

Investing in California's Infrastructure & Keeping Californians Connected

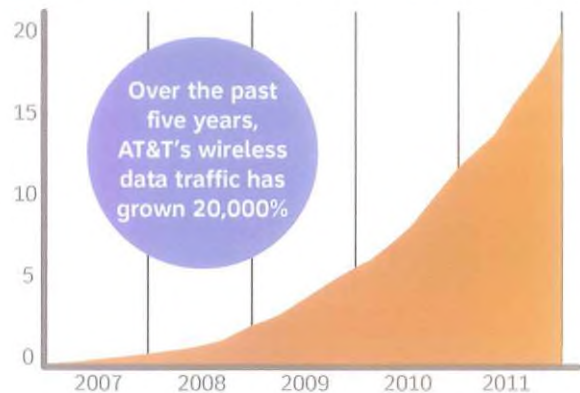
The Number of California Wireless Users is Growing

- At more than 33 million,¹ California leads the nation with more wireless consumers than any other state. And they depend on wireless service for their tablets, netbooks, picture frames, eReaders, cameras and even their cars. Wireless technology is now ingrained into Californians' on-the-go lifestyles.

The Way Californians' Use Wireless Devices Has Changed in Dramatic Ways:

Technology has evolved and Californians now use wireless devices to watch movies, read newspapers, read books, listen to music and consume other media.

- In the last five years, wireless data on AT&T's network has grown by **20,000 percent**.
- **44 percent** of African-Americans and Latinos are smart-phone users.²
- **88 percent** of American adults have a cell phone, **57 percent** have a laptop, **19 percent** own an e-book reader, and **19 percent** have a tablet computer.
 - **63 percent** of American adults go online wirelessly with one of those devices.³
- Both African Americans and English-speaking Latinos are more likely to own a mobile phone than whites.
 - Over half of all Black (56 percent) and Hispanic (51 percent) cell phone users use their mobile devices to access the Internet as compared to 39 percent of White cell phone users.⁴



More Californians Rely Exclusively on Wireless Devices

- More than 3 of every 10 households (31.6 percent) had only a wireless phone as of June 2011, **up from 13.6 percent** in 2007.⁵

California's Small Businesses Rely on Wireless Like Never Before

- Nearly all small businesses (96 percent) use wireless technologies in their operations, with almost two-thirds (63 percent) indicating that they could not survive — or it would be a major challenge to survive — without wireless technologies.
- More than four in 10 (43 percent) small businesses report all of their employees use wireless devices or technologies to work away from the office, a **nearly 80 percent jump** over the past three years.
- Despite being a relatively new technology device, two-thirds (67 percent) of small businesses indicate that they use tablet computers, **up from 57 percent** a year ago.
- **85 percent** of small businesses reported using smartphones for their operations, **up from 80 percent** last year and more than double the usage five years ago (42 percent).⁶

Californians Rely on Wireless Especially During an Emergency

- **74 percent** of Americans who own mobile phones say they have used their hand-held device in an emergency and gained valuable help.⁷
- **Nearly 90 percent** of cell phone users believe mobile technology is important for communicating during an emergency or a crisis.⁸
- **40 percent** of cell owners said they found themselves in an emergency situation in which having their phone with them helped.⁹

¹FCC's Local Telephone Competition: Status as of December 31, 2010.

²Pew Research Center's Internet & American Life Project, Smartphone Adoption and Usage Report, 7/11/11.

³Pew Research Center's Internet & American Life Project, Digital Differences Report, April 13, 2012.

⁴Ibid.

⁵National Center for Health Statistics (December 2011).

⁶AT&T Small Business Technology Poll 2012.

⁷Pew Research Center.

⁸Amplitude Research.

⁹Pew Research Center's Internet & American Life Project, Telephone Survey, May 22, 2011.

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AT&T INVESTS MORE THAN \$1.7 BILLION IN THE GREATER LOS ANGELES AREA FROM 2009 THROUGH 2011 TO IMPROVE LOCAL NETWORKS

Company Builds New Cell Sites, Boosts Capacity and Adds Fiber Optics to Enhance Networks

LOS ANGELES, CA., MARCH 28, 2012 — AT&T* invested more than \$1.7 billion** in the Greater Los Angeles area wireless and wireline networks from 2009 through 2011 with a focus on improving the company's mobile Internet coverage and overall performance of its networks.

During 2011, AT&T made nearly 2,250 wireless network upgrades in four key categories in the Greater Los Angeles Area. These enhancements include:

- Activating approximately 25 new cell sites or towers to improve network coverage.
- Enhanced more than 60 cell sites to improve network coverage.
- Deploying faster fiber-optic connections to nearly 1,000 cell sites. Combined with HSPA+ technology, these deployments enable 4G speeds***.
- Adding capacity or an extra layer of frequency to cell sites – like adding lanes to a highway – with the addition of more than 1,150 of these layers, or “carriers”.

AT&T also launched its new 4G LTE**** network in the Greater Los Angeles Area on January 5.

“Our goal is to deliver a network experience that mobilizes everything for customers,” said Jace Barbin, AT&T’s vice president/general manager for the Greater Los Angeles Area. “The ongoing investment we’re making in Los Angeles is designed to increase coverage and reliability, and to provide advanced services to our customers. Paired with the recent launch of our 4G LTE network in the Greater Los Angeles Area, customers can use wireless technology to its full potential.”

[CNN Money recently recognized AT&T](#) for enhancing its wireless network. Last year, AT&T completed 150,000 network enhancements across the country, more than triple the year before, giving customers more capacity and faster speeds, as well as improving 3G dropped-call performance by 25 percent.

"To conduct business and stay connected with friends and family, Californians use wireless communications now more than ever before," said Gary Toebben, President and CEO, Los Angeles Area Chamber of Commerce. "I applaud AT&T's continued investment in its wireless network and commitment to the communication needs of California's residents and businesses."

AT&T plans to support the build or upgrade of thousands of cell sites nationwide to increase network speed, coverage and reliability for both mobile voice and [Internet services](#). In addition, AT&T plans to install additional radio "carriers" at thousands of cell sites nationally, enabling new layers of spectrum capacity to carry larger volumes of mobile Internet traffic. Additional capacity helps support rising mobile data traffic volumes, which continue to increase at a rapid pace.

AT&T operates the [nation's largest Wi-Fi network](#)***** with nearly 30,000 hotspots in the U.S., more than 4,090 hotspots in California and provides access to nearly 190,000 hotspots globally through roaming agreements. Most AT&T smartphone customers get access to our entire national Wi-Fi network at no additional cost, and Wi-Fi usage doesn't count against customers' monthly wireless data plans. In 2011, customers made 1.2 billion AT&T Wi-Fi Connections, with 486.9 million connections in the 4th quarter alone.

For more information about AT&T's coverage in the Greater Los Angeles Area, or anywhere in the United States, consumers can visit the [AT&T Coverage Viewer](#). Using the online tool, AT&T customers can measure quality of coverage from a street address, intersection, ZIP code or even a landmark.

For updates on the AT&T wireless network, please visit the [AT&T network news](#) page.

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*AT&T products and services are provided or offered by subsidiaries and affiliates of AT&T Inc. under the AT&T brand and not by AT&T Inc.

**Capital expenditure and network upgrade numbers includes both the Los Angeles-Long Beach-Santa Ana Metropolitan Statistical Area (MSA) and Oxnard-Thousand Oaks-Ventura MSA.

***4G speeds delivered by HSPA+ with enhanced backhaul. Available in limited areas. Availability increasing with ongoing backhaul deployment. 4G device required. Learn more at [att.com/network](#).

**** Limited 4G LTE availability in select markets. Deployment ongoing. 4G LTE device and data plan required. LTE is a trademark of ETSI. 4G speeds not available everywhere. Learn more at [att.com/network](#).

***** Largest based on company branded and operated hotspots. Access includes AT&T Wi-Fi Basic. A Wi-Fi enabled device required. Other restrictions apply. See [www.attwifi.com](#) for details and locations.

HIGHLIGHTS FROM

STATE OF THE HISPANIC CONSUMER: THE HISPANIC MARKET IMPERATIVE

More than 52 million strong and representing the majority of population growth over the next five years, Latinos have become a prominent actor in all aspects of American life. Latinos are a fundamental component to future business success, with a projected buying power of \$1.5 trillion in 2015. It's increasingly important for marketers to understand how to connect with the audience by sheer virtue of demographic change, the social and cultural shifts expected to accompany Hispanics continued growth. To highlight these trends, Nielsen created the *State of the Hispanic Consumer: The Hispanic Market Imperative*. Key findings in the report included:



DEMOGRAPHICS AND PURCHASING POWER:

- Hispanic buying power is currently \$1 Trillion, but by 2015, it will increase by half to \$1.5 Trillion.
- By 2050, the U.S. Hispanic population is expected to grow by 167% (even if immigration is halted, Latino population growth will persist).

- More English-dominant Hispanic Adults now want to read, watch, and explore more Spanish media.
- Latinos skew younger. The average age is 28, compared to the total market average of 37.

TECHNOLOGY ADOPTION

- Latinos spend 68% more time watching video on the internet and 20% more time watching video on their mobile phones compared to non-Hispanic Whites.
- Latinos are 28% more likely to own a smartphone than non-Hispanic Whites.
- Hispanics outpace all ethnic groups in mobile data service consumption including music, picture downloads, and rely on mobile devices for internet connectivity.

CONSUMER

- Latinos make fewer shopping trips (142), but spend more (\$52) compared to \$47 for non-Hispanics, (about \$362 more annually per household).
- Latinos tend to spend more on categories which include baby products, hair care, toiletries and beverages.

ADVERTISING

- Latinos tend to be brand loyal and language can influence an advertiser's ability to connect with the Hispanic audience.
 - Hispanics remember English language commercials just as well as the general market.
 - The same commercial shown in Spanish, bumps up ad recall by as much as 30%.
 - Latinos like ads 51% more if they are viewed in Spanish.



Snap here to download full report or visit www.nielsen.com/latinos.

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