



Auto Insurance & S.D. Hispanics



An Industry Taking Notice

Recognizing the Value in Reaching Hispanics



“We’re doing things in the Hispanic market that are driving things to other targets, platforms. Our Hispanic efforts are becoming a best-practices center at the company.”

-Mark Gibson, Vice President of Advertising, State Farm

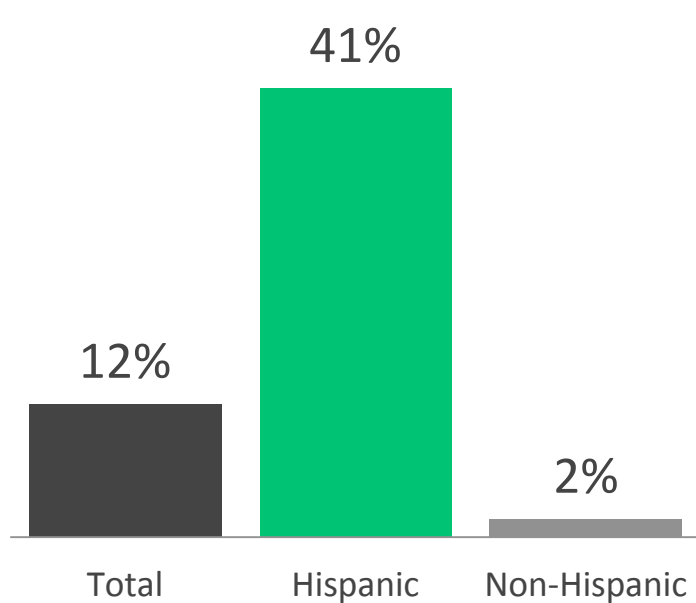


“We are committed to educating the Hispanic community and providing valuable information about safe driving. We care about the well being of all drivers and feel that it is especially important to communicate with the Hispanic driver and provide information in the Spanish language.”

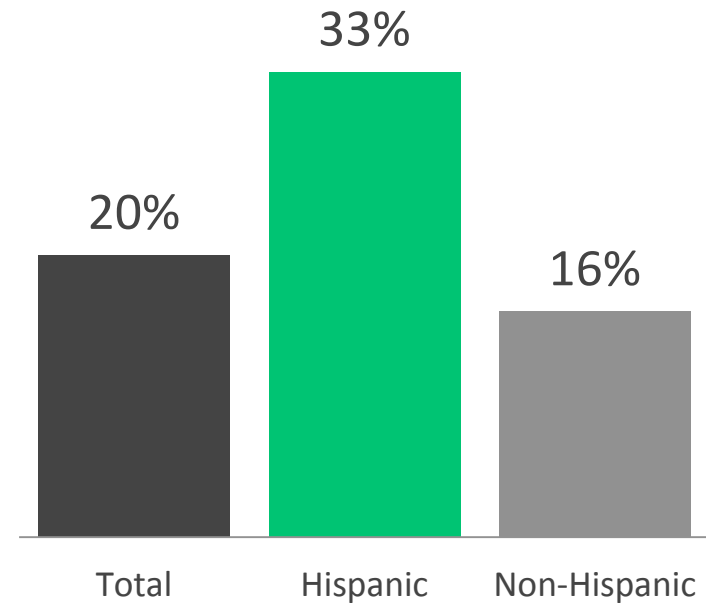
-Marlene O'Clery, GEICO spokesperson

Hispanic Growth is Driving the Market

Growth of San Diego Population:
2000 vs. 2013¹



Growth of SD DMA New Vehicle Sales Volume:
JUN12 RYTD vs. JUN13 RYTD²



Source:1. Geoscape. American Marketscape Datastream 2012 Series. Produced by the Geoscape® Intelligence System (GIS).
2. R.L. Polk & Co, New Vehicle Registrations (Personal Retail includes Leases) Enhanced Ethnic Data, San Diego DMA JUN12 RYTD & JUN13 RYTD

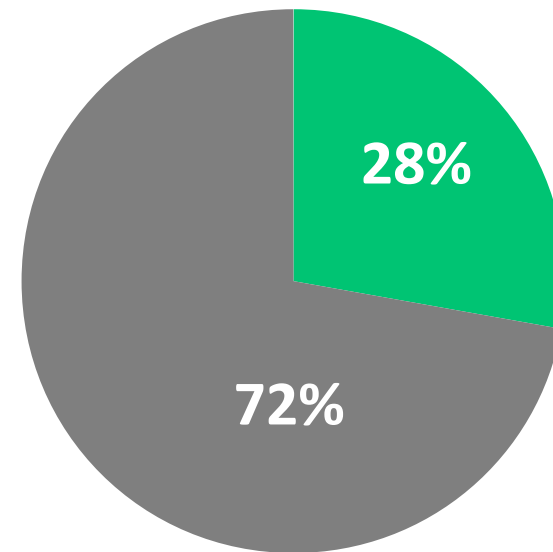
San Diego Hispanic Households

Represent a Large Share of the Auto Insurance Industry

Share of San Diego A18+ Whose HHLH has Auto Insurance

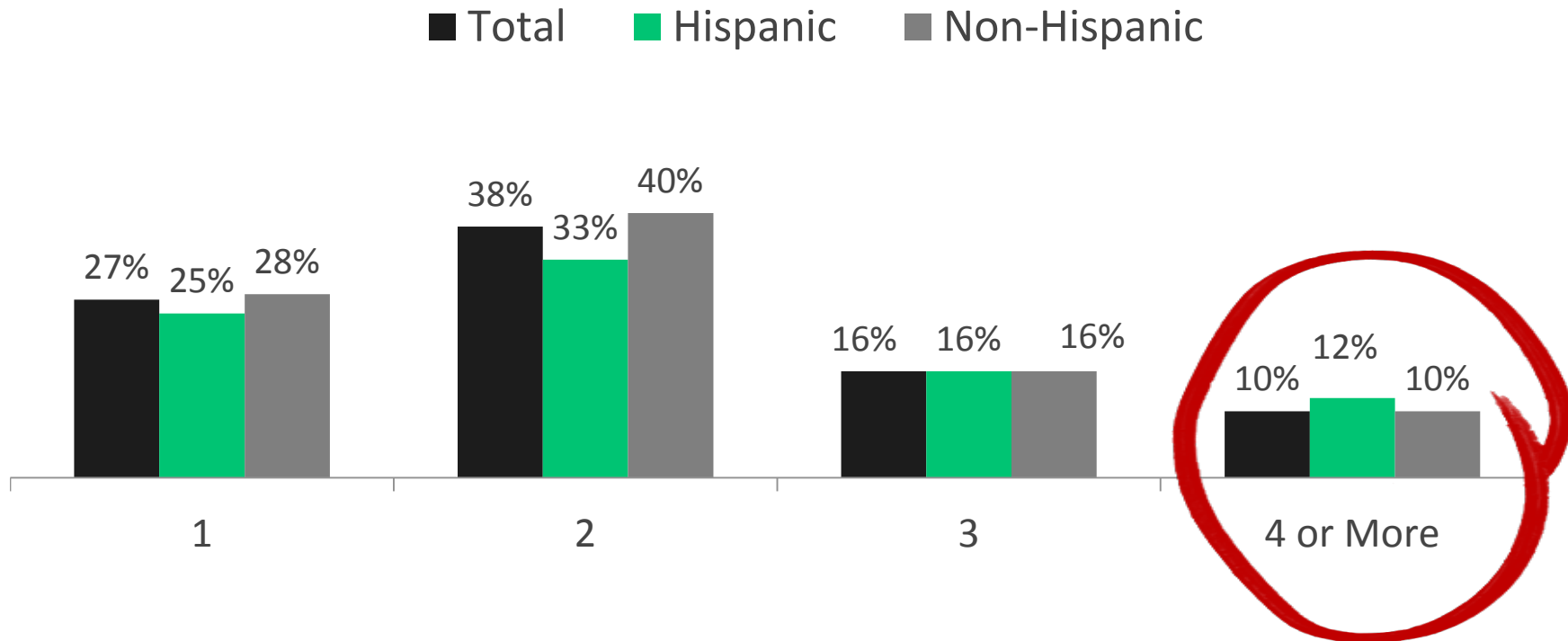


■ Hispanic ■ Non-Hispanic



Hispanics Are More Likely To Own Multiple Vehicles

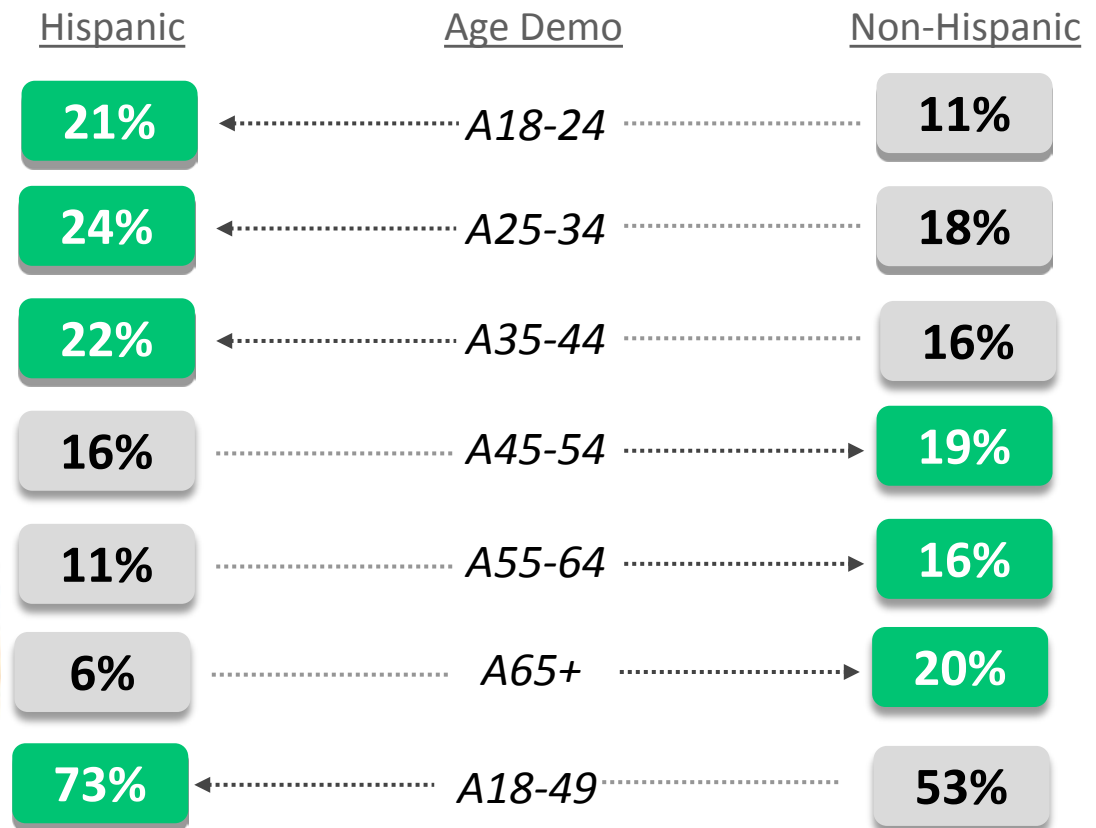
Number of Vehicles San Diego A18+ Households Own



Hispanics Are Also Younger

76% of San Diego A18+ are ages 18-49, compared to 53% of Non-Hispanics

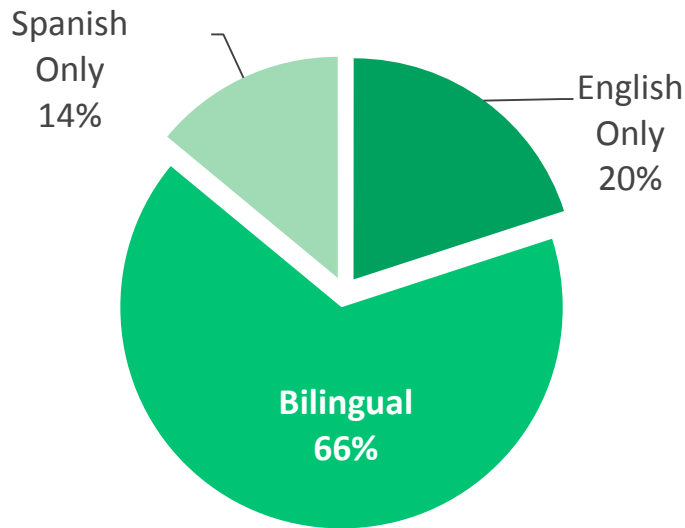
Age Group Share of San Diego Adults 18+



4 in 5 San Diego Hispanics Speak Spanish at Home

Among San Diego Hispanic Adults 18+ ...

Language Spoken at Home



...Agreed with the following

34%

“When I hear a company advertise in Spanish, they make feel like they respect my heritage and want my business”

29%

“I am much more loyal towards companies that show appreciation for our culture by advertising in Spanish”

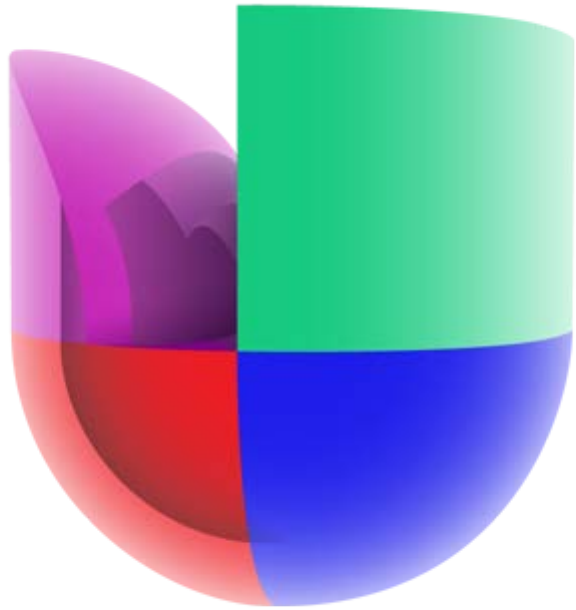
23%

“I remember more about or pay more attention to the products/services that are advertised in Spanish”

Automotive Insurance Landscape

% of San Diego A18+ whose household has a particular Auto Insurance Provider

Auto Insurance Provider	Hispanic	Non-Hispanics
Allstate	11.1%	7.6%
AAA Insurance	9.7%	17.4%
GEICO	7.9%	7.2%
Infinity	6.1%	1.4%
Progressive	5.9%	3.1%
USAA	5.8%	10.4%
Farmers Insurance Group	5.1%	7.3%
21st Century	4.2%	4.2%
State Farm	3.9%	11.1%
Mercury	2.5%	5.2%
Safeco	1.0%	0.7%
Travelers	1.0%	0.7%
Liberty Mutual	0.6%	1.8%
Nationwide	0.4%	1.7%
The Hartford	0.1%	1.7%
Other Provider	27.1%	11.2%



**Learn More.
Gain More.**