

A SUPPLEMENT TO

**AdvertisingAge**  
75  
1930-2005

# HISPANIC FACT PACK

ANNUAL  
GUIDE TO  
HISPANIC  
ADVERTISING  
& MARKETING

**2005 EDITION**

IN ASSOCIATION WITH

**ahaa**

*Association of Hispanic Advertising Agencies*



*Your prayers have been answered.*

Does good exist when it comes to Hispanic advertising? Is there a Hispanic marketing heaven? Is there life after acculturation? What language does one speak to get a portion of the almighty Hispanic dollar? These and many more answers are just a phone call away. Amen.

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# HISPANIC FACT PACK

## TOP-LINE DATA ON THE HISPANIC MARKET IN THE U.S.

THE U.S. HISPANIC POPULATION, and the money marketers pour into Hispanic media to keep up with America's largest minority group, keeps growing faster and faster. In 2005, TNS Media Intelligence is forecasting 10.5% growth for the U.S. Hispanic media market, compared to a moderate 3.4% increase for the total U.S. advertising market.

And as the U.S. Census Bureau revises data from the 2000 census, Hispanic growth is speeding up. According to the Census Bureau, Hispanics represented half of all growth in the U.S. population between July 1, 2003, and July 1, 2004. As the overall population rose by about 1%, the Hispanic market grew at a rate of 3.6%. The latest figures, released by the U.S. Census Bureau in June 2005, put the total U.S. Hispanic population at 41.3 million, and many believe that official count is an understatement.

*Advertising Age's* second annual Hispanic Fact Pack offers valuable, hard-to-find data about demographic trends, marketer spending by category and company, Hispanic media and an expanded ranking of the top 50 Hispanic ad agencies. New this year is information about use of the Internet by Hispanics, who are going online faster than the overall population, and about acculturation, as the Hispanic population reaches a tipping point where greater growth from now on will come from U.S.-born Hispanics than from immigration as in the past.

Ad spending is broken down by medium, except for the fast-growing online category, where no reliable figures exist yet. The Internet Advertising Bureau predicts Hispanic online ad revenue could hit \$100 million in 2005, but Hispanic digital agencies, while optimistic, put the figure at closer to \$60 million, with Univision.com probably taking about half of that total.

The strongest categories for Hispanic advertising such as automotive and retail advertising are still experiencing double-digit growth. And others are catching up fast. Financial services, a category that paid little attention to Hispanics except for a few major marketers, is now pouring money into the Latin market. Although from a low base, banks and others spent 74% more to reach Hispanics in 2004.

—Laurel Wentz

### HOW TO REACH US

**Staff:** R. Craig Endicott, Kevin Brown, Scott MacDonald, Mark Schumann, Mike Ryan, Jennie Sierra, Laurel Wentz.

This Hispanic Fact Pack is a supplement to *Advertising Age*, published July 18, 2005. Digital PDF versions of this document can be

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**GROWTH:** [ groth ] noun: the process of becoming larger and more mature through natural development.

*Delivering more impact for advertisers with an increase of 2,066,000 readers from 2003-2004\**

\*Source: Simmons NCS/NCHS Fall Unified Study, 2004

**publish** [ po-blish ] verb: 1. To present for circulation, exhibit, or sale. 2. To bring to public notice. 3. To be the author of (a published work or works).

**leader** [ li-der ] noun: 1. A Leading contestant. 2. Something or someone that shows the way. 3. One who is highest in rank or authority. 4. A professional politician who controls a party or political machine. 5. A prominent article in a periodical.



**STRENGTH:** [ strength ] noun: an extremely valuable or useful ability, asset, or quality.

*Boasting 7 of the top 10 most read US Hispanic titles under its umbrella, with a 68% share of the audience\**

\*Source: Simmons NCS/NCHS Fall Unified Study, 2004

**advertise** [ ad-ver-tais ] noun: 1. To make known vigorously the positive features of (a product) 2. To bring to public notice. 3. a: to make publicly and generally known b : to announce publicly especially by a printed notice or a broadcast c : to call public attention to especially by emphasizing desirable qualities.



**INNOVATION:** [ inne-vay-sh'n ] noun: the act or process of inventing or introducing something new.

*Expanding an impressive portfolio with new launches: ESPN Deportes La Revista, Tu Dinero, Prevention en español, Hispanic Magazine and other new promotional platforms for reaching the market*



EDITORIAL  
**Televisa**

Defining Growth, Strength and Innovation in the US Hispanic Market

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# ADVERTISING & MARKETING

**Top advertiser in U.S. Hispanic media in 2004**

LEXICON MARKETING CORP.

**Top Hispanic magazine advertiser**

PROCTER & GAMBLE CO.

**Top Hispanic newspaper advertiser**

SBC COMMUNICATIONS

**Top Spanish-language spot TV advertiser**

FORD MOTOR CO.

AS THE HISPANIC MARKET MATURES spending is becoming less concentrated at the top.

The Top 50 national advertisers in Spanish-language media in 2004 accounted for 49.8% of total Hispanic media as measured by TNS Media Intelligence. That's down from 55% share in 2003. By comparison, the Top 50 in all national media claimed 32% in both 2004 and in 2003.

New Top 50 Hispanic entries include Lowe's Cos., Platinum Health Plus, Petrone Group, DirecTV Group, Wendy's International and Ameriquest Mortgage Co.

# Hit Your Market!

Founded in 1983, Spanish Broadcasting System, Inc. is the largest Hispanic-controlled radio broadcasting company in the United States. SBS currently owns and operates 20 stations in six of the nation's top-ten Hispanic markets including New York, Miami, Los Angeles, San Francisco, Chicago and Puerto Rico.

Spanish Broadcasting's mission is to serve Hispanic audiences in the top U.S. markets and the advertisers that target their dynamic purchasing power.



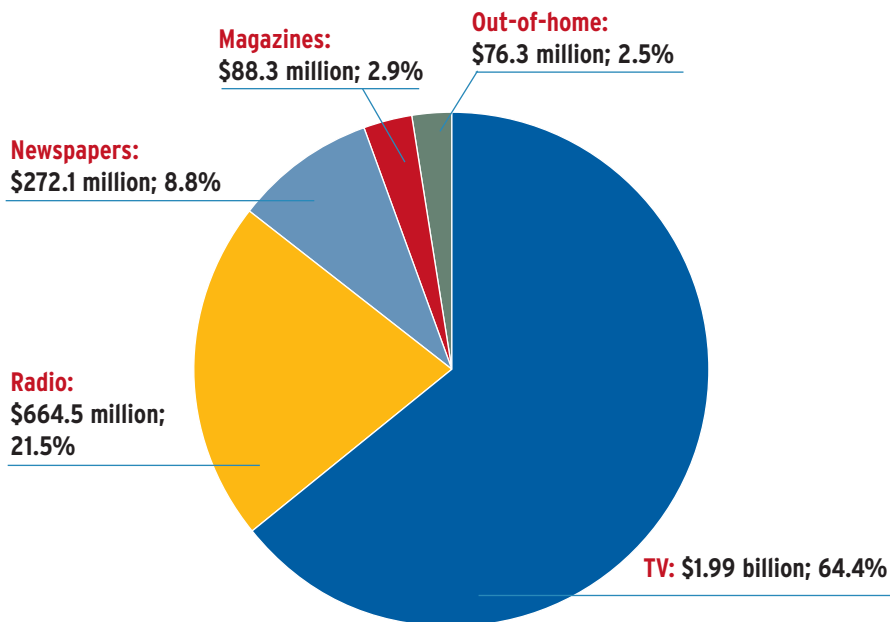
**SPANISH BROADCASTING SYSTEM**

SBS TOWER—2601 S. Bayshore Dr., Pll, Coconut Grove, Florida 33133 • [www.spanishbroadcasting.com](http://www.spanishbroadcasting.com)  
Nasdaq Symbol-SBSA • For sales and syndication info please contact Marko Radlovic (305)441-6901

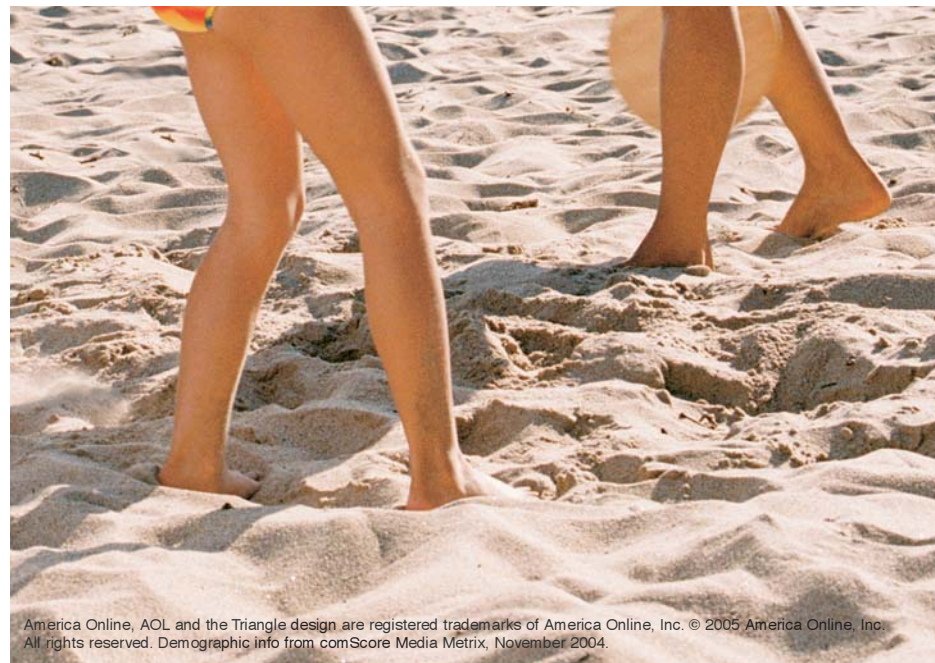
## HISPANIC AD SPENDING BY MEDIUM

MEDIUM	ADVERTISING SPENDING		
	2004	2003	% CHG
Network/national TV	\$1,387.2	\$1,216.8	14.0
Local TV	602.8	558.1	8.0
National radio	191.2	180.3	6.1
Local radio	473.2	448.3	5.6
National newspapers	110.2	95.0	16.0
Local newspapers	161.9	143.7	12.7
Magazines	88.3	73.6	20.0
Out-of-home	76.3	74.3	2.7
<b>Total</b>	<b>3,091.2</b>	<b>2,790.1</b>	<b>10.8</b>

Dollars in millions. Data from HispanTelligence, 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. See Page 24 for media explanation.



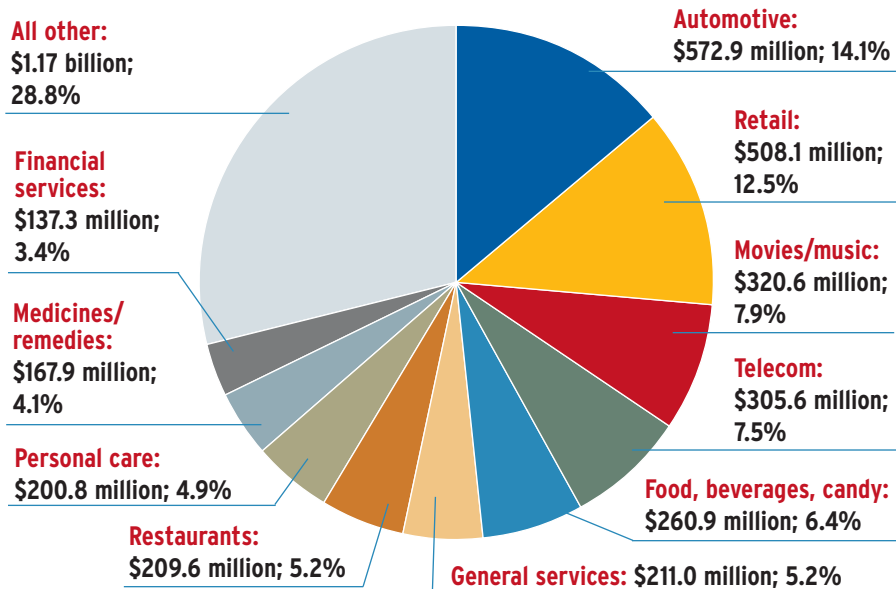
**MEET THE RIVERAS. AFTER THE SANDCASTLES.** Meet Mom on AOL Latino, getting ideas for the weekly family cookout. Meet Dad on AOL Deportes, loading up with soccer scores. Want to meet the Riveras and 10.3 million Hispanics like them? Start by visiting [aolmedianetworks.com](http://aolmedianetworks.com). Let us connect you to their lives. **AMERICA LIVES. HERE.** **AOL/media networks**



## AD SPENDING BY CATEGORY IN HISPANIC MEDIA

CATEGORY	ADVERTISING SPENDING		
	2004	2003	% CHG
Automotive	\$572.9	\$499.1	14.8
Retail	508.1	449.1	13.1
Movies, video & music	320.6	255.3	25.6
Telecommunications	305.6	304.6	0.3
Food, beverages & candy	260.9	284.2	-8.2
General services	211.0	178.4	18.3
Restaurants	209.6	197.5	6.1
Personal care	200.8	194.1	3.5
Medicines & remedies	167.9	154.8	8.5
Financial services	137.3	79.1	73.7
All other	1,168.1	1,197.9	-2.5
<b>Total measured media</b>	<b>4,062.8</b>	<b>3,794.0</b>	<b>7.1</b>

Dollars in millions. Media from TNS Media Intelligence and representing combined media totals from broadcast TV networks, Galavision (cable), Spanish-language magazines (including four PIB monitored Spanish-language magazines), Spanish-language newspapers and Spanish-language spot TV stations. Categories are aggregated by *Ad Age*.



we are hungry,  
and we want a car.

We have many reasons to smile about (Sensodyne). We are moved by beauty (Pantene, Clairol, Cover Girl), we have a soft spot for clothes (Downy), we love to shop (Kmart), and of course look for reasons to celebrate... always responsibly (Crown Royal). There's a scent of success in the air here (Febreze). Bank on it (US Bank). We think that putting our clients at ease (Dulcolax) is the only way to secure our future (Allianz Life). After all, we have put a lot of talent behind it.

So, we'll come clean (Zest), and say it: we are looking for a food account and a car account. So be it.

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or call Tony Dagnery +1 212 • 500 • 9418

## TOP 50 ADVERTISERS IN HISPANIC MEDIA

RANK	MARKETER	2004 AD SPENDING	% CHG
1	Lexicon Marketing Corp.	\$178.5	-19.9
2	Procter & Gamble Co.	153.6	-10.9
3	Sears Holdings Corp.	111.5	-19.2
4	General Motors Corp.	108.3	30.1
5	DaimlerChrysler	70.4	54.0
6	PepsiCo	68.5	-20.6
7	Johnson & Johnson	67.5	35.9
8	McDonald's Corp.	65.8	1.4
9	Ford Motor Co.	62.7	5.4
10	SBC Communications	58.8	47.4
11	Wal-Mart Stores	55.9	73.1
12	U.S. Government	54.7	2.7
13	Verizon Communications	53.8	44.3
14	Toyota Motor Corp.	43.1	-25.4
15	AT&T Corp.	40.0	-16.2
16	Time Warner	39.9	-6.6
17	Hyundai Motor Co.	39.5	29.7
18	Altria Group	39.0	19.6
19	L'Oreal	34.6	25.6
20	Sony Corp.	31.4	-2.4
21	Yum Brands	30.8	10.7
22	Walt Disney Co.	30.7	9.7
23	Home Depot	29.3	-5.0
24	Coca-Cola Co.	27.7	16.1
25	Kellogg Co.	25.2	14.1

RANK	MARKETER	2004 AD SPENDING	% CHG
26	Unilever	\$24.8	22.7
27	Bally Total Fitness Holdings Corp.	24.6	-37.8
28	SABMiller	24.2	-40.2
29	Texas Pacific Group (Burger King)	24.2	15.8
30	Deutsche Telekom	23.1	30.3
31	Americatel Corp.	22.9	-39.9
32	Nissan Motor Co.	22.7	7.3
33	Honda Motor Co.	22.4	-2.1
34	Ameriquest Mortgage Co.	21.2	NA
35	General Electric Co.	20.9	-1.3
36	Anheuser-Busch Cos.	20.5	-13.3
37	Wendy's International	20.4	28.2
38	Clorox Co.	19.9	-38.3
39	News Corp. (DirecTV Group)	19.6	57.5
40	Cosmeticos Elicina	19.5	-50.7
41	Southwest Airlines	19.1	-5.0
42	EMI Group	18.8	53.3
43	Petrone Group	17.5	36.8
44	J.C. Penney Co.	17.3	-21.1
45	Target Corp.	17.3	28.6
46	Platinum Health Plus	17.2	107.7
47	Pfizer	17.1	-19.5
48	Colgate-Palmolive Co.	16.6	-16.8
49	World Vision Organization	16.1	-75.7
50	Lowe's Cos.	15.3	NA

Dollars in millions. 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.

## TOP 25 ADVERTISERS IN HISPANIC MAGAZINES

RANK	MARKETER	2004 AD SPENDING	% CHG
1	Procter & Gamble Co.	\$11,223.9	-28.2
2	General Motors Corp.	9,585.0	5.7
3	L'Oreal	8,974.8	24.7
4	Ford Motor Co.	8,211.3	-29.3
5	Johnson & Johnson	5,963.9	62.7
6	DaimlerChrysler	5,779.5	24.0
7	U.S. Government	4,496.0	20.4
8	Unilever	3,934.7	207.5
9	Estee Lauder Cos.	3,898.0	-31.0
10	Pfizer	2,950.9	3.0
11	Sears Holdings Corp.	2,617.7	-3.9
12	Toyota Motor Corp.	2,558.7	-34.0
13	Time Warner	2,531.4	-19.7
14	Altria Group	2,343.2	-24.0
15	Colgate-Palmolive Co.	2,220.6	2.0
16	Samy Salon Systems	2,135.9	98.6
17	McDonald's Corp.	1,978.6	87.1
18	Wal-Mart Stores	1,869.1	86.4
19	Lexicon Marketing Corp.	1,666.2	523.1
20	Kellogg Co.	1,558.9	1203.4
21	Verizon Communications	1,375.6	65.9
22	Avon Products	1,164.9	-42.4
23	Volkswagen	1,157.4	-43.3
24	Hyundai Motor Co.	1,075.7	128.1
25	Mosaico	986.4	497.1

Dollars in thousands. Magazine ad spending from TNS Media Intelligence, including two media classifications: Spanish-language magazines and four PIB monitored Spanish-language magazines.

## TOP 10 BRANDS IN HISPANIC MAGAZINES

RANK	BRAND/SERVICES	2004 AD SPENDING	% CHG
1	Office of Nat'l Drug Control Policy	\$2,008.1	77.1
2	Chrysler Town & Country	1,746.0	NA
3	Ingles Sin Barreras	1,643.2	NA
4	McDonald's Restaurants	1,550.9	NA
5	Land Rover LR3	1,525.5	NA
6	Ortho Evra	1,481.5	NA
7	Aricept	1,402.2	-26.1
8	Viagra	1,353.5	101.8
9	Samy Salon Systems	1,334.6	NA
10	Verizon Wireless	1,208.3	146.3

Kellogg.  
Lápiz client since 1990.





## TOP 10 ADVERTISERS IN HISPANIC NEWSPAPERS

RANK	MARKETER	2004 AD SPENDING	% CHG
1	SBC Communications	\$9,197.6	48.9
2	Sears Holdings Corp.	3,956.1	-13.2
3	Verizon Communications	3,850.7	146.3
4	Univision Communications	3,113.0	128.8
5	General Electric Co.	2,486.2	66.7
6	Walt Disney Co.	2,450.2	69.0
7	Rooms To Go	2,434.9	18.1
8	Washington Mutual	2,251.7	84.3
9	U.S. Government	2,168.5	39.7
10	Nextel Communications	1,991.1	184.4

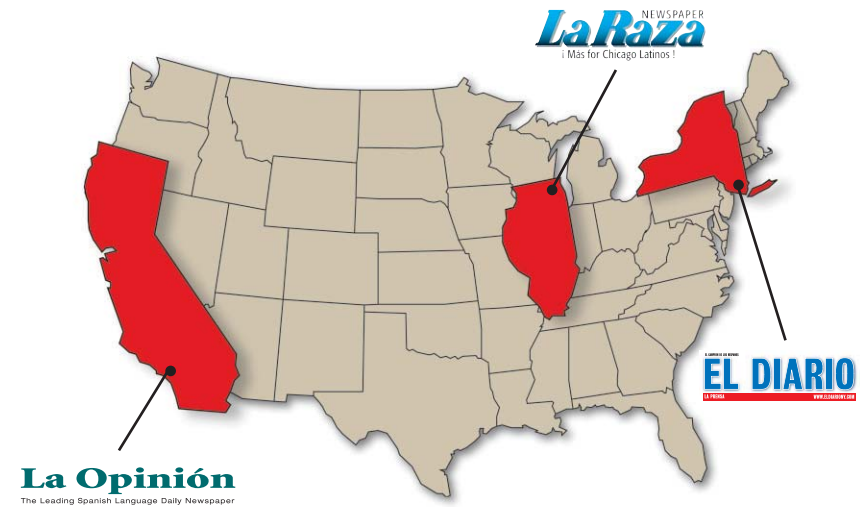
Dollars in thousands. Measured magazine ad spending from TNS Media Intelligence. Percent change is computed from 2003 data.

## TOP 10 BRANDS IN HISPANIC NEWSPAPERS

RANK	BRAND	2004 AD SPENDING	% CHG
1	Cingular Wireless	\$2,990.5	144.0
2	Verizon Wireless	2,580.2	214.6
3	Sears	2,439.8	18.3
4	Rooms To Go	2,434.9	18.1
5	Univision	2,385.9	169.5
6	Rhino Sky Satellite	2,309.1	60.1
7	AT&T Wireless stores	2,302.3	181.5
8	Home Depot	1,918.0	36.3
9	Best Buy	1,890.9	16.9
10	Washington Mutual	1,863.2	72.8

Dollars are in thousands. Measured magazine ad spending from TNS Media Intelligence. Percent change is computed from 2003 data.

# 1.9 million unique Hispanic readers per week



impressed?

#1 US Spanish Language Newspaper Publisher

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La Opinión NEWSPAPER La Raza NEWSPAPER EL DIARIO

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at (212) 807-4781 or  
erich.linker@impremedia.com

Source: Scarborough, 2004

## TOP 25 ADVERTISERS IN SPANISH-LANGUAGE NET TV

RANK	MARKETER	2004 AD SPENDING	% CHG
1	Lexicon Marketing Corp.	\$175.0	-21.0
2	Procter & Gamble Co.	138.2	-8.1
3	Sears Holdings Corp.	99.9	-20.4
4	General Motors Corp.	76.6	24.3
5	PepsiCo	62.0	-22.5
6	Johnson & Johnson	59.9	34.9
7	McDonald's Corp.	52.2	-4.4
8	Wal-Mart Stores	51.1	76.1
9	DaimlerChrysler	47.4	86.6
10	SBC Communications	38.9	238.8
11	Altria Group	34.2	27.0
12	Toyota Motor Corp.	33.3	-28.2
13	AT&T Corp.	33.2	-17.6
14	Time Warner	33.0	-4.2
15	U.S. Government	30.9	-21.8
16	Hyundai Motor Co.	30.4	20.1
17	Ford Motor Co.	28.4	5.8
18	Verizon Communications	28.0	26.5
19	Sony Corp.	27.1	-6.0
20	Home Depot	26.7	-6.9
21	Coca-Cola Co.	26.3	21.3
22	L'Oreal	24.7	22.7
23	Burger King (Texas Pacific Group)	23.5	17.5
24	Walt Disney Co.	23.4	12.2
25	Kellogg Co.	22.7	7.3

Dollars in millions. Measured magazine ad spending from TNS Media Intelligence, including Univision, Telemundo and Telefutera broadcast TV networks and Galavision cable TV network. Percent change is computed from 2003.

**CHALLENGE**

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(210) 244-2324

## TOP 25 BRANDS IN SPANISH-LANGUAGE NETWORK TV

RANK	BRAND	2004 AD SPENDING	% CHG
1	Ingles Sin Barreras	\$175.0	-21.0
2	McDonald's	52.2	0.4
3	Sears stores	32.3	-5.7
4	Home Depot	26.5	-4.1
5	Verizon Wireless	25.5	15.3
6	10-10-345	24.4	-0.4
7	Burger King	23.5	17.5
8	Cre-C	23.2	NA
9	Coca-Cola	23.1	6.7
10	AT&T Wireless	22.8	NA
11	Bally Total Fitness	22.5	-41.1
12	Pepsi	22.3	14.8
13	10-10-123	21.2	-30.1
14	Wal-Mart stores	21.1	-10.6
15	Ameriquest	21.1	NA
16	Elicina	19.4	-50.7
17	Wendy's	19.1	29.2
18	Paquete Desintoxicador	17.5	-13.2
19	Hongosan	17.5	37.1
20	T-Mobile wireless	17.3	11.9
21	World Vision Org	16.0	-75.6
22	Sears appliances	15.9	-39.7
23	Wal-Mart groceries	15.5	NA
24	AOL	14.6	66.7
25	Miller Lite	13.9	-61.1

Dollars in millions. Measured magazine ad spending from TNS Media Intelligence, including Univision, Telemundo and Telefuturo broadcast TV networks and Galavision cable TV network. Percent change is computed from 2003.

# REACHING LATINO SPORTS FANS WHEREVER THEY ARE.



ESPN Deportes delivers all the action this elusive target craves with ESPN Deportes television, ESPN Deportes La Revista, ESPNDeportes.com, ESPN Deportes Radio and ESPN Deportes Wireless.

*Are you taking full advantage of what ESPN Deportes has to offer?*

FOR ADVERTISING INFORMATION, CONTACT FÉLIX PÉREZ, ESPN DEPORTES: (212) 456-0268

## TOP 10 ADVERTISERS IN SPANISH-LANGUAGE SPOT TV

RANK	MARKETER	2004 AD SPENDING	% CHG
1	<b>Ford Motor Co.</b>	\$24.9	20.0
2	<b>Verizon Communications</b>	20.6	61.4
3	<b>General Motors Corp.</b>	20.2	72.1
4	<b>DaimlerChrysler</b>	16.4	10.8
5	<b>Yum Brands</b>	12.9	2.4
6	<b>Nissan Motor Co.</b>	12.4	-7.2
7	<b>McDonald's Corp.</b>	11.4	25.9
8	<b>SBC Communications</b>	10.0	-54.7
9	<b>Anheuser-Busch Cos.</b>	9.1	10.4
10	<b>Jack in the Box</b>	8.6	-6.5

Dollars are in thousands. Measured magazine ad spending from TNS Media Intelligence. Percent change is computed from 2003 data.

## TOP 10 BRANDS IN SPANISH-LANGUAGE SPOT TV

RANK	BRAND	2004 AD SPENDING	% CHG
1	<b>Verizon Wireless</b>	\$15.2	69.9
2	<b>McDonald's</b>	11.1	27.4
3	<b>Jack In The Box</b>	8.6	-6.5
4	<b>DirectTV</b>	6.1	NA
5	<b>Los Defensores Atty</b>	5.9	9.1
6	<b>Famsa appliances</b>	5.6	-0.9
7	<b>21st Century insurance</b>	5.6	NA
8	<b>T-Mobile</b>	5.2	NA
9	<b>Taco Bell</b>	5.0	3.5
10	<b>Sopp Chevrolet (Bell, Calif.)</b>	5.0	42.2

Dollars are in thousands. Measured magazine ad spending from TNS Media Intelligence. Percent change is computed from 2003 data.

## MEDIA BUYERS SEE BUSINESS WHERE OTHERS ONLY SEE NEWSPAPER BOXES.



What good media buyers see in RUMBO's boxes is real business; a powerful outlet to speak to more than 267,000 unique Hispanic households besides newsstand copies.

Our network of four Spanish-language daily newspapers reaches the Hispanic markets of Houston, San Antonio, Rio Grande Valley and Austin.



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Mark Stacey, National Advertising Director  
P: 512.697.3904 E: [mark.stacey@diaiosrumbo.com](mailto:mark.stacey@diaiosrumbo.com)

# MEDIA

**Top Hispanic magazine by ad revenue**

PEOPLE EN ESPAÑOL

**Top Hispanic newspaper**

EL NUEVO HERALD

**Top English-language net TV prime-time program among Hispanic viewers**

AMERICAN IDOL

**Top Spanish-language program**

LA MADRASTRA

TWO SOURCES for measuring media are employed in this Fact Pack. Each offers data that, together, offer a more complete picture of the market.

TNS Media Intelligence measures Hispanic media at rate card rates (gross expenditures), and generates media rankings by medium (print in this section) and by advertiser.

HispanTelligence of Hispanic Business determines media totals via discussions with Hispanic media, agencies and the use of public records. Its figures are net—what the media retain. *Ad Age* uses its data by market (opposite), and by eight-media splits (Page 8).

## TOP HISPANIC DMA'S BY MEDIA SPENDING

MARKET	TV		RADIO		PRINT		TOTAL	
	'04	% CHG	'04	% CHG	'04	% CHG	'04	% CHG
Los Angeles	\$307.3	8.5	\$167.0	12.7	\$89.3	3.6	\$563.5	8.9
Miami-Ft. Lauderdale	116.8	8.7	94.2	8.1	57.2	27.0	268.2	11.9
New York	99.3	5.0	84.4	5.3	49.9	18.7	233.6	7.8
Houston	55.8	6.9	56.3	5.8	8.2	6.0	120.3	6.3
Chicago	47.2	2.9	43.8	3.7	24.1	24.8	115.1	7.2
San Francisco-Oakland-San Jose	42.1	5.5	27.2	4.7	5.0	8.5	74.3	5.6
Dallas	33.8	5.2	27.9	7.2	7.5	3.3	69.2	5.8
San Antonio	21.9	2.9	31.1	3.4	3.9	21.6	56.9	4.5
Phoenix	26.9	5.2	13.1	7.7	16.0	0.1	56.1	4.0
San Diego	27.2	3.0	18.0	5.5	4.9	4.0	50.1	4.0
<b>Total</b>	<b>778.3</b>	<b>6.8</b>	<b>563.1</b>	<b>7.8</b>	<b>265.9</b>	<b>12.7</b>	<b>1,607.3</b>	<b>8.1</b>

Dollars are estimated and are in millions. Data from HispanTelligence, the research arm of *Hispanic Business*. Market estimates based on information supplied by Spanish-language TV, radio and print outlets.

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## TOP 10 WEB PROPERTIES AMONG HISPANIC USERS BY LANGUAGE PREFERENCE

RANK	PROPERTY	UNIQUE VISITORS (000)	% REACH
------	----------	-----------------------	---------

### SPANISH-LANGUAGE PREFERRED

1	Yahoo! Sites	1,777	76.4
2	MSN-Microsoft Sites	1,760	75.7
3	Time Warner Network	1,674	72.0
4	Google Sites	1,238	53.2
5	eBay	795	34.2
6	Univision.com	662	28.5
7	Terra Networks	622	26.8
8	Vendare Media - New.net Sites	583	25.1
9	Ask Jeeves	540	23.2
10	Bank of America	455	19.5

### ENGLISH-LANGUAGE PREFERRED

1	Time Warner Network	5,781	74
2	Yahoo! Sites	5,558	71
3	MSN-Microsoft Sites	5,072	65
4	Google Sites	3,615	46
5	eBay	3,049	39
6	Ask Jeeves	2,032	26
7	Vendare Media - New.net Sites	1,906	24
8	Amazon Sites	1,689	22
9	Intermix Media	1,677	21
10	CNET Networks	1,562	20

Data from comScore Media Metrix. Unique visitors are in thousands. % reach is the percent of all Hispanic Internet users who prefer Spanish (2.3 million in the top table) or English (7.8 million in the bottom table) who visited the property for the month of April 2005.

## TOP WEB PROPERTIES AMONG ALL HISPANIC USERS

RANK	PROPERTY	UNIQUE VISITORS (000)	% REACH
1	Time Warner Network	10,609	74.6
2	Yahoo! Sites	10,530	74.0
3	MSN-Microsoft Sites	9,717	68.3
4	Google Sites	7,037	49.5
5	eBay	5,464	38.4
6	Vendare Media - New.net Sites	3,839	27.0
7	Ask Jeeves	3,763	26.5
8	Amazon Sites	3,115	21.9
9	Intermix Media	2,898	20.4
10	CNET Networks	2,888	20.3

Data from comScore Media Metrix. % reach is of all Hispanic Internet users (14.2 million).

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## TOP 25 HISPANIC NEWSPAPERS BY AD REVENUE

RANK	NEWSPAPER	2004 AD REVENUE	% CHG
1	<b>El Nuevo Herald (Miami)</b>	<b>\$65,140.9</b>	<b>10.1</b>
2	<b>La Opinion (Los Angeles)</b>	<b>49,255.8</b>	<b>19.6</b>
3	<b>El Diario (Juarez)</b>	<b>24,641.3</b>	<b>NA</b>
4	<b>El Diario la Prensa (New York)</b>	<b>24,254.9</b>	<b>-17.5</b>
5	<b>Hoy (Chicago)</b>	<b>21,409.3</b>	<b>202.0</b>
6	<b>Hoy (New York)</b>	<b>20,190.5</b>	<b>-9.0</b>
7	<b>La Raza (Chicago)</b>	<b>10,044.8</b>	<b>-13.1</b>
8	<b>Hoy (Los Angeles) *</b>	<b>8,346.3</b>	<b>NA</b>
9	<b>El Norte (El Paso)</b>	<b>7,860.2</b>	<b>NA</b>
10	<b>Phoenix TV y Mas</b>	<b>7,354.8</b>	<b>117.0</b>
11	<b>El Sentinel (Miami)</b>	<b>7,051.4</b>	<b>83.2</b>
12	<b>Nuevo Mundo (San Jose)</b>	<b>7,045.3</b>	<b>14.8</b>
13	<b>Diario las Americas (Miami)</b>	<b>5,955.4</b>	<b>30.5</b>
14	<b>Al Dia (Dallas)</b>	<b>5,338.0</b>	<b>504.3</b>
15	<b>Lawndale News (Chicago)</b>	<b>5,292.9</b>	<b>36.5</b>
16	<b>Washington Hispanic</b>	<b>5,036.2</b>	<b>NA</b>
17	<b>Diario la Estrella (Dallas)</b>	<b>4,993.4</b>	<b>250.4</b>
18	<b>La Voz (Phoenix)</b>	<b>4,355.4</b>	<b>52.8</b>
19	<b>Prensa Hispana (Phoenix)</b>	<b>4,309.7</b>	<b>NA</b>
20	<b>El Latino San Diego</b>	<b>4,089.4</b>	<b>21.9</b>
21	<b>Al Dia (Philadelphia)</b>	<b>3,584.7</b>	<b>NA</b>
22	<b>El Especial (New York)</b>	<b>3,260.6</b>	<b>NA</b>
23	<b>Mundo L.A. (Los Angeles)</b>	<b>3,075.4</b>	<b>54.7</b>
24	<b>La Voz de Houston</b>	<b>2,785.6</b>	<b>NA</b>
25	<b>Vida en el Valle (Fresno, Calif.)</b>	<b>2,693.2</b>	<b>NA</b>

Dollars are in thousands. Measured newspaper ad spending from TNS Media Intelligence. Percent change is computed from figures for 2003. \*Started monitoring in May 2004

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## TOP 25 HISPANIC MAGAZINES BY AD REVENUE

RANK	MAGAZINE	2004 AD REVENUE	% CHG
1	People en Español	\$34,849.3	18.9
2	Latina	24,851.4	39.9
3	Glamour en Español	16,268.8	29.5
4	RD Selecciones	15,473.1	23.2
5	Vogue en Español	14,702.6	36.2
6	Hispanic Business	9,714.9	13.3
7	Vanidades	9,357.5	NA
8	TV y Novelas	9,090.0	NA
9	Hispanic Magazine	6,920.7	12.9
10	Newsweek en Español	5,961.2	-13.1
11	Vista	5,233.8	-19.2
12	Nuestra Gente	4,867.5	-20.6
13	Motor Trend en Español	4,700.4	-6.9
14	Nexos	4,547.5	32.0
15	Cristina	3,235.6	24.0
16	Mira	3,079.3	NA
17	Cosmopolitan en Español	2,922.7	NA
18	Prevention en Español	2,912.0	NA
19	Shape en Español	2,010.4	NA
20	Estylo Magazine	1,976.3	24.1
21	National Geographic Hispanic	1,938.3	NA
22	Lamaze Para Padres	1,916.0	46.1
23	Ser Padres	1,852.0	NA
24	Latina Style	1,724.2	30.8
25	Buenhogar	1,538.6	NA

Dollars in thousands. Measured magazine ad spending from TNS Media Intelligence, including two media classifications: Spanish-language magazines and four PIB monitored Spanish-language magazines.

## TOP U.S. RADIO FORMATS BY AGE GROUP

RANK	FORMAT	SHARE % BY AGE GROUP				
		12+	12-17	18-24	25-34	35-44
<b>ALL FORMATS</b>						
1	News, talk, info	17.6	2.1	3.8	10.7	15.0
2	Adult contemporary	13.8	6.9	9.9	14.0	16.9
3	Contemporary hit radio	11.3	41.4	25.9	14.8	8.0
4	Urban	10.3	18.2	14.1	11.9	10.8
5	Spanish-language	10.0	7.4	14.7	15.8	10.3
<b>SPANISH-LANGUAGE FORMATS</b>						
1	Mexican regional	3.7	3.0	6.9	6.7	3.6
2	Spanish contemporary	2.8	2.4	4.4	4.6	2.9
3	Spanish tropical	1.8	1.5	2.3	2.9	2.2

Formats ranked by share of 12+ listening audience. In reading the chart, the Hispanic format holds a 10% share of all radio listening aged 12 and older and is strongest, at 15.8%, in the 25-34 age group. Data from Arbitron's American Format Listening Trends report for Winter 2005 covering 98 continuously measured markets.

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## TOP 20 PRIME-TIME ENGLISH-LANGUAGE NETWORK TV PROGRAMS AMONG HISPANIC VIEWERS

RANK	PROGRAM [DATE IN 2005]	NETWORK	HISP. HH RATING	AVG. HISP. HH	AVG. HISP. VWRS
1	<b>American Idol</b> [Wed.]	FOX	7.5	822	1,290
2	<b>Simpsons</b> [Sp-5/15 8:30P(S)-05/15]	FOX	6.6	716	1,136
3	<b>Simpsons</b> [Sp-5/1 8:30P(S)-05/01]	FOX	6.5	714	1,193
3	<b>American Idol</b> [Tue.]	FOX	6.5	709	1,038
5	<b>Desperate Housewives</b>	ABC	6.4	695	1,043
6	<b>Family Guy</b>	FOX	6.0	655	1,091
7	<b>CSI</b>	CBS	5.9	642	927
8	<b>American Dad</b>	FOX	5.7	622	1,054
9	<b>Simpsons</b> [Sp-5/8 8:30P(S)-05/08]	FOX	5.5	598	1,022
10	<b>CSI: Miami</b>	CBS	5.4	584	766
11	<b>Simpsons</b>	FOX	5.2	563	948
12	<b>Raymond: Last Laugh</b> [(S)-05/16]	CBS	5.1	556	777
12	<b>Everybody Loves Raymond</b>	CBS	5.1	553	753
14	<b>Contender</b> [5/24(S)-05/24]	NBC	5.0	546	956
14	<b>Lost</b>	ABC	5.0	546	901
14	<b>WWE Smackdown!</b>	UPN	5.0	544	871
17	<b>Without A Trace</b>	CBS	4.9	537	723
17	<b>Law and Order: SVU</b>	NBC	4.9	535	676
17	<b>NBC Movie of the Week</b> [Sun(S)-05/29]	NBC	4.9	533	904
20	<b>Grey's Anatomy</b>	ABC	4.8	521	781

Data from Nielsen Hispanic Homevideo Index. Households and viewers are measured in thousands. Measurement period was 7pm to 11pm, Monday through Sunday (04/25/05 - 05/29/05). Programs under five minutes and breakouts are excluded. Average Hispanic viewers (VWRS) are the number of persons in Hispanic households viewing the program.

## TOP 8 ENGLISH-LANGUAGE CABLE TV PROGRAMS AMONG HISPANIC VIEWERS

RANK	PROGRAM [MONTH/DAY IN '05]	NETWORK	HISP. HH RATING	AVG. HISP. HH	AVG. HISP. VWRS
1	<b>Fairly Odd Parents</b> [05/28]	Nickelodeon	4.3	468	710
2	<b>WWE Entertainment</b> [04/25]	Spike TV	4.1	443	814
3	<b>WWE Entertainment</b> [05/16]	Spike TV	3.9	431	737
3	<b>Spongebob</b> [05/28]	Nickelodeon	3.9	430	701
3	<b>Spongebob</b> [05/07]	Nickelodeon	3.9	425	582
3	<b>WWE Entertainment</b> [05/23]	Spike TV	3.9	424	594
7	<b>Fairly Odd Parents</b> [05/22]	Nickelodeon	3.8	417	519
7	<b>Fairly Odd Parents</b> [05/22]	Nickelodeon	3.8	412	532

Data from Nielsen Hispanic Homevideo Index. Households and viewers in thousands. Measurement period was 24 hours, from Monday through Sunday (04/25/05 - 05/29/05).

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## TOP 10 PRIME-TIME SPANISH-LANGUAGE NETWORK TV PROGRAMS AMONG HISPANIC VIEWERS

RANK	PROGRAM [WEEKNIGHT]	NETWORK	HISP. HH RATING	AVG. HISP. HH	AVG. HISP. VWRS
1	<b>La Madrastra [Tue.]</b>	Univision	25.4	2,774	4,613
1	<b>La Madrastra [Wed.]</b>	Univision	25.4	2,771	4,889
1	<b>La Madrastra [Mon.]</b>	Univision	25.4	2,770	4,845
4	<b>La Madrastra [Thu.]</b>	Univision	24.4	2,657	4,624
5	<b>La Madrastra [Fri.]</b>	Univision	23.2	2,536	4,366
6	<b>Apuesta Por Un Amor [Mon.]</b>	Univision	22.9	2,500	4,403
6	<b>Apuesta Por Un Amor [Wed.]</b>	Univision	22.9	2,499	4,392
8	<b>Apuesta Por Un Amor [Tue.]</b>	Univision	22.7	2,472	4,218
9	<b>Apuesta Por Un Amor [Thu.]</b>	Univision	21.7	2,370	4,135
10	<b>Inocente De Ti [Wed.]</b>	Univision	21.1	2,300	3,862

## TOP 11 SPANISH-LANGUAGE CABLE TV PROGRAMS

RANK	PROGRAM [DATE IN 2005]	NETWORK	HISP. HH RATING	AVG. HISP. HH	AVG. HISP. VWRS
1	<b>Futbol Liga Mex [Wed 05/11]</b>	Galavisión	2.8	309	563
1	<b>El Chavo II [05/03]</b>	Galavisión	2.8	302	548
3	<b>El Chavo II [04/29]</b>	Galavisión	2.7	293	583
4	<b>El Chavo II [05/02]</b>	Galavisión	2.5	275	609
4	<b>El Chavo II [05/25]</b>	Galavisión	2.5	274	530
4	<b>El Chavo [04/29]</b>	Galavisión	2.5	271	643
7	<b>El Chavo [05/03]</b>	Galavisión	2.4	263	399
7	<b>El Chavo II [05/24]</b>	Galavisión	2.4	258	470
9	<b>El Chavo II [04/28]</b>	Galavisión	2.3	255	402
9	<b>Copa Lib Rd16 Gm10 (2) [05/24]</b>	Fox Sports en Esp.	2.3	254	452
9	<b>Chespirito - [Mon 05/16]</b>	Galavisión	2.3	246	388

Data from Nielsen Hispanic Homevideo Index. Households and viewers are measured in thousands. TV measurement period was 7pm to 11pm/cable was 24 hour, Monday through Sunday, May 2005 (04/25/05 - 05/29/05). Programs under five minutes and breakouts are excluded. Average Hispanic viewers (VWRs) are the number of persons in Hispanic households viewing the program. 11 cable programs are shown because the last three are tied.

## TOP 10 HISPANIC LOCAL TV MARKETS

RANK	MARKET	HISPANIC TV HH	TOTAL TV HH	HISP. % OF ALL*	DOMIN.**
	<b>Total US</b>	<b>10,910,000</b>	109,600,000	10.0	46.4
1	<b>Los Angeles</b>	<b>1,718,730</b>	5,431,140	31.6	48.4
2	<b>New York</b>	<b>1,203,930</b>	7,355,710	16.4	51.5
3	<b>Miami</b>	<b>603,180</b>	1,496,810	40.3	62.8
4	<b>Houston</b>	<b>454,560</b>	1,902,810	23.9	48.6
5	<b>Chicago</b>	<b>432,920</b>	3,417,330	12.7	46.1
6	<b>Dallas</b>	<b>388,860</b>	2,292,760	17.0	50.9
7	<b>San Antonio</b>	<b>348,250</b>	748,950	46.5	25.8
8	<b>San Francisco</b>	<b>332,500</b>	2,359,870	14.1	41.4
9	<b>Phoenix</b>	<b>294,560</b>	1,596,950	18.4	45.4
10	<b>Harlingen, Texas</b>	<b>256,840</b>	312,300	82.2	46.4

Data from Nielsen Hispanic Station Index. \*Estimates as of Jan. 1, 2005, \*\*% of Hispanic households where only or mostly Spanish is spoken by all persons 2 yrs. old+ in the home.

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## TOP SPANISH-LANGUAGE CABLE NETWORKS

RANK	CABLE NETWORK	CABLE COVERAGE % OF ALL HISPANIC TV HH	SHARE % OF HISPANIC CABLE HH
1	Galavision	56.5	79.1
2	Fox Sports en Español	31.5	44.1
3	Mun2	29.5	41.3
4	MTV Español	24.3	34.1
5	CNN en Español	20.3	28.4
6	Discovery en Español	20.1	28.1

Data from Nielsen Media Research's NHTI coverage of Hispanic households (HH) as supplied by Galavision. There are 7,620,000 Hispanic cable households out of 10,910,000 Hispanic TV households. Networks in chart are only those with coverage of 20% or more. Among other networks: Cine Latino, Canal Sur, Go!TV and VH1 Uno. Also of note: As of Jan. 15, 2005, 1.8 million Hispanic TV households (16.9%) had DBS.

## HISPANIC TV NETWORK VIEWERSHIP

RANK	NETWORK	HISPANIC HH RATING	HISPANIC HH SHARE	HISPANIC HH IN RATING (000)	HISPANIC P+ SHARE	HISPANIC P+ VIEWERS
1	Univision	18.8	31	2,053	29	3,452
2	Telemundo	4.7	8	518	7	821
3	Fox	3.9	6	422	5	637
4	ABC	3.2	5	348	5	568
5	TeleFutura	3.2	5	351	4	500
6	NBC	3.1	5	336	4	514
7	CBS	3.0	5	332	4	470
8	UPN	2.3	4	256	3	374
9	WB	2.0	3	218	3	331
10	Azteca America	1.3	2	141	2	232
11	PAX	0.2	NA	24	NA	31

Data from Nielsen Hispanic Television Index based on Hispanic prime-time viewership from 7 p.m. to 11 p.m. from Sept. 20, 2004 to May 29, 2005. Rating is % of Hispanic TV HH; share is % of those HHs with TV sets in use and watching the network. P+ counts total viewing persons in those Hispanic TV households tuned in to the network.

The average household income of U.S. Hispanics/Latinos who read magazines is \$60,217, 35% higher than the average household income of Hispanics/Latinos who do not read magazines (\$44,691).

(Simmons NCS/NHCS Fall 2003)

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# AGENCIES

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**Largest U.S. city for Hispanic agencies**

NEW YORK

**Revenue growth of leading 50 agencies**

27.6% IN 2004

HISPANIC AGENCIES flexed their muscle in 2004, driving revenue up 27.6% to \$409.1 million, according to data on 50 leading Hispanic agencies collected by *Ad Age*.

By comparison, all U.S. agencies, traditional and marketing services, rose 8.6% to \$17.59 billion for the year, according to *AA*'s 61st annual Agency Report (May 2).

Revenue generation by city by the Top 50 agencies found New York leading the group at a collective \$87 million. Miami was No. 2 at \$77 million, two-thirds attributed to nearby tony Coral Gables, Fla.

# YOUNG LATINOS. 18-34. DECEIVING?

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## TOP 50 HISPANIC AGENCIES

RANK	AGENCY [HOLDING COMPANY AFFILIATION]	HEADQUARTERS	2004 REVENUE	% CHG
1	<b>Bromley Communications*</b> [Publicis]	San Antonio	\$39,500	20.1
2	<b>Bravo Group*</b> [WPP]	New York	37,500	18.0
3	<b>GlobalHue*</b> [Interpublic]	Southfield, Mich.	32,130	48.3
4	<b>Dieste, Harmel &amp; Partners*</b> [Omnicom]	Dallas	31,000	34.8
5	<b>Accentmarketing*</b> [Interpublic]	Coral Gables, Fla.	18,200	40.0
6	<b>Zubi Advertising Services</b>	Coral Gables, Fla.	17,000	3.7
7	<b>Lopez Negrete Communications</b>	Houston	16,500	36.4
8	<b>Lapiz*</b> [Publicis]	Chicago	16,300	31.1
9	<b>La Agencia de Orci &amp; Asociados</b>	Los Angeles	14,047	-0.8
10	<b>Vidal Partnership*</b>	New York	13,000	46.3
11	<b>Del Rivero Messianu DDB*</b> [Omnicom]	Coral Gables, Fla.	12,600	12.4
12	<b>Casanova Pendrill Publicidad*</b> [Interpublic]	Costa Mesa, Calif.	11,200	4.8
13	<b>Conill*</b> [Publicis]	New York	11,000	44.7
14	<b>WING Latino*</b> [WPP]	New York	9,600	5.5
15	<b>Reynardus &amp; Moya Advertising</b>	New York	7,572	62.5
16	<b>Cartel Group</b>	San Antonio	7,137	13.5
17	<b>HeadQuarters Advertising</b>	San Francisco	6,900	46.8
18	<b>Machado Garcia-Serra Publicidad</b>	Miami	6,476	20.8
19	<b>Castells &amp; Asociados Advertising*</b> [DavisElen]	Los Angeles	6,421	-1.1
20	<b>San Jose Group</b>	Chicago	6,415	5.0
21	<b>Siboney USA*</b> [Interpublic]	Miami	6,300	1.6
22	<b>Arvizu Advertising &amp; Promotions</b>	Phoenix	6,255	16.8
23	<b>Hispanic Group Corp.</b>	Miami	5,782	172.4
24	<b>LatinWorks Marketing</b>	Austin, Texas	5,498	-14.5
25	<b>Acento</b>	Los Angeles	5,059	4.0

Dollars are in thousands. \*Figures are Advertising Age estimates. Chart continues on Page 42.



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## TOP 50 HISPANIC AGENCIES

RANK	AGENCY [HOLDING COMPANY AFFILIATION]	HEADQUARTERS	2004 REVENUE	% CHG
26	<b>Ornelas &amp; Partners</b>	Dallas	\$4,748	-6.4
27	<b>Maya Advertising &amp; Communications*</b>	Washington	4,500	NA
28	<b>La Gente de RLR</b>	Pasadena, Calif.	4,493	19.7
29	<b>Creative Civilization</b>	San Antonio	4,300	38.7
30	<b>Al Punto</b>	Tustin, Calif.	4,200	40.0
31	<b>Euro RSCG Latino*</b> [Havas]	New York	4,000	NA
32	<b>Anita Santiago Advertising</b>	Santa Monica	3,963	0.8
33	<b>Grupo Gallegos</b>	Long Beach, Calif.	3,500	75.0
34	<b>CreativeOnDemand</b>	Coral Gables, Fla.	3,000	11.1
35	<b>Viva Partnership</b>	Miami	2,880	NA
36	<b>Rios Group</b>	Lakewood, Colo.	2,350	NA
37	<b>OLE</b>	New York	2,271	NA
38	<b>Media 8 Digital Marketing</b>	Miami	2,200	69.2
39	<b>Fraser Communications</b>	Santa Monica, Calif.	1,910	18.9
40	<b>RodriguezMejer Advertising</b>	New York	1,699	25.5
41	<b>Enlace Communications</b>	Brentwood, Calif.	1,509	13.0
42	<b>Hill, Holliday Hispanic*</b> [Interpublic]	Miami Beach, Fla.	1,400	NA
43	<b>MASS Promotions</b>	Miami	1,170	8.3
44	<b>Cultura*</b> [Omnicom]	Dallas	1,100	10.0
45	<b>:30 Segundos</b>	New York	1,050	-44.7
46	<b>Español Marketing &amp; Communications</b>	Cary, N.C.	1,002	11.2
47	<b>Ethnic Marketing Group</b>	Valencia, Calif.	825	NA
48	<b>PM-HispanAmerica</b>	Atlanta	600	NA
49	<b>Interlex Latino</b>	San Antonio	502	53.3
50	<b>Grupo Ñ Advertising</b>	Phoenix	500	NA

Dollars are in thousands. \*Indicates figures are *Ad Age* estimates. *Ad Age* collected most of the data for the 61st annual Agency Report (AA, May 2, 2005). Parent holding companies may own only a minority stake. Data set for the top cities on Page 43 comes from the Top 50 agencies listed here.

## TOP 10 CITIES FOR HISPANIC AGENCIES

RANK	CITY	2004 REVENUE	% CHG	COUNT
1	<b>New York</b>	\$87,692	34.2	9
2	<b>Miami</b>	77,008	26.5	11
3	<b>Los Angeles</b>	57,127	9.5	11
4	<b>San Antonio</b>	51,439	20.7	4
5	<b>Dallas</b>	36,848	26.7	3
6	<b>Detroit</b>	32,130	48.3	1
7	<b>Chicago</b>	22,715	22.5	2
8	<b>Houston</b>	16,500	36.4	1
9	<b>San Francisco</b>	6,900	46.8	1
10	<b>Phoenix</b>	6,755	20.5	2

Dollars in thousands. See footnote on Page S-42



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## HISPANIC CREATIVE ADVERTISING AWARDS

TWENTY-THREE DIFFERENT agencies won awards chosen from 545 entries, competing for Gold, Silver and Bronze in *Advertising Age's* 6th annual Hispanic Creative Advertising Awards contest in 2004. The contest, held in cooperation with the Association of Hispanic Advertising Agencies, was judged by a panel that included four leading Hispanic creative directors and four senior marketing executives. Two *Ad Age* editors participated in the judging.

Awards were reported in the Marketing to Hispanics Special Report (AA, Oct 4, 2004). The full report with playable video of winning spots can be found on **AdAge.com** at **QwikFIND aap98y**.

A record 710 agency entries will compete for the 7th annual Hispanic Creative Advertising Awards. Winners will be announced in an awards ceremony Friday, Sept. 30, 2005 in New York. A Special Report and **AdAge.com** report will announce the winners Oct. 3, 2005.

## GOLD AWARD WINNERS

BEST OF SHOW	MARKETER/BRAND	CAMPAIGN
Vidal Partnership, New York	Heineken	"Blackout"
<b>GOLD/TV</b>		
La Comunidad, Miami Beach, Fla.	Citibank	"Tire Swing," "Superheroes," "Marquez Sisters"
Badillo Nazca Saatchi & Saatchi, Guaynabo, P.R.	Toyota Prius	"Te Extraño"
Euro RSCG Latino, New York	Yahoo en Español Personals	"Hola," "Adios"
Grupo Gallegos, Long Beach, Calif.	Energizer Batteries	"Game"
La Comunidad, Miami Beach, Fla.	Manos del Sur	"Double," "Delegating," "Receptionist," "Orchestra," "Psychologist"
<b>GOLD/MAGAZINES</b>		
La Comunidad, Miami Beach, Fla.	Volkswagen	"Institucional"
<b>GOLD/RADIO</b>		
Vidal Partnership, New York	Heineken	"Telegrafico: Mexican, Argentinean, Puerto Rican," "Fiesta," "Maraton"
Bromley Communications, San Antonio	Continental Airlines	"Inganacio"
<b>GOLD/DIRECT MARKETING</b>		
Castells & Asociados, Los Angeles	Adelphia en Español	"Mexican Movie Posters"
<b>GOLD/INTERACTIVE-WEB SITE</b>		
Nobox Marketing Group, San Juan, P.R.	Frito-Lay	"Doritos DJ"
<b>GOLD/INTERACTIVE-ONLINE</b>		
Garcia 360, San Antonio	Home Depot	"Home Depot Te Ayuda"
Zubi Advertising, Coral Gables, Fla.	Ford Focus SVT	"Plumas"



### BEST OF SHOW: HEINEKEN, VIDAL PARTNERSHIP

This quickie commercial, playing on many Hispanics' experience with power outages in their home countries, was inspired by the massive U.S. blackout on Thursday, Aug. 14, 2003. As the office lights went out in Manhattan, a Dominican promotions executive at Vidal exclaimed,

"Welcome to Santo Domingo!" Vidal had been planning a Heineken spot targeting the Caribbean community and quickly assembled this commercial that was shown to Heineken USA on Monday and broke on Tuesday in the Northeast region affected by the blackout.

## SILVER AWARD WINNERS

SILVER/TV	MARKETER/BRAND	CAMPAIGN
Vidal Partnership, New York	Heineken	"Master of Languages"
Bromley Communications, San Antonio	Coors Light	"Zoologico"
Creative on Demand, Coral Gables, Fla.	Volkswagen Passat	"The Fly"
Vidal Partnership, New York	MasterCard International	"Remeras"
<b>SILVER/MAGAZINES</b>		
EJE Sociedad Publicitaria, Hato Rey, Puerto Rico	ICI Paints/Duramax	"Strainer"
La Comunidad, Miami Beach, Fla.	Volkswagen	"Touareg," "Matrimonio," "Valijas," "Problemas"
<b>SILVER/RADIO</b>		
Euro RSCG Latino, New York	Disney Resorts	"Painter," "Funeral Home," "Pet Store"
La Comunidad, Miami Beach, Fla.	Citibank	"Coffee," "Breakfast in America," "Answering Machine"
<b>SILVER/NEWSPAPER</b>		
EJE Sociedad Publicitaria, Hato Rey, Puerto Rico	Sprint Corp.	"Picture Frame"
Leo Burnett Puerto Rico, San Juan	Olimpiadas Especiales	"Cheque"
La Comunidad, Miami Beach, Fla.	Citibank	"Zapatos," "Prioridades," "Doctor,"
Zubi Advertising, Coral Gables, Fla.	American Airlines	"Motivos"
<b>SILVER/DIRECT MARKETING</b>		
Concept Cafe, Miami	Discovery Channel	"Goldfish," "Toilet Paper"
<b>SILVER/INTERACTIVE-WEB SITE</b>		
Terra Networks USA, Miami	L'Oreal's Garnier Fructis	"For Hair That Shines With All Its Strength"

# DEMOGRAPHICS

## 2004 U.S. Hispanic population

41.3 MILLION

## Hispanics as projected percent of U.S. population in 2050

24.4%

POPULATION SEGMENT GROWTH is known for glacial movement on a year-to-year basis, but in 2004, the total Hispanic market in the U.S. grew by a robust 3.6% as the total population edged upward by 1%, according to the U.S. Census Bureau.

## U.S. POPULATION BY RACE AND HISPANIC OR LATINO ORIGIN

	2004	2003	CHANGE	% CHG
<b>TOTAL POPULATION</b>	293,655,404	290,788,976	2,866,428	1.0
<b>WHITE</b>	239,880,132	237,901,475	1,978,657	0.8
<b>BLACK</b>	39,232,489	38,731,737	500,752	1.3
<b>AM. INDIAN AND ALASKA NATIVE</b>	4,409,446	4,366,011	43,435	1.0
<b>ASIAN</b>	13,956,612	13,497,891	458,721	3.4
<b>NATIVE HAWAIIAN/PACIFIC ISLANDER</b>	976,395	959,803	16,592	1.7
<b>HISPANIC (OF ANY RACE)</b>	<b>41,322,070</b>	<b>39,901,601</b>	<b>1,420,469</b>	<b>3.6</b>
<b>WHITE ALONE, NOT HISPANIC/LATINO</b>	197,840,821	197,325,085	515,736	0.3

Source: U.S. Census Bureau, June 9, 2005 estimated for July 1, 2004 vs. July 1, 2003.

## POPULATION PROJECTIONS BY YEAR

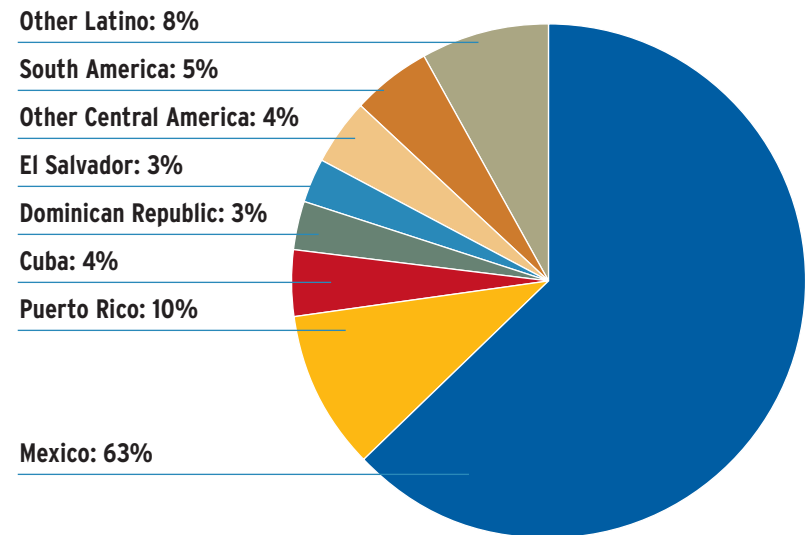
POPULATION (IN THOUSANDS)	2010	2020	2030	2040	2050
Total U.S. population	308,936	335,805	363,584	391,946	419,854
U.S. Hispanic population	47,756	59,756	73,055	87,585	102,560
Hispanic as % of U.S.	15.5	17.8	20.1	22.3	24.4

### PROJECTED HISPANIC POPULATION OF THE U.S.



Source: U.S. Census Bureau, 2004, "U.S. Interim Projections by Age, Sex, Race, and Hispanic Origin."

## U.S. LATINO POPULATION BY PLACE OF ORIGIN



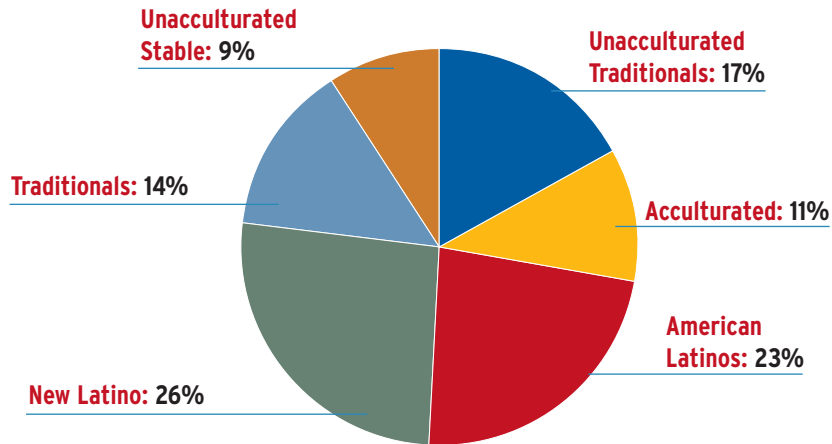
Source: Pew Hispanic Center (www.pewhispanic.org) tabulations from the 2000 Census.



## ACCULTURATION

### SYNOVATE'S CLUSTER ANALYSIS

In the 2004 U.S. Hispanic Market Report, Synovate performed cluster analyses on a survey of about 1,400 Hispanics, on a national basis. This allowed for the standard three segment model (Mostly Acculturated/Partially Acculturated/Relatively Unacculturated) to be further segmented into six groups. Definitions are from Synovate.

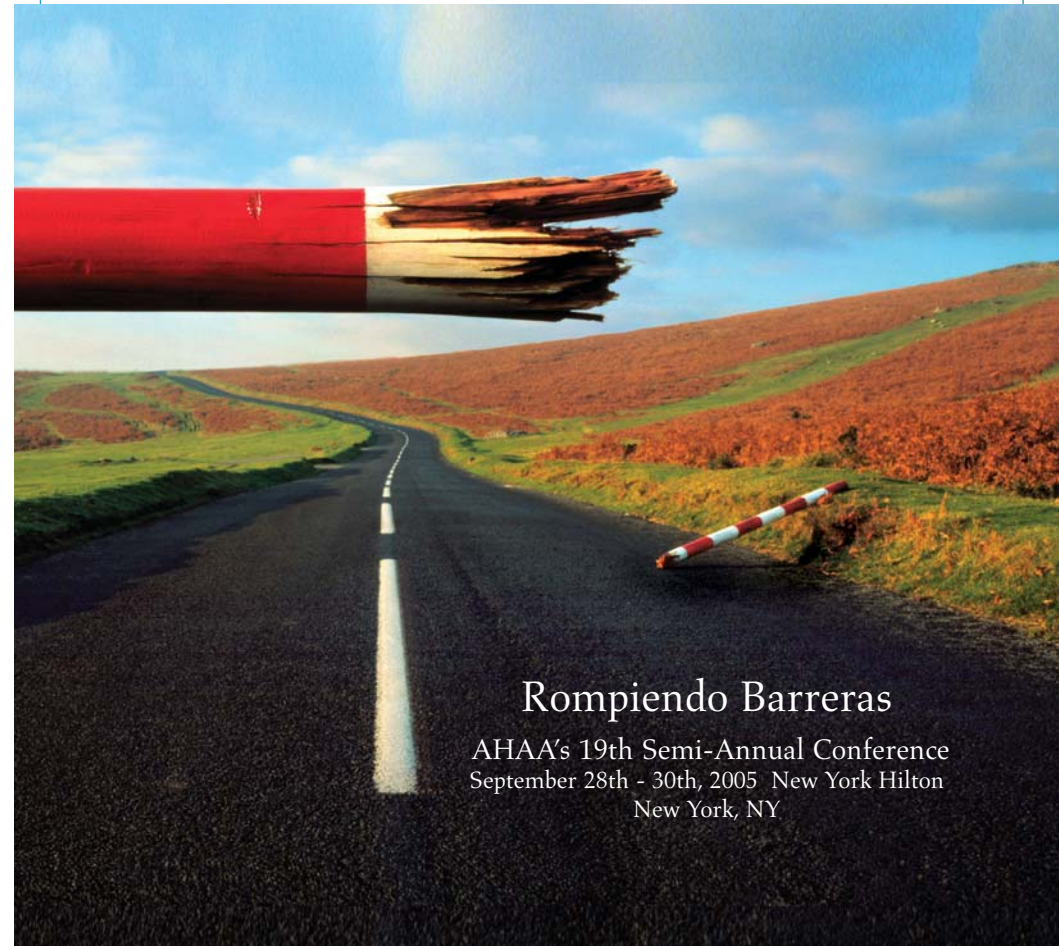


1. Unacculturated Traditionals are foreign-born Hispanics with intermediate and high levels of cultural tension. They have been in the U.S. the shortest amount of time and tend to live in key entry points. They have close ties and keep in touch regularly with friends and family in their country of origin. 33% of this group lives in either Los Angeles or Miami.
2. Unacculturated Stable is composed of foreign-born unacculturated Hispanics with low levels of tension. They tend to live in markets with high concentrations of Hispanics like Miami and Los Angeles and a large proportion are homemakers. Because of the high concentration of Hispanics and established Spanish infrastructure in these markets, people in this segment have no need or motivation to acculturate further. The acculturation process among this group is much slower than for others.
3. Traditionals are the oldest group of Partially Acculturated. Most are foreign born, but as a group have been living in the U.S. the longest. They are partially acculturated with high levels of cultural tension. They have conservative values in terms of women's roles and religion. In general, although they have an attachment to the United States, they are uncomfortable with the American way of life.
4. New Latino are relatively young, mostly foreign born and have lived in the U.S. for a significant amount of time. They are partially acculturated with intermediate levels of cultural tension. Three-quarters of them have children. They tend to live in large metro areas and consume a significant amount of Spanish media.
5. American Latinos are very comfortable living in both worlds—the Latin and the U.S. culture. They are partially acculturated with low levels of cultural tension. They are also a very young group with an inclination to purchase electronic "gadgets," SUVs, and eat fast-food.
6. Mostly Acculturated segment of Hispanics has unique characteristics. Although they are mostly acculturated, Spanish is still spoken in many of these homes, and there is some Spanish media consumption.

## 7th Annual AdvertisingAge Hispanic Creative Advertising Awards

Friday, September 30th Metropolitan Pavilion  
New York, NY

**ahaa** Association of Hispanic Advertising Agencies



### Rompiendo Barreras

AHAA's 19th Semi-Annual Conference  
September 28th - 30th, 2005 New York Hilton  
New York, NY

## HOW LATINOS IDENTIFY THEMSELVES

	BY COUNTRY OF ORIGIN	AS LATINO OR HISPANIC	AS AMERICAN
<b>LANGUAGE</b>			
Spanish dominant	68%	27%	3%
Bilingual	52%	24%	22%
English dominant	29%	17%	51%
<b>GENERATION</b>			
First generation	68%	24%	6%
Second generation	38%	24%	35%
Third or higher generations	21%	20%	57%

Source: Pew Hispanic Center (www.pewhispanic.org)/Kaiser Family Foundation National Survey of Latinos, December 2002. This table refers to either the first or the only term Latino respondents to the survey identify themselves.

## TOP 10 HISPANIC MARKETS BY POPULATION

RANK	MARKET	HISPANIC POPULATION	HISPANIC % OF TOTAL
1	Los Angeles	7,811,100	44.5
2	New York	4,316,400	20.5
3	Chicago	1,838,000	19.0
4	Miami	1,836,800	43.1
5	Houston	1,822,600	33.4
6	Dallas-Fort Worth	1,509,700	23.5
7	San Francisco	1,491,800	21.3
8	San Antonio	1,293,700	60.3
9	Phoenix	1,208,000	27.2
10	McAllen, Texas	1,142,000	94.8

Data from Synovate's 2004 U.S. Hispanic Market Report. Figures are 2004 estimates.

“Newspapers are the primary source for Hispanics when they plan a purchase.”

- Hoy Proprietary Media Consumption Study 2005  
Los Angeles, New York, Chicago

## WHAT ELSE DO YOUR CLIENTS WANT TO KNOW?

- > Media habits
- > Advertising interests
- > Shopping behavior

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