

**MUND Group**  
**Market and Public Policy Research**



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## The market in Mexico for media in english

Twenty years ago, México had more media in English and fewer English speakers than today. Why?

Twenty years ago, cable television services were just starting. Now, there are several cable services in English, providing all sorts of offerings, from concerts and movies to news programs.



Twenty years ago, the Internet services were mainly used by academics and technicians. Now, the Internet is omnipresent, representing links of all kinds for culture and information in English.

At the same time, the number of English speakers is at least ten times bigger and than twenty years. The media offerings in English are hundreds of times more varied. Nonetheless, there is space for a publication (with online capacity) that can take advantage of the hunger to read original content in Mexico – a publication that complements other media offerings in English, and is supported by advertising in the style of a quality magazine.





## The market in Mexico for media in english

How do we measure the size of the market of English speakers in Mexico?

Government sources (National Migration Institute and Census) estimate a half million registered foreigners residing in the country. Informal sources indicate the number could be three to six times larger.



**500,000 to 3,000,000 resident English speakers**



Sources such as the Mexican Census and periodic studies of Consulta Mitofsky and the MUND Group confirm that there are more than 1,000,000 Mexicans that (claim to) speak and read in English. The tendency in polls for respondents to over-declare their capacity to speak and read in English. However, it is quite possible that more than half of them are comfortable listening to music and enjoying movies in English.

**500,000 or more English speakers among Mexicans**

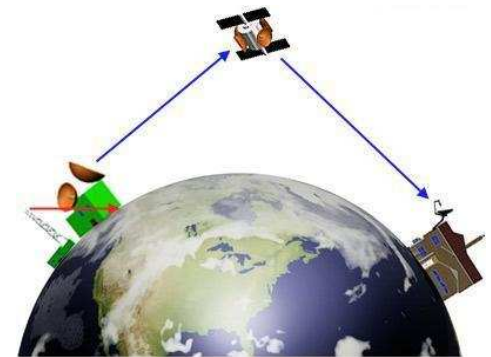


## The market in Mexico for media in english

How do we measure the size of the market of English speakers in Mexico?

At this moment, ITEL (Mexican cable) confirms 4,145,000 homes with cable television. And the COFETEL (Mexican telephone) indicates 1,361,000 satellite television subscriptions. We can anticipate some homes with both services, but it is safe to estimate a market here of 4,500,000 homes. Our monitoring indicates that 12.5% of the cable and satellite offerings are in English.

**562,500 or more English speakers with cable and/or satellite.**



For 2007, CONACINE confirms the sale of 174,200,000 tickets. If every film lover attends 10 times a year, we are projecting 17,420,000 filmgoers in the movie theatres of the country. Of the 3,936 screens in Mexico, 10% of the movies are from Mexico or Spain. 90% come from the USA or are distributed by the USA. Of these 30% come without dubbing, with subtitles.

**5,400,000 or more enjoying movie offerings in English**



## The market in Mexico for media in english

How do we measure the size of the market of English speakers in Mexico?

The most conservative and cautious projection procedure gives us an English speaking market of one million in Mexico:

**1,000,000 (between foreigners and citizens)**



A more realistic, still cautious, method is to project the market in terms of two to three million consumers of English language media.

**2,000,000 to 3,000,000 and growing**



## The market in Mexico for media in english

While the NAFTA has passed its initial period of impact, the idea of North America is evolving with new demographics.

Of the estimated 12,000,000 Mexicans without papers in the USA, up to 800,000 each year are formally requesting papers to become naturalized as American citizens. Of the 12,000,000 Mexicans with double nationality or without papers in the USA, fewer than 25,000 voted in the Mexican elections of 2006. Of the 22,000,000 Mexicans with the right to vote in the USA, we estimate that more than 12,000,000 will vote in the American elections of 2008 (*“Tell me in which election you vote in and I will tell you your nationality.” MUND Group Study*) .



**The growth in Mexico from the natural increase of Mexican families will be modest in the coming period, because a segment of 200,000 to 400,000 will keep leaving each year. This group is within the index of the most fertile couples.**



## The market in Mexico for media in english

While the NAFTA has passed its initial period of impact, the idea of North America is evolving with new demographics.

The pressures of the cost of housing, along with other retirement budget pressures, combined with ample perspectives of long life characterizes many new American and Canadian arrivals in Mexico. The capacity here to provide support in health care, will increase in the coming years as this unanticipated demographic wave increases..

**The growth in Mexico on the part of the foreign immigrants of the third age will be exceptional in the coming period.**





## The market in Mexico for media in english

While the NAFTA has passed its initial period of impact, the idea of North America is evolving with new demographics.

What type of media are the most appropriate for this segment, of people with education, resources and a positive orientation towards their new country of residency?





## The market in Mexico for media in english

In order to have commercial success, the media has to find points that are complementary and not competitive. Beyond consumer brands, a publication must seek to promote the consumption of music, movies, theatre, radio, television, Internet, magazines and books in general.

A publication can take advantage of and promote all the other media by:

- Being a reference point for consumption by having quality advertising
- Previewing new products and reviewing cultural products and services
- The original content of a quality publication, (that is to say its presentation, its commentary, its reviews, its articles) constitute a validation for its advertisers.



## The market in Mexico for media in english

### Corporate vision of the MUND Group

Our objective is to provide service to our clients in the areas of public policy, the evaluation of government services, and markets in transition. We work to consolidate our position as a critical point of reference in the framework of the development of societies and markets. We seek to become the point of origin for the most reliable information in the realms of research and consultancy. The MUND Group is the name used in the public studies of MUNAMLAT, S.A. de C.V.

**Dan Lund**  
**President**

