the U.S., nearly 60 percent of foreign-born Hispanics say they eat yogurt at least a few times a week or more, versus only 40 percent of U.S.-born Hispanics.[63] Unlike with milk consumption, yogurt consumption among adults does not appear to drop off as Hispanics acculturate.

About 75 percent of Hispanic kids and adults say they like or love yogurt and about half of respondents say they don't eat enough of it.[64] As compared to milk and cheese, yogurt is a category where Hispanics, even less acculturated, are willing to pay a premium for convenience products.

One key point is that the industry is losing volume from kids as they become teenagers. Though households with younger children appear to be strong yogurt consumers, only 56 percent of households with teens say they consume yogurt a few times a week or more, versus almost 70 percent of households with kids age 12 and under.[65] Reported yogurt consumption among kids drops off from less as they acculturate.

Kid Yogurt Consumption Frequency[66]



The industry stands to benefit by developing products, packaging, and marketing messages to keep young adults emotionally attached to the yogurt category.

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63 New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
64 New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
65 New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
66 New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.

Yogurt Preferences
Compared to the general population, Hispanics are trading standard cup yogurt for more convenient, kid-oriented versions. Overall, cup yogurt accounts for 87 percent of category volume. But for the least acculturated Hispanics, it accounts for only 64 percent of volume,[67] suggesting it plays an especially important role with Hispanic consumers.

According to a Mintel report, having a cartoon or movie character on packages makes snacks fun for 61 percent of Hispanic kids age 6-12 years old.[68] Qualitative research findings reinforce this preference, as respondents cited the appeal of cartoon characters which are prevalent in the kids cup yogurt (e.g. Dora the Explorer, Trix) and GoGurt (Sponge Bob Square Pants, LaLa Yomi character) products.[69]

In terms of flavors, household penetration of strawberry/banana and mango-flavored yogurt was much higher among less acculturated Hispanics as compared to the general population.[70] Compared to non-Hispanic households, U.S. Hispanics show greater preference for tropical flavors such as guava, mango, and strawberry-banana flavors; and less preference for blueberry, peach, and vanilla yogurts.[71]

While lowfat yogurt is widely accepted overall by Hispanics, fat-free is less so. This is consistent with product acceptance in the milk category.

Yogurt Eating Occasions
Breakfast usage is similar across acculturation levels, however less acculturated Hispanics eat yogurt more frequently as a dessert than more acculturated and U.S.-born. Developing creamy, dessert-like yogurts and reinforcing dessert as a usage occasion, could increase consumption, as an alternative to more indulgent, less healthful desserts consumed in the U.S. Snack usage increases with acculturation, from 46 percent of less acculturated eating yogurt as a snack, to 54 percent of more acculturated and 72 percent of U.S.-born.[72]

An opportunity exists to reinforce breakfast and dessert yogurt traditions among the less acculturated through innovation, product positioning, or usage ideas.

[67] The Nielsen Company, "Consumer Purchasing among Hispanics and Non-Hispanics in the Milk, Cheese and Yogurt Categories," Homescan Purchase Report, 2006.
[68] Mintel Report, Healthy Kids Snacking Report, 2007.
[69] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[70] The Nielsen Company, "Consumer Purchasing among Hispanics and Non-Hispanics in the Milk, Cheese and Yogurt Categories," Homescan Purchase Report, 2006..
[71] The Nielsen Company, "Consumer Purchasing among Hispanics and Non-Hispanics in the Yogurt Category," Homescan Purchase Report, 2007.
[72] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.

Considerations for Innovation Beyond the Products

Marketing to Hispanics at Foodservice
When asked which restaurant segments they frequent most often, Hispanics are evenly split between quick service and casual dining. While price plays an important role for Hispanics when deciding where to eat, almost 60 percent of Hispanics say the experience is just as important as the food.[73]

A stellar example of how to successfully market a non-Hispanic product to Hispanics is Pizza Patron, a highly successful regional pizza chain with a strong affinity among Hispanics. Pizza Patron is reaching Hispanics not with traditional cuisine, but through authentic, relevant messages and strategies that demonstrate a strong understanding of Hispanic consumers' needs and wants. For example, Pizza Patron offers an extra-large family size pizza,, uses and consistently promotes 100% natural ingredients like Mozzarella cheese, displays menu items in Spanish, employs Spanish speakers, and offers culturally-connected consumer promotions like "Pizza for Pesos" where consumers can pay for pizza with pesos.

Delivering on attributes important to Hispanics—especially making the entire family feel welcomed and comfortable through the Spanish language, family-friendliness, price, culturally appealing promotions and ambience—is key to attracting the Hispanic dining dollar.

In Market Observations
Category leaders in carbonated beverages, snack foods, frozen foods and packaged goods have pounced on the authentic Latino food trend, increasing sales with high-quality products specifically tailored to the unique taste and convenience needs of Hispanics. In doing so, they have found not only enthusiastic consumers among Hispanics, but many products are adopted by mainstream consumers who have become more and more adventurous with eating and cooking.

Hispanics across the board associate yogurt as a digestive health aid. The general market positioning of Activia as a product that maintains a healthy digestive system, has appealed to Hispanics across all levels of acculturation. Despite its higher price, Activia is doing well among Hispanics, with penetration higher among Hispanics than the general population (13 percent among total U.S. Hispanics and 17 percent among the Spanish dominant Hispanics in Los Angeles).[74]

Likewise, Yakult, the Japanese probiotic yogurt drink which was first launched in the U.S. in 2007, is experiencing tremendous success in Hispanic-dominant markets and in Hispanic format grocery stores. The cultured dairy drink contains more than 8 billion "friendly" bacteria to aid in digestion and support immune system function. Fermented dairy drinks such as Yakult (Yakult Honsha) and Chamyto (Nestlé) grew 8.5% in 2002 U.S. dollar terms, largely due to their popularity in Brazil and Colombia. In Mexico, market leader Yakult has adopted door-to-door sales and promotes relationships with doctors to increase penetration, while rival Nestlé has targeted children and young mothers.[75]

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[73] Restaurant & Institutions, New American Diner Survey, 2008.
[74] The Nielsen Company, "Consumer Purchasing among Hispanics and Non-Hispanics in the Milk, Cheese and Yogurt Categories," Homescan Purchase Report, 2006.
[75] "The Changing Face of the Latin American Dairy Market." Euromonitor International, 2008.

Another interesting case in point is the Frito-Lay Company.[76] In 2009, Frito-Lay looked to Sabritas, its sister company in Mexico, for Hispanic-inspired successes, and introduced a host of new snacks under various U.S. brands, such as Cheetos and Ruffles. Included in the line-up were:

- Ruffles Queso, a top-selling, cheese-flavored potato chip for Sabritos in Mexico
- Turbos Flamas, a spicy red pepper and tangy lemon-seasoned, corn-based “twisted” snack
- Rancheritos, a corn-based, rectangular-shaped chip with blended seasonings, including chile, roasted tomato and a smoky chipotle
- Tostitos Salsa Verde, a familiar variation of “salsa roja”

After only a few months in California and select Chicago markets, “Ruffles Queso has ‘leap-frogged’ the rest of the line-up and is now our best selling Hispanic-inspired item in the U.S,” said Ceclia Hidalgo, Marketing Manager for Frito-Lay’s Hispanic portfolio. “Now our challenge is to identify a broader audience in the U.S. for it.”

Frito-Lay has an extremely successful track record for introducing Hispanic-driven innovation to Hispanic-dominant populations, then pushing it out to the mainstream. Once upon a time, a brand called Doritos was sold only in California, targeting Hispanics. Today, every market in the U.S. purchases this popular household brand.

Grocery Shopping Habits

Hispanics have shopping habits that mirror their unique lifestyles, particularly as they start to acculturate. Overall, Hispanics take fewer trips to the grocery store than the general population (9.6 trips per 4-week period vs. 10.2 for the general population); however, their total grocery spend per household outpaces the general market in nearly every outlet. In particular, Hispanic households spend more money than the general market at convenience, mass retail, club, and dollar stores.[77] Presumably, the strong appeal of buying on deal and in bulk for larger families is what draws Hispanic shoppers to the club store formats.

Most of Hispanics’ shopping trips are fill-in trips, followed by quick general grocery and meal trips and major stock-up trips.[78] Compared to the general population, Hispanics make a higher rate of fill-in trips, which fulfill grocery shopping needs for products they’ll use that day, ie. baby products, frozen and refrigerated treats, dairy, deli meats and cheeses, and bakery items.[79] In fact, twenty percent of Hispanics’ routine shopping trips are for products they’ll use that day, versus virtually zero for the general market,[80] which reinforces Hispanics’ preference for fresh products and higher levels of “homemade” meals.

Shopping Changes with Acculturation

Upon arrival in the U.S., immigrants are more likely to shop at smaller, Hispanic format stores, like bodegas, that offer familiar products, brands and cultural references. Their grocery shopping trips are more frequent, they buy products on deal, and their baskets are full of fresh ingredients.

Less acculturated Hispanic households spend more at convenience and dollar stores and less at traditional grocery, drug stores, and at supercenters than more acculturated Hispanics and the general market.[81] Since we know that Hispanics tend to buy in bulk, it may be surprising that they

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[76] Frito-Lay September 27, 2009 Blog
[77] IRI Hispanic Shopping Basket Assessment, January, 2009.
[78] Unilever Research, Winning the Hispanic Shopping Trip, 2006.
[79] Unilever Research, Winning the Hispanic Shopping Trip, 2006.
[80] Unilever Research, Winning the Hispanic Shopping Trip, 2006.
[81] IRI Hispanic Shopping Basket Assessment, January 2009.

index lower for supercenter trips, but this may be because those stores are located outside of urban communities where most less acculturated Hispanics live.

As Hispanics acculturate, their lives become busier, they have more disposable income and their shopping habits start to change. Nine in ten Hispanics describe their lives as somewhat or extremely busy; this perception increases with acculturation and income.[82] Among U.S.-born, nearly 40 percent use convenience products to make meal prep easier, compared to only 15 percent of less acculturated.[83] More acculturated Hispanic household spending at club stores is on par with less acculturated, but they spend less per household at dollar and convenience stores. With acculturation, household spending at traditional grocery stores increases, and even surpasses, the general population.[84]

In an effort to win over this growing and highly coveted segment, some traditional grocery retailers have opened Hispanic format stores and/or expanded Hispanic product offerings and programming to appeal to this audience. Publix opened its Sabor stores with more Caribbean, Central and South American products, and Winn Dixie launched its Hispanic Neighborhood Merchandising program to appeal to Hispanics living in communities where Winn Dixie retail stores are located. Earlier this year, Walmart opened two Hispanic format stores- Supermercado de Walmart, with store layout, product assortment, and bilingual signage designed to be more relevant to Hispanic shoppers.

Subgroups within the U.S. Hispanic population share some similar shopping behaviors, such as a preference for buying in bulk and buying on deal, and displaying high brand loyalty. But keep in mind that Hispanic shopping habits change with acculturation, making it critical to have the right products in the right retail channels to drive sales among Hispanics.

Overall Health Perceptions of Dairy

Almost half of U.S.-born Hispanic respondents recognize and acknowledge that they should be drinking more milk.[85] Two-thirds of Hispanics in two studies mention calcium as a health benefit. They also cite bone-building, dental health, and vitamin D as key health benefits.[86] Even among Hispanics who currently don't drink milk, three quarters say they are extremely or somewhat likely to consider consuming milk in the future, which may indicate a perception that drinking milk is an important part of one's diet.[87]

Yogurt is generally viewed as healthy among Hispanic consumers. Forty-four percent of respondents in one survey said they believe yogurt is "*extremely* good for you". When asked about specific health benefits, again, "provides calcium" was the top benefit mentioned, followed by "provides vitamins/vitamin D." In Mexico, young women are strong yogurt consumers, using the product as a meal substitute as part of a weight regime.[88]

[82] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[83] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[84] IRI Times and Trends, Hispanic Consumers: Capturing CPG Market Potential, April 2008.
[85] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[86] Milk Opportunities Study, Phase III Hispanics, June 1, 2009.
[87] Milk Opportunities Study, Phase III Hispanics, June 1, 2009.
[88] "The Changing Face of the Latin American Dairy Market." Euromonitor International, 2008.

Dairy and Digestion
The issue of lactose intolerance will be addressed in a separate DMI white paper. However, new research indicates that prevalence rates among Hispanics are far less than those widely reported. A published article in *Nutrition Today* places the number of lactose intolerant Hispanic adults at about 10 percent, versus the widely publicized statistic of 50% to 80%.

While roughly ten percent of Hispanic adults self-report lactose intolerance, more than half of respondents in DMI's Attitude and Usage Study thought milk had a *soothing* effect on the stomach. Cubans and Puerto Ricans were the most likely to believe this.[89]

In addition, more than 61 percent of respondents said yogurt is "soothing to the stomach." While digestion was the third most common health benefit mentioned, after calcium and vitamins, it is a benefit less associated with other dairy products. Reinforcing yogurt as a digestive aid could provide a compelling reason for Hispanics to eat yogurt over less nutritious options.

Hispanic Kids are a Gateway to Household Dairy Purchases
The children of foreign-born Hispanics are the bridge between parents and American trends and tastes- typically experiencing foods first and introducing them to the family. Second-generation Hispanics are fast becoming the driver to the group's growth, with 88% of Hispanic children born in the US versus 61% of adults.[90] Foreign-born Hispanics are twice as likely as U.S.-born to say their kids are teaching them about American food, culture and products.[91] Hispanic children are also influential grocery shoppers, as they shop with their parents more frequently than the general population.[92] Latino moms tend to show their love with good food, and may be compelled to purchase kid-pleasing items.

Of Hispanic moms surveyed, 81 percent with kids in the household say they eat cheese a few times a week or more, versus 62 percent of women without kids in the house.[93] This is validated by Nielsen Homescan data showing Hispanic households with kids over-index on cheese as compared to households without kids.[94]

Additionally, household penetration of kid-friendly string cheese is higher among Hispanics (37%) than non-Hispanics (29%), and consumption increases as Hispanics acculturate.[95] When it comes to snacking, Mintel reports Hispanic children are less likely than any other race or ethnicity to disagree with their parents about what snacks they select.[96]

The same patterns hold true with yogurt. Sixty-one percent of Hispanic moms with kids 12 years old or younger say they eat yogurt a few times a week or more, versus only 48 percent of women without kids in the household.[97]

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[89] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[90] Adweek.com "The Hispanic Market is Set to Soar", Noreen O'Leary November, 2009
[91] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[92] FMI, El Mercado "A Perspective on U.S. Hispanic Shopping Behavior."
[93] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.
[94] The Nielsen Company, "Consumer Purchasing among Hispanics and Non-Hispanics in the Milk, Cheese and Yogurt Categories," Homescan Purchase Report, 2006.
[95] The Nielsen Company, "Consumer Purchasing among Hispanics and Non-Hispanics in the Milk, Cheese and Yogurt Categories," Homescan Purchase Report, 2006.
[96] Mintel Report, Healthy Kids and Snacking, 2007.
[97] New American Dimensions, Driving Consumption Among Hispanic Consumers: Research Results, 2007.

Unlike the general population, presence of children in the household does not affect adult milk consumption.[98]

Hispanic kids are important because they are a gateway to the less acculturated family and Hispanic moms gravitate to kid-pleasing products.

DMI Hispanic Products Concept Exploration

Based on insights from the Hispanic A&U study, DMI developed 19 milk and 15 cheese ideas for screening to gauge receptivity among U.S. Hispanics, particularly foreign-born. The goal was to determine which ideas have the highest potential to drive increased consumption of dairy products among Mexican-, Puerto Rican- and Cuban-Americans. These concepts are not optimized or ready for launch consideration, but are intended to provide industry guidance on which Hispanic-targeted ideas merit further consideration and additional product development and consumer work.

Top scoring concepts---meaning they were preferred not only when compared to all ideas, but also when compared to other "winning" ideas, were **milk and cheese concepts fortified with added calcium and vitamins and minerals.** The challenge is finding compelling ideas that do not cannibalize existing products or usage occasions.

Milk

- Extra calcium, extra vitamins and minerals, and extra protein are keepers across all three countries of origin.
  - Given that these ideas also have higher cannibalization compared to some concepts in this study, other new products may do a better job driving increased dairy usage among Hispanics.
- Based on broad appeal across country of origin and incremental volume potential, three concepts emerge as lead candidates for product innovation.
  - Natural Flavors Milk– for this and other flavored milk concepts, quantitative work is needed to determine the most appealing flavors for the target consumer.
  - Family-size licuados/batidos
  - Milk PM

Cheese

- Cheese with extra calcium emerges as a keeper across all three countries of origin.
  - However, this idea has higher cannibalization compared to some concepts in this study. Other concepts may do a better job driving increased usage among Hispanics.
  - May align with similar products already tested/in-market and may require awareness building among this target.
- Several concepts emerge as strong candidates for product innovation among two of the three countries of origin.
  - Zip pack and crumbles have strong appeal among Mexicans and Puerto Ricans (while zip pack may not be as incremental as other ideas, it is a simple innovation that consumers seem hungry for).
  - Farm-fresh has strong appeal among Mexicans and Cubans. It has lower popularity among Puerto Ricans, but high power among those Puerto Ricans who like the idea.

[98] Milk Opportunities Study, Phase III Hispanics, June 1, 2009.

Consistent with the Hispanic A&U research findings, these insights reinforce that the unique nutrient package found in dairy products is extremely important to Hispanics.

The DMI Product Concept Screen also included a number of fruit and cheese combination product ideas, primarily because we know this is a popular usage among some Hispanics, such as Cubans. While not a tradition in Mexico, Mexicans are [separately] passionate about their fruit and their cheese. In summary, these concepts scored very high among Cubans, and one actually received fairly good acceptance among Mexicans. During the survey screen, a surprising 51 percent of Mexicans said they either liked or loved "eating cheese and fruit together."

Measuring the incremental volume of these new product ideas is challenging and requires further exploration. The specific categories of milk, cheese, and yogurt bring their unique opportunities and thus require different approaches and tactics for product exploration and development.

Other categories are realizing success among this market, suggesting there is potential. Additional understanding of Hispanic-targeted efforts is needed to better understand how to more accurately size the opportunity and realize significant incremental business. It is recommended this be done by analyzing in-market successes and failures both within and outside of the dairy category, and expanding the initial DMI concept work to reflect more breakout innovation and assess incrementality more effectively.

Glossary of Terms

Level of Acculturation Definitions by Data Source		**% of Total Hispanics**
Synovate 2008 Diversity Markets Report		
• Foreign-born, in the US 9-8 years, Speak Spanish	"Less Acc"	23%
• 1/2 foreign-born, in the US 16-17+ years, 1/2 are Spanish-dominant	"Partially Acc"	69%
• 90% US-born, 1/2 3rd generation, English-dominant	"Mostly Acc"	8%
Adweek *The Hispanic Market is Set to Soar*, November 2, 2009		
• Speak Spanish only or more often than English at home	NA	44%
• Equally bilingual at home	NA	25%
• English only or more often than Spanish At home	NA	31%
NPD Hispanics at the Table 2008*		
• Foreign born, 10 years or less in U.S. , Spanish-dominant	"Less Acc"	29%
• Foreign-born, more than 10 years in U.S., typically bilingual	"More Acc"	34%
• U.S.-Born	"U.S. Born"	37%
TNS Milk Barrier Study 2008 Used language criteria only		
• Spanish-dominant	NA	34%
• Both Spanish and English	NA	46%
• English-dominant	NA	20%
IRI Shopping Basket Study/Attitude Link Panel Survey 2009		
• Speaking Spanish all/most of the time	"Unacc"	28%
• Speaking Spanish/English equally	"Bi-Cultural"	22%
• Speaking all/mostly English	"Acc"	50%
New American Dimensions		
• Immigrants: less than 50% of life in U.S.	"Less Acc"	44%
• Immigrants: more than 50% of life in U.S.	"More Acc"	37%
• U.S. Born	"U.S. Born"	18%