

# ASIAN-AMERICANS: CULTURALLY DIVERSE AND EXPANDING THEIR FOOTPRINT

**THE ASIAN-AMERICAN CONSUMER  
2016 REPORT**

**nielsen**  
.....

AN UNCOMMON SENSE  
OF THE CONSUMER™



# FOREWORD

Asian-Americans' influence on everything from food to technology continues to rise in the U.S. **Asian-Americans: Culturally Diverse and Expanding Their Footprint**, the latest report in Nielsen's Diverse Intelligence Series, examines not only how the entrepreneurial spirit of Asian-Americans is contributing to the U.S. economy by boosting business start-ups, sales and employment, but also how their geographic footprint is moving beyond traditional strongholds in the Northeast and West as they make population gains across the Midwest and South.

Asian-Americans are diverse, spanning the languages and cultural traditions of more than 40 different ethnicities. From an aggregated view, they lead the U.S. population (on a per household basis) for expenditures and usage, in a number of consumer categories, from food and travel to baby products, mobile digital devices, and social media. They are the most affluent (by median household income) of all major ethnic groups in the U.S., including non-Hispanic Whites, and are more highly educated than any other group. Their visibility in entertainment is increasing in Hollywood and beyond. However, we can not generalize this unique, diverse segment: a more disaggregated view is necessary to understand their consumption behaviors.

Young, empowered, and growing, Asian-Americans' economic clout will continue to expand. Understanding how to connect with this vibrant and multifaceted consumer group in today's multicultural American mainstream will help shape the strategies necessary to succeed now and in the future.

This report is a collaborative effort between Nielsen and its Asian Pacific American External Advisory Council, led by co-chairs Nita Song and Michael Sherman. We hope you find this report a useful resource in understanding the Asian-American community as it grows in importance.



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# EXECUTIVE SUMMARY

Asian-Americans represent the nation's fastest-growing multicultural segment, with a population the U.S. Census Bureau projects will reach 25.7 million by 2019. Current Asian-American buying power in the U.S. is worth \$825 billion. This group has an impact and influence that are shifting and gaining ground in important new ways. As they expand their geographic footprint beyond traditional Asian immigrant enclaves in the West and Northeast, their increasing presence in the Midwest and South is affecting consumer preferences across mainstream America with far-reaching implications for brands and marketers. Nielsen's fourth report on the culturally diverse and dynamic Asian-American consumer looks at consumption habits through a regional lens. This regional look uncovers new insights to help marketers better understand and respond to the unique and changing needs of this diverse population.

**Expanding footprint.** Between 2009 and 2014, immigration, relocation, and new births led to an Asian-American population increase of 33% (over 1.1 million) in the South and 29% in the Midwest (538,000). Though the West is expected to see the greatest growth between 2014 and 2019, just under 2 million, the South will see the second-greatest growth in the Asian-American population with over 1.5 million.

**Consumer dynamos with unrivaled wealth.** At an aggregate view, Asian-Americans are the nation's wealthiest consumer segment, with a household median income of \$74,829. This is 39% greater than the national median income of \$53,657. Their buying power is expected to reach \$1.1 trillion by 2020.

**Food for thought.** Asian-Americans' dietary habits reflect the role of food as a key cultural connection to one's cultural heritage. Asian-American diets primarily consist of fresh and healthy choices. Asian-American shoppers also continue to over-index in non-edible categories such as recyclable and eco-friendly products. Regionally, the density of the Asian-American population is highest in the West and Northeast. Asian-American influence is strongest in those regions, with the general market and Asian-Americans having similar purchasing habits.

**Tech titans.** Asian-Americans continue to lead other consumer segments when it comes to adopting the latest technology, and they are often trendsetters in the pursuit of innovative platforms. While Asian-American tech ownership is strong in all regions, it particularly outpaces the general market in the South, where they own 10% more smartphones, 18% more home computers, and 22% more tablets than the general population.

**New-age screen viewing.** While live TV is still a main viewing source for Asian-Americans, they are rapidly adopting other methods to access their favorite content. Asian-American viewers are moving toward broadband-only TV access at nearly twice the rate of the general population. Ninety-three percent of Asian-American households have high-speed Internet. Subscription video on demand (SVOD) is now found in 68% of Asian-American households, a number that outpaces other households' adoption by 21%.

**Entrepreneurship on the rise.** Reflecting an entrepreneurial mind-set exemplified by self-reliance, innovation and resilience, Asian-American-owned businesses grew by 24% between 2007 and 2012 and had the highest percent sales increase (38%) of any racial or ethnic group. Of the 87 U.S. start-up companies valued at over \$1 billion, 19 were founded by Asian-Americans.



*Note: Those referred to as Asian-American in the following report include those classified in any of the source documents as Asian alone or in combination with one or more other races; Native Hawaiian alone or in combination with one or more other races; and Other Pacific Islander alone or in combination with one or more other races.*

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## SECTION I

# A CROSS-COUNTRY VIEW OF ASIAN-AMERICAN POPULATION AND DEMOGRAPHIC TRENDS

## WHERE IS THE GROWTH?

### POPULATION AND DENSITY—NATIONAL, REGIONAL AND METRO

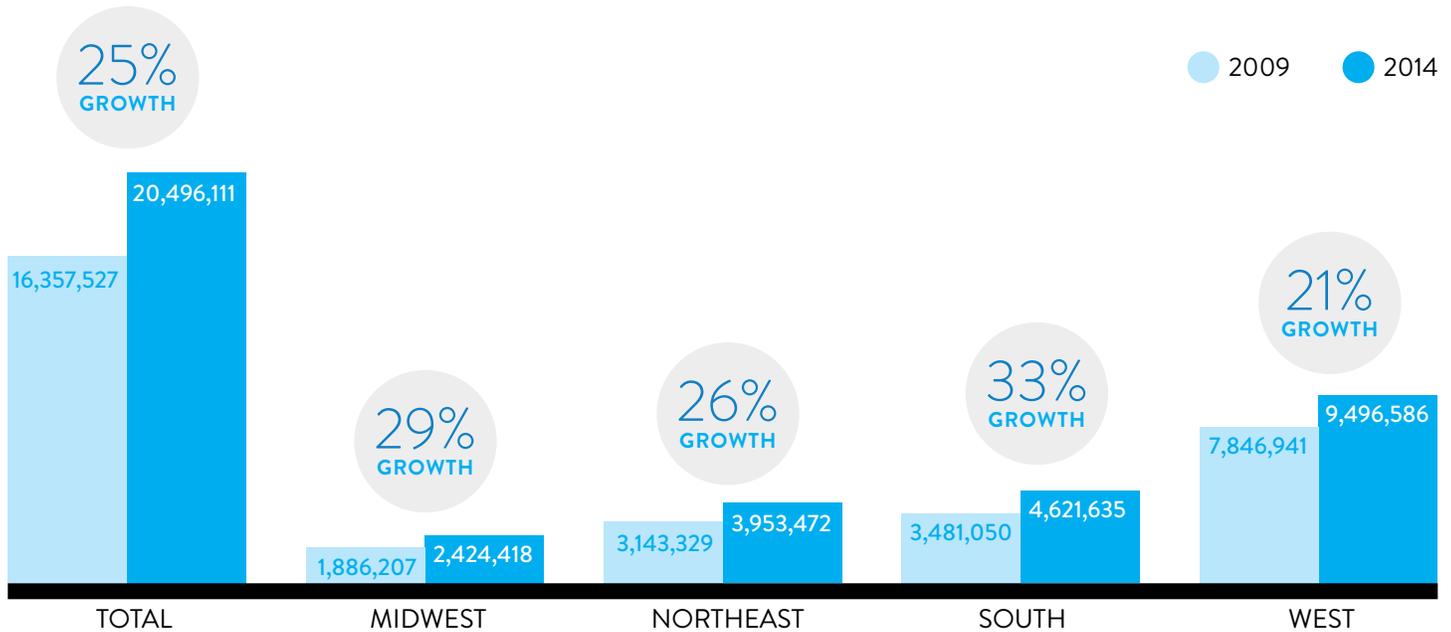
Asian-Americans represent the fastest-growing, highest-income, and most-educated population segment in the U.S. From 2009–2014, the Asian-American population grew 25%. Almost 20.5 million strong, Asian-Americans today represent 6% of the total U.S. population. Driven largely by new immigrants coming to the U.S., the Asian-American population is expected to grow to 25.7 million by 2019.

FROM 2009–2014, THE ASIAN-AMERICAN POPULATION GREW

25%



## ASIAN-AMERICAN POPULATION



Source: U.S. Census Bureau, American Community Survey, 2014 and 2009 American Community Survey PUMS File, one-year estimate.

Although the West and Northeast are traditional enclaves for Asian-Americans, the Midwest and South are experiencing significant population gains. Though almost half (46%) of Asian-Americans live in the West, and 40% (1.65 million) of the total Asian-American population growth from 2009–2014 occurred in the West, Asian-American populations in other regions of the country are growing significantly as well. Through a combination of recent immigration, relocations, and new births the South saw a population increase of 33% (over 1.1 million) between 2009 and 2014, and the Midwest and Northeast grew by 29% (538,000) and 26% (810,000), respectively, during the same time period.

U.S. Census projections show that by 2055, Asian-Americans will pass Hispanics as the largest immigrant group in the U.S. Driven primarily by emigration from China and India, net immigration of Asians into the U.S. has exceeded immigration of all other races and ethnicities since 2013. Changes in U.S. immigration policy in 1965, which eliminated national-origin quota systems, have resulted in sweeping changes in the number and makeup of new U.S. residents. The foreign-born Asian-American population has shown the greatest percentage increase, growing over 13 times since 1970 (from 824,000 to 11.1 million).

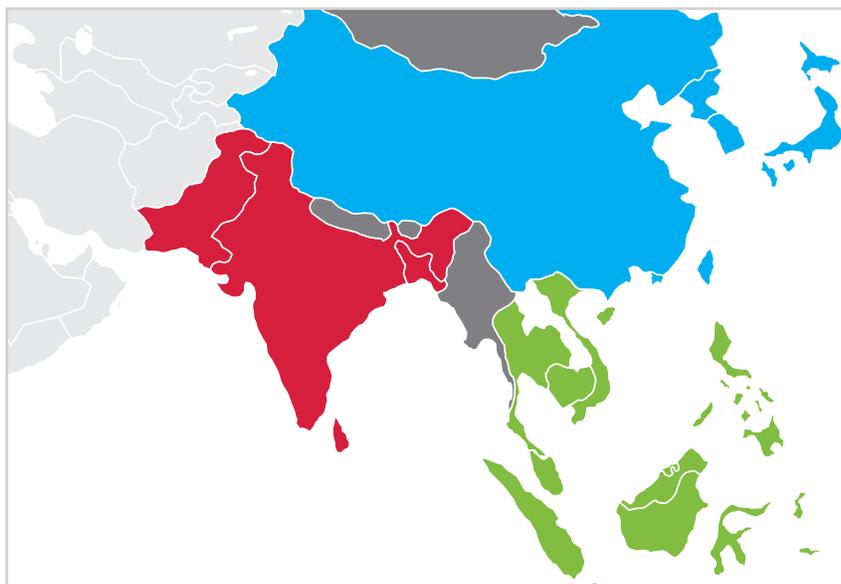
# THE ASIAN-AMERICAN DIASPORA

## WHICH COUNTRIES ARE FUELING THE GROWTH?

Hailing from more than 40 countries of origin, Asian-Americans are a diverse group. Asians of Chinese ancestry are the largest group, representing 20% of the Asian-American population. South Asian Indians (17%), Filipinos (16%), Vietnamese (9%), Koreans (9%) and Japanese (6%) are the next largest groups. In this report, we will classify Asian-Americans by countries of origin in four groups: East Asian, South Asian, Southeast Asian/Pacific Islander, and other Asian/multiracial (as defined below).

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## MAJOR COUNTRIES OF ORIGIN FOR ASIAN-AMERICANS (AS DEFINED FOR THIS REPORT)



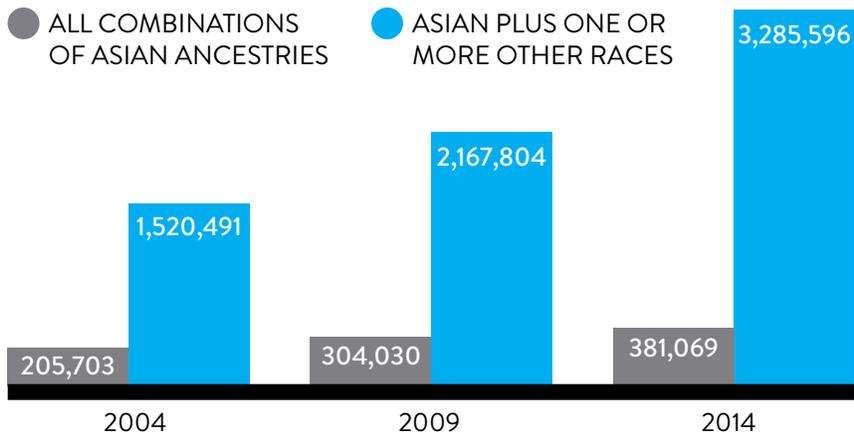
**EAST ASIA:** China, Korea, Japan and Taiwan

**SOUTH ASIA:** India, Pakistan, Bangladesh and Sri Lanka

**SOUTHEAST ASIA/PACIFIC ISLANDS:** Philippines, Vietnam, Cambodia, Laos, Thailand, Hawaii, Samoa, Indonesia, Guam (including Chamorro), Tonga, other Pacific Islands and Malaysia

**OTHER ASIA OR MULTIRACIAL:** Nepal, Burma, Bhutan, Mongolia, other Asian, and all combinations of Asian races

## ASIAN MULTIRACIAL POPULATION

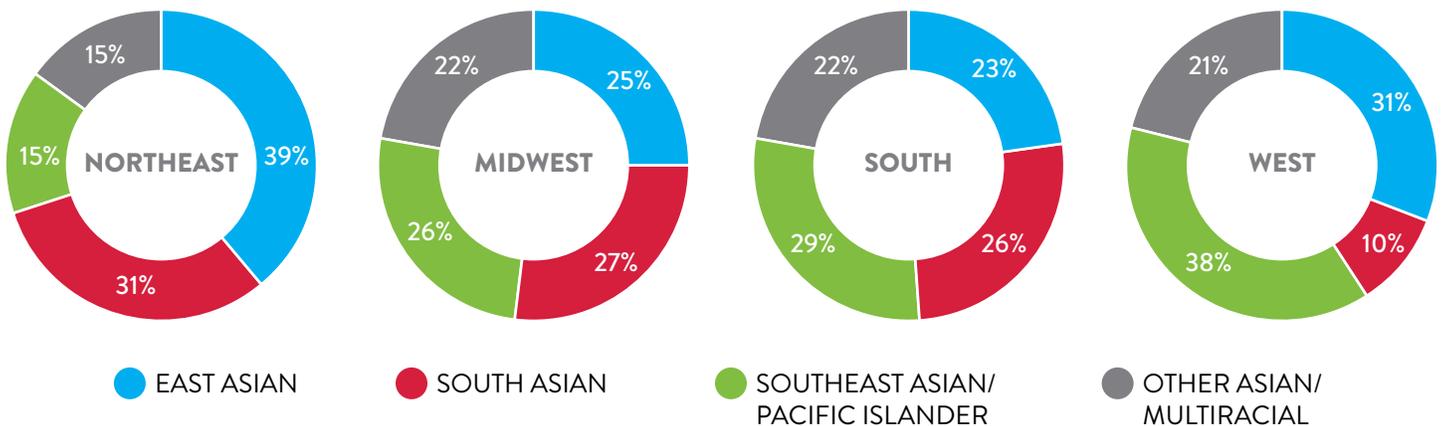


Source: U.S. Census Bureau, American Community Survey, 2014 and 2009 American Community Survey PUMS File, one-year estimate.

Multiracial groups are among the most rapidly expanding segments of Asian-Americans, comprising 18% of the total Asian-American population in 2014. The number of those who are of more than one Asian ancestry has increased 85% since 2004, and the number of those who are Asian and another race has increased 116% in that same time period.

Twenty-three percent of Asian-Americans, mostly of Chinese, Indian and Vietnamese descent, currently live in the South. Nineteen percent of Asian-Americans, primarily of Chinese and Indian ancestry, live in the Northeast, while 12% of Asian-Americans, also mostly of Chinese and Indian descent, live in the Midwest.

## ASIAN-AMERICAN ANCESTRY COMPOSITION OF U.S. REGIONS



Source: U.S. Census Bureau, American Community Survey, 2014 and 2009 American Community Survey PUMS File, one-year estimate.

Those of Chinese ancestry are the largest group in the New York, San Francisco, and Boston metropolitan areas, where they represent approximately one-third of those cities' Asian-American population. Meanwhile those of Indian descent are the largest groups in Chicago, Houston and Dallas metropolitan areas, where they are 33%, 25% and 26%, of the Asian-American population, respectively.

### MAJOR ASIAN-AMERICAN GROUPS IN U.S. METROPOLITAN AREAS

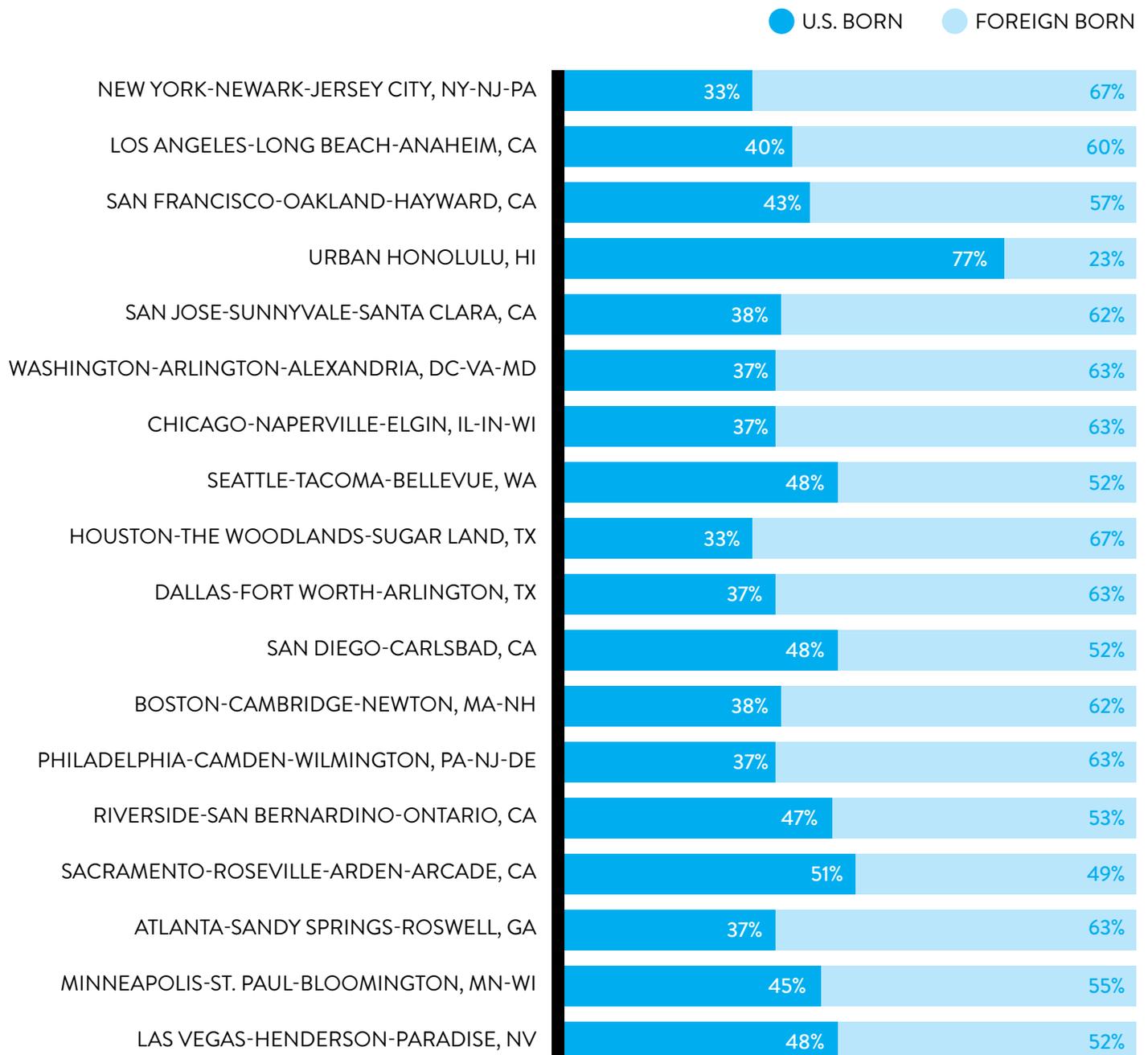
			CHINESE	ASIAN INDIAN	FILIPINO	VIETNAMESE	KOREAN	JAPANESE
TOTAL U.S. ASIAN POPULATION		% Asian Population	18%	17%	13%	8%	7%	4%
		Population (Thousands)	3,790	3,450	2,760	172	1,480	762
NORTHEAST	NEW YORK-NEWARK -JERSEY CITY, NY-NJ-PA	% Asian Population	32%	27%	9%	1%	8%	2%
		Population (Thousands)	758	625	202	30	196	45
	BOSTON-CAMBRIDGE-NEWTON, MA-NH	% Asian Population	34%	21%	3%	8%	4%	2%
		Population (Thousands)	134	83	12	33	17	7
	PHILADELPHIA-CAMDEN-WILMINGTON, PA-NJ-DE	% Asian Population	22%	28%	6%	8%	9%	1%
		Population (Thousands)	86	107	25	31	35	6
WEST	LOS ANGELES-LONG BEACH-ANAHEIM, CA	% Asian Population	21%	6%	18%	13%	14%	6%
		Population (Thousands)	499	139	418	297	322	137
	SAN FRANCISCO-OAKLAND-HAYWARD, CA	% Asian Population	34%	13%	20%	6%	3%	3%
		Population (Thousands)	450	168	259	74	43	43
	URBAN HONOLULU, HI	% Asian Population	7%	0%	20%	1%	3%	20%
		Population (Thousands)	48	773*	147	8	21	145
SOUTH	WASHINGTON-ARLINGTON-ALEXANDRIA, D.C-VA-MD	% Asian Population	15%	23%	8%	10%	12%	2%
		Population (Thousands)	102	158	58	67	85	14
	HOUSTON-THE WOODLANDS-SUGARLAND, TX	% Asian Population	15%	25%	10%	21%	3%	1%
		Population (Thousands)	80	132	51	113	14	5
	DALLAS-FT. WORTH-ARLINGTON, TX	% Asian Population	12%	26%	7%	17%	7%	1%
		Population (Thousands)	56	127	33	80	32	5
MIDWEST	CHICAGO-NAPERVILLE-ELGIN, IL-IN-WI	% Asian Population	15%	33%	17%	3%	8%	2%
		Population (Thousands)	103	222	116	18	51	14
	MINNEAPOLIS-ST.PAUL-BLOOMINGTON, MN-WI	% Asian Population	9%	14%	3%	9%	6%	1%
		Population (Thousands)	24	37	8	24	15	2
	DETROIT-WARREN-DEARBORN, MI	% Asian Population	11%	36%	9%	2%	9%	2%
		Population (Thousands)	21	71	18	4	17	4

\*Read as: 773 (seven hundred seventy-three).

Source: U.S. Census Bureau, American Community Survey, 2014 American Community Survey PUMS File, one-year estimate.

In the most Asian-American-dense U.S. cities (with the exception of Honolulu and Sacramento), more than half of the Asian-American population is foreign born. This is the result of recent Asian immigrants—those who arrived between 2009 and 2014—emigrating to cities where there was already a large community from their cultural heritage offering a network of community support.

## ASIAN-AMERICAN NATIVITY BY METROPOLITAN STATISTICAL AREA (MSA)

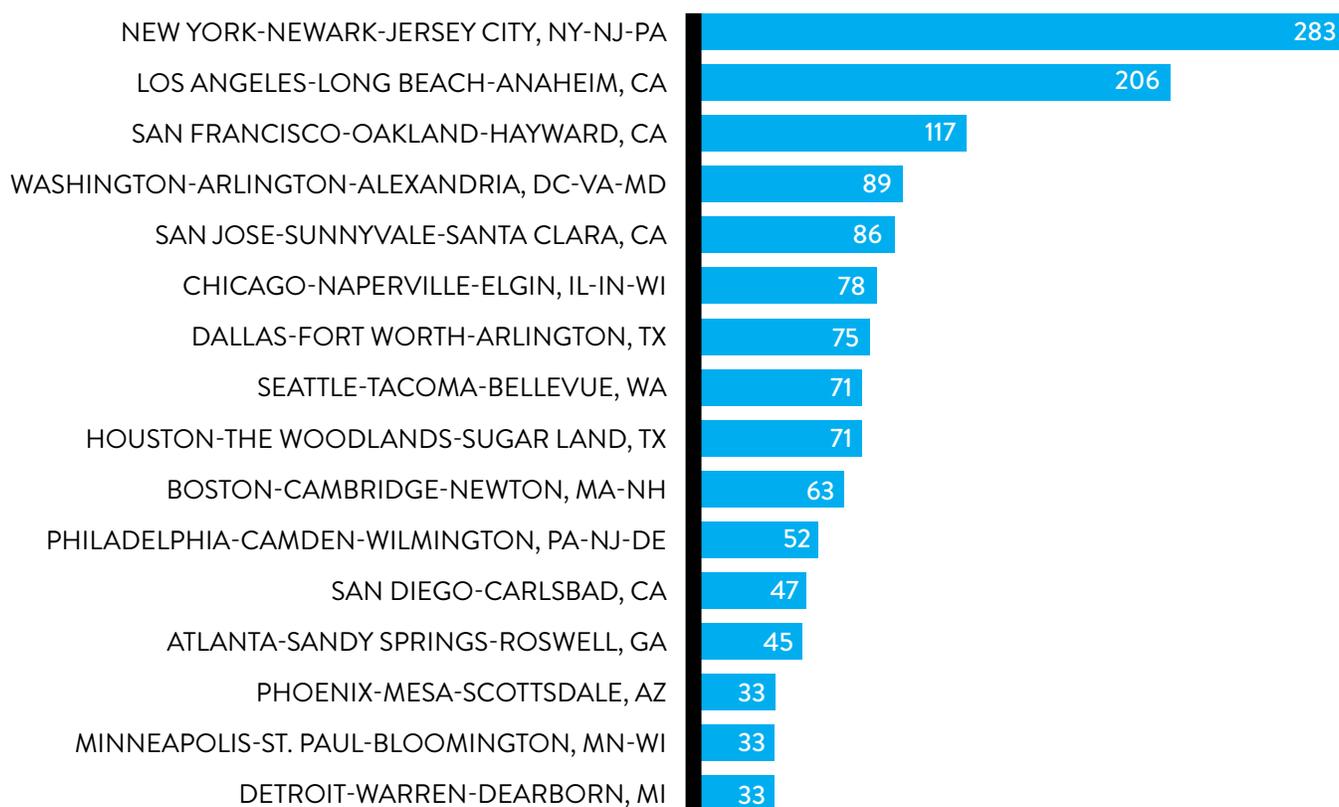


Source: U.S. Census Bureau, American Community Survey, 2014 American Community Survey PUMS File, one-year estimate.

Sixty-three percent of recent Asian immigrants live in 16 U.S. metropolitan areas. Twelve percent, almost 283,000 recent Asian immigrants, settled in the New York metropolitan area, and 8% (206,000) in the Los Angeles metropolitan area. However, smaller cities, including Phoenix, Minneapolis and Detroit, also have seen an influx of newly arrived Asian-Americans.

## TOP DESTINATION METRO AREAS FOR RECENT ASIAN IMMIGRANTS

(NUMBER OF ASIAN IMMIGRANTS IN THOUSANDS)



Source: U.S. Census Bureau, American Community Survey, 2014 American Community Survey PUMS File, one-year estimate.

63%

OF RECENT ASIAN IMMIGRANTS LIVE IN  
16 U.S. METROPOLITAN AREAS

# WHAT IS THE SCOPE?

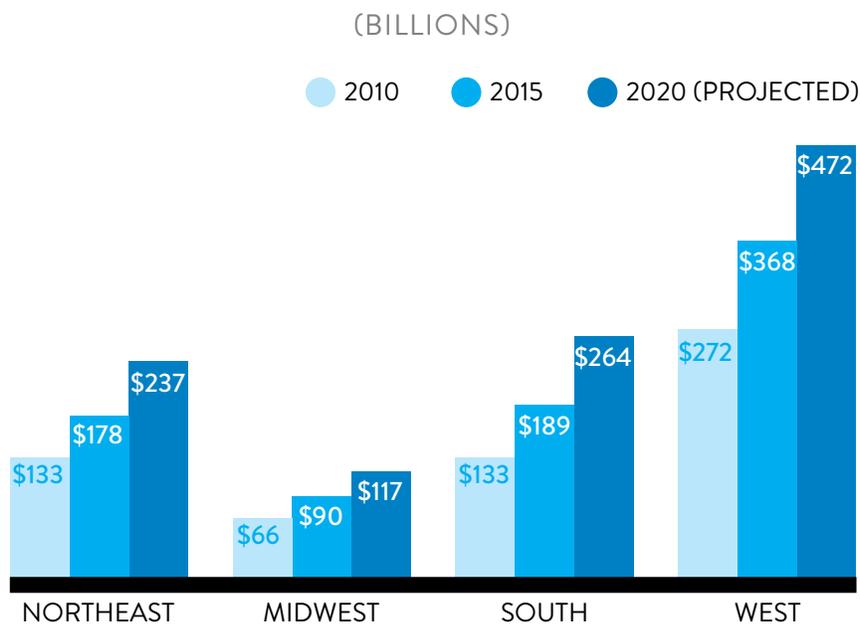
## SIZE AND GROWTH OF BUYING POWER AND ECONOMIC INFLUENCE

Asian-Americans are a powerful driving force in the U.S. economy, currently representing \$825 billion in buying power. Put another way, Asian-American buying power is larger than the economies of all but 17 countries worldwide, and slightly larger than the gross domestic product (GDP) of Turkey. Their current buying power is expected to increase 32% to \$1.1 trillion—or 6.7% of total U.S. buying power—by 2020. This builds on an already-impressive 199% increase in buying power between 2000 and 2015.

The buying power of Asian-Americans in the West was over \$368 billion in 2015, representing 45% of total U.S. Asian-American buying power. The buying power increase of 34% between 2010 and 2015, the smallest percentage change of any of the regions, is projected to hold steady from 2015 to 2020. In the South, Asian-American buying power saw the highest increase (43%) between 2010 and 2015, and the South is projected to continue to show an increase in the next five years.



### U.S. REGIONAL ASIAN-AMERICAN BUYING POWER



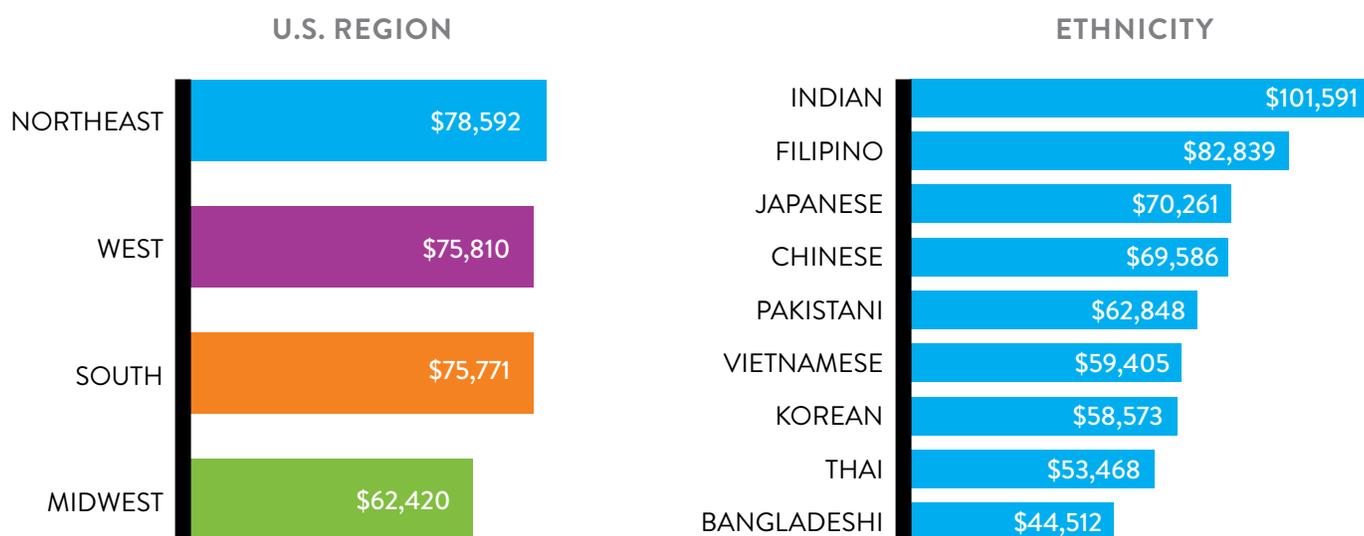
Source: Selig Center for Economic Growth, *The Multicultural Economy* 2015, Asian only.

# A HOUSEHOLD VIEW: MEDIAN INCOME AND COMPOSITION

Attributable largely to the entrepreneurial spirit of newly arrived professionals, the U.S. Asian-American population is the wealthiest segment (at an aggregate view) on a per-household basis. With a household median income of \$74,829, it is 39% greater than the national median income of \$53,657. While the average income of total Asian-Americans taken as a whole is the highest of any racial or ethnic segment in the U.S., there are notable geographic and demographic variations within the Asian-American population. Asian-American median income is highest in the Northeast, at \$78,592, followed by the West at \$75,810, the South at \$75,771 and the Midwest at \$62,420.

Indian-Americans have the highest household income of any Asian-American group; with a median annual household income of \$101,591, they are the first U.S. ethnic segment with a median income over \$100,000. Filipino-, Japanese-, Chinese-, Pakistani-, Vietnamese-, and Korean-Americans all exceed the total population median income as well.

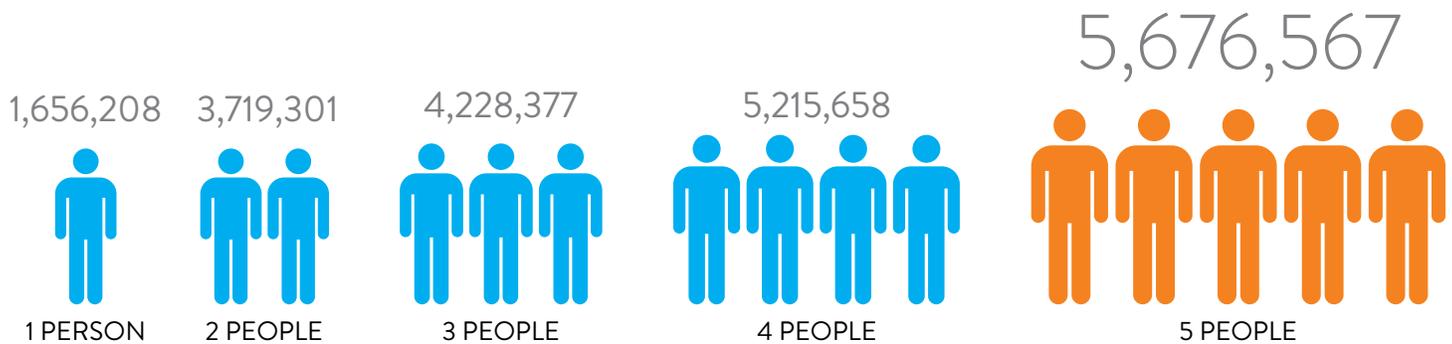
## MEDIAN ASIAN-AMERICAN HOUSEHOLD INCOME



Source: U.S. Census Bureau, Current Population Survey, 2014 and 2015 Annual Social and Economic Supplements.

## ASIAN-AMERICAN HOUSEHOLD SIZES

(NUMBER OF HOUSEHOLDS PER SIZE IN THE U.S.)



Source: U.S. Census Bureau, American Community Survey, 2014 American Community Survey PUMS File, one-year estimate.

Understanding the granularity and nuances of the Asian-American population from both a regional and a country-of-origin point of view is critical when optimizing product offerings and services to meet the needs of this diverse community.

The influx of newly arrived Asian-Americans has had another profound effect on the composition of Asian-American households; these households are larger than those of other U.S. races, with a mean size of 3.41, versus Whites at 2.96 and Blacks at 3.28.

When asked if they plan to have a baby in the next 12 months, Asian-American respondents said “yes” at a 57% higher rate than the total population.\* Thus, it is not surprising that Asian-Americans over-index the general population for buying baby products, with a 70% higher rate in the baby needs category and 30% higher in the disposable diapers category.

Also, Asian-Americans have 12% more adults (18 and older) in their households, than the general population. This greater presence of adults in Asian-American households not only makes for larger household sizes, as evidenced by the fact that households of five or more individuals constitute the largest number of Asian-American households, but also makes for greater earning potential and a higher median household income.

ASIAN-AMERICANS BUY  
BABY PRODUCTS AT A  
**70%** HIGHER RATE  
THAN THE  
GENERAL POPULATION\*\*



\*Source: Scarborough USA+, 2015 Release 2, Total (August 2014 - October 2015), GfK MRI Attitudinal Insights.

\*\*Source: Nielsen Homescan, Total Shopper View, Total U.S., 52 weeks ending December 26, 2015.



## DEMOGRAPHIC IMPERATIVES TO DRIVE YOUR BUSINESS GROWTH

- Asian-Americans, the fastest-growing multicultural segment, saw 25% growth in the last five years, and should be the centerpiece of your growth strategy in all regions of the country. The South grew fastest, (33% over five years). The Midwest the Northeast grew by 29% and 26%, respectively; and the West by 22%. Past strategies concentrating solely on the West and Northeast, must be revisited.
- Seventy-five percent of Asian-Americans live in just 31 DMAs, each of which has more than 100,000 Asian-American residents. Cultural heritage and countries of origin vary within these cities. Understanding the demographic granularity of these cities and regions will provide a road map for your business.
- At an aggregate view, Asian-American median income is highest in the Northeast, at \$78,592, followed by the West at \$75,810, the South at \$75,771, and the Midwest at \$62,420. In all of these regions, Asian-American median income is higher than the general market and the national general-population average.
- Indian-Americans have the highest household income of any Asian-American group, at \$101,591. They are the first U.S. ethnic group with a median income over \$100,000. Filipino-, Chinese-, Vietnamese-, Korean-, Japanese- and Pakistani-Americans all exceed the total population median income.
- Asian-Americans have the largest households of any race. Households containing five or more people make up the largest number of Asian-American households. Stocking-up and bulk-buying shopping behaviors must be a part of your strategy.



## SECTION II

# A COAST-TO-COAST VIEW OF ASIAN-AMERICAN SHOPPING HABITS

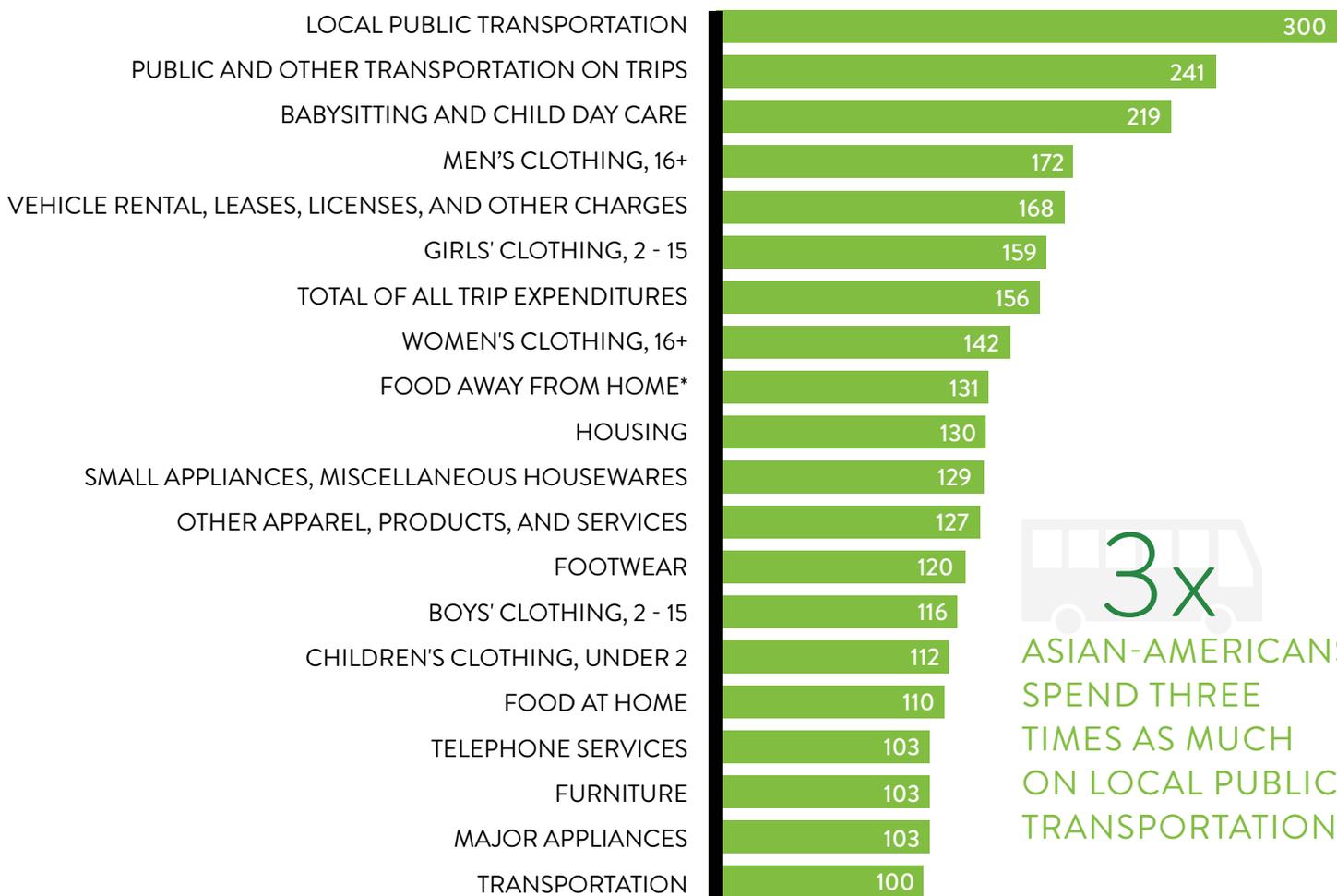
## INDUSTRIES AND CATEGORIES IN WHICH ASIAN-AMERICANS SPEND MORE

Asian-Americans are a powerful economic force that is increasingly driving many industries and categories in which they significantly spend more than the general population. As a whole, Asian-Americans' average yearly expenditure is just over \$53,000, 18% higher than that of the general U.S. population. Thirty-seven percent of Asian-Americans' expenditure goes to housing, a dollar amount 30% higher than the average amount spent by the total population. Another 15% of Asian-Americans' expenditure is spent for food, and an equal amount for transportation. While their average expenditure on transportation is roughly the same overall as that of the total population, Asian-Americans spend three times as much on local public transportation, indicating a higher urban presence. Furthermore, they spend 2.4 times as much for transportation on trips, indicating the natural propensity of a heavily foreign-born adult population to travel. Asian-Americans also over-index in spending on all clothing and apparel categories, child care, and small appliances.



## ASIAN-AMERICAN AVERAGE ANNUAL HOUSEHOLD EXPENDITURES INDEX

(TOTAL ASIAN-AMERICANS VS. TOTAL POPULATION)



**3x**  
 ASIAN-AMERICANS  
 SPEND THREE  
 TIMES AS MUCH  
 ON LOCAL PUBLIC  
 TRANSPORTATION

Source: Bureau of Labor Statistics, Consumer Expenditure Survey, 2014 Consumer Expenditure Survey, PUMD File.

\* Food away from home includes: all meals (breakfast and brunch, lunch, dinner and snacks and non-alcoholic beverages); including tips at fast food, take-out, delivery, concession stands, buffet and cafeteria, full-service restaurants, and at vending machines and mobile vendors. Also included are board (including at school), meals as pay, special catered affairs, such as weddings, bar mitzvahs, and confirmations; school lunches, and meals away from home on trips.

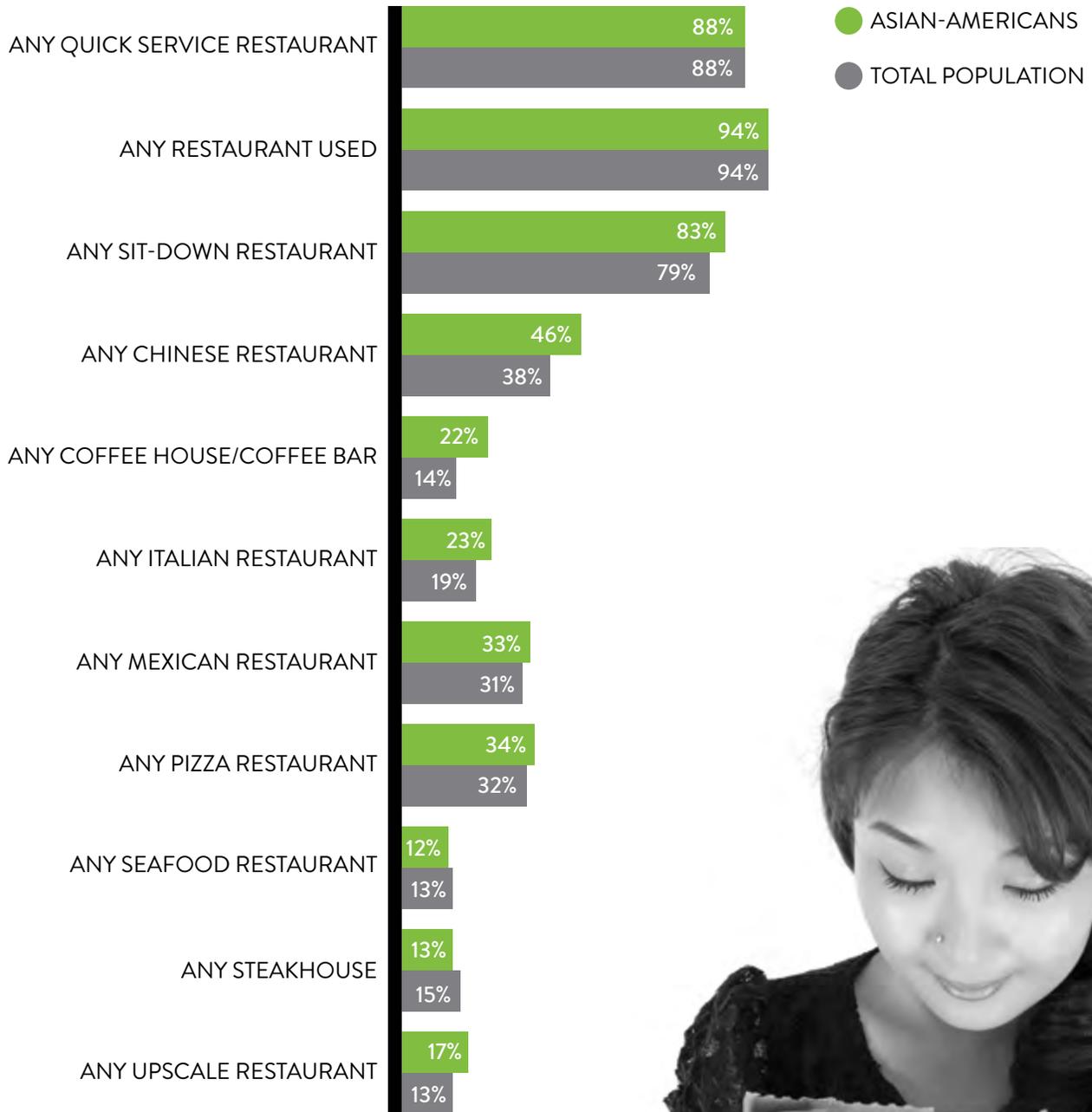
Asian-Americans spend 10% more on food at home and 31% more on food away from home than do the average population.

When it comes to eating out, Asian-Americans say they spend 34% more for take-out food and report going out to upscale restaurants at a 30% higher rate and to coffee houses at a 56% higher rate than the total population.\*

\* Source: Scarborough USA+, 2015 Release 2, Total (August 2014 - October 2015), GfK MRI Attitudinal Insights.

## ASIAN-AMERICANS DINE OUT FREQUENTLY

(PERCENT MORE LIKELY TO DINE-OUT IN THE PAST 30 DAYS VS. THE TOTAL POPULATION)



Source: Scarborough USA+ 2015 Release 2 Total (Aug 2014 - Oct 2015), GfK MRI Attitudinal Insights.

Furthermore, in the past 30 days, Asian-Americans were 22% more likely to dine at Chinese restaurants, 21% at Italian restaurants and 15% at sit-down restaurants four or more times a month, than the total population.

# ASIAN-AMERICAN GROCERY SHOPPING IS SERIOUS BUSINESS

“A MAN CANNOT BE TOO SERIOUS ABOUT  
HIS EATING, FOR FOOD IS THE FORCE  
THAT BINDS SOCIETY TOGETHER.”

– CONFUCIUS

That quote is never so true as when one is part of a diaspora; food is the last part of one's cultural heritage and ancestry to be lost through acculturation, and it's one of the primary elements passed down to new generations. This element of cultural bonding, in combination with the Eastern view of food as the primary pathway to health and beauty, is why many Asian-Americans of ethnic backgrounds of origin adhere to a relatively similar traditional diet, which consists largely of rice, a large quantity of vegetables and fruits, and fish, pork, tofu, poultry, nuts, and dry beans as the main proteins.

As a result, Asian-Americans purchase almost three times as much dry vegetables and grains as the total population (item buying rate index of 282 [the average volume for the item purchased per household]), and they over-index on the purchase of fresh fruits and vegetables, seafood, baked goods, prepared foods, coffee and other fresh items. Seventy-nine percent of Asian-Americans agree they prefer cooking with fresh food rather than canned or frozen, and 71% agree that they rarely eat frozen dinners.\*

In comparison to the total population, in the past year, Asian-Americans have purchased more fresh seafood, a primary source of both protein and calcium in traditional Asian diets. On average, Asian-Americans purchase 69% more fresh seafood than the total population. Asian-Americans also purchase 72% more fresh vegetables, 23% more frequently, and 29% more fresh fruits, 9% more frequently than the total population. Juices are also a big part of the Asian-American shopping basket, with more than twice as much frozen juices (item buying rate index of 213) and 27% more refrigerated juices (item buying rate index of 127) purchased than the total population.

\*Source: Scarborough USA+, 2015 Release 2, Total (August 2014 - October 2015), GfK MRI Attitudinal Insights.

Fresh preparation of cuisine in the Asian-American household is of the utmost importance. When it comes to food, Asian-Americans are still particularly conscientious about health, safety and environmental impact. Asian-Americans say they don't allow junk food in their home at an 8% higher rate than the general population, and that they evaluate the nutrition of menu items when ordering at a restaurant at a 6% higher rate.\*

Eighty-five percent of Asian-Americans agree that they try to eat healthy and pay attention to their nutrition, while they say they buy organic foods at a rate 52% higher than the total population. Sixty-five percent of Asian-Americans say they try to buy foods grown or produced locally in the region where they live, and 77% say they recycle their glass, paper and plastic (11% higher than the total population). Asian-Americans also say they would pay more for eco-friendly products at a rate 42% higher than the total population. Fifty-five percent say they buy natural products because they are concerned about the environment, and 52% feel they are more environmentally conscious than most (13% higher than the total population).\*

\*Source: Scarborough USA+, 2015 Release 2, Total (August 2014 - October 2015), GfK MRI Attitudinal Insights.

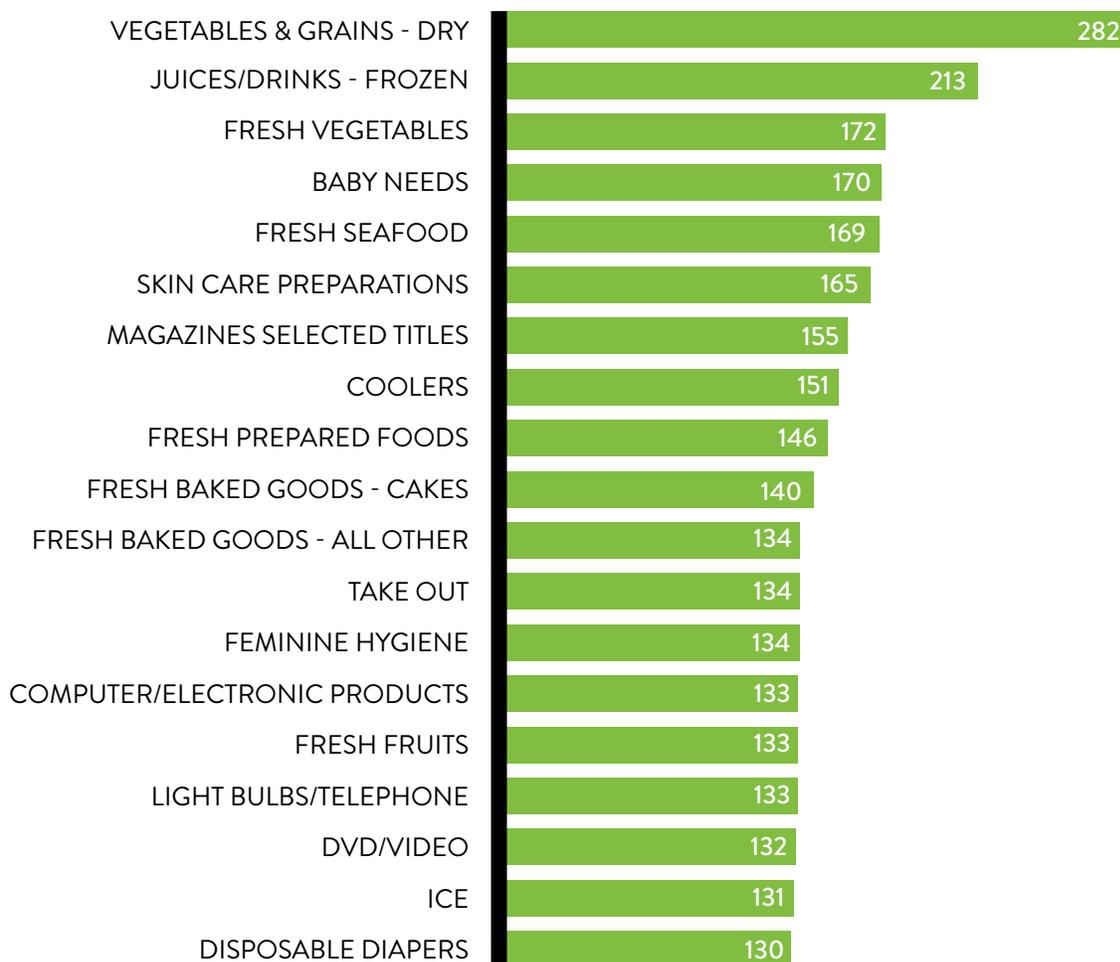


85%  
OF ASIAN-AMERICANS  
AGREE THAT THEY TRY  
TO EAT HEALTHY AND  
PAY ATTENTION TO THEIR  
NUTRITION



## TOP ASIAN-AMERICAN OVER-INDEXED CATEGORIES

(ITEM BUYING RATE FOR ASIAN-AMERICAN HOUSEHOLDS VS. TOTAL POPULATION)



Read as: Asian-American households purchased twice as much dry vegetables and grains than the total population (182%).

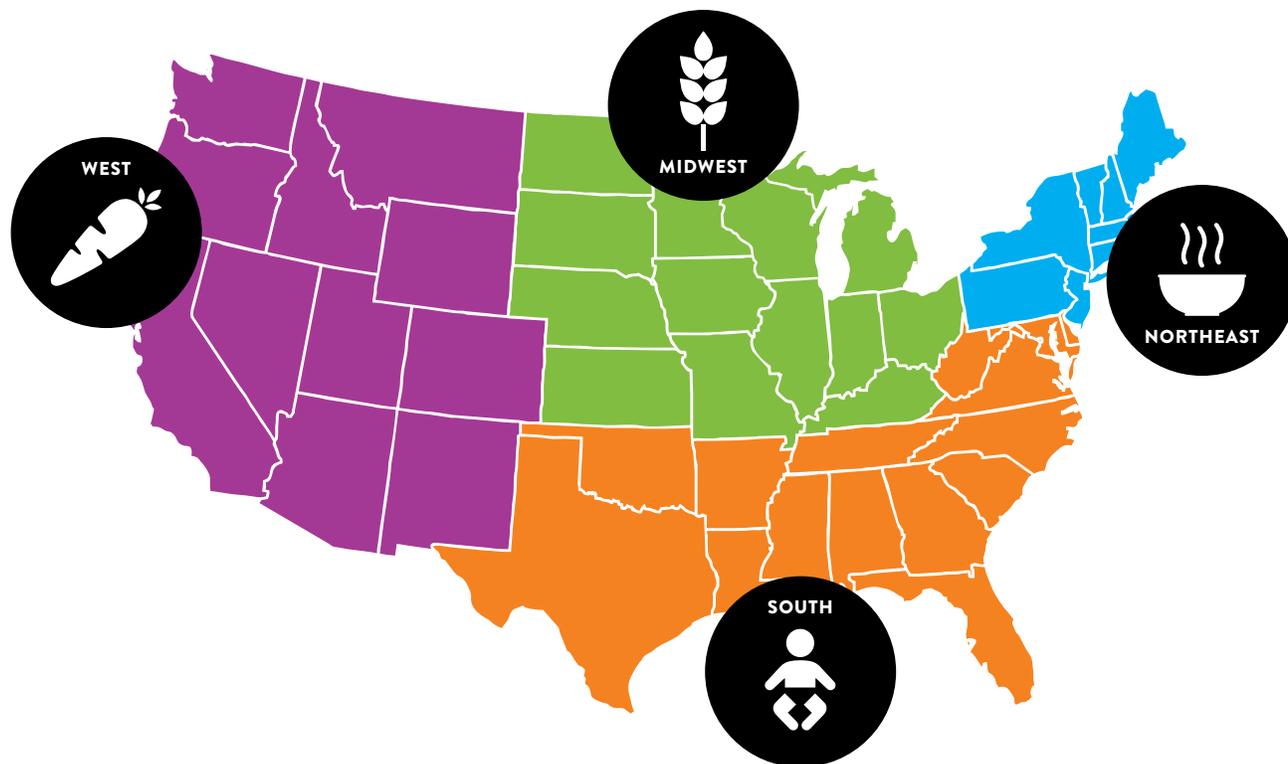
Source: Nielsen Homescan, Total Shopper View, Total U.S., 52 weeks ending December 26, 2015.

Fresh, nutritious, and environmentally friendly foods are just one aspect of Asian-Americans' focus on a healthy outlook: Asian-Americans also buy, on average, 17% more than the total population in the health and beauty aids department. They are 45% more likely to buy health and beauty products on the Internet than the total population.\* They belong to a health club or gym at a rate 28% higher than the total population, generally wear sunscreen at a rate 10% higher, and go to day spas at a rate 28% higher.\* The buying rate of skin-care preparations, oral-hygiene products, women's fragrances, men's toiletries, hair care and cosmetics also are higher among Asian-Americans.

\* Source: Scarborough USA+, 2015 Release 2, Total (August 2014 - October 2015), GfK MRI Attitudinal Insights

# REGIONAL PREFERENCES, TRENDS AND INFLUENCES ON THE MAINSTREAM

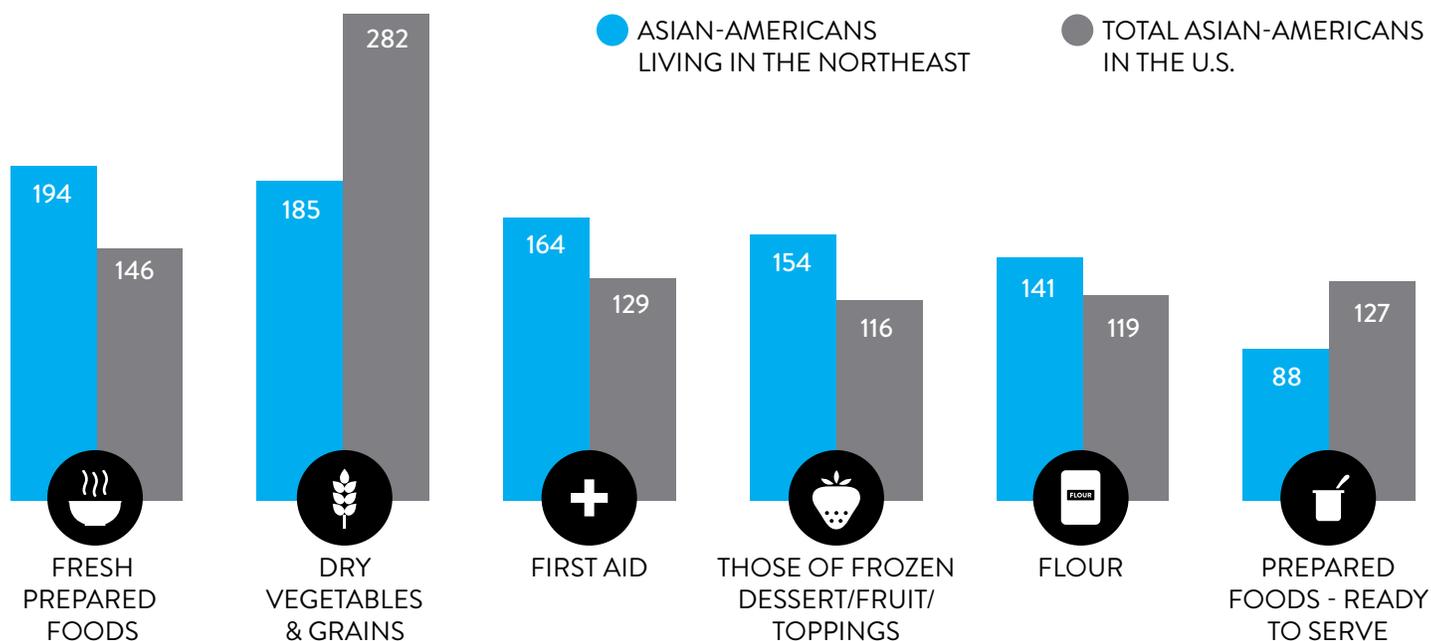
Asian-American consumers' specific purchasing habits are affecting mainstream purchasing habits. The density of the Asian-American population is highest in the West and Northeast, so it is not surprising that Asian-American influence is strongest in those regions, and that the general market and Asian-Americans behave more similarly in those regions than they do elsewhere. However, while many Asian-American consumers in different regions of the country have similar tastes and buying patterns, there are some notable differences and distinctions between each region.



Note: Data cited in this section measures shopping behaviors at mainstream retailers and does not include behaviors at ethnic retailers.

## ASIAN-AMERICANS' SHOPPING CARTS IN THE NORTHEAST DIFFER FROM TOTAL ASIAN-AMERICANS IN THE U.S.

(ITEM BUYING RATE INDEX)



Read as: Asian-Americans in the Northeast purchased fresh prepared foods 94% more than the general market in that region, which is greater than the difference of the 46% more purchased by total Asian-Americans in the U.S. compared to the general market.

Source: Nielsen Homescan, Total Shopper View, Total U.S., 52 weeks ending December 26, 2015.

Item Buying Rate Index for Asian-Americans living in Northeast indexed to general population in Northeast using fair share (index of category item buying rate versus total buying rate for Asian-Americans in each region).

Item Buying Rate Index for Asian-Americans living in total U.S. indexed to general population in total U.S. using fair share (index of category item buying rate versus total buying rate for Asian-Americans in each region).

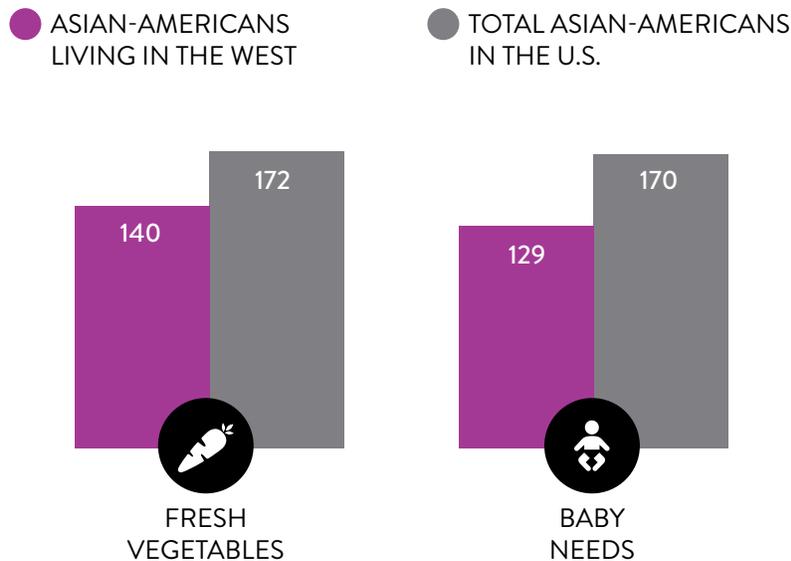
Asian-Americans living in the Northeast over-index against the general market in that region with 185 in the dry vegetables and grains category. This is much lower, however, than the 282 index for all Asian-Americans in the country—suggesting that the general market in the Northeast is more heavily influenced by Asian-American dietary habits than is the country in total. This is one example of the influence that Asian tastes could have on general-market cooking styles. Other clear examples are evident in the growing popularity of items such as soy milk, seaweed, Asian curries and many others. While Asian-Americans in the Northeast differ less from the general market in the dried vegetable and grain category, they differ significantly more compared with the total U.S. Asian-American population in the fresh prepared foods, flour, desserts and first-aid categories.

Asian-Americans living in the West purchase fresh vegetables and baby needs at levels more like those of the general population than do the total U.S. Asian-American population, suggesting that in high Asian-American density regions, the differences in buying behaviors between Asian-Americans and the total population are less than the differences in other regions.

Asian-Americans who live in the South and Midwest regions differ the most from the general market in those regions. In the South, Asian-Americans' purchase levels of baby needs, table syrups, candy, nuts, and seeds differ the most from the general market as compared to the difference between Asian-Americans and the total U.S. Asian-Americans living in the Midwest differ the most from the general population in their purchasing of dried vegetables and grains, but they exhibit a greater differential in the categories for pasta, soft drinks, refrigerated dough, and fresh meat.

## ASIAN-AMERICANS IN THE WEST SHOP MORE LIKE TOTAL ASIAN-AMERICANS IN THE U.S. FOR CERTAIN CATEGORIES

(ITEM BUYING RATE INDEX)



Read as: Asian-Americans in the West purchased 40% more fresh vegetables than the general market in that region, which is lesser of a difference than the 72% more purchased by total Asian-Americans in the U.S. compared to the general market.

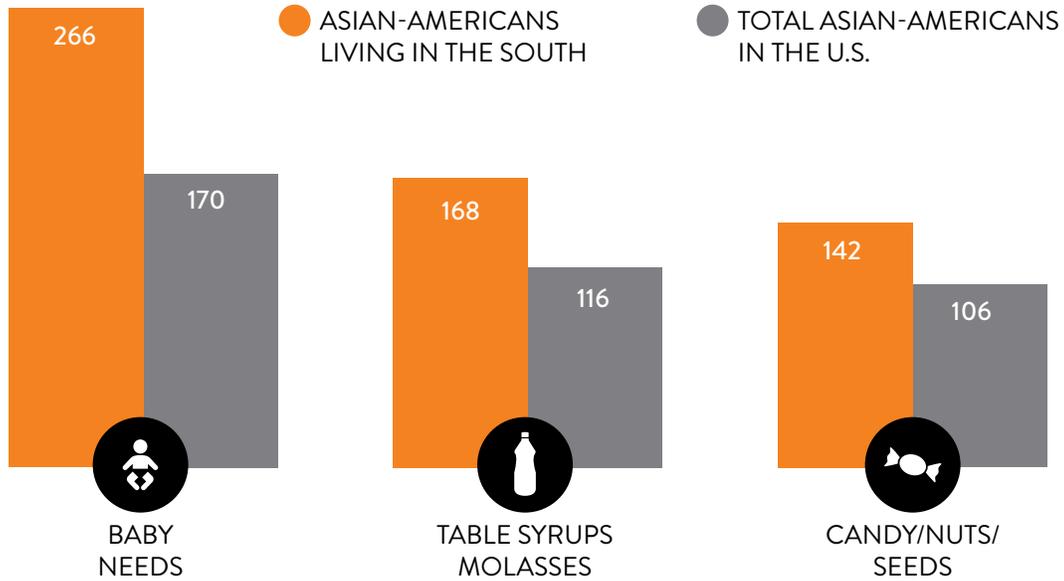
Source: Nielsen Homescan, Total Shopper View, Total U.S., 52 weeks ending December 26, 2015.

Item Buying Rate Index for Asian-Americans living in West indexed to general population in West using fair share (index of category item buying rate versus total buying rate for Asian-Americans in each region).

Item Buying Rate Index for Asian-Americans living in total U.S. indexed to general population in total U.S. using fair share (index of category item buying rate versus total buying rate for Asian-Americans in each region).

## ASIAN-AMERICANS' BUYING RATE IN THE SOUTH OUTPACES TOTAL ASIAN-AMERICANS IN THE U.S. FOR CERTAIN CATEGORIES

(ITEM BUYING RATE INDEX)



Read as: Asian-Americans in the South purchased twice as much baby needs than the general market in that region (166%), which is greater than a difference of 70% more purchased by total Asian-Americans in the U.S. compared to the general market.

Source: Nielsen Homescan, Total Shopper View, Total U.S., 52 weeks ending December 26, 2015.

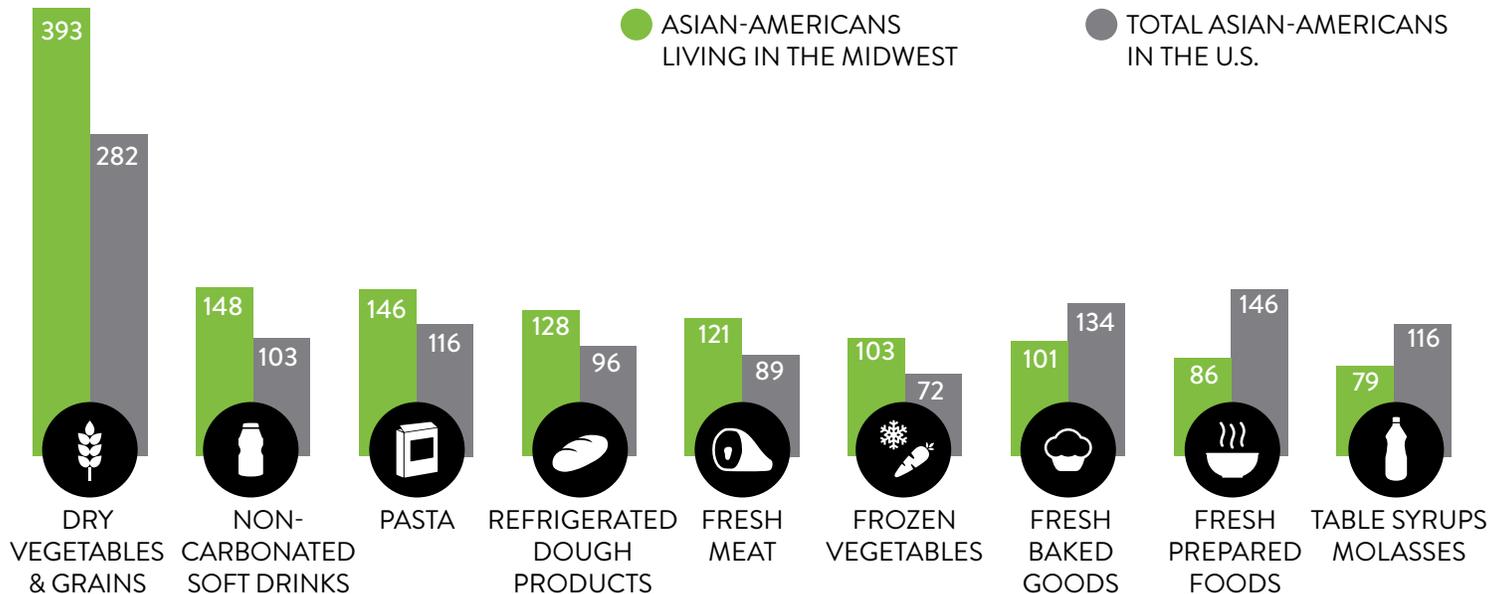
Item Buying Rate Index for Asian-Americans living in South indexed to general population in South using fair share (index of category item buying rate versus total buying rate for Asian-Americans in each region).

Item Buying Rate Index for Asian-Americans living in total U.S. indexed to general population in total U.S. using fair share (index of category item buying rate versus total buying rate for Asian-Americans in each region).



## ASIAN-AMERICANS' BUYING RATE IN THE MIDWEST OUTPACES TOTAL ASIAN-AMERICANS IN THE U.S.

(ITEM BUYING RATE)



Read as: Asian-Americans in the Midwest purchased three times more dry vegetables and grains than the general market in that region (293%), which is greater than a difference of the twice as much purchased by total Asian-Americans in the U.S. compared to the general market (182%).

Source: Nielsen Homescan, Total Shopper View, Total U.S., 52 weeks ending December 26, 2015.

Item Buying Rate Index for Asian-Americans living in Midwest indexed to general population in Midwest using fair share (index of category item buying rate versus total buying rate for Asian-Americans in each region).

Item Buying Rate Index for Asian-Americans living in total U.S. indexed to general population in total U.S. using fair share (index of category item buying rate versus total buying rate for Asian-Americans in each region).



### MEETING ASIAN-AMERICAN SHOPPERS' NEEDS

- Food is a part of cultural bonding in Asian-American households and fresh is king. Many Asian-Americans of all ethnic backgrounds and in all regions of the U.S. adhere to relatively similar traditional diets consisting primarily of rice, large quantities of vegetables and fruits, and fish, pork, tofu, poultry, nuts and dry beans as main proteins. Offering the best selection of fresh alternatives within these staple categories should drive growth for your business.
- Higher proportions of Asian-Americans living in the West and Northeast have influenced general-market shopping behaviors longer. As such, popular Asian-American categories are also common to many consumers in these regions. In the South and Midwest, Asian-American shopping preferences differ a bit more from the general population, but general market behaviors are evolving quickly.
- Healthy staples, including natural, locally produced and organic foods, will appeal to Asian-American shoppers. Asian-American shoppers also over-index for the purchase of recyclable and eco-friendly products.
- Asian-American shoppers are 45% more likely to say they purchase health and beauty products on the Internet than the total population and are 70% more likely to say they purchase baby needs than the total population.

## SECTION III

HOW ASIAN-AMERICANS ARE  
CONSUMING CONTENT SCREEN BY SCREEN

Just as they exhibit differences from the general market in shopping behaviors, Asian-American consumers exhibit profound differences in their viewing and digital behaviors—differences based on their cultural roots and on the regions of the U.S. where they live. As we continue to grow as a multiscreen society with many different ways to receive messages and consume content, Asian-Americans lead the general population in adopting the latest technology and innovative technology platforms. A look at the regional viewing habits of Asian-Americans can help content creators continue to develop programming that resonates and connects with this influential audience.



76%

OF ASIAN-AMERICAN HOUSEHOLDS  
OWN TABLETS

# DEVICE OWNERSHIP AND MEDIA ACCESS PREFERENCES BY REGION

Asian-Americans outpace the general population on ownership of the latest technology platforms in all regions of the country, with multimedia device ownership standing out particularly high. A similar pattern follows with mobile where we see that 95% of Asian-American TV households own smartphones—indexing 9% higher than the general population, with Asian-Americans in each of the four regions over-indexing against total TV households by at least 5%. Ninety-two percent of Asian-American households own computers, which is 12% higher than the general population. Seventy-six percent of Asian-Americans own tablets, the fastest-growing personal Internet access platform, at a rate of 18% higher than the general population. Tablet ownership is particularly strong among Asian-Americans who live in the South, where they over-index the general population by 22%.

95%  
OF ASIAN-AMERICAN  
TV HOUSEHOLDS OWN  
SMARTPHONES



# DEVICE OR SERVICE OWNERSHIP FOR ASIAN-AMERICANS ACROSS U.S. REGIONS

## ASIAN-AMERICANS, AGES 2-99 HOUSEHOLDS OWNERSHIP RATES AND INDEX VS. TOTAL HOUSEHOLDS

		TOTAL ASIAN-AMERICAN	MIDWEST	NORTHEAST	WEST	SOUTH
<b>TV ACCESS METHOD</b> 	<b>BROADBAND-ONLY</b>	6%	5%	5%	7%	4%
	ASIAN-AMERICAN INDEX TO TOTAL HOUSEHOLDS	<b>186</b>	<b>126</b>	<b>228</b>	<b>143</b>	<b>182</b>
	<b>CABLE PLUS (ANY CABLE ACCESS + SATELLITE)</b>	79%	73%	85%	78%	80%
	ASIAN-AMERICAN INDEX TO TOTAL HOUSEHOLDS	<b>92</b>	<b>88</b>	<b>93</b>	<b>95</b>	<b>92</b>
	<b>ALTERNATIVE DELIVERY SYSTEM (SATELLITE OR WIRELESS CABLE)</b>	21%	26%	13%	22%	25%
ASIAN-AMERICAN INDEX TO TOTAL HOUSEHOLDS	<b>66</b>	<b>79</b>	<b>79</b>	<b>62</b>	<b>66</b>	
	<b>BROADCAST ONLY</b>	15%	21%	10%	15%	17%
	ASIAN-AMERICAN INDEX TO TOTAL HOUSEHOLDS	<b>135</b>	<b>162</b>	<b>170</b>	<b>119</b>	<b>145</b>
<b>DVR</b> 	<b>DVR</b>	43%	39%	37%	46%	45%
	ASIAN-AMERICAN INDEX TO TOTAL HOUSEHOLDS	<b>81</b>	<b>74</b>	<b>71</b>	<b>88</b>	<b>82</b>
<b>SUBSCRIPTION VIDEO</b> 	<b>SUBSCRIPTION VIDEO ON DEMAND (SVOD)</b>	68%	67%	65%	69%	68%
	ASIAN-AMERICAN INDEX TO TOTAL HOUSEHOLDS	<b>121</b>	<b>122</b>	<b>108</b>	<b>110</b>	<b>134</b>
<b>HIGH-SPEED INTERNET</b> 	<b>HIGH-SPEED INTERNET CONNECTION</b>	93%	91%	94%	94%	93%
	ASIAN-AMERICAN INDEX TO TOTAL HOUSEHOLDS	<b>116</b>	<b>113</b>	<b>110</b>	<b>112</b>	<b>124</b>
<b>DEVICES</b>     	<b>COMPUTER (HOUSEHOLD WITH ONE OR MORE)</b>	92%	91%	94%	91%	92%
	ASIAN-AMERICAN INDEX TO TOTAL HOUSEHOLDS	<b>112</b>	<b>110</b>	<b>107</b>	<b>110</b>	<b>118</b>
	<b>SMARTPHONE (HOUSEHOLD WITH ONE OR MORE)</b>	95%	93%	95%	95%	95%
	ASIAN-AMERICAN INDEX TO TOTAL HOUSEHOLDS	<b>109</b>	<b>110</b>	<b>108</b>	<b>105</b>	<b>110</b>
	<b>TABLET (HOUSEHOLD WITH ONE OR MORE)</b>	76%	69%	77%	78%	74%
	ASIAN-AMERICAN INDEX TO TOTAL HOUSEHOLDS	<b>118</b>	<b>110</b>	<b>111</b>	<b>116</b>	<b>122</b>
	<b>DVD</b>	72%	74%	70%	75%	65%
	ASIAN-AMERICAN INDEX TO TOTAL HOUSEHOLDS	<b>91</b>	<b>90</b>	<b>89</b>	<b>95</b>	<b>85</b>
	<b>VIDEO GAME CONSOLE</b>	56%	58%	53%	56%	56%
	ASIAN-AMERICAN INDEX TO TOTAL HOUSEHOLDS	<b>100</b>	<b>101</b>	<b>93</b>	<b>100</b>	<b>107</b>

Source: Nielsen NPOWER, penetration based on average scaled installed counts for January 15, 2016 of Asian-Americans versus total population.

Note: Although the sample design is not controlled by Asian language, we make significant efforts to accommodate non-English speaking respondents and as such, our Asian panelists include both English and non-English language speaking populations.

# 93%

## OF ASIAN-AMERICAN HOUSEHOLDS HAVE HIGH- SPEED INTERNET ACCESS



Given the prevalence of Internet-connected devices, Internet speed is critical to Asian-American households. It is not surprising, then, that 93% of Asian-American households have high-speed Internet access and that they over-index the general population by 16% nationwide, as well as over-index in all regions of the country. This high-speed Internet access is a pathway to subscription video on demand (SVOD) streaming services, in which Asian-Americans far outpace their general market counterparts; 68% of households have SVOD services—a 21% higher rate than the general population. Given this higher rate for SVOD penetration, it is not surprising that Asian-American households have a much lower rate of DVR usage than the general population—43% versus 62%. It is also interesting to note that Asian-Americans' ownership of DVD players is significantly lower than the general population in all regions of the country: This device is rapidly being replaced by newer technology, and it is no surprise to see Asian-Americans leading the move away from this older platform.

A move to broadband-only TV access and cord-cutting is a much talked about trend. Although the overall numbers in the U.S. are lower than many predicted, Asian-Americans are moving to broadband-only more quickly than other groups—especially in the West, where 7% of Asian-Americans have broadband-only TV access. They are cord-cutters at a rate that is 86% higher than the general market and they out-pace the general market in the Northeast at a rate 128% higher than general market in that region. Usage of an alternative delivery system (ADS)—personal satellite or wireless cable access—is highest among Asian-Americans in the Midwest and South; not surprisingly, total access for cable plus (any cable TV plus satellite) for Asian-Americans lags that of the general population. Due to the high instances of cord cutting, 15% of Asian-Americans (35% more than the general population) don't have cable or satellite services and would need to be reached by broadcast TV, non-TV media, or online sources. This is especially the case in the Midwest (21%) and South (17%).

# SCREEN TIME COMPETITION INCREASES

Competition for screen time is fierce as more devices offer the opportunity to watch TV programming. Asian-Americans take the lead in using multimedia devices such as audio-video playback multimedia devices, averaging almost twice the minutes per day of the general population. Asian-Americans spend less time per day watching live TV (about two hours, versus the total population average of about four and a half hours). Asian-Americans living in the Northeast watch the least live TV, while those in the West and South watch more, although still less than the general population. Those in the Midwest region spend over 30 minutes per day watching programming on multimedia—by far the most of any of the U.S. regions.

## TIME SPENT ACROSS DEVICES BY U.S. REGION

AVERAGE TIME SPENT PER DAY (HOURS:MINUTES:SECONDS)	ASIAN-AMERICAN VS. TOTAL POPULATION			ASIAN-AMERICAN BY U.S. REGION			
	TOTAL POPULATION	TOTAL ASIAN- AMERICAN	INDEX	MIDWEST	NORTHEAST	WEST	SOUTH
DVD PLAYBACK	0:09:18	0:06:46	73	0:07:11	0:06:17	0:07:25	0:05:30
DVR PLAYBACK	0:32:36	0:18:21	56	0:18:10	0:10:54	0:21:53	0:19:37
LIVE TV	4:28:43	2:09:10	48	2:01:41	1:55:21	2:16:17	2:15:39
VIDEO GAME CONSOLE	0:17:51	0:13:08	74	0:16:24	0:07:45	0:13:12	0:17:18
MULTIMEDIA (INTERNET-CONNECTED DEVICE + AUDIO-VIDEO)	0:12:25	0:22:02	177	0:30:23	0:21:13	0:19:19	0:23:08

Source: Nielsen NPOWER, Quarter 4, September 21, 2015 – December 27, 2015, based on Asian-Americans versus total population.

Note: Although the sample design is not controlled by Asian-language, we make significant efforts to accommodate non-English speaking respondents and as such, our Asian panelists include both English and non-English language speaking populations.

As would be expected from early adopters, Asian-Americans are spending significantly less time watching content on DVD and DVR playback. They also spend less time on video game consoles, with Asian-Americans in the Northeast spending by far the least amount of time; those in the Midwest and South spend significantly more.

# TV SHOWS REFLECT CULTURAL CONNECTIONS

Asian-American actors and actresses are playing an increasingly prominent role in prime-time television. Network shows with Asian-American leading roles include ABC's sophomore comedy *Fresh off the Boat*, starring Randall Park, its creator, and its freshman drama, *Quantico*, featuring former Miss World, Priyanka Chopra. Thirty-five percent of all network shows now feature at least one Asian cast member in a main role, according to Fusion.net.

In addition to landing acting roles, Asian-Americans are also becoming a major force in producing, writing and directing broadcast television. Besides Mindy Kaling's success as a producer, director and writer on NBC's *The Office*, and later as the creator, producer and lead actress of Hulu's *The Mindy Project*, there is Chinese-American actress and director Lucy Liu, who currently stars in CBS's *Elementary* and directed an episode for USA Network's *Graceland* during the last broadcast season.

## 2x

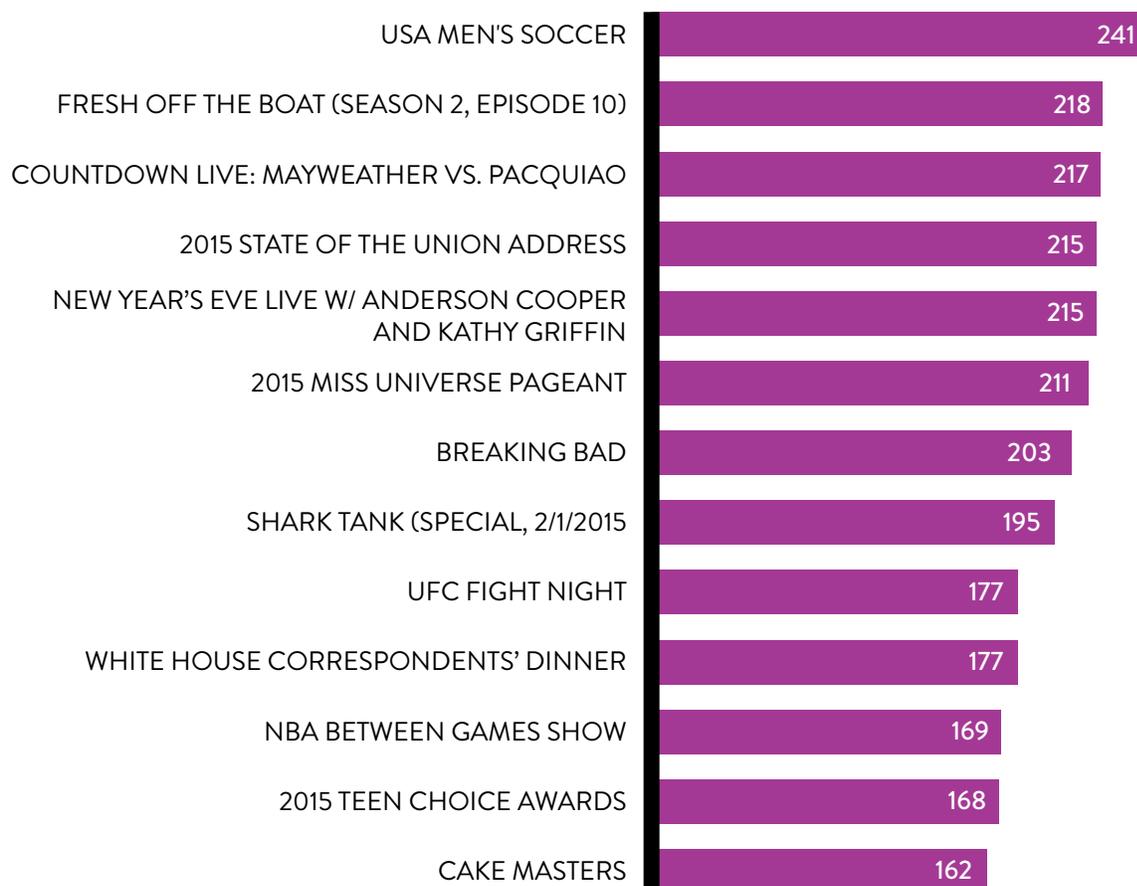
ASIAN-AMERICANS SPEND  
NEARLY TWICE AS MANY  
MINUTES PER DAY USING  
MULTIMEDIA DEVICES THAN  
THE TOTAL POPULATION



High-indexing programs from the 2014-2015 broadcast television season, where Asian-American viewership over-indexed against the total population, reflect Asian-American culture and passion points. Specific sports shows (soccer, basketball, boxing, and the Ultimate Fighting Championship [UFC]) highly over-index versus the general population. Asian-Americans' viewership of special-event shows such as the 2015 State of the Union Address, the 2015 Miss Universe pageant, and the 2015 Teen Choice Awards all doubled or nearly doubled the total population in strength of viewership. High-indexing programs, during the 2014-2015 broadcast season, among Asian-American viewers were ABC's *Fresh off the Boat*, HBO's *Breaking Bad*, ABC's *Shark Tank*, and Food Network's *Cake Masters*. *Shark Tank* and *Cake Masters* making them likely candidates for high levels of viewing among Asian-Americans both reflect entrepreneurial drive and spirit.

## 2014 - 2015 HIGH-INDEXING PROGRAMS AMONG ASIAN-AMERICAN VIEWERS

(HIGH-INDEXING PROGRAMS AMONG ASIAN-AMERICANS VS. TOTAL POPULATION)



Source: Nielsen NPOWER, 2014-2015 season, September 22, 2014 – September 20, 2015, based on Asian households versus total population. Programs with less than a 1.0 rating among Asian-American households have been omitted.

Note: Although the sample design is not controlled by Asian language, we make significant efforts to accommodate non-English speaking respondents and as such, our Asian panelists include both English and non-English language speaking populations.

# A REGIONAL LOOK AT IN-LANGUAGE BROADCAST MEDIA OPTIONS

Asian-American consumers over-index for video-streaming services and are early adopters of the newest platforms, but the rise of multicasting or “diginets”—a digital television technology that gives viewers access to local broadcast TV channels broadcast simultaneously by their local TV providers—has offered a compelling option through digital tuners to Asian-American viewers who consume Asian-language media.

A look at five of the top Nielsen designated market areas (DMAs) reveals that Asian-Americans have myriad broadcast choices being offered by their local broadcasters through multicasts. In Los Angeles, there are two Asian in-language television channels, but there are 44 multicasts being offered to viewers through digital tuners. New York offers 18 multicasts, which allow viewers of varied cultural backgrounds to view news and entertainment in the language of their country of origin. These options, in conjunction with in-language broadcast radio choices, offer marketers multiple options when planning hyperlocal media strategies.

Through paid and free local TV, most Asian-American homes have access to Asian-language TV. This may explain why the digital bucket that contains unmeasured digital subchannels (which a majority of these in-language viewing sources are) can be one of the highest rated viewing sources among Asian-Americans. In Los Angeles, the PTZD digital bucket achieves a 1.5 household rating and a 7% share of total day viewing surpassing any individual broadcast or cable network. Though this bucket likely includes some English-language content, it is likely that much comes from in-language content. (Source: Nielsen NLTV: February 2016 Los Angeles PTZD Monday-Sunday 3:00 A.M.-3 A.M.) Nearly half of Asian-Americans watching English TV are dual-language viewers, meaning they also watch TV in an Asian language.\* Watching TV in two languages can be a source of culture sustainability that keeps families connected with their distant family members and friends and with their native culture. The ability to fully function with effortless duality in more than one culture is rapidly becoming an advantage in today’s more multicultural America.

\*Source: Nielsen TV Brand Effect, Panel Data January 1, 2013 - December 31, 2013. Asian Language data through February 10, 2014.



## NUMBER OF ASIAN IN-LANGUAGE BROADCAST AND MULTICAST TELEVISION CHANNELS

DMA	MULTICAST	MAIN CHANNEL
LOS ANGELES	44	2
NEW YORK	18	5
SAN FRANCISCO-OAKLAND	21	2
HONOLULU	2	2
WASHINGTON, D.C.	7	1

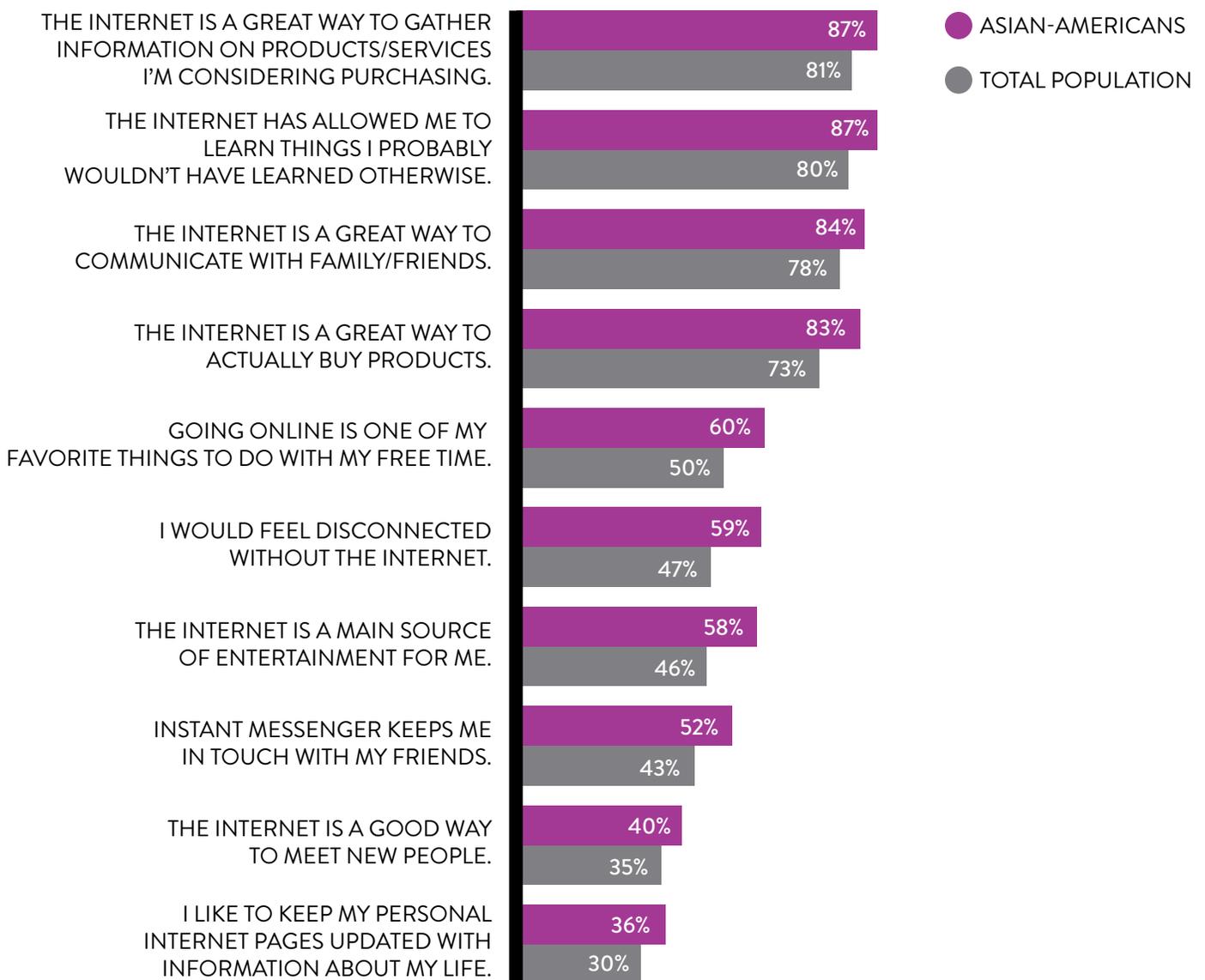
Source: LA18-KSCI TV and Nielsen’s Asian Pacific American External Advisory Council.



Asian-Americans continue to over-index on many Internet-related topics. The majority agrees, at a higher rate than the general market, that the Internet is a great way to gather information about and buy products, to learn things they would not have learned otherwise, and to communicate with family and friends. Asian-Americans also agree, at a higher rate than the total population, that going online is one of their favorite pastimes, is a main source of entertainment, and keeps them connected to their friends.

## ASIAN-AMERICANS' INTERNET ATTITUDES COMMAND ATTENTION

(PERCENT OF ASIAN-AMERICANS MORE LIKELY TO AGREE VS. TOTAL POPULATION)



Source: Scarborough USA+ 2015 Release 2 Total (August 2014 - October 2015), GfK/MRI Attitudinal Insights.

# REGIONAL WEBSITE VISITS

## WHAT ARE THE DIFFERENCES?

As voracious consumers of web content, Asian-American consumers have favorite sites they frequent, which often vary by region. In order to connect with these early adopters, an understanding of the similarities and differences between Asian-American consumers in the four U.S. regions of the country is critical. The top websites with the highest use by Asian-Americans are fairly similar in all regions of the country. Google takes the No. 1 spot, at 66% to 68% across all regions, followed closely by Yahoo, MSN sites, YouTube, Facebook and Amazon. Notable regional standouts include Wikipedia, AOL and eBay in the Northeast; NBCUniversal and Yelp in the West, and Google Maps in the Northeast and South.



## U.S. REGIONAL WEBSITE PREFERENCES AMONG ASIAN-AMERICANS

(PERCENT OF ASIAN-AMERICANS WHO VISIT WEBSITES)

	WEST	SOUTH	NORTHEAST	MIDWEST
GOOGLE	67%	68%	68%	66%
YAHOO	52%	49%	52%	44%
MSN/OUTLOOK/BING/SKYPE	46%	52%	53%	42%
YOUTUBE	44%	45%	53%	37%
FACEBOOK	41%	42%	44%	37%
AMAZON	39%	36%	47%	31%
MICROSOFT	38%	37%	43%	34%
GMAIL	32%	31%	41%	29%
YOUTUBE	29%	25%	30%	25%
AOL	26%	21%	30%	21%
NBC UNIVERSAL WEBSITES	25%	19%	20%	17%
APPLE	25%	23%	26%	20%
YAHOO (HOME PAGE)	24%	24%	23%	20%
WIKIPEDIA	23%	24%	32%	22%
YAHOO/ABC NEWS WEBSITES	22%	18%	22%	9%
YELP	22%	11%	14%	8%
eBAY	20%	17%	25%	14%
YAHOO MAIL	20%	20%	24%	16%
GOOGLE MAPS	18%	22%	23%	17%

Source: Nielsen Netview, January, 2016 Brands and Channels, West: East North Central, West North Central, Mountain; North East: New England, Middle Atlantic; South: South Atlantic, East South Central, West South Central; West: Pacific.

Data used in this report is inclusive of multicultural audiences. Asian panelists in Netview are comprised primarily of English-language capable households, but may also include non-English speaking Asian respondents.

There is little in common across regions with regard to which sites over-index among Asian-Americans. The California Lottery site in the West and the New York Lottery site in the Northeast, for example, are the No. 1 over-indexing sites for Asian-Americans relative to the total population within their region. GameFAQs (a site that features tricks for video games) over-indexes in the South and Northeast, while Google Drive over-indexes in the Northeast and Midwest. State, retail, news and reference sites make up most of the list of over-indexing regional websites.

## RETAIL, NEWS AND ENTERTAINMENT SITES ARE POPULAR

(ASIAN-AMERICANS' U.S. REGIONAL WEBSITE VISITS VS. TOTAL POPULATION)

WEST		SOUTH		NORTHEAST		MIDWEST	
CALOTTERY.COM	679	MEDIAFIRE	370	NEW YORK STATE	765	SPOTIFY	222
KAISER PERMANENTE	527	TRIPADVISOR	243	GAMEFAQS	429	THESAURUS.COM	203
CALIFORNIA	524	MICROSOFT OFFICE	210	VERIZON	359	U.S. NEWS MEDIA GROUP/USNEWS.COM	179
COSTCO	372	WEEBLY	207	GAMESPOT NETWORK	256	GOOGLE CHROME	170
PCMAG	363	GAMEFAQS	184	GOOGLE DRIVE	225	GOOGLE DRIVE	134
T-MOBILE INTERNATIONAL	346	BANK OF AMERICA	178	WIKIHOW	221	TIME.COM	129
MARKETWATCH	319	µTORRENT	176	TIME.COM	217	ZIFF DAVIS TECH CONSUMER ELECTRONICS WEBSITES	128
AMERICAN EXPRESS	299	LIBERTY INTERACTIVE GROUP	175	WIKIA	217	REDDIT.COM	127
MOTLEY FOOL	297	DAILYMOTION	168	ADVANCE INTERNET	213	GOOGLE+	126
SLICKDEALS.NET	291	E! ONLINE ENTERTAINMENT WEBSITES	163	MUSL	207	ADOBE	125

Read as: Asian-Americans in the Midwest visited Spotify.com twice as much (122%) as the general population.

Source: Nielsen Netview, January, 2016 Brands and Channels, West: East North Central, West North Central, Mountain; North East: New England, Middle Atlantic; South: South Atlantic, East South Central, West South Central; West: Pacific.

Data used in this report is inclusive of multicultural audiences. Asian panelists in Netview are comprised primarily of English-language capable households, but may also include non-English speaking Asian respondents.



## CONNECTING ACROSS SCREENS WITH ASIAN-AMERICANS WHERE THEY LIVE

- Asian-Americans use multimedia devices more than the general market, making video platforms such as YouTube, Vimeo, and Twitch important to any business strategy used to reach Asian-Americans.
- Asian-American consumers are technology leaders and influencers in all regions of the country. They over-index the general population for all three major Internet personal devices: smartphones, home computers and tablets, with Asian-Americans in the South differing the most from the general market in the region. Online purchasing intentions outpace the general market as well.
- Ninety-three percent of Asian-American households have high-speed Internet access, and 68% have newer streaming technologies such as SVOD.
- Asian-Americans spend half the amount of time on live TV as the general population. Live TV time is higher for Asian-Americans in the West and South and is lowest in the Northeast.
- Asian-Americans as a whole spend less time on video game consoles; however, time spent on game consoles is significantly higher for Asian-Americans in the South and Midwest than in the Northeast.
- Special live-event TV shows (the 2015 State of the Union Address, the 2015 Miss Universe Pageant, the 2015 Teen Choice Awards, etc.), specific sporting events (soccer, basketball, boxing, UFC fighting, etc.), and specific series (*Shark Tank* and *Fresh off the Boat*) highly over-index with Asian-American viewers in all regions of the country.
- Broadcast planning to reach Asian-Americans should include in-language platforms that resonate with in-language preferred viewers who are looking for the authentic cultural connection offered by culture-relevant content producers.
- Many platforms resonate with in-language-preferred viewers, who are looking for the authentic cultural connection offered by in-language, in-culture content. This is especially true in the Midwest (21%) and Southern (17%) regions.
- Frequency of visits to websites are fairly similar for Asian-Americans in all regions of the country, but each region has specific websites that greatly over-index. These provide marketers with key considerations when developing an online strategy.

## SECTION IV

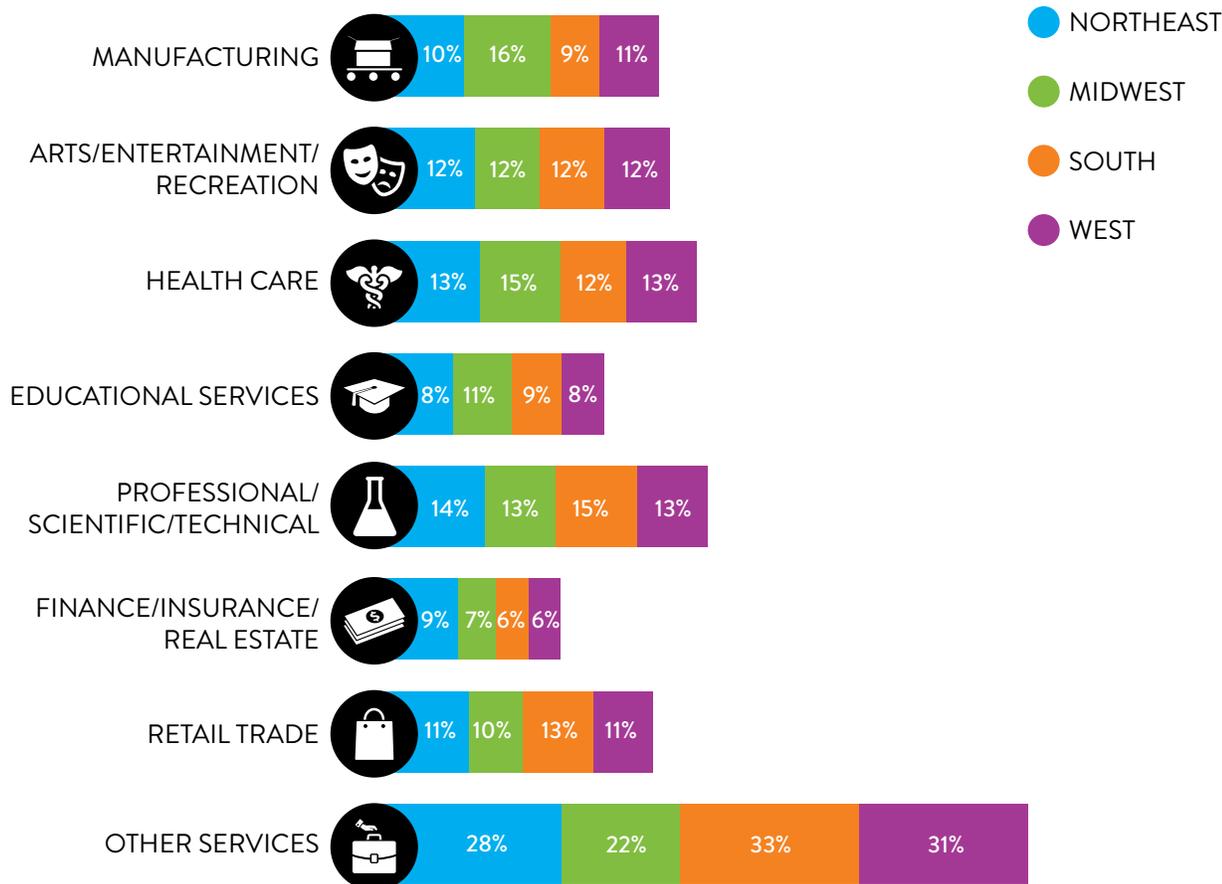
# ASIAN-AMERICAN EMPLOYMENT AND ENTREPRENEURSHIP

An entrepreneurial newcomer mind-set—exemplified by an ethic of self-reliance, innovation and resilience for the betterment of one's self and family financial attainment—is evident among Asian-Americans. In the U.S. Census's recently released *Survey of Business Owners*, the number of Asian-American-owned businesses grew by 24% between 2007 and 2012 and claimed the highest percent sales increase (38%) of any racial or ethnic group. This section will provide greater detail on the Asian-American entrepreneurial regional landscape by exploring the industries in which Asian-Americans are employed and breaking down the details of the boom in Asian-American-owned firms.

## GROWTH INDUSTRIES AND REGIONAL DISTRIBUTION OF EMPLOYMENT

Asian-Americans are actively employed in a wide range of industries, including science, entertainment, health care and educational services. The variety of their collective skills and interests is amplifying and solidifying their social engagement with and contribution to the American mainstream. Of the 11.6 million Asian-Americans in the workforce, about 70% are employees of for-profit businesses, 12% are government employees, 7% work for nonprofits, and 9% are self-employed, while 1% are unemployed. The professional, scientific and technical industry, which employs 1.6 million Asian-Americans, followed closely by the health care industry, which employs 1.5 million, and the arts, entertainment and recreation industry, which employs 1.4 million, are the three primary industries of Asian-American employment.

## INDUSTRY OF EMPLOYMENT FOR ASIAN-AMERICANS, BY U.S. REGION



Source: U.S. Census Bureau; American Community Survey, 2014 American Community Survey PUMS File, one-year estimate.

Health care is the largest industry of employment for Asian-Americans in the West, including four others: professional, scientific and technical (including management and administrative); arts and entertainment; manufacturing; and retail trade. Other industries employing large numbers of Asian-Americans in the West are educational services, and finance, insurance and real estate. In the South, the most common industries of employment for Asian-Americans are: professional, scientific and technical; retail; health care; and arts, entertainment and recreation. Educational services and manufacturing also are big employers in this region.

In the Northeast, Asian-Americans are most likely to work in the professional, scientific and technical industries or in health care. Other big areas of employment in this region are in arts and entertainment, retail, and manufacturing. In the Midwest, the most common industries of employment for Asian-Americans are manufacturing and health care.

# ASIAN-AMERICAN ENTREPRENEURSHIP

## TRENDS FOR MAJORITY-ASIAN-OWNED BUSINESSES

Asian-Americans are avid entrepreneurs: they lead all other groups in the percentage of new-business sales growth. As of 2012, Asian-Americans are the majority owners of almost 2 million businesses in the U.S., with combined sales just under \$708 billion and average sales of \$359,000 per business. The professional, scientific and technical services industries represent the largest portion of those businesses at 14%, in line with the percentage of all firms in that industry. Asian businesses greatly over-index, however, in both the accommodations and food services industry (8%) and other services (20%) while they under-index in the construction industry (4%).

## NUMBER OF MAJORITY-ASIAN-AMERICAN-OWNED BUSINESSES, BY INDUSTRY, 2012



Source: U.S. Census Bureau, Survey of Business Owners, Asian-owned businesses, 2012, released 2015.

In all U.S. regions, the same five industries—professional, scientific and technical; retail trade; health care and social assistance; accommodations and food services; and other services—make up the largest percentages of Asian-American-owned businesses. In the West, however, Asian-American-owned real estate businesses also are numerous, outnumbering businesses that offer accommodations and food services.

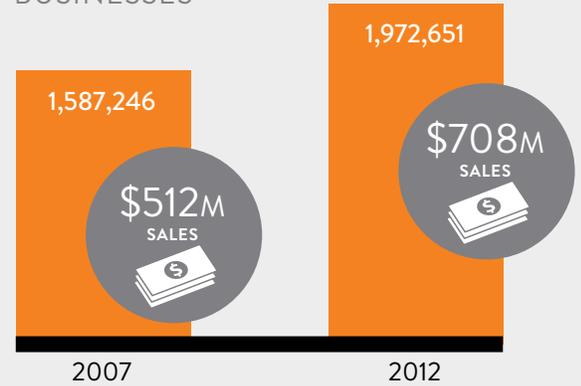
Between 2007 and 2012 the number of Asian-American-owned businesses grew 24% and their sales increased by 38%, the highest sales increase of any ethnic group. Professional, scientific and technical services, along with other services saw the greatest growth in number of businesses, in all regions.

Not surprisingly, the largest number of Asian-American-owned businesses, 32% of the total in the U.S., are located in California, followed by New York (with 12%) and Texas (8%).

Between 2007 and 2012, these three states also saw the greatest increases in the number of Asian-American-owned businesses and their sales revenues. The numbers of businesses grew by 101,000 in California, 47,000 in New York, and 43,000 in Texas. Dollar sales grew approximately by \$49 million, \$15 million and \$23 million, respectively.

### U.S. ASIAN MAJORITY-OWNED BUSINESSES' SALES INCREASED FROM 2007 TO 2012

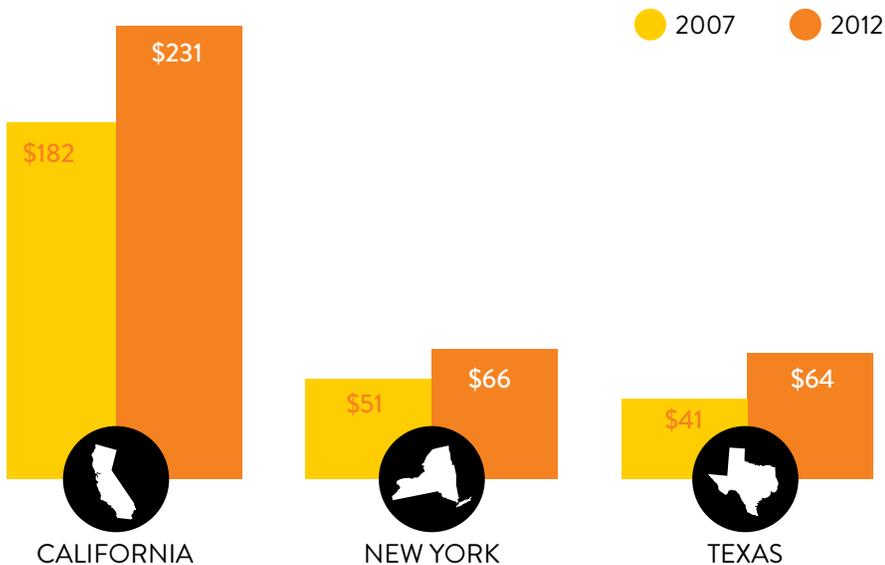
NUMBER AND SALES OF MAJORITY-ASIAN-AMERICAN-OWNED BUSINESSES



Source: U.S. Census Bureau, Survey of Business Owners, Asian-owned businesses, 2007 and 2012.

### SALES OF MAJORITY-ASIAN-AMERICAN-OWNED BUSINESSES IN TOP STATES

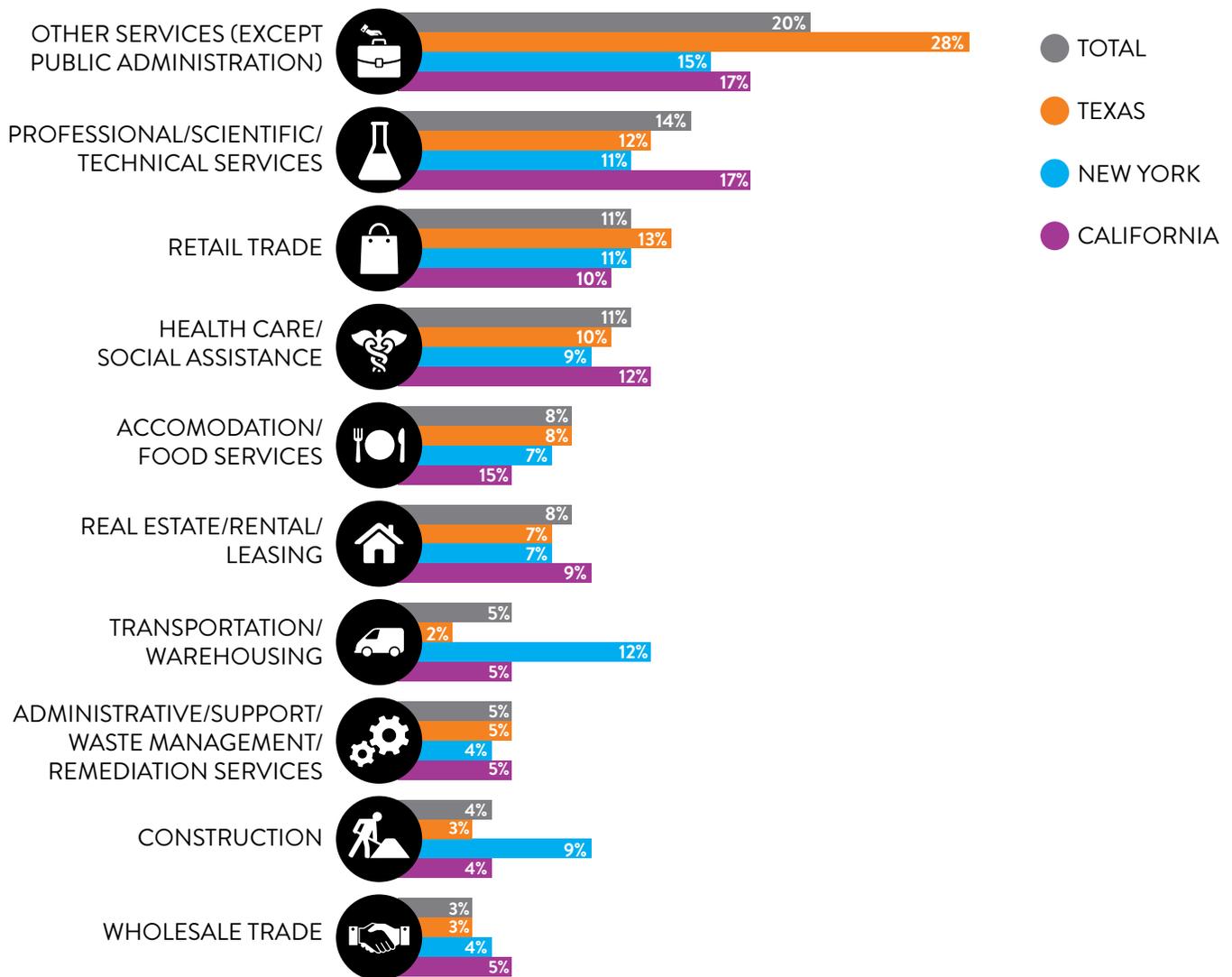
(MILLIONS)



Source: U.S. Census Bureau, Survey of Business Owners, Asian-owned businesses, 2007 and 2012.

Looking at business growth by industry, the growth in the number of Asian-American-owned businesses in California came primarily from three industry groups: professional, scientific and technical; other services; and healthcare and social assistance. In New York, the highest growth came from transportation and warehousing and from other services. In Texas, the highest growth in number of Asian-owned businesses came in health care and social assistance and in other services. California over-indexes for professional, scientific and technical; New York over-indexes for transportation and warehousing and for construction; and Texas over-indexes for other services.

## MAJORITY ASIAN-AMERICAN-OWNED BUSINESSES IN TOP STATES, BY INDUSTRY TYPE



Source: U.S. Census Bureau, Survey of Business Owners, Asian-owned businesses, 2012.



## ASIAN-AMERICANS EXHIBIT A STRONG ENTREPRENEURIAL SPIRIT

- For the 11.6 million Asian-Americans in the workforce, the professional, scientific and technical industries (1.6 million Asian-American employees), the healthcare industry (1.5 million), and the arts, entertainment and recreation industries (1.4 million), are the three primary areas of employment. Only 1% of Asian-Americans is unemployed.
- Health care is the largest industry of employment for Asian-Americans in the West, followed closely by professional, scientific and technical, which is the most common in the Northeast and South. In the Midwest, the most common industry of employment for Asian-Americans is manufacturing.
- Asian-Americans are avid entrepreneurs. As of 2012, Asian-Americans were the majority owners of almost 2 million U.S. businesses, with combined sales just under \$708 billion and average sales of \$359,000 per business. The number of majority-Asian-American-owned businesses grew by 24% between 2007 and 2012 and had the highest percent sales increase (38%) of any racial or ethnic group.
- In all regions, the largest portion of Asian-American majority-owned businesses (14%) and the greatest growth in number of businesses was in the professional, scientific and technical services industry. The largest number of Asian-American-owned businesses are located in California (32% of total), New York (12%) and Texas (8%).



# CONCLUSION

Increasingly diverse and already the nation's fastest-growing immigrant group, Asian-Americans will outnumber Hispanics by 2055 according to U.S. Census Bureau projections. Asian-American immigration is being led by arrivals from China, followed by Indians, Filipinos, Vietnamese, Koreans, and Japanese. As Asian-Americans spread their regional footprint beyond traditional strongholds in the Northeast and West into the Midwest and South, their cultural and economic clout will continue to grow and expand in myriad ways.

Marketers looking to connect with Asian-American consumers, need to re-examine short- and long-term strategies and consider messaging that appeals to the rapidly-evolving market including recent immigrants. One powerful example is Toyota, which conveyed a “smart with sexy” message in a way that was exciting to young urban consumers but also spoke to a traditional appreciation of reliability and value. In a 2011 ad campaign designed to attract Chinese, Vietnamese, and South Korean consumers to its new Camry model and keep its ranking as the No. 1 carmaker for Asian-Americans, Toyota enlisted South Korean actor and pan-Asian celebrity Lee Min-ho to star in a three-part miniseries in which Min-ho wakes up from a coma with only keys to a new Camry to give him clues to rediscovering his identity. The culturally acute campaign showcased an exciting storyline with just enough technical details to connect with the wants and needs of their consumers.

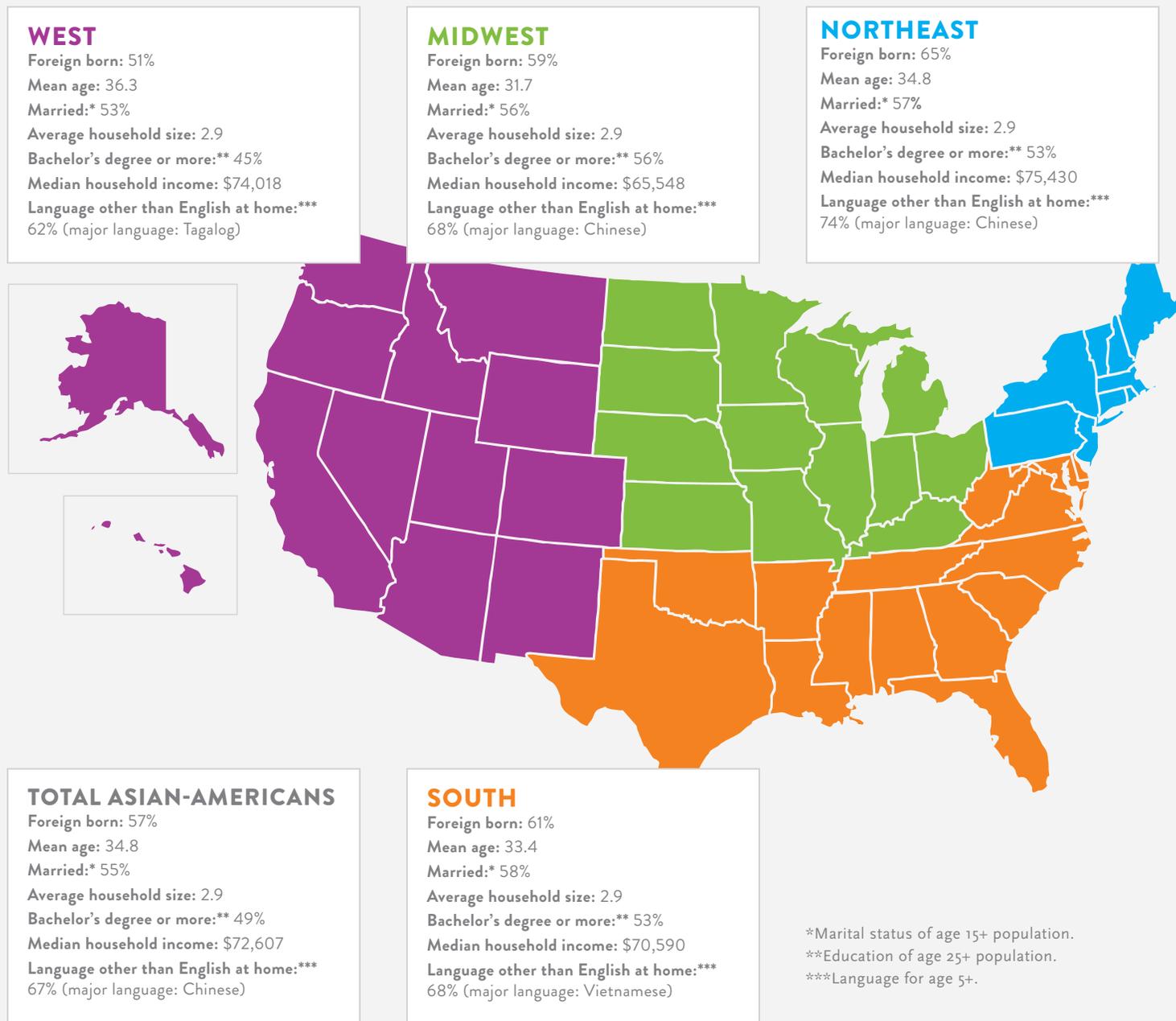
Bolstered by their growing buying power, Asian-Americans are voracious consumers who over-index on a wide variety of products and services, ranging from housing and transportation, to clothing, child care and small appliances. Food is a central focus of family and general well-being for Asian-Americans, who over-index on ingredients for home cooking as well as fine dining in restaurants.

Asian-Americans avidly engage, and are frequent visitors to their favorite websites, which vary by region. While Asian-American tech ownership is strong in all regions, it particularly outpaces that of the general market in the South. In order to connect with these early adopters, an understanding of the similarities and differences between Asian-American consumers in the four U.S. regions is critical.

Though most Asian-American viewers are consuming their in-language news, weather, sports and entertainment programming on free local TV and radio from local broadcasters, they are also moving toward broadband-only TV access at nearly twice the rate of the general population. Ninety-three percent of Asian-American households have high-speed Internet, and subscription video on demand (SVOD) is now found in 68% of Asian-American households, a number that outpaces adoption in other households by 21%.

Furthermore, reflecting a culturally-ingrained mindset of resilience and self-reliance, Asian-Americans are natural-born entrepreneurs and key drivers of new business growth in terms of employment and sales across a variety of industries nationwide.

# APPENDIX: ASIAN-AMERICAN DEMOGRAPHICS BY U.S. REGION



Source: 2014 American Community Survey 1-Year Estimates, PUMS data tabulated by EthniFacts; Asian category and Asian alone.

# METHODOLOGIES

Insights used in this report were sourced from the following Nielsen analytical tools and solutions. All tools offer their own representative levels of consumer insights and behavior across Asian-American and total respondents (based on data collection, survey/panel design, and/or fusion approaches).

## **Homescan Panel Data**

The Homescan national panel consists of a randomly dispersed sample of households that is intended to be representative of, and projectable to, the Total U.S. market. Panel members use handheld scanners to record items with a UPC code that they purchase from any outlet.

The Homescan Total Shopper View panel consists of a subset (80-90%) of the Homescan Panel. In addition to reporting UPC-coded items, panelists use a codebook to report non-UPC items such as deli cheese, fresh meat, and bakery products.

Asian households in the U.S. are recruited online and in English.

Data for this report is based on Homescan panel data from the following period: 52 weeks ending December 26, 2015.

## **Nielsen Scarborough USA+ 2015 Release 2, GfK/MRI Attitudinal Insights Module August 2014 – October 2015**

(Base: Age of respondent summaries: Adults 18+ - Projected 245,403,097, Respondents: 204,396)

By integrating 400+ attitudinal statements and segmentations with Nielsen Scarborough's syndicated data set, this analysis reflects consumer psychographics in the studied categories. The Scarborough study is a sample balanced for the Asian population only in Honolulu; the survey is offered in English and is not offered in any Asian languages.

## **Nielsen Netview**

In July 2011, an improved hybrid methodology was introduced in Nielsen's Netview and VideoCensus product. This methodology combines a census level accounting of page views where Nielsen measurement tags have been deployed in order to project audience and behavior to the full universe of all Internet users.

Hours:minutes:seconds for Internet and video use are based on the universe of persons who used the Internet/watched online video. All Internet figures are weekly or monthly averages over the course of the quarter. All Internet on a PC metrics are derived from Nielsen Netview, while all Video on a PC metrics are derived from Nielsen VideoCensus. The audience of Video on a PC is a subset of Internet on a PC.

As of August 2015, the rules used for crediting page views and duration within Netview have been updated with more comprehensive accounting of multi-tabbed browsing and iFrames, as well as the implementation of a longer timeout threshold for mouse/keyboard inactivity.

These changes resulted in an increase in Internet duration on a PC.

Data used in this report is inclusive of multicultural audiences. Asian panelists in Netview are comprised primarily of English language capable households but may also include non-English speaking Asian respondents. Any non-English speaking Asians were passively recruited as we can't control for all family members

**Nielsen NPOWER** Audience estimates based on a nationally representative panel of people whose televisions are metered with a device called the National People Meter (NPM) that passively detects exposures to codes embedded in content. A comprehensive questionnaire is also collected of the panel.

Data used in this report is inclusive of multicultural audiences. Although the sample design is not controlled by Asian language, we make significant efforts to accommodate non-English speaking respondents and as such our Asian panelists include both English and non-English language speaking populations.

Nielsen Territories: Northeast - Crossed Territory (Northeast and Asian household); South - Crossed Territory (Southeast and Asian household, plus Southwest and Asian household); West - Crossed Territory (Pacific and Asian Household); and Midwest - Crossed Territory (East Central and Asian household, plus West Central and Asian household).

#### **Additional Television Methodology**

Live+DVR/Time-shifted TV includes Live usage plus any playback viewing within the measurement period. DVR/Time-shifted TV is playback primarily on a DVR but includes playback from video on demand, DVD recorders, server-based DVRs and services like Start Over.

TV-connected devices (DVD, Game Console, Multimedia Device) would include content being viewed on the TV screen through these devices. This would include when these devices are in use for any purpose, not just for accessing media content. For example, Game Console would also include when the game console is being used to play video games.

Multimedia Devices is a combination of usage of the Internet Connected Devices viewing source and Audio-Video viewing sources. It would include viewing on an Apple TV, Roku, Google Chromecast, Smartphone, Computer/Laptop, etc. connected to the TV. Reach for television and TV-connected devices includes those viewing at least one minute within the measurement period.

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## ABOUT NIELSEN

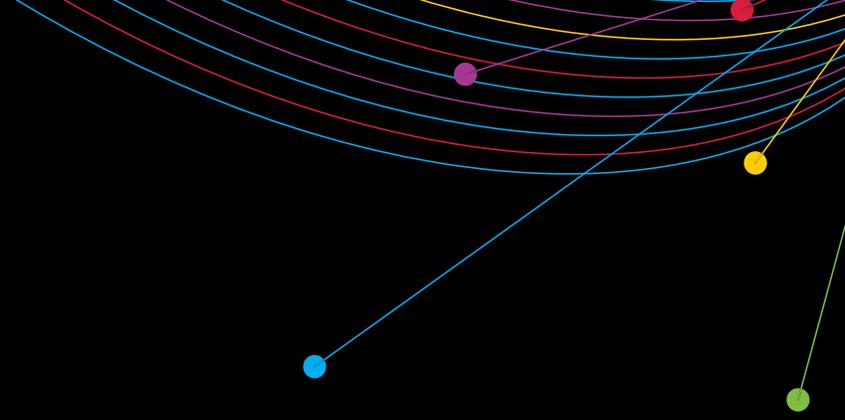
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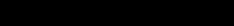
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