

HISPANIC FACT PACK

A SUPPLEMENT TO
AdvertisingAge

FACT PACK

2008 Edition

**Annual Guide
to Hispanic
Marketing
and Media**

crain

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HISPANIC FACT PACK

What's up (and down) in the U.S. Hispanic market.

AS U.S. AD SPENDING growth virtually ground to a halt in early 2008, the \$4 billion U.S. Hispanic market continued to post small but respectable gains.

In the first quarter of 2008, spending on Spanish-language TV grew by 4.4% and Spanish-language magazines surged by 14.2%, while the U.S. media market as a whole grew by just 0.6%, according to TNS Media Intelligence. Spanish-language newspapers, however, fared no better than their general market counterparts, falling 5.3%, in line with the 5.2% drop for ad spending in the overall newspaper market.

In 2007, Hispanic media ad spending grew by 4.2% while the general market was essentially flat at 0.2% growth, according to TNS. The biggest Hispanic surge was in internet media, up 36.3% in 2007.

Advertising Age's fifth annual Hispanic Fact Pack includes data about marketers' 2007 ad spending by company and category, demographic trends, and rankings of top TV, radio, newspaper, magazine and online media. Expanded information on digital media and how it is used by Hispanics is included.

Ad Age's exclusive ranking of the top 50 U.S. Hispanic agencies for the first time includes non-Hispanic agencies that report a significant amount of Hispanic business.

Most Hispanic agencies had a good year, with only three of the top 25 seeing a drop in revenue.

For marketers, it was a mixed year. Seven of the top 10 Hispanic advertisers cut their budgets in 2007, including double-digit drops by AT&T (-10%) and Verizon Communications (-13%). Further down the ranking, Coca-Cola Co. slashed spending by 48% and PepsiCo by 30%. Other marketers stepped up with new support for the Hispanic market, as insurance companies State Farm and Allstate boosted spending by 91% and 26%, respectively, and Kraft Foods was up by 34% and Toyota Motor Corp. by 17%.

In 2008, Univision Communications continued its legal wrangles with its main program provider, Mexico's ambitious media giant Grupo Televisa. A U.S. trial to determine the fate of their long-term programming agreement was repeatedly postponed as the two sides tried to negotiate an agreement.

The No. 2 Spanish-language TV network, NBC Universal-owned Telemundo, poached Jacqueline Hernández, publisher of the biggest Spanish-language magazine, *People en Español*, for the new post of chief operating officer.

—Laurel Wentz

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0159. Staff: Kevin Brown, Bradley Johnson, Maureen Morrison, Maura Wall, Laurel Wentz. This Hispanic Fact Pack is a supplement to Advertising Age, published July 28, 2008. Digital PDF versions of this document can be downloaded in the DataCenter at AdAge.com.

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GUIDE TO SPEAKING TR3S

LESSON #092



◀ **COOLTURA:** Our top-secret mechanism of cool, engineered to determine what's in, what's out, and what's next in Latino youth culture.

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COOLTURA

The 100 young Latinos of the **Cooltura** panel keep us dialed in to the mindset of young Latinos, who are becoming more influential than ever. We take their insights on everything from music to fashion to technology, and turn them into compelling content and experiences that resonate in the barrio and beyond. You could say they're our secret weapons. Contact Andrea Piskora, Trade Marketing Manager at 212-846-7560 for more info.

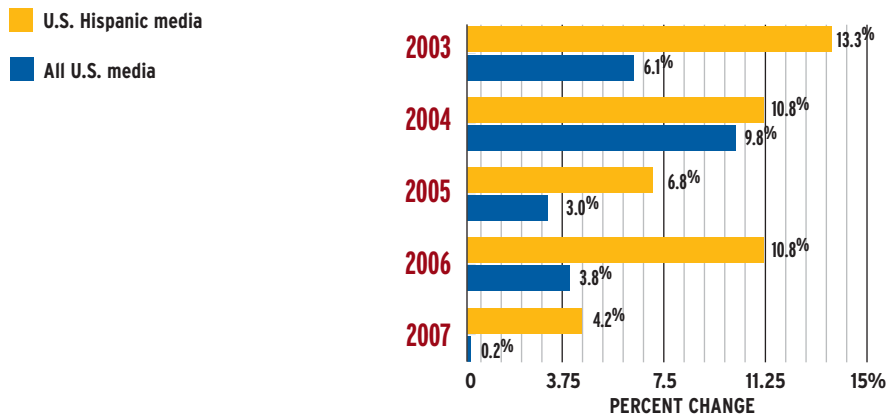


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ADVERTISING & MARKETING

HISPANIC MEDIA AD SPENDING GROWTH RATES

Versus all U.S. measured media ad spending growth, 2003 to 2007



Hispanic media data from HispanTelligence, research arm of Hispanic Business, based on input from TNS Media Intelligence, media industry experts, advertising agencies and public records. All U.S. media data from TNS Media Intelligence.

AD SPENDING BY CATEGORY IN HISPANIC MEDIA

RANK	CATEGORY	U.S. GROSS MEASURED ADVERTISING SPENDING		
		2007	2006	% CHG
1	Automotive	\$725,276	\$717,583	1.1
2	Retail	584,427	601,538	-2.8
3	Telecommunications, internet services and ISP	549,622	513,760	7.0
4	Food, beverages & candy	285,507	327,377	-12.8
5	Restaurants	280,936	250,340	12.2
6	Movies, recorded video & music	274,236	359,035	-23.6
7	General services	246,315	218,157	12.9
8	Personal care	227,560	237,304	-4.1
9	Medicine & remedies	203,281	170,456	19.3
10	Financial services	167,420	139,233	20.2

Dollars in thousands. Media from TNS Media Intelligence represents combined totals for TV from broadcast TV networks, Galavision (cable) and Spanish-language spot TV stations; print from Spanish-language magazines (including four PIB-monitored Spanish-language magazines) and Spanish-language newspapers and Hispanic web sites. Categories aggregated by Ad Age. Only the top 10 are shown.

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Here's your opportunity to get your brand into the action.

From concept to screen, only Telemundo can showcase your brand and integrate your message inside the telenovelas that Hispanic audiences love.

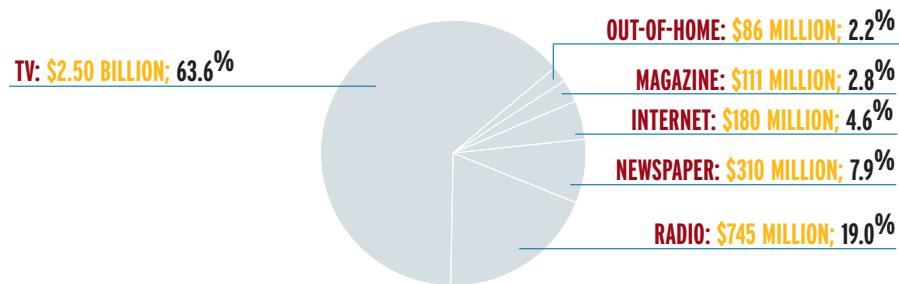
Call Mike Rodríguez, SVP Sales & Marketing at 212-664-7417.



HISPANIC MEDIA AD SPENDING

U.S. measured media ad spending

MEDIUM	ADVERTISING SPENDING		
	2007	2006	% CHG
Network/national TV	\$1,789.4	\$1,733.9	3.2
Local TV	707.0	690.1	2.5
National radio	221.3	214.3	3.3
Local radio	524.1	511.7	2.4
National newspapers (excl. classified)	123.8	120.7	2.5
Local newspapers (excl. classified)	185.8	182.0	2.0
Internet	179.9	132.0	36.3
Magazines	110.6	100.2	10.4
Out-of-home	86.2	83.9	2.8
Total	3,928.0	3,768.7	4.2



Dollars in millions. Data from HispanTelligence, the research arm of Hispanic Business. National totals based on input from TNS Media Intelligence, media industry experts, advertising agencies and public records. Figures are net (media-retained) ad expenditures.

GROSS PRINT MEDIA AD REVENUE

U.S. advertising revenue for Hispanic print media, including classified

MEDIUM	GROSS ADVERTISING SPENDING			PUBLICATIONS COUNTED		AUDITED 2007
	2007	2006	% CHG	2007	2006	
Newspapers ¹	\$1,117	\$1,124	-0.6	827	768	160
Magazines	391	360	8.6	521	513	46
Other ²	60	55	9.1	576	570	5
Total	1,568	1,539	1.9	1,924	1,851	211

Dollars in millions. Data from Latino Print Network. 1) Includes classified advertising. 2) Other includes annuals, catalogs, journals, newsletters and Yellow Pages.

¡RE-ACCIÓN!



Telemundo is changing the rules of engagement on Spanish-language TV.

Telemundo's primetime viewers reported higher recall and likeability of your ads when compared to English-language broadcast TV ads featuring identical brands. For more information about the IAG Spanish Language Measurement Service and the Telemundo Pulse Research Center, call Mike Rodríguez, SVP Sales & Marketing at 212-664-7417.



* SOURCE: IAG RESEARCH WEIGHTED AD PERFORMANCE DATA ACROSS COMMON BRANDS ON BOTH TELEMUNDO AND ENGLISH-LANGUAGE BROADCAST TV (ABC, CBS, CW, FOX AND NBC). A18-49, 1/11/08 - 4/26/08

TOP ADVERTISERS IN HISPANIC MEDIA: 1 TO 25

By measured U.S. media spending

RANK	MARKETER	2007 AD SPENDING	% CHG
1	Lexicon Marketing Corp.	\$218,108.2	24.4
2	Procter & Gamble Co.	163,078.1	-4.3
3	AT&T	119,320.6	-10.0
4	General Motors Corp.	100,848.6	-2.7
5	Broadcasting Media Partners (Univision)	91,273.3	-14.8
6	McDonald's Corp.	89,676.7	6.6
7	Toyota Motor Corp.	80,687.6	16.9
8	Sears Holdings Corp.	79,568.9	-4.5
9	Verizon Communications	79,277.8	-12.8
10	Johnson & Johnson	76,791.4	-3.6
11	Ford Motor Co.	73,406.0	-0.3
12	Walt Disney Co.	67,025.2	3.8
13	Cerberus Capital Management (incl. Chrysler)	66,109.7	1.9
14	Nissan Motor Co.	61,314.9	82.7
15	Wal-Mart Stores	59,890.3	-10.3
16	TVAtlas.com	55,071.6	14.8
17	Hyundai Corp.	53,945.2	-12.8
18	America Directo	52,466.3	14.2
19	Sprint Nextel Corp.	51,752.2	98.3
20	Deutsche Telekom	50,085.0	15.4
21	Allstate Corp.	46,979.9	26.4
22	Olympia	43,158.0	NA
23	Unilever	42,791.4	-4.6
24	SABMiller	41,957.2	-8.7
25	L'Oreal	41,713.3	-10.5

Dollars in thousands. Media from TNS Media Intelligence and represent the sum of broadcast TV networks, Galavision (cable), Spanish-language magazines (including four PIB-monitored Spanish-language magazines), Spanish-language newspapers and Spanish-language spot TV and Spanish-language web sites. Ranking continues on Page 12. Percent change is computed from 2006 data.

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TOP ADVERTISERS IN HISPANIC MEDIA: 26 TO 50

By measured U.S. media spending

RANK	MARKETER	2007 AD SPENDING	% CHG
26	J.C. Penney Co.	\$41,197.1	26.0
27	PepsiCo	41,054.7	-29.9
28	Home Depot	39,551.8	-18.7
29	U.S. Government	39,093.4	30.2
30	Kraft Foods	38,520.5	34.2
31	Grupo Televisa	37,759.7	-24.6
32	Computacion Sin Barreras	36,488.2	NA
33	State Farm Mutual Auto Insurance Co.	36,070.7	91.1
34	Yum Brands	35,357.6	12.7
35	Target Corp.	33,232.8	5.3
36	Anheuser-Busch Cos.	33,200.9	-20.5
37	Honda Motor Co.	30,846.9	9.1
38	Time Warner	30,513.7	-10.0
39	Lowe's Cos.	29,607.9	8.0
40	Filtramax	29,337.2	66.4
41	Clorox Co.	29,273.5	-3.8
42	Macy's	27,027.2	10.9
43	Coca-Cola Co.	26,990.8	-47.7
44	Wendy's International	25,514.2	25.6
45	Visa	25,463.6	11.1
46	General Electric Co.	25,309.9	7.8
47	News Corp.	24,822.5	30.3
48	Children International	24,232.1	NA
49	Bally Total Fitness Holdings Corp.	23,575.5	4.0
50	Guthy-Renker Corp.	23,521.5	84.2

Dollars in thousands. Media from TNS Media Intelligence and represent the sum of broadcast TV networks, Galavision (cable), Spanish-language magazines (including four PIB-monitored Spanish-language magazines), Spanish-language newspapers and Spanish-language spot TV and Spanish-language web sites. Percent change is computed from 2006 data.

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TOP 25 ADVERTISERS IN HISPANIC NEWSPAPERS

By measured U.S. newspaper ad spending

RANK	MARKETER	2007 AD SPENDING	% CHG
1	Interbond Corp. of America	\$5,289.0	258.6
2	Gobierno Del Estado/Chihuahua	3,224.4	63.0
3	Macy's	3,211.9	-5.6
4	Sears Holdings Corp.	3,018.7	-27.2
5	Verizon Communications	2,888.8	-32.1
6	Rooms To Go	2,833.1	-9.8
7	Best Buy Co.	2,572.9	-23.7
8	Bank of America Corp.	2,447.6	3.1
9	Home Depot	2,360.7	-2.8
10	Target Corp.	2,280.1	-28.0
11	Broadcasting Media Partners (Univision)	2,194.3	-18.0
12	AT&T	2,037.1	-66.3
13	Sprint Nextel Corp.	1,958.7	-37.7
14	Washington Mutual	1,795.3	-29.3
15	Humana	1,680.4	50.7
16	Lowe's Cos.	1,640.7	37.3
17	U.S. Century Bank	1,460.8	137.9
18	General Motors Corp.	1,434.9	5.1
19	Bankrate	1,430.2	54.6
20	General Electric Co.	1,374.4	-20.0
21	Walt Disney Co.	1,299.0	-40.1
22	Cerberus Capital Management (incl. Chrysler)	1,242.6	-15.4
23	Publix Supermarkets	1,234.0	8.4
24	State Farm Mutual Auto Insurance Co.	1,167.1	61.5
25	City of Miami	1,015.1	-31.5

Dollars in thousands. Measured newspaper ad spending from TNS Media Intelligence. Percent change is computed from 2006 data. Automotive dealers and associations are excluded.

TOP 10 ADVERTISERS ON HISPANIC WEB SITES

By measured U.S. web ad spending on Spanish-language sites

RANK	MARKETER	2007 AD SPENDING	% CHG
1	AT&T	\$12,775.2	NA
2	Grupo Televisa	5,279.3	NA
3	General Motors Corp.	5,061.4	-13.7
4	Ford Motor Co.	4,563.7	75.6
5	U.S. Government	3,985.1	NA
6	Verizon Communications	3,600.8	NA
7	Impremedia	3,150.0	NA
8	Sprint Nextel Corp.	3,086.0	79.1
9	Cerberus Capital Management (incl. Chrysler)	2,840.4	28.0
10	Toyota Motor Corp.	2,819.0	-5.8

Dollars are in thousands. Measured web ad spending from TNS Media Intelligence. TNS monitors 44 Hispanic sites. Excludes paid search and broadband video. Percent change is computed from 2006 data.

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27% of the U.S. Hispanic female market
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Source: 2007 Simmons Fall Full Year Study; Publishers adjusted audience for Ser Padres and Siempre Mujer; 2004 Reader Studies for Espera and 12 Meses.

TOP 25 ADVERTISERS IN SPANISH-LANGUAGE SPOT TV

By measured U.S. spot TV ad spending

RANK	MARKETER	2007 AD SPENDING	% CHG
1	AT&T	\$50,116.2	8.1
2	Ford Motor Co.	26,921.6	0.9
3	Nissan Motor Co.	25,921.8	103.8
4	Broadcasting Media Partners (Univision)	25,078.6	-20.0
5	Cerberus Capital Management (incl. Chrysler)	23,842.6	18.7
6	Ventura Entertainment Enterprises	20,856.9	-43.6
7	Yum Brands	18,475.1	18.5
8	Verizon Communications	17,548.1	-36.7
9	Guthy-Renker Corp.	16,275.6	162.2
10	Toyota Motor Corp.	15,639.5	22.4
11	General Motors Corp.	14,851.9	-26.2
12	McDonald's Corp.	14,594.9	20.5
13	DirecTV Group	11,384.3	NA
14	Rooms To Go	11,298.7	0.4
15	Jack in the Box	9,898.9	-18.6
16	Famsa	9,755.3	8.2
17	Honda Motor Co.	9,101.4	29.8
18	Buenavida Enterprises	9,049.6	-34.5
19	Dish Network Corp.	8,551.4	104.3
20	Cablevision Systems Corp.	8,405.3	19.2
21	Hyundai Corp.	8,216.9	27.5
22	Washington Mutual	7,916.3	37.6
23	Time Warner	7,691.6	37.2
24	La Curacao Store	7,303.0	16.2
25	Empire Today	6,856.6	43.9

Dollars are in thousands. Measured spot TV ad spending from TNS Media Intelligence. Percent change is computed from 2006 data. Automotive dealers and associations and political advertising are excluded.

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Round 9, 40 Games; Oct 11 - Oct 15, 2008

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TOP 25 ADVERTISERS IN NATIONAL SPANISH-LANGUAGE TV

By measured U.S. ad spending on broadcast and cable networks in 2007

RANK	MARKETER	2007 AD SPENDING	% CHG
1	Lexicon Marketing Corp.	\$214,316.8	23.5
2	Procter & Gamble Co.	144,198.2	-6.6
3	Sears Holdings Corp.	75,523.5	-2.0
4	McDonald's Corp.	69,483.6	2.2
5	General Motors Corp.	68,153.7	-1.9
6	Johnson & Johnson	67,415.1	-5.0
7	AT&T	62,897.7	-17.9
8	Broadcasting Media Partners (Univision)	62,832.4	-13.9
9	Toyota Motor Corp.	58,521.2	18.4
10	Walt Disney Co.	57,246.3	7.9
11	Wal-Mart Stores	55,862.6	-7.5
12	TVAtlas.com	54,772.9	14.7
13	Verizon Communications	53,416.2	-4.1
14	America Directo	52,098.0	16.1
15	Deutsche Telekom	46,778.3	9.6
16	Olympia	42,773.4	NA
17	Hyundai Corp.	42,653.3	-19.1
18	Allstate Corp.	42,430.3	24.4
19	Sprint Nextel Corp.	41,682.0	126.5
20	Unilever	40,385.0	2.5
21	Ford Motor Co.	37,602.7	-7.5
22	PepsiCo	37,361.0	-26.6
23	J.C. Penney Co.	37,276.7	25.4
24	Home Depot	36,135.4	-20.8
25	SABMiller	35,878.4	-18.0

Dollars in thousands. Measured ad spending from TNS Media Intelligence for Univision, Telemundo and TeleFutura TV networks and Galavisión cable TV network. Percent change computed from 2006 data.

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TOP 10 ADVERTISERS IN HISPANIC SPOT RADIO

By measured U.S. Spanish-language ad spending

RANK	MARKETER	2007 AD SPENDING	% CHG
1	Broadcasting Media Partners (Univision)	\$20,091.2	-35.1
2	Verizon Communications	9,915.8	0.2
3	Sprint Nextel Corp.	9,760.5	109.9
4	McDonald's Corp.	8,965.5	-10.7
5	AT&T	8,306.8	-12.2
6	General Electric Co.	7,627.5	-30.4
7	Toyota Motor Corp.	7,000.2	-22.8
8	J.C. Penney Co.	6,258.0	-15.4
9	Radio Shack Corp.	6,104.4	82.7
10	General Motors Corp.	5,899.5	-18.0

Dollars in thousands. Measured radio ad spending from Nielsen Monitor-Plus. Percent change is computed from 2006 data.

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TOP 25 ADVERTISERS IN HISPANIC MAGAZINES

By measured U.S. magazine ad spending

RANK	MARKETER	2007 AD SPENDING	% CHG
1	Procter & Gamble Co.	\$14,453.1	7.0
2	L'Oreal	11,193.8	-3.6
3	Johnson & Johnson	8,854.7	39.1
4	General Motors Corp.	8,389.3	29.0
5	Cerberus Capital Management (incl. Chrysler)	3,979.7	33.5
6	Berkshire Hathaway (incl. Geico)	3,877.8	77.1
7	McDonald's Corp.	3,826.9	6.0
8	Time Warner	3,592.4	19.8
9	Kraft Foods	3,537.1	197.3
10	Toyota Motor Corp.	3,292.5	-5.1
11	U.S. Government	3,179.4	9.6
12	Clorox Co.	3,131.9	8.4
13	GlaxoSmithKline	3,062.5	245.1
14	Hyundai Corp.	2,836.0	55.4
15	Coty (JAB Investments)	2,767.4	11.3
16	AstraZeneca	2,720.6	-1.7
17	Ford Motor Co.	2,607.8	-13.1
18	Mosaico	2,603.9	18.1
19	Visa	2,549.0	22.0
20	Kimberly-Clark Corp.	2,437.9	50.6
21	Estee Lauder Cos.	2,303.5	-14.9
22	State Farm Mutual Auto Insurance Co.	2,224.4	310.6
23	Bayer	2,183.3	53.9
24	Target Corp.	2,123.3	139.1
25	Intima	2,021.1	-10.8

Dollars in thousands. Magazine ad spending from TNS Media Intelligence includes two media classifications: Spanish-language magazines and four PIB-monitored Spanish-language magazines. They are People en Español, Nexos, RD Selecciones, Latina. Percent change is computed from 2006 data.

Television is part of the family room. Univision is part of the family.

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Source: Media Habits Study, Simmons 2007. ©2008 Univision Communications Inc.

MEDIA

TOP HISPANIC DMAS BY MEDIA SPENDING

For Spanish-language outlets in 2007

RANK	MARKET	TOTAL	% CHG	TV	RADIO	PRINT
1	Los Angeles	\$645.5	2.2	\$353.3	\$190.3	\$101.9
2	Miami-Fort Lauderdale	305.0	2.0	136.7	103.3	65.0
3	New York	260.7	2.0	113.7	92.0	55.0
4	Houston	136.7	1.5	63.9	63.3	9.5
5	Chicago	126.8	2.8	51.8	47.9	27.1
6	San Francisco-Oakland-San Jose	85.2	2.9	47.1	31.8	6.3
7	Dallas	79.4	2.1	39.3	31.2	8.9
8	Phoenix	63.3	1.7	30.3	15.0	18.0
9	San Antonio	64.0	3.0	24.3	35.1	4.6
10	San Diego	55.3	2.2	29.6	19.9	5.7
	Total	1,821.7	2.2	889.8	629.9	302.0

Dollar estimates in millions for designated market areas based on information supplied by Spanish-language TV, radio and print outlets. Numbers are rounded. Data from HispanTelligence, the research arm of Hispanic Business. Percent change computed from 2006 data.

TOP 10 HISPANIC LOCAL TV MARKETS

RANK	MARKET	HISPANIC TV HH	TOTAL TV HH	HISP. % OF ALL*	DOMIN.**
1	Los Angeles	1,817,270	5,647,440	32.2%	40.8%
2	New York	1,207,480	7,391,940	16.3	46.5
3	Miami-Fort Lauderdale	635,610	1,536,020	41.4	60.9
4	Houston	524,810	2,050,550	25.6	47.4
5	Chicago	468,440	3,469,110	13.5	49.5
6	Dallas-Fort Worth	458,410	2,435,600	18.8	50.0
7	San Antonio	367,650	792,440	46.4	26.7
8	Phoenix (Prescott)	358,440	1,802,550	19.9	41.5
9	San Francisco-Oak.-San Jose	352,900	2,419,440	14.6	41.0
10	Harlingen, Texas ¹	279,880	338,550	82.7	49.3

Data from Nielsen Hispanic Station Index. *Estimates as of Jan. 1, 2008. **% of Hispanic households where only or mostly Spanish is spoken by all persons 2 yrs. old+ in the home. 1) Harlingen, Weslaco, Brownsville and McAllen, Texas.



Time to upgrade your Hispanic marketing tactics.

TOP 25 HISPANIC NEWSPAPERS

By measured advertising revenue, excluding classified

RANK	NEWSPAPER	GROSS 2007 AD REVENUE	% CHG
1	El Nuevo Herald (Miami)	\$90,450.6	8.6
2	La Opinion (Los Angeles)	45,910.3	-12.5
3	El Diario (Juarez, Mexico)	33,712.8	6.9
4	El Diario La Prensa (New York)	25,710.3	0.6
5	Hoy (Chicago)	20,088.6	41.0
6	Hoy (Los Angeles)	12,929.6	-0.1
7	La Raza (Chicago)	11,649.5	11.4
8	El Norte (El Paso, Texas/Juarez, Mexico)	10,754.1	17.5
9	Hoy (New York)	10,625.4	-16.3
10	Washington Hispanic	10,393.2	-13.9
11	TV y Mas (Phoenix)	6,821.0	-5.9
12	Al Dia (Dallas)	6,427.5	-16.2
13	La Voz de Phoenix	6,311.3	-5.3
14	El Sentinel (Miami-Fort Lauderdale)	6,148.1	-25.8
15	Diario Las Americas (Miami)	5,969.2	-6.1
16	Prensa Hispana (Phoenix)	3,871.3	-14.5
17	Lawndale News (Chicago)	3,862.9	-14.2
18	La Voz de Houston	3,828.1	-15.1
19	Vida en El Valle (Fresno, Calif.)	3,785.4	-46.1
20	Al Dia (Philadelphia)	3,213.4	-25.0
21	El Latino (San Diego)	3,153.0	-15.7
22	El Especial (New York)	2,837.7	-0.1
23	El Mensajero (San Francisco)	2,406.5	-15.8
24	Excelsior (Orange County, Calif.)	2,257.0	-17.6
25	Reflejos (Chicago)	2,210.9	47.4

Dollars are in thousands. Measured newspaper ad spending from TNS Media Intelligence. Figures exclude classified advertising, select local retail categories, internet advertising and circulation revenue. Not all advertising editions are monitored. Percent change is computed from figures for 2006.

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TOP 25 HISPANIC MAGAZINES

By measured advertising revenue

RANK	MAGAZINE	2007 AD REVENUE	% CHG
1	People en Español	\$49,692.5	1.7
2	Latina	36,042.1	11.4
3	TV y Novelas	16,152.8	30.2
4	Selecciones (Reader's Digest)	15,330.4	0.7
5	Siempre Mujer	12,890.5	39.5
6	Vanidades	12,607.8	5.0
7	Ser Padres	9,699.4	41.6
8	Hispanic Business	8,055.2	0.0
9	Mira	7,942.2	13.1
10	Sports Illustrated Latino	6,670.3	16.2
11	Hispanic Magazine	6,576.0	20.0
12	Fox Sports en Español Magazine	6,352.7	83.6
13	TV Notas	6,263.8	24.2
14	Healthy Kids en Español	5,624.5	-2.9
15	Fútbol Mundial	5,550.0	-13.5
16	Vista	5,131.9	4.4
17	Tu Ciudad Los Angeles*	4,959.9	68.1
18	Cosmopolitan en Español	4,896.4	-12.2
19	Espera	3,359.8	11.6
20	Selecta	3,316.6	11.2
21	Ocean Drive en Español	3,098.8	4.1
22	Sobre Ruedas	2,802.4	44.2
23	Casa y Hogar	2,729.2	-10.8
24	Alma Magazine	2,468.4	5.8
25	ESPN Deportes - La Revista	1,993.6	16.2

Dollars in thousands. Measured magazine ad spending from Media Economics Group's HispanicMagazineMonitor through Televisa Publishing. Percent change computed from 2006 data. *Emmis Publishing suspended publication of Tu Ciudad in June 2008.

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TOP 10 WEB PROPERTIES AMONG HISPANIC USERS

By language preference and number of unique visitors

SPANISH-LANGUAGE PREFERRED

RANK	PROPERTY	UNIQUE VISITORS IN THOUSANDS	% REACH
1	Google sites	3,536	82.1
2	Microsoft sites	3,419	79.4
3	Yahoo sites	3,361	78.0
4	AOL	2,399	55.7
5	Fox Interactive Media	2,397	55.6
6	Univision.com	1,886	43.8
7	eBay	1,803	41.8
8	Ask network	1,553	36.0
9	Apple	1,456	33.8
10	Amazon sites	1,229	28.5

ENGLISH-LANGUAGE PREFERRED

RANK	PROPERTY	UNIQUE VISITORS IN THOUSANDS	% REACH
1	Yahoo sites	7,510	72.4
2	Google sites	7,265	70.1
3	Microsoft sites	6,032	58.2
4	AOL	5,673	54.7
5	Fox Interactive Media	5,456	52.6
6	eBay	3,461	33.4
7	Ask network	2,826	27.3
8	Amazon sites	2,534	24.4
9	Viacom Digital	2,468	23.8
10	Wikipedia sites	2,455	23.7

Data from comScore Media Metrix. Unique visitors are in thousands. Percent reach is the percent of all Hispanic internet users who prefer Spanish (4.3 million in the top table) or English (10.4 million in the bottom table) who visited the property for the month of May 2008.

TOP WEB PROPERTIES AMONG ALL HISPANIC USERS

By number of unique visitors regardless of language preference

RANK	PROPERTY	UNIQUE VISITORS IN THOUSANDS	% REACH
1	Google sites	14,813	74.0
2	Yahoo sites	14,791	73.9
3	Microsoft sites	12,715	63.5
4	AOL	10,718	53.6
5	Fox Interactive Media	10,508	52.5
6	eBay	7,127	35.6
7	Ask network	5,972	29.8
8	Apple	5,172	25.8
9	Wikipedia sites	5,060	25.3
10	Amazon sites	5,050	25.2

Data from comScore Media Metrix. Percent reach is of all Hispanic internet users (20.0 million) in April 2008.



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TOP 10 HISPANIC WEB SITES

By measured U.S. web ad spending

RANK	WEB SITE [URL, IF DIFFERENT]	2007 AD SPENDING	% CHG
1	YahooTelemundo.com [telemundo.yahoo.com]	\$18,011.3	46.1
2	Univision.com	16,717.0	-45.7
3	StarMedia.com	13,531.0	10.1
4	Batanga.com	11,695.1	69.7
5	MSNLatino.com	9,465.1	27.6
6	LatinoAOL.com [latino.aol.com]	5,825.8	NA
7	La Opinion Digital.com [laopinion.com]	5,332.5	130.2
8	EIHispanoNews.com	2,237.7	NA
9	EINuevoHerald.com	1,803.7	77.4
10	ElDiarioNY.com	1,742.8	NA

Dollars are in thousands. Measured web ad spending from TNS Media Intelligence. Percent change is computed from 2006 data. TNS monitors 44 Hispanic sites. Excludes paid search and broadband video.

Passion has many faces but only one channel...



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TOP PRIME-TIME NETWORK TV PROGRAMS

Ranked by May 2008 ratings among Hispanic viewers

SPANISH LANGUAGE

RANK	PROGRAM [DAY]	NETWORK	HISP. HH RATING	AVG. HISP. HH	AVG. HISP. VWRS
1	Fuego en la Sangre [Mon]	Univision	22.2	2,697	5,026
2	Fuego en la Sangre [Wed]	Univision	22.1	2,687	4,809
3	Fuego en la Sangre [Tue]	Univision	22.0	2,667	4,901
4	Al Diablo con Guapos [Mon]	Univision	21.8	2,645	4,881
5	Al Diablo con Guapos [Tue]	Univision	21.6	2,621	4,749
6	Al Diablo con Guapos [Thu]	Univision	21.5	2,610	4,791
7	Al Diablo con Guapos [Wed]	Univision	21.4	2,594	4,754
8	Fuego en la Sangre [Thu]	Univision	21.2	2,577	4,695
9	Al Diablo con Guapos [Fri]	Univision	18.6	2,259	3,959
10	Aqui y Ahora [Tue]	Univision	18.3	2,226	3,704

ENGLISH LANGUAGE

RANK*	PROGRAM [DAY/DATE]	NETWORK	HISP. HH RATING	AVG. HISP. HH	AVG. HISP. VWRS
37	American Idol [Wed]	Fox	7.0	854	1,339
42	Dancing with the Stars (Results) [Tue]	ABC	6.0	725	1,060
46	American Idol [Tue]	Fox	5.7	698	1,079
51	Dancing with the Stars [Mon]	ABC	5.4	656	973
52	Grey's Anatomy [Thu 9 p.m.]	ABC	5.2	629	878
56	Desperate Housewives [Sun]	ABC	4.6	557	821
58	Family Guy [Sun]	Fox	4.5	545	839
64	Friday Night Smackdown [Fri]	CW	4.2	507	857
65	House [Mon 9 p.m.]	Fox	4.2	507	787
66	CSI: Miami [Mon]	CBS	4.1	499	718

Data from Nielsen Media Research, National People Meter Hispanic Sub Sample. Households and viewers are measured in thousands. Rating is % of Hispanic TV households. Measurement period was 7 p.m. to 11 p.m., Monday through Sunday (4/28/2008-5/25/2008). *Rank among all Hispanic viewers. Programs under five minutes and breakouts are excluded. Average Hispanic viewers (VWRs) are the number of persons in Hispanic households viewing the program. Viewing estimates include 7 days of DVR.

HISPANIC TV NETWORK VIEWERSHIP

RANK	NETWORK	HH RATING	HH SHARE	HH (000)	P 2+ VIEWERS
1	Univision	16.0	25	1,946	3,371
2	Telemundo	5.1	8	621	987
3	Fox	3.4	5	416	636
4	TeleFutura	3.2	5	383	638
5	ABC	3.0	5	361	514
6	CBS	2.6	4	314	433
7	NBC	2.5	4	302	429
8	CW	1.9	3	226	348
9	MNT	0.8	1	102	152
10	Azteca America	0.8	1	94	150

Data from National People Meter Hispanic Sub Sample based on Hispanic prime-time viewership from 7 p.m. to 11 p.m. from Sept. 24, 2007 to May 21, 2008. Rating is % of Hispanic TV HH; share is % of those HHs with TV sets in use and watching the network. P 2+ counts total viewing persons in thousands those Hispanic TV households tuned in to the network. Viewing estimates include 7 days of DVR.

When Hispanics come to the United States, the first thing they think of is ~~becoming~~ millionaires without working hard. Unlike Americans, they ~~don't~~ have a set of values. They ~~hardly~~ do anything to learn our language, and ~~assume that~~ it's in our best interest to make them feel part of our society.

Everything looks better when we erase the stereotypes



TOP CABLE TV PROGRAMS

Among Hispanic viewers

SPANISH LANGUAGE

RANK	PROGRAM [DATE]	NETWORK	HISP. HH RATING	AVG. HISP. HH	AVG. HISP. VWRS
1	Copa Libertadores Qtr Rd, Gm8 (2) [5/22]	Fox Sports en Español	3.7	447	799
2	Fútbol Liga Mexicana [5/15]	Galavision	2.8	343	475
3	Copa Libertadores Rd 16 - Gm13 (2) [5/7]	Fox Sports en Español	2.6	313	469
4	Copa Libertadores Qtr Rd, Gm4 (2) [5/15]	Fox Sports en Español	2.6	311	506
5	Copa Libertadores Rd 16 - Gm11 (2) [5/6]	Fox Sports en Español	2.1	250	381
6	Fútbol Liga Mexicana [5/8]	Galavision	1.9	225	382
7	Previa Qtr Final (2) [5/22]	Fox Sports en Español	1.8	213	333
8	Vida Salvaje [5/13]	Galavision	1.7	211	326
9	Fútbol Liga Mexicana [5/15]	Galavision	1.7	208	338
10	Copa Campeone Final 2 (2) [4/30]	Fox Sports en Español	1.7	202	296

ENGLISH LANGUAGE

RANK	PROGRAM [DATE]	NETWORK	HISP. HH RATING	AVG. HISP. HH	AVG. HISP. VWRS
1	Zoey Movie - Chasing Zoey [5/2]	Nickelodeon	6.1	742	1,138
2	Zoey 101 [5/2]	Nickelodeon	6.1	737	1,095
3	NBA Playoffs [5/21]	TNT	5.2	635	998
4	iCarly [5/2]	Nickelodeon	4.7	567	882
5	NBA Playoffs [5/23]	TNT	4.5	543	788
6	NBA Playoffs [5/25]	TNT	4.4	537	845
7	Drake & Josh [4/28]	Nickelodeon	4.4	536	651
8	SpongeBob [5/9]	Nickelodeon	4.4	534	781
9	iCarly [5/12]	Nickelodeon	4.2	514	612
10	NBA Playoffs [5/19]	TNT	4.2	507	663

Data from Nielsen Media Research, National People Meter Hispanic Sub Sample. Households and viewers are measured in thousands. Rating is % of Hispanic TV households. Measurement period was 24 hours, Monday through Sunday (4/28/08-05/25/08). Programs under five minutes and breakouts are excluded. Average Hispanic viewers (VWRS) are the number of persons in Hispanic households viewing the program. Viewing estimates include 7 days of DVR.

TOP SPANISH-LANGUAGE CABLE NETWORKS

By cable TV coverage as a percent of all Hispanic TV households

RANK	CABLE NETWORK	CABLE COVERAGE AS A PERCENT OF ALL HISPANIC TV HH	SHARE AS PERCENT OF HISPANIC CABLE HH
1	Galavision	66.61%	82.69%
2	Mun2	42.14	52.31
3	Fox Sports en Español	38.01	47.18
4	ESPN Deportes	30.19	37.47
5	Discovery en Español	27.54	34.18
6	Gol TV	27.25	33.82

Data from Nielsen Media Research's National People Meter Hispanic Sub Sample for May 2008. There are 9.7 million Hispanic cable households out of 12.4 million Hispanic TV households. Networks are those with coverage of 20% or more.

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TOP U.S. RADIO FORMATS BY AGE GROUP

With top Spanish-language formats breakout

RANK	FORMAT	SHARE % BY AGE GROUP				
		12+	12-17	18-24	25-34	35-44
ALL FORMATS						
1	News, talk, info	19.1%	2.9%	4.8%	10.7%	16.1%
2	Adult contemporary	13.7%	10.0%	11.3%	13.9%	16.2%
3	Spanish-language	10.2%	7.6%	14.0%	17.2%	11.3%
4	Contemporary hits	9.6%	37.4%	24.6%	13.9%	7.4%
5	Rock	6.9%	5.8%	9.0%	8.8%	9.5%
6	Urban	8.7%	14.6%	12.2%	10.1%	9.6%

SPANISH-LANGUAGE FORMATS*

1	Mexican regional	4.1%	2.6%	7.2%	8.9%	4.4%
2	Spanish contemporary	1.9%	1.8%	7.2%	2.7%	2.2%
3	Spanish adult	1.1%	0.4%	2.4%	1.8%	1.5%
4	Spanish tropical	1.1%	0.8%	1.2%	1.5%	1.4%
5	Spanish news, talk	0.7%	0.1%	1.3%	0.4%	0.5%
6	Latino urban	0.5%	1.5%	0.1%	0.7%	0.4%
7	Spanish variety	0.4%	0.2%	1.3%	0.6%	0.4%

TOP 5 SPANISH-FORMATTED RADIO STATIONS

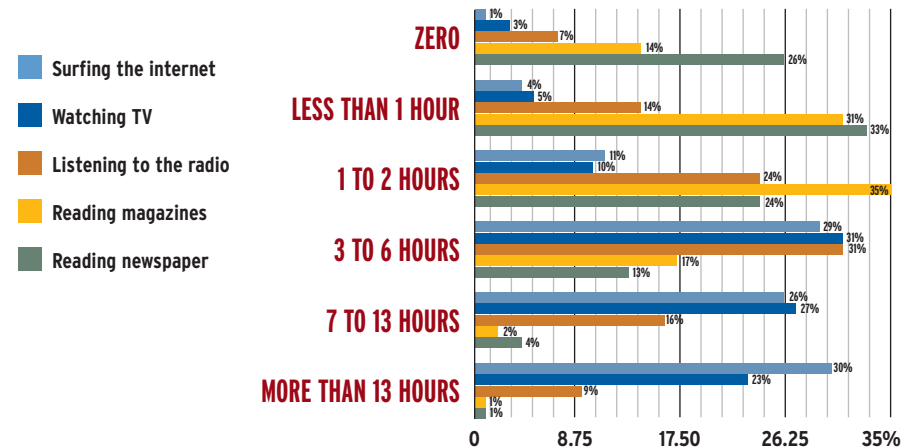
By cumulative listeners

RANK	STATION (MARKET)	OWNER	LISTENERS
1	KLVE-FM (Los Angeles)	Univision Communications	1,477,300
2	WSKQ-FM (New York)	Spanish Broadcasting System	1,332,800
3	KSCA-FM (Los Angeles)	Univision Communications	1,204,900
4	WPAT-FM (New York)	Spanish Broadcasting System	1,161,400
5	KLAX-FM (Los Angeles)	Spanish Broadcasting System	965,800

Source: Arbitron. Exported from MaximiSer, Fall 2007 National Regional Database, Top 100 Arbitron-rated markets, Monday-Sunday, 6 a.m. to midnight. *Spanish-language formats are a subset of Line 3 "Spanish-language" in the ALL FORMATS table.

MEDIA CONSUMPTION

Average number of hours per week Hispanics spend doing the following



Source: Terra.com Hispanic Syndicated Study, conducted by comScore for Terra Networks USA (Jan. 31- Feb. 28, 2008).

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DIGITAL MEDIA USAGE

INTERNET ACTIVITIES IN THE LAST 30 DAYS

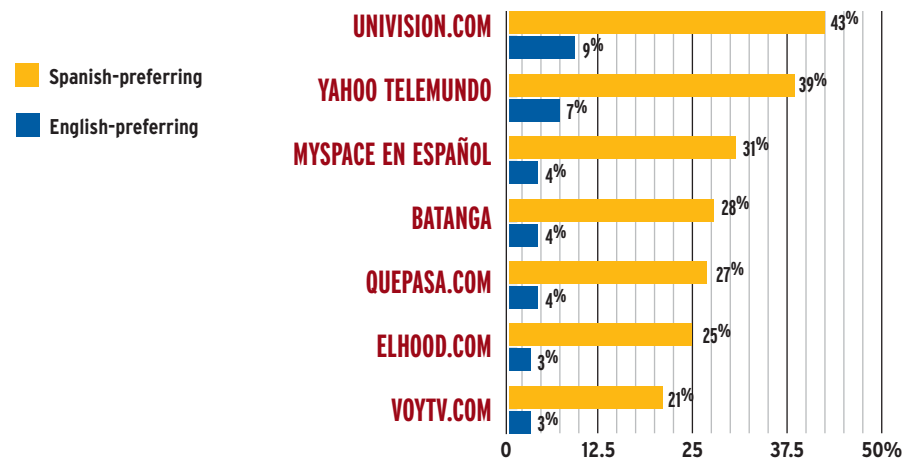
U.S. Hispanics versus non-Hispanics

SITE	HISPANIC	NON-HISPANIC
Visited a chat room	7.38%	4.14%
Used e-mail	46.84	63.62
Used Instant Messenger	25.87	24.53
Made a purchase for personal use	18.83	31.62
Made a purchase for business use	5.78	9.83
Made personal or business travel plans	11.70	18.06
Played games online	18.20	20.36
Obtained financial information	15.47	23.55
Tracked investments/traded stocks, bonds or mutual funds	4.40	10.98
Paid bills online	24.98	31.92
Obtained the latest news/current events	24.69	38.19
Obtained sports news/information	17.17	23.17
Obtained information for new or used car purchase	8.59	9.05
Obtained information about real estate	7.38	10.94
Obtained medical information	12.10	16.67
Obtained childcare or parenting information	5.24	4.01
Looked for employment	12.52	11.26
Looked for recipes	12.22	19.68
Visited a TV network or TV show's website	12.11	14.96
Looked at TV listings online	5.23	6.12
Looked up movie listings or show times	12.46	15.64
Listened to radio on the internet	11.38	10.18
Downloaded music	19.62	17.08
Downloaded podcasts/podcasting	2.09	2.87
Watched a live TV program	1.71	2.07
Visited online blogs	5.35	9.27
Wrote an online blog	2.30	3.72
Made a phone call	2.10	2.92
Watched online video	15.11	16.74
Shared photos through internet website	7.81	10.87
Sent an electronic greeting card	2.72	4.15

Source: Spring 2008 MRI Survey of the American Consumer. Survey dates were March of 2007 through April of 2008. Approximately 26,000 adults were surveyed.

ONLINE VIDEO DESTINATIONS

How frequently Hispanics view online video at the following web sites



Source: Forrester Research Hispanic Technographics © Online Omnibus Survey, Q3 2007. Includes Hispanics who do these activities at least once a month or more frequently.

webelieveinsuperheroes.com



TOP ONLINE MEMBER COMMUNITIES

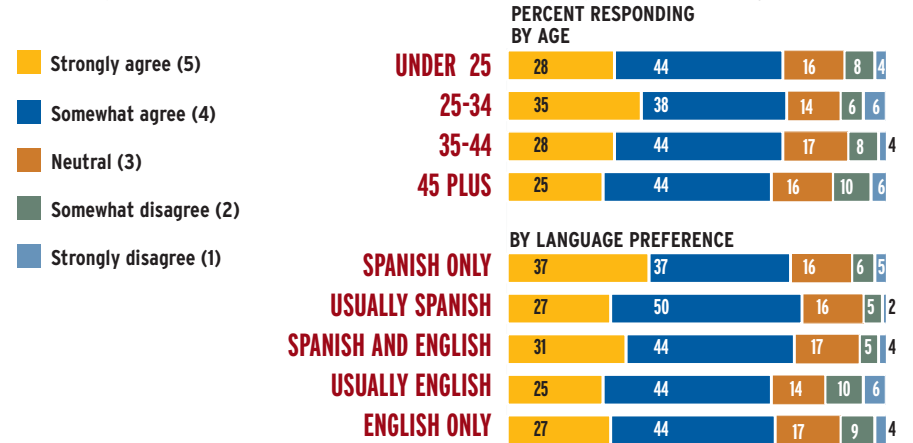
For people of Hispanic origin ranked by unique audience

SITE	UNIQUE AUDIENCE (000)	UNIQUE AUDIENCE COMPOSITION (%)
MySpace.com	7,112	11.7%
Blogger	3,388	8.6
Facebook	1,941	7.5
WordPress.com	1,786	10.4
Windows Live Spaces	1,033	13.5
Six Apart TypePad	855	7.7
MSN Groups	803	10.0
Classmates Online	706	4.9

Unique audience includes anyone of Hispanic origin who visited the site at least once during May 2008, and anyone who visited the site more than once was not counted again. Data include a combined, home and work panel of approximately 30,000 people 2 years old and over. For example, in May 2008 7.1 million unique visitors to Myspace.com were of Hispanic origin. Source: Nielsen NetRatings via MRI.

KEEPING UP WITH TECHNOLOGY

How Hispanics describe themselves: "I try to keep up with technology"



Source: Terra.com Hispanic Syndicated Study, conducted by comScore for Terra Networks USA (Jan. 31-Feb. 28, 2008). *Respondents were asked to qualify their answers where 1=strongly disagree and 5=strongly agree.

“Mucho Grande Success.”

Que en 5 años estemos entre las 10 agencias independientes del mercado hispano, no es casualidad. Hay un equipo de 70 personas que trabaja siempre unido.

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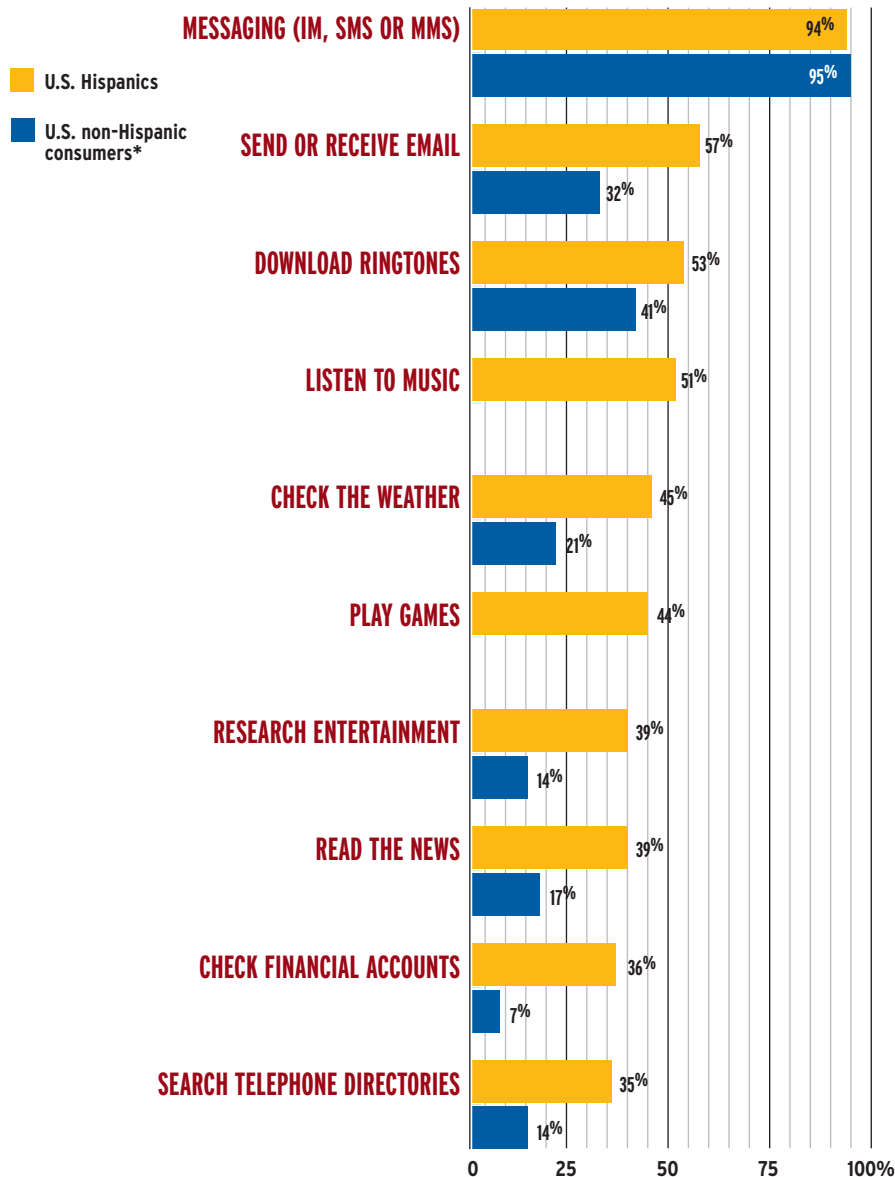
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MOBILE DATA SERVICE USAGE

Hispanic versus non-Hispanic engagement with wireless devices by activity



Source: Forrester Research Hispanic Technographics © Consumer Technology Phone Survey, Q4 2007. *Source: North American Technographics Benchmark Survey, 2007. "Listen to music" and "play games" were not asked comparatively to non-Hispanic consumers. More info: <http://www.forrester.com>

HISPANIC MOBILE USER DEMOGRAPHICS

They are younger and more likely to be bilingual or English-dominant

DEMOGRAPHIC	USE WIRELESS DATA SERVICES	DO NOT USE WIRELESS DATA SERVICES*
Mean age	34	38
Female	40%	48%
Mean income	\$51,700	\$38,400
Spanish-dominant	41%	61%
Bilingual	23%	17%
English-dominant	36%	23%
4 year college degree or more	21%	16%
Gen Y (18-27)	37%	21%
Gen X (28-41)	40%	45%
First-generation in U.S.	57%	69%

Source: Forrester's Hispanic Technographics © Consumer Technology Phone Survey, Q4 2007: Base: 504 U.S. Hispanic adults who own a cell phone and use mobile data services. *Base: 1,308 U.S. Hispanics who own a cell phone and do not use mobile data services.

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Tu Mundo a Diario



DEMOGRAPHICS

U.S. POPULATION BY RACE AND HISPANIC ORIGIN

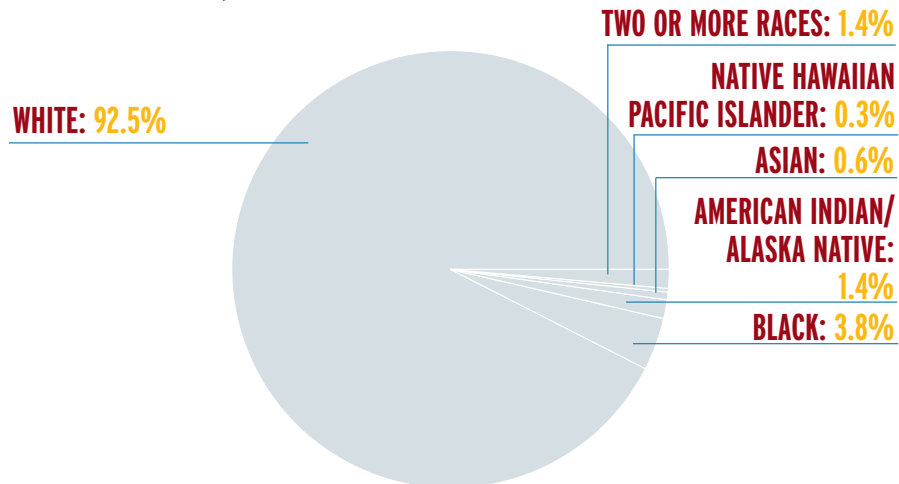
For 45.5 million Hispanics in the U.S. in 2007

	2007	2006	CHANGE	% CHG
Total population	301,621,157	299,398,484	2,222,673	0.7
White	241,166,890	239,746,254	1,420,636	0.6
Black or African-American	38,756,452	38,342,549	413,903	1.1
American Indian/Alaska Native	2,938,436	2,902,851	35,585	1.2
Asian	13,366,154	13,159,343	206,811	1.6
Native Hawaiian/Pacific Islander	537,089	528,818	8,271	1.6
Two or more races	4,856,136	4,718,669	137,467	2.9
Hispanic or Latino	45,504,311	44,321,038	1,183,273	2.7
Not Hispanic (of any race)	256,116,846	255,077,446	1,039,400	0.4

Source: U.S. Census Bureau, annual estimates of the population by age, sex, race, and Hispanic origin; and estimates of the number of housing units. The 2007 population estimates start with a base population for April 1, 2000, and calculate population estimates for July 1 for years 2000 to 2007, released May 1, 2008.

U.S. HISPANIC POPULATION BY RACE

For 45.5 million Hispanics in the U.S. in 2007



Source: U.S. Census Bureau, annual estimates of the population by age, sex, race, and Hispanic origin; and estimates of the number of housing units. The 2007 population estimates start with a base population for April 1, 2000, and calculate population estimates for July 1 for years 2000 to 2007, released May 1, 2008.

PROJECTED U.S. HISPANIC POPULATION

Versus total U.S. population

TOTAL POPULATION	2000	2010	2020	2030	2040	2050
Total U.S.	282,125	308,936	335,805	363,584	391,946	419,854
Hispanic (of any race)	35,622	47,756	59,756	73,055	87,585	102,560
NUMERICAL CHANGE	'00-'50	'00-'10	'10-'20	'20-'30	'30-'40	'40-'50
Total U.S.	137,729	26,811	26,869	27,779	28,362	27,908
Hispanic (of any race)	66,938	12,134	12,000	13,299	14,530	14,975
PERCENT CHANGE	'00-'50	'00-'10	'10-'20	'20-'30	'30-'40	'40-'50
Total U.S.	49	10	9	8	8	7
Hispanic (of any race)	188	34	25	22	20	17
PERCENT OF TOTAL POPULATION	2000	2010	2020	2030	2040	2050
Total U.S.	100	100	100	100	100	100
Hispanic (of any race)	13	15	18	20	22	24

Source: U.S. Census Bureau. Population in thousands.

B

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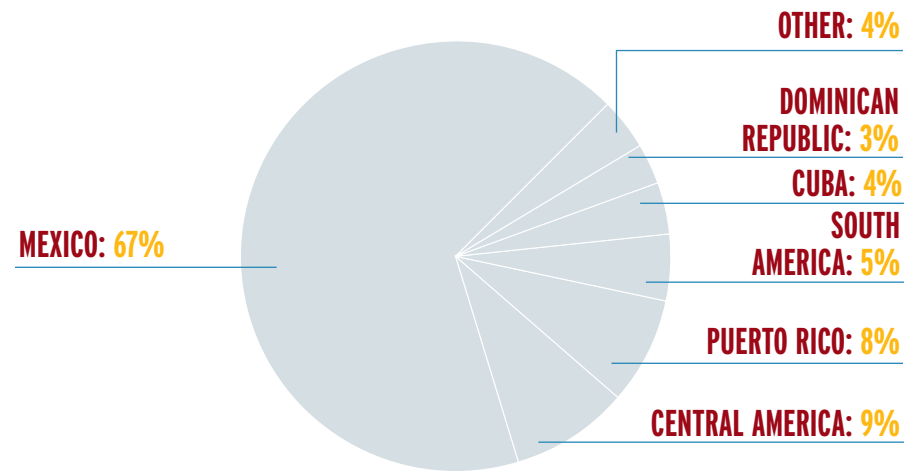
TOP 25 U.S. HISPANIC MARKETS

By estimated 2008 population

RANK	MARKET AREA	HISPANIC POPULATION	HISPANIC % OF TOTAL
1	Los Angeles	8,507,000	48.1
2	New York	4,434,700	21.1
3	Miami	2,152,300	49.2
4	Houston	2,064,300	34.5
5	Chicago	1,972,700	20.3
6	Dallas-Fort Worth	1,757,500	25.9
7	San Francisco	1,712,300	23.7
8	Phoenix	1,378,200	27.4
9	San Antonio, Texas	1,259,400	54.6
10	McAllen, Texas	1,153,200	96.5
11	San Diego	998,200	33.1
12	Fresno-Visalia, Calif.	982,300	51.3
13	Sacramento	886,100	23.4
14	El Paso, Texas	817,200	85.9
15	Denver	791,000	20.8
16	Albuquerque, N.M.	767,600	45.0
17	Washington	688,600	11.1
18	Philadelphia	626,500	7.9
19	Atlanta	623,500	10.1
20	Las Vegas	532,500	28.5
21	Orlando, Fla.	529,600	14.8
22	Tampa, Fla.	521,200	12.0
23	Austin, Texas	496,600	29.6
24	Boston	465,100	7.3
25	Tucson, Ariz. (Nogales)	442,500	38.3

Data from Synovate's 2008 U.S. Diversity Markets Report. Figures are 2008 estimates.

U.S. HISPANIC POPULATION BY PLACE OF ORIGIN



Data from Synovate's 2008 U.S. Hispanic Market Report. Figures are 2008 estimates. This chart includes the birth place for Hispanics born outside the U.S. and the place of origin for Hispanics born in the U.S. (For this graph, respondents were only allowed to choose one answer.)



AGENCIES & WORK



BEST OF SHOW, HISPANIC CREATIVE AD AWARDS: GRUPO GALLEGOS, LONG BEACH, CALIF.

The top spot promotes a package of cable TV, internet and voice services. “Ketchup” pitches Comcast’s Triple Play with an anthropomorphized wallet, forever showing gratitude for a good deal on combined telecom. Here it shields its owner from a stain.



Never stop questioning!

HISPANIC CREATIVE AD AWARDS

AGENCIES WON awards chosen from 717 entries, competing for Gold, Silver and Bronze in Advertising Age's 9th annual Hispanic Creative Advertising Awards contest in 2007. The contest was held in cooperation with the Association of Hispanic Advertising Agencies. The 2007 winners were honored at an awards show Nov. 2 in New York.

Awards were reported in the Hispanic Creative Advertising Awards Special Report (AA, Nov. 5, 2007). The full report with playable video of winning spots can be found on AdAge.com.

A record 760 agency entries will compete for the 10th annual Hispanic Creative Advertising Awards. Winners will be announced at an awards ceremony Friday, Sept. 12, 2008, in Los Angeles, and in a Special Report in AdAge and AdAge.com on Sept. 15, 2008.

BEST OF SHOW AND GOLD AWARD WINNERS

BEST OF SHOW	BRAND	CAMPAIGN
Grupo Gallegos, Long Beach, Calif.	Comcast Triple Play	"Ketchup"

GOLD/TV		
Grupo Gallegos, Long Beach, Calif.	Energizer E2 Lithium	"Immortal"
Grupo Gallegos, Long Beach, Calif.	Calif. Milk Processor Board	"Ley de Gravedad"
Grupo Gallegos, Long Beach, Calif.	Calif. Milk Processor Board	"Sueños," "Risas," "Ley de Gravedad"

GOLD/NONTRADITIONAL, GUERRILLA MARKETING		
JWT, San Juan	Amnistía Internacional	"La Casa del Horror"

GOLD/NEWSPAPERS		
Conill, New York	Procter & Gamble's Tide	"Stains Attack: French Fry, Jam, Soup"

GOLD/OUT-OF-HOME		
Badillo Nazca Saatchi & Saatchi, San Juan	Verizon Wireless	"Llamadas Interrumpidas: Mucho, Busca, Conmigo"

GOLD/BEYOND HISPANIC		
LatinWorks, Austin, Texas	Anheuser Busch's Bud Light	"Class"

GOLD/INTERACTIVE		
Alma DDB, Miami	McDonald's Corp.	"LoMxímo"

GOLD/DIRECT MARKETING		
La Agencia de Orci & Asociados, Los Angeles	Verizon	FiOS campaign



NEWSPAPERS GOLD: CONILL, NEW YORK

Continuing the messy Ketchup theme, "Stains Attack: French Fry, Jam, Soup" wins for Procter & Gamble's Tide. Little warriors rush to keep the clothing spotless.

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SILVER AWARD WINNERS

SILVER/TV	BRAND	CAMPAIGN
Vidal Partnership, New York	Heineken	"Lluvia"
Creative On Demand, Miami	Volkswagen	"Confrontation"
Grupo Gallegos, Long Beach, Calif.	Comcast Triple Play	"Pedro," "Ladrón"
Dieste Harmel & Partners, Dallas	Clorox Co.'s Glad ForceFlex trash bags	"Trash Tamer"
Dieste Harmel & Partners, Dallas	PepsiCo's Sierra Mist	"Cash Register"
Grupo Gallegos, Long Beach, Calif.	Calif. Milk Processor Board	"Sueños"
Vidal Partnership, New York	Sprint	"Silencio"
Bromley Communications, San Antonio	Continental Airlines	"Taller"
DraftFCB, San Juan	Radio Shack's Memory Card	"Gobernadores"

SILVER/RADIO

Grupo Gallegos, Long Beach, Calif.	Comcast Cable Latino	"Media Naranja"
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SILVER/NONTRADITIONAL, GUERRILLA MARKETING

Alma DDB, Miami	Personal Music	"Paísa"
Badillo Nazca Saatchi & Saatchi, San Juan	Toyota Yaris	"Manijas"

SILVER/OUT-OF-HOME

Conill, New York	Procter & Gamble's Tide	"Messy Things: Coffee, Ketchup, Wine"
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SILVER/MAGAZINE

BBDO, Puerto Rico	Puerto Rico Alzheimer's Foundation	"Forgotten Animals: Fish, Cage"
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SILVER/BEYOND HISPANIC

Lapiz, Chicago	Chicago Latino Film Festival	"Cowboys"
La Comunidad, Miami	Katrina Foundation	"Bin Laden"

SILVER/BICULTURAL, ENGLISH-SPEAKING HISPANICS

La Comunidad, Miami	Mun2	"Fences, Dream, Quiz Show"
Mun2	Mun2	"Snoop Dogg Knows Best"

SILVER/INTERACTIVE

Conill, Los Angeles	Toyota Motor Sales	"Yaris Music Lab"
La Comunidad, Miami	Art Basel	Art Basel invitation



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Bromley Communications • Bumpercar • BVK/Meka • The Cartel Group
Casanova Pendrill • Castells • Chambers Lopez & Gaitan • Cinco • Comunicad
Conill • COSTA IMC • Creative Civilization-An Aguilar/Girard Agency
CreativeOndemanD • cruz/kravetz: IDEAS • d expósito & Partners
Dieste Harmel & Partners • Directo Hispanic • Directo Hispano
Ethnic Marketing Group (EMG) • Enlace Communications • Euro RSCG Latino
FPO • Fusión • García 360° • GlobalHue Latino • GlobalWorks
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Onda R7 • Origen Global • PM Publicidad • Ponce Publicidad
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HISPANIC AGENCIES RANKED 1 TO 25

By U.S. revenue in 2007

RANK	AGENCY [HOLDING COMPANY AFFILIATION]	HEADQUARTERS	REVENUE	% CHG
1	Dieste Harmel & Partners* [Omnicom]	Dallas	\$40,400	4.9
2	Bravo Group* [WPP]	Miami	37,800	7.1
3	Vidal Partnership	New York	31,000	19.2
4	Lopez Negrete Communications	Houston	23,775	12.2
5	Bromley Communications* [Publicis]	San Antonio	22,620	-3.3
6	Conill* [Publicis]	Miami	20,900	20.1
7	GlobalHue* ¹	Southfield, Mich.	20,544	23.7
8	Zubi Advertising Services	Coral Gables, Fla.	19,600	3.2
9	LatinWorks* [Omnicom]	Austin, Texas	17,272	9.3
10	Casanova Pendrill* [Interpublic]	Costa Mesa, Calif.	15,000	11.1
11	Accentmarketing* [Interpublic]	Coral Gables, Fla.	14,278	-20.8
12	Hispanic Group Corp.	Miami	13,172	-7.3
13	Alma DDB* [Omnicom]	Coral Gables, Fla.	13,100	0.0
14	De la Cruz Group	Guaynabo, Puerto Rico	13,038	3.5
15	La Agencia de Orci & Asociados	Los Angeles	12,072	-24.7
16	Arvizu Advertising & Promotions	Phoenix	11,800	15.1
17	Winglatino* [WPP]	New York	10,000	0.0
18	Grupo Gallegos	Long Beach, Calif.	9,520	12.0
19	Euro RSCG Latino* [Havas]	New York	9,500	102.1
20	Machado/Garcia-Serra	Coral Gables, Fla.	9,269	28.8
21	Vox Collective	New York	8,986	37.4
22	Lopito Ileana & Howie	Guaynabo, P.R.	8,157	17.1
23	Moroch Partners'	Dallas	7,898	5.1
24	Al Punto	Tustin, Calif.	7,800	13.0
25	Acento	Los Angeles	7,520	15.5

Dollars are in thousands. *Figures are Ad Age estimates. Data are from the 63rd Agency Report (AA, May 5, 2008). Agencies are ranked by 100% of U.S. revenue unless Hispanic activities are less than 75% of revenue, in which case they are ranked at that percent of revenue. Holding companies may own only a minority stake. Notes continue on Page 58.

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HISPANIC AGENCIES RANKED 26 TO 50

By U.S. revenue in 2007

RANK	AGENCY [HOLDING COMPANY AFFILIATION]	HEADQUARTERS	REVENUE	% CHG
26	Reynardus & Moya Advertising	New York	\$7,433	-19.4
27	La Comunidad	Miami Beach, Fla.	\$7,000	16.7
28	Tapestry* [Publicis]	Chicago	\$6,831	10.0
29	San Jose Group	Chicago	\$6,790	3.2
30	Hawkeye ¹ [Hawkeye Group]	Dallas	\$6,365	7.1
31	LatinMedios.com	Aventura, Fla.	\$6,297	108.2
32	Images USA ^{1*}	Atlanta	\$6,255	84.2
33	Elevation ²	Washington	\$6,150	69.1
34	Castells & Asociados	Los Angeles	\$6,132	-0.8
35	Lapiz Hispanic Marketing* [Publicis]	Chicago	\$5,800	-17.1
36	Siboney USA* [Interpublic]	Coral Gables, Fla.	\$5,800	0.0
37	HeadQuarters Advertising	San Francisco	\$5,250	12.9
38	MARCA Hispanic ²	Coconut Grove, Fla.	\$5,235	14.9
39	Richards Group ¹	Dallas	\$4,980	3.8
40	Revolucion	New York	\$4,948	49.0
41	Cruz/Kravetz:Ideas	Los Angeles	\$4,791	-3.8
42	Cartel Group*	San Antonio	\$4,786	0.0
43	Marketing Store ¹	Lombard, Ill.	\$4,540	-9.8
44	Creative Civilization*	San Antonio	\$4,368	-6.7
45	Anderson Advertising*	San Antonio	\$4,100	NA
46	CreativeOnDemand*	Coconut Grove, Fla.	\$3,900	-15.2
47	McCann Healthcare Worldwide* [Interpublic]	Parsippany, N.J.	\$3,738	4.6
48	RLR Advertising & Marketing*	Pasadena, Calif.	\$3,653	0.0
49	Planit ¹	Baltimore	\$3,360	1.8
50	Viva Partnership	Miami	\$3,360	11.0

Notes continued from Page 56. 1) Ad Age estimates total GlobalHue multicultural revenue at \$42.8 million (Hispanic represents 48% of the total), up 23.7%. Hispanic activities represent 25% at Moroch Partners; 10% at Hawkeye; 45% at Images USA; 3% at Richards Group; 10% at Marketing Store; 3% at McCann Healthcare Worldwide; and 20% at Planit. 2) Added to the ranking after publication of the Agency Report, May 5. This ranking was revised in August 2008. MARCA Hispanic, No. 38, was omitted from the original ranking. Mass Hispanic Marketing, which was previously ranked No. 50, is now ranked No. 51 and does not appear on this revised chart.

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