Hispanic Market Overview - 2010

A report from the JakeAdams Editorial Services and Research Consultancy, released in partnership with HispanicAd.com.

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INTRODUCTION

The U.S. Hispanic market continues to present tremendous growth opportunities for brands and projects that seek to attract loyal consumers. With Census 2010 ramping up, new data showing coast-to-coast growth in the Latino population will further cement the need of CMOs and brand managers to directly approach this segment of the U.S. population.

But will the dollars start flowing in 2010? Are non-Latino media entities recovering from the Great Economic Downturn of 2009 at a faster rate than Spanish-language media?

Early indications point to tepid growth for Hispanic media through the remainder of the year, despite the predicted boost expected from Census 2010 and the 2010 FIFA World Cup - the biggest event of the year for Spanish-speaking males in the U.S.

Nevertheless, optimism pervades in the offices of the nation's biggest Hispanic creative shops and media companies. The overall consensus is that 2010 can't be as terrible as 2009.

According to The Nielsen Company, **$4.03 billion** was invested in the Spanish-language media it tracked during the first three quarters of 2009; full-year 2009 data has not yet been finalized by Nielsen. While that sounds like a princely sum, total dollars in the nine month period were off 5.5 percent from 2008.

2009: THE BIG PICTURE

What accounted for the dip in total dollars flowing from advertisers to Spanish-language media?

An exodus from Hispanic magazines and newspapers is largely to blame overall year-over-year decline.

Spanish-language network television - far and away the dollar hog in the U.S. Hispanic market -saw its ad dollars dip by 4.6 percent, to $2.13 billion, in the first three quarters of 2009. Spot television dollars, reflecting local Spanish-language television campaigns, declined 11.4 percent year-over-year in the nine-month period - ending at $1.04 billion.

Spot radio was statistically flat, while Spanish-language cable television saw roughly $304 million in activity through September 2009. However, year-over-year comparisons are difficult, as Nielsen added GolTV to its reporting in December 2008. Additionally, ESPN Deportes was added in late April 2008 and Discovery en Español became Nielsen-monitored in February 2008.

Other Spanish-language cable networks measured by Nielsen include Univision-owned Galavisión, Fox Sports En Español, and Mun2.

TOTAL ADVERTISING DOLLARS TO SPANISH-LANGUAGE MEDIA

Media Type	**Q1 2008-Q3 2008**	**Q1 2009-Q3 2009**	**Percent Change**
Local Magazine	$988,225	$0	-100%
Local Newspaper	$78,513,524	$57,445,570	-26.8%
National Magazine	$128,725,898	$78,090,997	-39.3%
Spanish Language Cable TV	$230,503,711	$304,193,594	32%
Spanish Language Network TV	$2,228,401,499	$2,126,522,124	-4.6%
Spot Radio	$420,513,265	$419,680,438	-0.2%
Spot TV	$1,175,157,718	$1,041,592,250	-11.4%
Total	**$4,262,803,840**	**$4,027,524,973**	**-5.52%**

Source: The Nielsen Company

Ad expenditures for digitial and online media are not included. Please refer to the Online and Digital section in this report for further insight.

2009: THE TOP PLAYERS

According to Nielsen, the top advertiser using traditional Spanish-language media through the first three quarters of 2009 is **DirecTV**. Focusing its efforts primarily on the DirecTV Más Hispanic platform, the direct broadcast satellite provider invested $130.7 million in Spanish-language advertising during the period. Year-over-year, DirecTV more than doubled its Hispanic market ad dollars, from $63.2 million during the first three quarters of 2008.

Much of DirecTV's 2009 activity centered around the transition from analog television to digital transmissions. Spots featuring telenovela actor Andrés García were designed to not just drive traffic to DirecTV but also serve as an alert to viewers that not taking action would result in television sets full of nothing but static.

DirecTV even eclipsed the longtime leader in ad dollars - **Procter & Gamble Co.** - in the first three quarters of 2009. Compared to the first nine months of 2008, P&G lowered its Spanish-language advertising budget from $133.7 million to $115.2 million.

"DirecTV takes very seriously the existence and growth of the U.S. Hispanic market," says **John de Armas,** vice president of DirecTV's "WorldDIRECT" unit. "We are not only looking at Hispanics as a market, but also as an individual that consumes different types of media."

De Armas takes pride in DirecTV's Latino lineup, which includes 48 television networks and 11 all-music channels targeting audiences that consume Spanish-language media. The roster of networks includes programming from across Latin America. Additionally, De Armas boasts, DirecTV carries more live soccer matches than any other service thanks to its variety of networks.

Luring subscribers led DirecTV to work closely with its Hispanic market agency of record, Miami-based DMG Solutions, in amplifying the budget exponentially since signing on as a client in 2007. Creative currently appearing in Spanish-language media puts the focus on Hispanic celebrities Andrés García - a telenovela icon in the Latin world - and noted television talk host Charytín.

DirecTV's commitment to the U.S. Hispanic market runs deep, says de Armas. "A lot of companies out there enter the Hispanic market because they are told to. But they put a bunch of junior people who don't know how to do it properly in charge of the effort. Targeting Hispanics is a highly sophisticated task, and we know how amazingly profitable the market can be - if the marketing is done right."
DirecTV's activity in 2010 is not expected to slow down, says de Armas. "These are the time that instead of taking your foot off the pedal, you keep it down on the floor. If you run to the hills, you'll leave me the entire market for myself."

➢ The three other companies found in the Top Five Of 2009 increased their Hispanic ad budgets from the same period in 2008. **Verizon**, led by its wireless communications arm, upped its ad dollars from $74.9 million to $94.2 million through September 2009. Close behind is **McDonald's**, which saw its Hispanic media budget grow from $79.5 million to $92.4 million. **AT&T** rounds out the top five, with $89.9 million in ad dollars - up from $89.2 million in the 2008 period.

Rounding out the top 10 advertisers using Spanish-language media in the first three quarters of 2009 are **Univision**, which placed advertising valued at $63.8 million for its programming across its own multimedia platform**; State Farm; Toyota; Stichting Anheuser-Busch InBev** and **Vivendi SA**.

TOP ADVERTISERS BY DOLLARS IN U.S. HISPANIC MEDIA

Company	Q1 2008-Q3 2008	Q1 2009-Q3 2009
DIRECTV	$63,198,617	$130,667,639
PROCTER & GAMBLE CO.	$133,716,914	$115,227,211
VERIZON COMMUNICATIONS	$74,891,445	$94,216,067
MCDONALD'S	$79,507,501	$92,384,443
AT&T	$89,245,972	$89,871,907
BROADCASTING MEDIA PARTNERS (UNIVISION)	$74,960,582	$63,825,293
STATE FARM	$61,693,320	$63,585,504
TOYOTA MOTOR CORP	$89,516,436	$62,028,335
STICHTING ANHEUSER-BUSCH INBEV	$49,338,600	$57,181,537
VIVENDI SA	$49,288,206	$56,744,780
Total	**$765,357,593**	**$825,732,716**

Source: The Nielsen Company

It's hardly a surprise that telecommunications companies and wireless services providers are among the top advertisers in the U.S. Hispanic market. But when it came to total ad dollars by category invested in Spanish-language media through September 2009, quick-service restaurants outpaced wireless companies.

In fact, "fast food" restaurants stepped up their spending in 2009, as economic challenges gave chains such as McDonald's, Sonic, Burger King and Wendy's, among others, strong reason to reach out to Spanish speakers with value options. Through the end of the third quarter, quick-service restaurants accounted for $253 million in advertising - a 16 percent increase from the same period in 2008.

Wireless services companies overall increased their ad spending by 8.6 percent year-over-year, to $242.8 million.

Also seeing growth is the **Direct Response** category - namely thanks to **Lexicon Marketing Corp.** and its Inglés Sin Barreras product, the highly popular English-language instructional series geared for first-generation Latinos with low literacy in Spanish. Total ad dollars from direct response advertisers in U.S. Hispanic media totaled $184.8 million, for the first nine months of 2009. Year-over-year growth of 12.3 percent was seen.

While Lexicon is a major player in the Direct Response arena, **Vivendi SA** is tops by dollars invested in Spanish-language media - mainly for the promotion of compilation CDs featuring top Spanish-language recording acts across all Latin music genres. Through the first three quarters of 2009, Vivendi was responsible for $56.7 million in ad dollars.

Seeing the largest percentage growth in 2009 are **Legal Services** companies, with year-over-year spending climbing by 43.7 percent, to $95.4 million. From tax attorney **Roni Deutch** to Southern California-based legal brands **Los Defensores** and **Alivio Legal**, the Legal Services category has become quite robust.

Beer remains a big category in the U.S. Hispanic market, as illustrated in the chart below. To no surprise, the **Automotive** category slumped significantly - along with auto insurance companies. **Department Store** spending was also down, however the data does not reflect fourth-quarter activity from such active retailers as Kohl's, JCPenney, Macy's and Wal-Mart.

TOP CATEGORIES BY DOLLARS IN U.S. HISPANIC MEDIA

Product Category	**Q1 2008-Q3 2008**	**Q1 2009-Q3 2009**	**% Change**
RESTAURANT-QUICK SVC	$219,044,710	$253,891,023	15.9%
TELEPH SVCS-WIRELESS	$223,510,336	$242,804,671	8.6%
AUTOMOTIVE	$415,508,735	$226,284,615	-45.5%
DIRECT RESPONSE	$164,610,520	$184,842,629	12.3%
SAT COMMUNICATION SVCS	$95,135,012	$183,526,403	92.9%
DEPT STORES	$190,672,480	$179,400,304	-5.9%
BEER	$126,125,771	$136,175,218	8%
LEGAL SVCS	$66,383,912	$95,392,342	43.7%
AUTO INSURANCE	$109,146,735	$75,910,119	-30.5%
MOTION PICTURE	$85,401,992	$75,710,968	-11.4%
Total	**$1,695,540,203**	**$1,653,938,292**	**-2.5%**

Source: The Nielsen Company

THE U.S. HISPANIC MARKET: RELEVANCE & UNDERSTANDING

Targeting Latino consumers in the U.S. takes time, effort, commitment, understanding and the respect of the very audience marketers and brand managers wish to attract. But who are today's Hispanic consumers?

More than ever, the U.S. Hispanic market is comprised of a diverse group of individuals from a host of countries across the Americas and from Spain. Spanish is their common language. But commonalities among U.S. Latinos continue to shrink. For marketers, a view of Hispanic in monolithic terms may be an exercise in futility.

For one, despite all of the recent debate over U.S. immigration reform and a crackdown on undocumented immigrants (commonly referred to as "illegal" by the media), the growth engine of the U.S. Hispanic market is the U.S. itself.

"Births are accounting now for more of the population growth than immigration," notes **Dr. Felipe Korzenny**, founder and director of the Center for Hispanic Marketing Communication at Florida State University. "The shape of the U.S. Hispanic market is going to change."

An expert Hispanic marketer, Korzenny recalls that for many marketers, targeting immigrants with Spanish-language advertising was the single most-effective way to reach Hispanic consumers. Today, taking that approach limits the marketer who seeks growth for their brand with Latino consumers. "Marketers who are talking only to recent immigrants are missing the boat on other large components of the U.S. Hispanic population," Korzenny says.

Today, U.S.-born Hispanics who prefer to use Spanish may be more acculturated and knowledgable of certain types of products and services than recent immigrants. There are also Latinos who use both Spanish and English media, and those that don't consume any Spanish-language media but are tied culturally to friends and family members that speak Spanish.

According to the U.S. Census Bureau's 2008 American Community Survey, approximately 70 percent of Hispanics five years of age and older speak English well or very well. That's why selecting the right Hispanic consumer target should be step one for marketers. For example, Korzenny suggests that makers of new automobiles and insurance companies target the acculturated Latino, given the types of products, goods and services they seek to sell. With recent immigrants, he says, the ability to purchase a new vehicle or the understanding of various insurance policies may be limited.

At the same time, makers of children's products and packaged goods can easily capitalize on the new immigrant segment of the Hispanic population, given the prevalence of large families with young kids.

"It's a matter of being focused on your objectives," says Korzenny. "Many advertisers became disenchanted with the U.S. Hispanic market because they could not capitalize on their advertising efforts. But the reality was they were targeting the wrong segment."

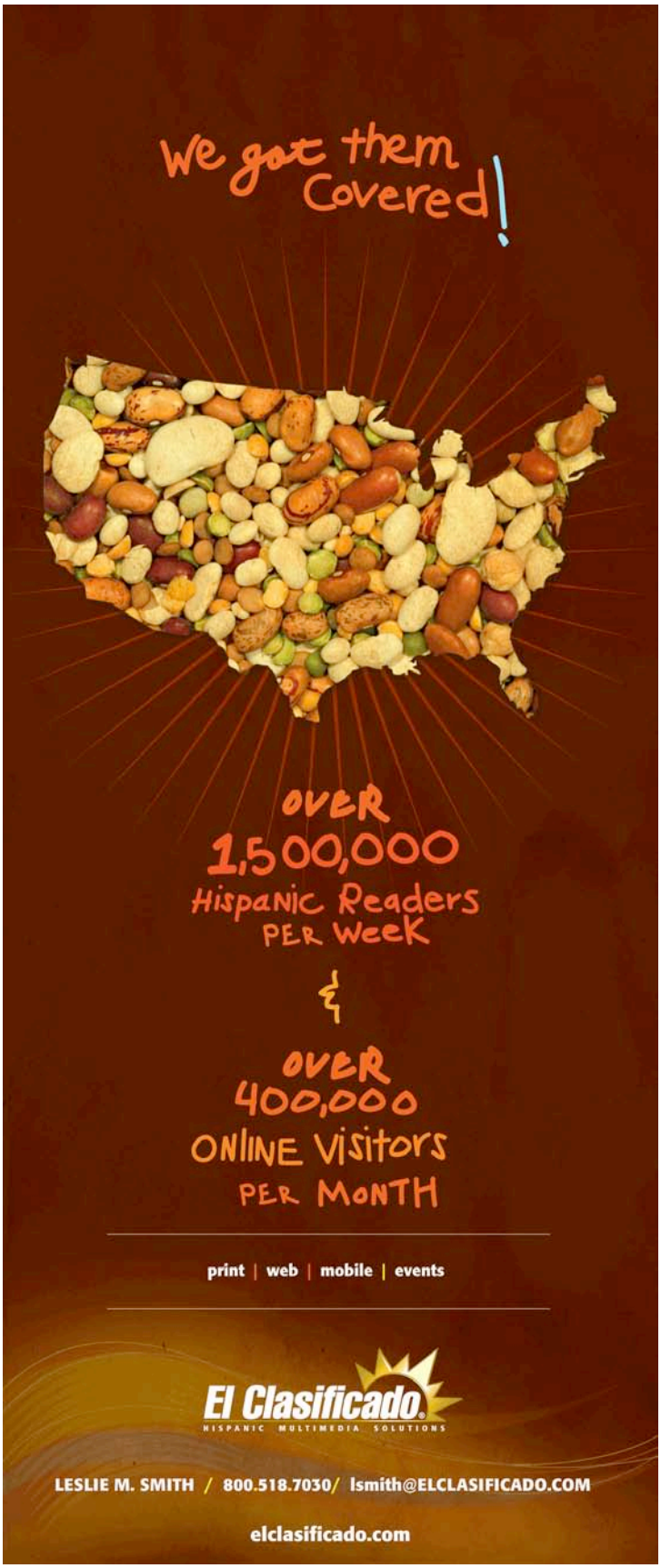
How Hispanics identify themselves and who influences them are key to understanding how to approach today's Latino consumer, Korzenny notes. Additionally, marketers should understand that a widening spectrum of Spanish-language and English-language media is directly related to the growing diversity within the U.S. Hispanic market. For example, while the networks owned by Univision and NBC Universal's Telemundo arm attract the lion's share of television viewers, cable networks such as Telemundo's Mun2, Sí TV and LATV speak to the evolution of the U.S. Latino populace. Mun2 and LATV each target a hip, urban Latino audience with a blend of Spanish-language music and entertainment-themed programming. Sí TV airs English-language programming targeted to acculturated Hispanic youth and young adults.

Furthermore, every English-language broadcast networks has noticed the rise in Latino viewership and are doing more to attract Hispanic audiences. Fox's "American Idol" is widely popular in Latino homes, as is the network's Sunday-night lineup of animated shows and its Monday night drama "House." ABC has seen success among Hispanic viewers with "Grey's Anatomy," "Modern Family" and "Lost." CBS's "CSI" and "NCIS" franchises also perform strongly with Latinos, while the CW Network's "Vampire Diaries" is hugely popular with Hispanic teens and young adults.

Additionally, McDonald's and Coca-Cola have incorporated Latino themes and the use of Spanish in creative appearing on English-language broadcast networks. Pay television network Showtime's "Weeds" regularly airs scenes with dialogue solely in Spanish - with no subtitles in English.

In the next decade, Korzenny believes Univision and Telemundo will continue to generate large audience shares. But each of the networks will need to better understand how to approach and retain relevancy with Hispanics in the U.S. This involves attracting and grooming talent from the U.S. and working closely with content creators.

"Even Hispanics who prefer to use English will continue to watch [Spanish-language channels]," Korzenny says. "Their mother or their cousin may watch certain shows, and they will feel compelled to watch them to remain part of their social sphere. Spanish-language television will do well for a long time to come. You can be proficient in English and still enjoy programming in Spanish. But if Spanish-language media does not adapt to the changing nature of the Hispanic population, they will likely see a decline in audience share because there are many others competing with them."



THE U.S. HISPANIC MARKET: INCOME TRENDS

In 1980, the median income in Hispanic households was $33,961. By comparison, the median income seen in all U.S. households was $44,059.

Eighteen years later, the gap between the median income seen in Hispanics households and that of all U.S. households was actually larger.

An analysis of data from the U.S. Census Bureau's 2008 American Community Survey by Dr. Korzenny, of Florida State University, shows the median Hispanic household income in 2008 at $37,913. That compares to $50,303 for all U.S. households.

The gap is the largest seen since 1999, and Korzenny believes the social and economic issues that resulted from the U.S. economic downturn seen between 2007 and 2009 is the prime reason for the disparity.

But a closer look at the Census data shows that income differences vary by household income levels - providing uplifting news to Hispanic marketers, Korzenny says.

In fact, in 2008 there were a greater percentage of

Hispanic homes with a median household income of up to $59,000 than for the entire U.S. population. Where Hispanics lagged behind the overall U.S. population was in homes where the median income exceeded $75,000 per year.

Median Household Income	Hispanic%	US%	Difference
Less than $10,000	8.52%	7.21%	1.32%
$10,000 to $14,999	6.44%	5.43%	1.01%
$15,000 to $19,999	6.79%	5.19%	1.60%
$20,000 to $24,999	7.37%	5.46%	1.91%
$25,000 to $29,999	6.43%	5.07%	1.36%
$30,000 to $34,999	6.61%	5.30%	1.31%
$35,000 to $39,999	5.91%	4.87%	1.04%
$40,000 to $44,999	5.63%	4.92%	0.71%
$45,000 to $49,999	4.95%	4.38%	0.57%
$50,000 to $59,999	8.61%	8.29%	0.32%
$60,000 to $74,999	10.03%	10.50%	-0.47%
$75,000 to $99,999	10.22%	12.39%	-2.17%
$100,000 to $124,999	5.54%	7.93%	-2.39%
$125,000 to $149,999	2.79%	4.38%	-1.59%
$150,000 to $199,999	2.49%	4.38%	-1.89%
$200,000 or more	1.67%	4.31%	-2.63%

Source: U.S. Census Bureau American Community Survey 2008; Dr. Felipe Korzenny, Florida State University Center for Hispanic Marketing Communication

With more Hispanics in the middle income categories than the overall U.S. population, smart marketers should embark on campaigns designed to lure this consumer group, Korzenny notes. In a post appearing on his blog, Korzenny said, "For the majority of consumer products, income levels between $25,000 and $60,000 are ideal, and that is the range in which there are more Hispanics proportional to their population. This alone is a very important reason for marketers to pay attention to Latinos."

Korzenny acknowledges that, proportionally, Hispanics have a greater amount of households in the lower end of the income spectrum than the overall U.S. population. But where the "sweet spot of most marketers resides - the middle - Hispanics have higher representation. This is surprising and uplifting, and helps understand that Hispanics are not generally poorer and are better represented where it counts for marketers."

HISPANIC TELEVISION: BROADCAST NETWORKS

Viewers of Spanish-language television in the U.S. have more choices than ever. DirecTV subscribers have access to 48 nationally distributed cable networks, in addition to broadcast networks targeting Hispanics. Yet even with increased competition from cable, Spanish-language broadcast networks continue to attract the most viewers.

Four main networks can be found across the U.S. - Telemundo, Univision, TeleFutura and Azteca América. All four are rated by Nielsen, with overnight data available for Telemundo and Univision.

Telemundo can be found in 210 markets across the U.S., and reaches 93 percent of all Hispanic television households. Owned by NBC Universal, Telemundo owns and operates 15 stations in Chicago, Dallas, Denver, Fresno, Houston, Las Vegas, Los Angeles, Miami, New York, Phoenix, Salt Lake City, San Antonio, San Francisco and Tucson.

The network can be found on 47 affiliates across the U.S. Washington, DC-based ZGS Communications owns Telemundo affiliates in Boston, El Paso, Ft. Myers-Naples, Hartford, Orlando, Philadelphia, Tampa and in the Nation's Capital.

Telemundo is currently in a heated ratings battle with both Univision and TeleFutura, the latter of which enjoyed a particularly strong January 2010, according to Nielsen ratings. But Telemundo is gearing up for a strong year ahead, thanks in part to the highly anticipated February 15 launch of the telenovela "El Clon."

A new Telemundo production based on the hit 2002 Globo TV novela of the same name, "El Clon" features Mauricio Ochmann and Sandra Echeverria in the lead roles and veteran star Saúl Lisazo in a main supporting role. Ochmann is a telenovela actor who has appeared in Telemundo's "Victorinos," "Victoria," and "Dame Chocolate." Echeverria was seen in the Telemundo telenovela "Marina." The novela airs in the 8pm slot, following the dating-themed variety show "12 Corazones" - a 7pm staple on Telemundo since 2005.

Telemundo also has high hopes for another self-produced telenovela remake - "¿Donde Esta Elisa?" Based on the Chilean soap opera of the same name, it's scheduled to debut in prime-time on the network soon. The new shows join Telemundo's 9pm novela "Perro Amor," based on a novel written by Venezuelan writer Natalia Ospina. The show launched December 7. "Perro Amor" stars Carlos Ponce, best-known to non-Latino audiences for his roles in the film "Couples Retreat" and the NBC prime-time program "Lipstick Jungle."

At 10pm presently is "Sin Tetas No Hay Paraiso," the original Colombian version of the Telemundo-produced telenovela "Sin Senos No Hay Paraiso," which concluded its run in late 2009 as the highest-rated soap to ever air on the network.

Telemundo viewers can start their day with "Levántate" - a three-hour morning network show focused news and entertainment airing from 7-10am. The show is based in Puerto Rico, with live segments from Miami, Los Angeles, New York and Mexico. A network newscast airs at 6:30pm weeknights and is hosted by José Diaz-Balart, who replaced Pedro Sevcec in December 2009. Rounding out the news

programming is "Al Rojo Vivo," hosted by Maria Celeste Arraras.

Daytime programming includes the courtroom show "Caso Cerrado," with Dra. Ana Maria Polo. Sports programming is highlighted by first-division Mexican soccer home games for Atlas, Toluca, Monterrey (Rayados), Tigres, UNAM (Pumas) and Atlante; and is the exclusive television home in the U.S. for the Chivas de Guadalajara club.

➢ The ratings leader in the U.S. Hispanic television industry is the **Univision** network. Week in and week out, a prime-time telenovela airing on Univision regularly tops the Nielsen Spanish-language TV rankings.

As of early February, the undisputed champ among viewers of Spanish-language television is "Sortilegio," a novela produced for Mexico's Televisa network that airs - like many other successful soap operas - on Univision thanks to a Program Licensing Agreement between the two networks. It stars Jacqueline Bracamontes - a past winner of Nuestra Belleza México who has appeared in such novelas as "Las Tontas No Van al Cielo." William Levy ("Cuidado con el Angel") and veteran novela star David Zepeda also have lead roles in "Sortilegio," which has aired on Univision since October 2009.

Univision's strong prime-time lineup also includes the 7pm soap "En Nombre del Amor," and "Hasta Que el Dinero nos

Separe" at 8pm. The network is also the home to two icons of Spanish-language television: Cristina Saralegui and Don Francisco (a.k.a. Mario Kreutzberger), host of the long-running Saturday night variety show "Sábado Gigante."

Also on Univision is "El Gordo y La Flaca," a chat show featuring "the fat guy and the skinny lady," if you will. Raúl de Molina and Lili Estéfan - niece of Gloria Estefan - take the respective roles of El Gordo y La Flaca. The hour-long program airs weekdays at 4pm and mixes interviews with entertainers with reports on what the top actors, musicians and notables in the Latin world are up to.

Univision viewers start their day with top-rated morning show "Despierta América," a Spanish-language take on the "Today" show helmed by Ana María Canseco, Raúl González, Karla Martínez and news anchor Neida Sandoval. Taking a more reverent tone are "Noticiero Univision," a 30-minute national newscast featuring respected journalists Jorge Ramos and María Elena Salinas, and "Ultima Hora," with Edna Schmidt and Enrique Teutelo.

Two news magazines can also be found on the Univision lineup - "Primer Impacto," with anchors Barbara Bermudo and Ilia Calderón, and "Aquí y Ahora," hosted by Salinas and Teresa Rodríguez.

Unvision is also a prime destination for sports fans - especially this year. Univision holds the exclusive Spanish-language broadcast television rights to the 2010 FIFA World Cup, the world's biggest sporting event. It also airs First-Division Mexican league soccer matches, and is the home of the hugely popular "República Deportiva" featuring anchors Fernando Fiore, Rosana Franco and Félix Fernández - along with the "Senadores," the official model ambassadors of the show to Latino men across Hispanic America.

➢ Univision's sister broadcast network, **TeleFutura**, has enjoyed tremendous ratings gains over the past year. Launched in fall 2002, TeleFutura hit its stride in 2009 with a mix of classic telenovelas, feature films from the U.S. and Latin America, sports program "Contact Deportivo," Mexican soccer matches and veteran personality Charytín, host of the entertainment news magazine "Escándalo TV."

Several other Spanish-language networks attract a national viewing audience:

➢ **Estrella TV,** launched in September 2009 by Liberman Broadcasting (a.k.a. LBI Media), is comprised of owned-and-operated and affiliated stations. LBI stations airing Estrella TV are located in Los Angeles, Dallas, Houston, Phoenix, San Diego and Salt Lake City. Markets where Estrella TV affiliates can be found include New York, San Francisco, Miami, Tampa, Orlando, San Antonio, Albuquerque, El Paso, and Portland, Oregon. For programming information, visit www.lbimedia.com.

➢ **Azteca América** is the network targeting Mexican immigrants in the U.S. operated by Mexico's TV Azteca. Anchored by KAZA-Channel 54 in Los Angeles, Azteca América features a lineup that includes First-Division Mexican league soccer and prime-time programming such as "Ventaneando América" and "Laura en Todos."

➢ Spanish Broadcasting System's **Mega TV** began its life as a Miami-based television station. Today it is a full-fledged nationally distributed network, with a separate feed for Puerto Rico viewers. Mega TV programming includes the entertainment news magazine "Paparazzi TV," the talk program "Maria Elvira Live" and the

variety/comedy show "Esta Noche Tu Night," starring Aléxis Valdes.

Mega TV affiliates are located in New York, Chicago, Orlando, Dallas, Houston, Tampa, Fresno, West Palm Beach and Palm Springs, California. The network is also available on Channel 405 on DirecTV.

Spanish Television Sales handles sales for Mega TV.

➢ **LATV,** based at KJLA-Channel 57 in Los Angeles, offers a mix of youth-oriented music and entertainment programming. LATV affiliates are located in such top Hispanic DMAs as New York, Miami, San Francisco, Sacramento, Orlando, Tampa, Chicago, Las Vegas, Albuquerque, Dallas, Houston, El Paso, San Antonio, Tucson and Boston.

➢ **V-me** is the Spanish-language network offering educational and family-friendly programming through its national distribution on PBS member stations' digital multicast channels. V-me features a wide slate of children's programming, as well as documentaries targeting adult viewers. Lifestyle and current affairs programming is also a large part of the V-me lineup.

➢ Distributed via broadcast television affiliates, cable and direct broadcast satellite, **MTV Tr3s** is a U.S. Hispanic network that, like its general-market sibling MTV, targets a hip and influential youth audience. MTV Tr3s considers itself culturally in tune with the Latin youth of today, and has seen success with such shows as "Isa TKM" - a "High School Musical"-like telenovela; reality programs "Quiero mis Quinces" and the wedding-themed spin-off "Quiero mi Boda"; and viewer-controlled music program "Music My Güey."

In addition to these networks, WJAN-Channel 41 "**América TeVe**" in Miami has scored ratings and revenue success by targeting first- and second-generation Cuban immigrants. América TeVe in November 2009 assumed operations of the **CV Network,** which has channels in Miami and New York.

HISPANIC TELEVISION: CABLE NETWORKS

More than 70 "pay television networks" - industry parlance for channels available exclusively via cable television or direct broadcast satellite operators - target Latino viewers across the U.S.

Many of these networks are imported from Latin America and have limited distribution. Others may focus on a specific group of Spanish-language TV audiences, based on country of origin.

Seven Spanish-language pay television networks are members of the Cabletelevision Advertising Bureau, a leading advocate and champion of increased choice for U.S. viewers.

Among the fastest-growing cable television networks is **ESPN Deportes**, the Spanish-language version of The Walt Disney Co.'s ESPN network that's tailored specifically to U.S. Hispanic audiences.

Available on DirecTV, Dish Network and on cable systems across the U.S., ESPN Deportes offers its own editions of the popular "SportsCenter" program, and is the home to the roundtable sports talk program "Jorge Ramos y Su Banda," hosted by renowned sportscasters Jorge Ramos, Hernan Pereyra and Jose del Valle from Miami and Dionisio Estrada from Mexico.

ESPN Deportes is also the Spanish-language home for the National Football League's Monday Night Football telecasts, "Béisbol Esta Noche" - modeled after ESPN's "Baseball Tonight," "Cronómetro" - modeled after ESPN's "Pardon The Interruption," and soccer-intensive sports talk show "Fútbol Picante."
In June 2009, ESPN began airing coverage of Spain's First-Division soccer league, sharing U.S. Spanish-language television rights with **GolTV.** ESPN Deportes' coverage of La Liga has proven to be some of its most-watched programming, according to Nielsen. Among the teams in La Liga are global soccer powerhouses FC Barcelona and Real Madrid.

ESPN Deportes also airs Major League Soccer matches and will be airing 2010 FIFA World Cup matches in Portuguese; Univision holds the exclusive Spanish-language rights to the games in the U.S. Boxing is also a big part of ESPN Deportes' lineup, with Mexican beer brand Tecate the lead sponsor of its "Viernes de Combates" Friday-night boxing coverage and its in-studio boxing program "Golpe a Golpe."

Sports programming is among the most popular when it comes to Spanish-language pay television in the U.S., and ESPN Deportes and soccer-intensive GolTV compete for viewers with **Fox Sports en Español** - home of the Copa Libertadores and Copa Sudamericana; pro soccer from Italy, England and Argentina; boxing; and Major League Baseball - including the All-Star Game and World Series. Studio programming on Fox Sports en Español includes "Diario Fox Sports," a daily roundup of the top sports among U.S. Latinos.

From an overall perspective, **Galavisión**, owned and operated by Univision Communications, enjoys some of the largest audiences. Created 30 years ago, Galavisión presently covers 81 percent of U.S. Hispanic cable households. Programming on Galavisión includes a mix of sports, news from Mexico, general-

interest programming and even *lucha libre* - Mexican-style wrestling.

Telemundo also owns and operates a pay television network - **Mun2.** Originally a female targeted channel called "GEMS," Mun2 has emerged as one of the more popular networks among Latino youth and young adults. Shows on Mun2 include "The Chicas Project," a reality show featuring the chronicles of two young women - Crash and Yasmin - who serve as "VJs" on the channel. The show is in its third season. Mun2 also offers a broadcast of the popular wrestling offering "WWE Raw," and a heavy dose of music programming.

Discovery en Español is also a major draw for Spanish-language television viewers in the U.S. Created in 1998 to attract a growing audience of Hispanics, Discovery en Español today regularly dominates Nielsen's top 25 Spanish-language cable prime-time rankings. Among the more popular shows are "Historias de Ultratumba," "Mordidas Mortales," "Vivir Para Contarlo," and "Prueba de Todo," among other fare. Many of English-language sibling Discovery Channel's widely viewed programming, including "Mythbusters" and "Survivorman," also appears on Discovery en Español. A sister network targeting U.S. Latinos, **Discovery Familia**, targets a family-oriented audience; the channel is on DirecTV's Latino package.

Among the other widely distributed pay television networks available to Spanish speakers in the U.S. are **CNN en Español, History Channel en Español,** and Puerto Rico-based **WAPA América**.

Advertisers can also access an array of niche-oriented Spanish-language cable and satellite channels through DirecTV, Comcast Spotlight, Time Warner Cable and such entities as **Latinamerican Ethnic TV,** which represents the **SUR** group of networks in addition to **Telefe Internacional, Ecuavisa, TV Colombia** and **AyM Sports,** among other networks.

For more on Hispanic cable television, visit the Cabletelevision Advertising Bureau's website.

HISPANIC RADIO: BROADCASTERS

Spanish-language Radio: The Top Advertisers

For much of the 1990s and 2000s, Spanish-language radio operators experienced solid growth. AM and FM radio stations sprouted in a wide variety of markets. Owners enjoyed revenue gains from the conversion of underperforming English-language formats to programming specifically targeted to underserved Spanish speakers.

Today, Spanish-language radio stations can be found far and wide, from the top 10 Hispanic DMAs to emerging Hispanic markets and small towns across the U.S. Stations targeting Latinos continue to attract listeners, and many top advertisers certainly remain regular users of radio.

According to **Media Monitors**, McDonald's was the No. 1 advertiser by paid spot load on the Hispanic radio stations it tracked during 2009; the company does not release financial data. Industry estimates put the Golden Arches' Spanish-language 2009 radio budget at $8.8 million - consistent with Nielsen full-year data for 2008 and 2007.

No. 2 by paid spot load was Verizon, followed by AT&T, The Home Depot, DirecTV, JCPenney, State Farm and Cricket Wireless. Univision ranks fifth; many of its advertisements promoted shows airing on the Univision, TeleFutura and Galavisión networks and aired on Univision Radio stations.

The overall No. 1 by overall spot load is Liberman Broadcasting (LBI Media). Liberman's radio advertising focused on programming appearing on its owned-and-operated Estrella TV television stations.

Editor's Note: Visit the Television section for information on LBI Media's Estrella TV network and station group.

Spanish-language Radio: The Owners

The leading Spanish-language radio broadcaster in the U.S. is **Univision Radio**. Born in September 2003, Univision Radio was formerly known as Hispanic Broadcasting Company - an entity created in 1997 through the merger of Tichenor Media Systems and Heftel Broadcasting Corp. Today, Univision Radio owns and operates stations in Albuquerque, Austin, Chicago, Dallas, El Paso, Fresno, Houston, Las Vegas, Los Angeles, McAllen-Brownsville, New York, Phoenix, San Antonio, San Diego and San Francisco. Univision Radio also owns and operates two "cadenas," or networks, in Puerto Rico - Tropical Top 40 "KQ105" and Spanish Talk WKAQ-AM 580.

Univision Radio is a division of Univision Communications, which in 2007 was privatized by an investment group that includes Madison Dearborn Partners, Providence Equity Partners, TPG, Thomas H. Lee Partners and Saban Capital Group - formally known as Broadcasting Media Partners. Univision Radio's talent roster includes some of the most listened-to radio personalities in Spanish-language radio, including Los Angeles-based syndicated morning personality Eddie "Piolín" Sotelo, longtime Houston-based wake-up host Raul Brindis, and New York-based morning

talent Luis Jiménez.

While many of Univision Radio's properties in the top Hispanic DMAs are ranked as the No. 1 Spanish-language station, the company's sales force is not using Arbitron's Portable People Meter (PPM)-based ratings. Additionally, Univision Radio has refused to encode its radio stations in markets switching from Arbitron's four-decade-old diary methodology after June 2009. As a result, current ratings for Miami, Phoenix, San Diego, San Antonio and Las Vegas are incomplete, as Univision's stations don't appear due to lack of data.

In New York, Los Angeles and Chicago, Univision Radio is tops. According to the most recent "Holiday 2009" ratings reports from Arbitron, Tropical WXNY "X96.3" enjoys a 3.2 share of all listening by those with a PPM in the New York market. The closest competitor is Spanish Broadcasting System's Tropical rival, WSKQ-FM "Mega 97.9," with a 3.0 share. In L.A., soft adult contemporary KLVE "Radio Amor" has been the No. 1 Spanish-language station; in the Holiday rankings it is tied for No. 1 at 3.0 share with SBS's KLAX "La Raza" and Liberman's "Qué Buena." In Chicago, Regional Mexican WOJO-FM has a 3.8 share; nearest rival WLEY "La Ley," owned by SBS, has a 2.8 share in the Holiday ratings.

WXNY shot to the top of the Spanish-language radio rankings in New York after debuting October 15, 2009; the station's mix of salsa and reggaetón music previously aired, along with Jiménez, on WCAA-FM 105.9. In July 2009, Univision announced that it was swapping WCAA for WXNY - formerly Classical WQXR - in an arrangement with The New York Times Co. Univision also paid the Times $33.5 million to secure WXNY, giving the company a full-market signal with which to compete against SBS.

WXNY is one of two stations airing a mix of Tropical music, with WRTO "La Kalle" in Miami also serving an audience with Caribbean-based music preferences and heritage. Seventeen Univision Radio stations air Regional Mexican formats, eight feature Spanish pop and adult contemporary music, eleven are Mexican Adult Hit "Recuerdo"-branded stations, and 12 stations offer Spanish-language news and talk programming. KXTN-FM 107.5 in San Antonio is Univision Radio's heritage Tejano station. Univision Radio also owns English-language hip-hop station KBBT "98.5 The Beat" in San Antonio, one of the market's most-listened-to stations, in addition to Top 40 and Classic Rock stations in Albuquerque.

➢ **Entravision Communications** owns 48 AM and FM stations across the U.S. Among the biggest markets where Entravision has stations is Los Angeles - home to grupero-focused Regional Mexican simulcast KDLD/KDLE "103.1 El Gato," Regional Mexican Variety KLYY-FM "José" and Spanish contemporary pop KSSE "Súper Estrella."

In Albuquerque, Aspen, Denver, Yuma-El Centro, Las Vegas, Lubbock, Monterey-Salinas, Phoenix, Reno and Sacramento-Stockton-Modesto, Entravision's syndicated Regional Mexican "La Tricolor" format can be found on the local dial.

Additionally, the Regional Mexican Variety "José" format can be found in Albuquerque, Denver, Yuma-El Centro, El Paso, Las Vegas, Lubbock, McAllen-Brownsville, Modesto, Monterey-Salinas, Palm Springs, Phoenix and Sacramento.

Many of these stations were once affiliates of a syndicated "Súper Estrella" network, which was discontinued in January 2009.

Entravision also owns locally programmed WNUE-FM "Mega 98.1" in Orlando, a Tropical station; and KCVR-AM & FM "Maria" in Stockton, focusing on romantic Spanish adult contemporary music. Its KMIA-AM in Phoenix is an ESPN Deportes Radio affiliate.

➢ **Liberman Broadcasting (LBI Media)** owns and operates Spanish-language radio stations in its home market of Los Angeles, in addition to Riverside-San Bernardino, Dallas and Houston. In L.A., LBI's properties are comprised of the Regional Mexican "Qué Buena" simulcast, ranchera-focused KHJ-AM 930, and Orange County-focused Mexican Variety KWIZ-FM "La Rockola." Qué Buena is the company's biggest brand in Southern California, and is home to the nationally syndicated Don Cheto, who anchors the morning show. Riverside has its own Qué Buena at KRQB-FM 96.1.

In Texas, LBI has four brands in Dallas - Regional Mexican "La Raza," a Regional Mexican adult contemporary station dubbed "Z 98.3" (pronounced *Zeta*), Spanish contemporary pop "XO Radio 101.7," and ballad-driven soft contemporary "Bonita 106.7." Houston is also home to "La Raza," in addition to the norteño-intensive Regional Mexican "El Norte" and "La Ranchera," at AM 850.

➢ **Spanish Broadcasting System (SBS)** is the largest publicly traded Hispanic-controlled media company in the U.S. Founded in 1983, SBS first found success with its group of 20 radio stations in New York, Los Angeles, Miami, Chicago, San Francisco and Puerto Rico. Today, SBS is a multimedia operation that includes the Mega TV television network, the LaMusica.com music-and-entertainment internet portal, a live concert and event production arm and its Mega Films division.

SBS's radio station roster is comprised of Tropical WSKQ-FM "Mega 97.9" and Spanish adult contemporary WPAT-FM "93.1 Amor" in New York; Regional Mexican KLAX-FM "La Raza" and Latin Urban KXOL-FM "Latino 96.3" in Los Angeles; Regional Mexican WLEY-FM "La Ley" in Chicago; Regional Mexican KRZZ-FM "La Raza" in San Francisco; and Miami-based Tropical WXDJ-FM "El Zol 95.7," Spanish adult contemporary WRMA-FM "Romance," unique Spanish-language Classic Hits WCMQ-FM "Clásica 92.3," and Regional Mexican WRAZ-FM "La Raza 106.3." SBS Puerto Rico includes four *cadenas* (or "networks") - Spanish adult contemporary "Estereotempo," Latin Urban "Reggaetón 94," Tropical Top 40 "Mega 106.9," and Salsa-intensive "Z93" - and San Juan-based News/Talk "Red 96."

Among the talent found in the SBS radio family is "El Mandril," a hugely popular afternoon personality who can be heard across SBS's Regional Mexican properties. Additionally, "El Chulo de la Mañana" is the morning host for KLAX, WLEY and WRAZ. In Miami, popular comedians Gilberto Reyes and Miguelito Gonzalez team up for "Fonomanía" on Clásica 92.3; veteran radio host Al Fuentes can be found in mornings on El Zol 95.7.

While SBS has not been as vocal in its opposition to Arbitron's PPM methdology, Arbitron revealed February 11 that a trial-level court in New York has issued a Temporary Restraining Order requiring the broadcaster to resume encoding for PPM on all of its radio stations, minus WRAZ and the Puerto Rico group. On February 4,

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Arbitron learned that SBS had ceased encoding its signals on the nine stations - all of which are located in markets where PPM ratings service has been commercialized.

The TRO expired February 16, as the court set a hearing that day to review the matter.

Meanwhile, Arbitron says it suspended delivery of PPM data to SBS in December 2009; Arbitron did not elaborate on the reasons for the suspension, but Chief Legal Officer Timothy T. Smith confirms that SBS has existing contracts with Arbitron for both the PPM service and signal encoding.

➢ **Lazer Broadcasting** has emerged as a successful broadcaster of Regional Mexican programming in the Golden State. It owns and operates stations featuring three syndicated formats - the Regional Mexican "Radio Lazer," Spanish Oldies "La Mejor," and the ranchero-focused "La Mexicana." Lazer's stations are located in its home market of Monterey-Salinas; Oxnard-Ventura; Riverside-San Bernardino; San Luis Obispo; Santa Barbara; Santa Maria; Santa Rosa; Victor Valley; Yuma-El Centro; and Reno, Nevada.

➢ **Lotus Communications**, founded by Howard Kalmenson in 1962 with the purchase of KWKW-AM 1330 in Los Angeles, operates both Hispanic-focused and non-Latino AM and FM stations in Arizona, California and Nevada.

Lotus' Spanish-language stations include KWKW - now the flagship station for ESPN Deportes Radio. KWKW is also the Spanish-language broadcast home of the Los Angeles Angels of Anaheim baseball club and L.A. Galaxy soccer team. Lotus' other ESPN Deportes Radio affiliates include stations in Las Vegas, Fresno, Tucson and Bakersfield.

In Bakersfield, Lotus also operates Regional Mexican KIWI-FM "Radio Lobo," Spanish adult contemporary KPSL-FM "Concierto 92.1," and ranchera/norteño-oldies focused KCHJ-AM "El Gallito 1010."

Lotus' other Spanish-language stations include Regional Mexican KCMT-FM "La Caliente" in Tucson, KLBN-FM "La Buena" in Fresno, and KWID-FM "La Preciosa" in Las Vegas.

➢ **Radio Campesina** started as the Spanish-language voice for farmworkers in California and the West Coast. Today, the network is still owned by the National Farm Workers Service Center and includes a mix of noncommercial and commercially licensed FM stations. Radio Campesina stations include KMYX-FM in Bakersfield, KNAI-FM in Phoenix, KUFW-FM in Visalia, KSEA-FM in Monterey-Salinas; KRCW-FM in Tri-Cities, Washington; and KCEC-FM in Yuma-El Centro.

➢ Focused on emerging multicultural markets, **Davidson Media Group** - owned since February 2009 by SS Broadcast Holdings - operates a series of owner-operated and brokered AM and FM stations. Davidson's Spanish-language stations are located in Charlotte; Greenville-Spartanburg; Indianapolis; Raleigh; Kansas City; Minneapolis; Philadelphia; Providence; Richmond; Springfield, Massachusetts; Fayetteville, Arkansas; and the small town of Lumberton, North Carolina.

➢ **Bustos Media** owns and operates Spanish-language AM and FM stations in Sacramento-Stockton-Modesto; Salt Lake City; Seattle; Yakima; Milwaukee; and Boise, Idaho. The majority of Bustos' stations carry the company's syndicated "**La Gran D**" Regional Mexican format.

Currently, the company is working with its lenders to avoid bankruptcy or an asset liquidation. Longtime radio executive Jay Meyers has been brought on to work closely with CEO Amador Bustos on "fine-tuning" the company, trade publication *Inside Radio* reports. At present, the Bustos family has 10 percent interest in Bustos Media, with Alta Communications, Providence Equity Partners and Opportunity Capital Partners in control of the remaining 90 percent.

Amador Bustos remains highly focused on growth. In fact, the company he founded with his brother, John Bustos, in late 2009 added to its Portland, Oregon group of stations by acquiring KTIL-FM 94.3, a station slated to move to the market from Tillamook, Oregon. KTIL will likely take on "La Gran D" once winter weather abates and KTIL's transmitter can complete its move to the base of Mount Hood. KTIL joins four other Spanish-language stations in Portland run by Bustos - all on the AM band. Among those stations is KOOR-AM 1010, which recently became an affiliate of GLR Networks' "W Radio" Spanish News/Talk format [see section below].

➢ In August 2009, Texas-based broadcast company **Border Media** moved all of its assets into a business trust overseen by longtime media broker Larry Patrick; Border's Austin FMs dropped their respective regional Mexican and Spanish contemporary pop formats in November, while Regional Mexican Variety-formatted

KFON-AM "Juan 1490" in early January was sold to local broadcaster REO Radio for approximately $1.5 million. Border Media's lone remaining Spanish-language station in Austin is ESPN Deportes Radio affiliate KWNX-AM 1260. Border Media continues to operate Spanish-language stations in San Antonio, McAllen-Brownsville-Harlingen, Laredo and Waco.

➢ On the West Coast, longtime Hispanic radio broadcaster Abel de Luna in early February transferred his 12-station **Moon Broadcasting** to Dallas-based trustee Scott Savage, who has put the stations up for sale, according to radio industry newsletter *Taylor On Radio-Info*. Moon operates regional Mexican stations known as "La Maquina Musical" in such California markets as Santa Rosa, Riverside, Fresno, Visalia and Victor Valley. Moon also has three stations in the Yakima, Washington market.

Spanish-language Radio: The General-Market Operators

A decade ago, Spanish-language radio stations were owned and operated mainly by Hispanic broadcasters.

Today, the nation's three biggest radio companies — **Clear Channel, CBS Radio** and **Entercom** — each own Spanish-language stations.

Clear Channel has 19 Spanish-language radio stations under the direction of SVP/Hispanic Radio **Alfredo Alonso**. The roster includes Spanish Hot Adult Contemporary stations under the "Mega" banner in Chicago and Miami and "Mia" moniker in Boston, West Palm Beach, Tucson and Bryan-College Station, Texas; "La Preciosa" Regional Mexican Adult Hits stations in San José, Monterey-Salinas, Bakersfield, Riverside-San Bernardino, Tulsa, and Corpus Christi; and Tejano stations

in Corpus Christi and Tucson.

Additionally, Alonso oversees market-leading Tropical WRUM "Rumba 100.3" in Orlando, regional Mexican WBZY "El Patrón 105.3" in Atlanta, Tropical WUBA-AM "Rumba" in Philadelphia.

Alonso is pleased with the performance of Clear Channel's Spanish-language stations, and says the first quarter looks good, with respect to advertising sales. Yet many advertisers are coming in later than usual. "There's still a lot of inventory left, and with that better pricing," says Alonso.

He also notes that his stations in PPM markets, such as WMGE-FM "Mega 94.9" in Miami, are picking up a greater share of the Spanish-language ad dollars - and not necessarily new clients.

The challenge for Clear Channel's Hispanic properties is in the non-PPM markets. While Alonso is one of the few Spanish-language broadcasters to accept Arbitron's electronic measurement device, he's faced with minimal interest from advertisers in the Spanish-language stations Clear Channel operates in markets where Arbitron continues to use diary-based ratings methodology.

Thus, stations like WMGE and similarly formatted WNUA-FM "Mega 95.5" in Chicago are among the sales drivers. Alonso says telecommunications companies and retailers are the top advertiser categories at all of his stations.

CBS Radio owns and operates four stations serving Spanish speakers - Spanish Hot Adult Contemporary KLOL-FM "Mega 101.1" in Houston and sibling KMVK-FM "Mega 107.5" in Dallas; and Tropical twins WYUU-FM "Maxima 92.5" in Tampa and WLZL-FM "El Zol 99.1" in Washington, DC. Overseeing the Hispanic radio properties for CBS Radio is veteran Spanish-language radio broadcaster **Pio Ferro**, who took the role of VP/Spanish Programming in December 2009.

Entercom's Spanish-language holdings include a ESPN Deportes Radio affiliate in Portland, Oregon; Regional Mexican KYYS-AM 1250 "La Super X" in Kansas City.

Meanwhile, one of the radio industry's biggest Christian broadcasters - **Salem Communications** - has enjoyed strong ratings and revenue in Portland, Oregon with Regional Mexican KRYP-FM "93.1 El Rey." Salem switched the station from English-language talk programming in March 2007 and today remains the No. 1-rated Spanish-language station in one of the fastest-growing Hispanic markets in the U.S. West. Salem also owns KDOW-AM "La Jefa" and KKMO-AM "Radio Sol" in Seattle, with both stations targeting the region's Mexican immigrant population.

Other non-Latino companies with Spanish-language radio stations include Raleigh-based **Curtis Media**, which owns the market's Regional Mexican WYMY-FM "96.9 La Ley;" and **Emmis Communications**, which signed on its first Spanish-language station in December 2009 with the debut of KLZT-FM "107.1 La Z" in Austin.

In Boise, Idaho, locally owned **Impact Radio Group** has enjoyed revenue growth and strong audiences with its Regional Mexican KPDA-FM "100.7 La Poderosa," which debuted in late 2008. La Poderosa also draws listeners from the Twin Falls, Idaho market. The Univision Radio-syndicated "Piolín por la Mañana" airs in morning drive on La Poderosa.

Spanish-language Radio: Rep Firms

Lotus Entravision Reps (LER), formed in August 2001, represents more than 100 Spanish language radio stations, including those owned by Lotus Communications and Entravision Communications - 50/50 partners in the operation. LER has offices in Los Angeles, New York, Dallas, Miami and Chicago. On February 11, LER announced that it has added MVS Comunicaciones' Mexican Top 40 "Exa" and Regional Mexican "La Mejor 99.3" in San Diego to its portfolio. LER already reps XLTN-FM "Radio Latina" in the San Diego market; the three stations are based in Tijuana, Mexico but target listeners in both the U.S. and Mexico. For a look at LER's current station roster, click here or visit www.lotusentravisionreps.com.

Although not owned by the company, **Clear Channel Radio Sales** (CCRS) - formerly known as Katz Hispanic - represents MVS Comunicaciones' Mexican Top 40 "Exa" station serving El Paso, in addition to Spanish Contemporary KVIB-FM in Phoenix, Regional Mexican KIST-FM "Radio Bronco" in Santa Barbara, the "La Preciosa" affiliate in Santa Maria, and Grupo Radio Centro-managed Spanish adult contemporary KXOS-FM "Exitos 93.9" in Los Angeles. Two CBS Radio stations are also represented by CCRS - Spanish Hot Adult Contemporary format KLOL-FM "Mega 101.1" in Houston and KMVK-FM "Mega 107.5" in Dallas. Also under the Katz Media Group banner is **Univision Radio National Sales**, which includes mainly Univision Radio's AM and FM properties.

HISPANIC RADIO: PROGRAM SUPPLIERS AND NETWORKS

The Spanish-language Syndicator: Primed For Growth

Many people think primarily about who owns a radio station. But what airs on the AM or FM station - and where the programming comes from - may be the more important thing for a marketer or advertiser to consider.

At Spanish-language radio stations across the U.S., syndicated programming is often paired with local shows, giving stations targeting Hispanics an added dimension and content that is of high value to the audience.

Among the companies that supply AM and FM stations targeting Latinos a variety of programming is **GLR Networks.** Based in Miami, GLR is the U.S. arm of Unión Radio - the radio division of Spain's Grupo PRISA.

GLR Networks supplies both long-form and short-form programming. Among its signature short-form offerings is "**Minuto 60**" - a top-of-the hour five-minute newscast that GLR Networks Programming Director Jimmy Pérez says is specifically tailored to the Hispanic population in the U.S. "It has a good balance of news from Mexico, Central America, South America and the United States," he says.

This approach has helped Minuto 60 grow its affiliate count to nearly 80 stations across the U.S. Pérez continues, "We understand that people are more involved in U.S.-based news stories, such as immigration reform, health reform and getting driver's licenses, than ever before." Minuto 60 is delivered every hour on the hour between 3am and 9pm Monday through Friday.

With the 2010 FIFA World Cup set to begin June 11 with a highly anticipated opening match pitting host nation South Africa against Mexico, GLR - like many networks - has created "shoulder programming" to help quench the thirst of listeners who crave Cup updates. "**Rumbo a Sudafrica,"** hosted by Mexican soccer legend Jorge Campos, expanded its distribution in January to four times a day, Monday through Sunday. Campos delivers a three-minute report that looks back at big World Cup moments while also following this year's participants on their journey to South Africa.

Rounding out the short-form programming is "**Flash Grupero**," a 90-second vignette for Regional Mexican radio stations hosted by "El Gigio de la Calle" - a host based at GLR's Mexico-based network La Ke Buena.

GLR's long-form programming is headlined by "**Cita Con El Doctor**," a two-hour weekday program hosted by **Dr. Elmer Huerta** - the first Hispanic president of the American Cancer Society. Huerta is heard from 1-3pm Eastern on close to 80 stations, and the program is literally a doctor's appointment for its many listeners, who will call asking about the health of a grandmother, a child or themselves.

On Sundays at 8pm Eastern is a unique two-hour show that shrinks the distance between friends and family in the U.S. and Mexico. "**De Paisano a Paisano,"** produced by La Ke Buena in Mexico for the U.S. market, combines regional Mexican music with nostalgia and listener interaction from both sides of the border.

Sports is, without a doubt, one of the biggest draws when targeting Hispanic men. GLR is the home for First-Division Mexican soccer league coverage, and on January 16 kicked off its coverage of the "Torneo Clausura." Specifically, GLR holds the exclusive domestic radio rights to Chivas de Guadalajara team broadcasts, and its league coverage brings coverage of six other teams - Pachuca, Cruz Azul, Morelia, Santos, Tecos and Puebla - to U.S. audiences.

Coverage of two major pan-Latin soccer tournaments - Copa Santander Libertadores and Copa Nissan Sudamericana - can also be found on GLR.

In Spain and Latin America, GLR's brands are legendary. **Los 40 Principales**, born in Madrid in 1966 as a youth-oriented Top 40 music format, can now be found as full-time formats in Argentina, Chile, Colombia, Costa Rica, Ecuador, Guatemala, Mexico and Panama. "Los 40" is now available in the U.S., in the form of a two-hour countdown show airing weekends on stations airing a Spanish contemporary pop format.

Pérez believes "Los 40" is the biggest asset for Unión Radio. More than a radio station, Los 40 has grown to include a television network in Spain and, coming this year, a Latin American version. There's also "Premios 40 Principales," which has grown to become one of the Spanish-speaking world's top music awards shows. Credit cards and magazines branded with the Los 40 logo have also helped in making it a lifestyle, and not just a radio network.

"The idea is to make Los 40 bigger in the U.S.," says GLR's Luigi Bellizzi. "It's going to happen soon. The reality is we want to have this as a network." Bellizzi says GLR has been in talks with possible suitors and is willing to buy stations that would house a 24/7 Los 40 Principales network when launched in the U.S.

Station ownership is already part of GLR's domestic operations. In Southern California, GLR owns and operates Tijuana, Mexico-based XEWW-AM "**W Radio 690**." With a booming signal that covers the San Diego, Los Angeles, Oxnard-Ventura and Riverside-San Bernardino Arbitron markets, the station offers news and talk programming modeled after Unión Radio's W Radio in Mexico and Chile. On February 1, the "W Radio" brand expanded northward via a syndication agreement with Bustos Media's KOOR-AM 1010 in Portland, Oregon. Local programs air alongside W Radio shows designed for national appeal; GLR is offering W Radio to station operators in other markets via similar agreements.

➢ While GLR holds the rights to Mexican League soccer and big regional tourneys, it is the **Fútbol de Primera (FDP)** network that is "La Radio del Mundial" - the exclusive Spanish-language radio broadcaster in the U.S. for 2010 FIFA World Cup broadcasts. FDP also has the rights to the 2014 FIFA World Cup in Brazil, in addition to the CONCACAF Gold Cup soccer tournament and exclusive Spanish-language radio coverage of the Mexican national team. FDP programming can be heard on more than 100 affiliates, including 40 FM stations, and on Sirius XM Satellite Radio.

The most recognized personality on FDP is "Mr. Gooooooool" himself, **Andrés Cantor**. With him are the "FDP Mundialista Team," featuring former players and coaches now behind the broadcast booth and on the field.

➢ **ESPN Deportes Radio** has emerged as the lone 24/7 network serving Spanish-language audiences. Owned by Disney-owned ESPN, the Miami-based network features sports talk programs including "Jorge Ramos y Su Banda," along with its

signature "SportsCenter" update shows. ESPN Deportes Radio also offers live play-by-play of Major League Baseball's All-Star Game and post-season matches, NASCAR, and soccer coverage from Spain's La Liga and the Copa América tournament.

ESPN Deportes Radio can be heard on 39 affiliates and in such markets as Los Angeles, Miami, Orlando, Tampa, Las Vegas, Fresno, Tucson and Bakersfield. It is also available nationally on Sirius XM Satellite Radio.

➢ Among the other networks offering syndicated programs to Spanish-language radio stations across the U.S. is **Citadel Media en Español** - formerly ABC Radio Networks' Spanish-language division. Two long-form shows are available to affiliates - "**Conexión Thalia,**" a two-hour weekly program featuring the actress and singer focused on fashion, gossip and celebrity news; and "**Tu Vida es Mi Vida con Maria Marin**," a weekly show mixing music and positive thoughts from the motivational speaker and columnist. Citadel Media en Español is also the advertising sales representative for ESPN Deportes Radio, the 24/7 Spanish-language sports network.

Latino Broadcasting Corp. **(LBC)** is home to a two-hour music countdown for radio station specializing in Latin Urban sounds, such as reggaetón - hosted by noted producer Frankie Needles. Sports journalist Jesse Losada hosts a daily two-minute vignette, "Sports USA," and the accompanying two-minute feature "Palabra de Honor," which offers an editorial on international sports headlines of the day. LBC is also home to veteran Spanish-language television news anchor Teresa Rodriguez. Her two-minute vignettes include "Ser Mamá," with tips on parenting; the health and fitness-themed "Salud y Belleza;" and "Consejos para el Buen Vivir," a lifestyle advice piece.

CNN en Español Radio offers top-of-the-hour newscasts for Spanish-language radio stations in the U.S. and Latin America between 6am and 11pm Eastern. Affiliates can benefit from direct-to-station presentations from CNN en Español anchors, and "a la carte" news programming.

HISPANIC INTERNET: ONLINE AND DIGITAL

An Active Arena

For much of the 2000s, much had been said and written about the "digital divide" between Latinos and non-Hispanics. Yet U.S. Hispanics have had a plethora of online choices for much of the last part of the decade, as access to the internet increased. A steady increase in the number of Spanish-language websites targeting U.S. Hispanic web surfers, many of them emerging after the "dot com bust," gave both advertisers and agencies many new options for reaching consumers.

Among the first of the portals to attract U.S. Hispanics with internet access is **starMedia**, launched in August 1996 by Fernando Espuelas. Acquired by France Telecom's Orange in 2002, starMedia today enjoys a pan-Latin presence in addition to the U.S. Hispanic market.

In 1999 came the arrival of two formidable competitors - **Terra** and **AOL Latino**.

Terra is viewed by many throughout the Hispanic advertising industry as the game-changer for internet opportunities targeting U.S. Latinos. With the financial backing of parent company Telefónica of Spain, Terra turned heads by creating buzz, attracting a nascent user base in the U.S. and wooing advertisers.

Terra, starMedia and AOL Latino survived the dot com carnage of the early 2000s, as has **QuePasa.com** - although through various incarnations and the loss of tens of millions of dollars. Today's QuePasa.com is mainly a social networking site, having abandoned its news portal in 2008.

There's also **Yahoo! En Español**, which from 2006 to 2008 was known as "Yahoo! Telemundo" thanks to a partnership agreement between the internet brand and the NBC Universal-owned television network. Telemundo's portal is now officially a channel of **MSNLatino,** the Microsoft-run Spanish-language portal targeted to U.S. Latinos.

Widely acknowledged as the giant among Spanish-language internet portals is **Univision.com**. Thanks to the strong market presence of the Univision brand, through its radio and television properties, Univision.com has become more than just an online hub for the network to promote its over-the-air audio and visual programming.

These portals, along with music-focused site **Batanga.com**, helped set the stage for an active online arena that continues to grow.

- According to comScore, the U.S. Hispanic online population reached a record 20.3 million visitors in February 2009 – up 6 percent from a year earlier.
- The Pew Hispanic Center projected in December 2009 that an estimated 24 million Latinos are online.
- ComScore's 2009 study found that the Hispanic online demographic is growing at a rate that's 50 percent faster than the overall U.S. online population.

As a result, advertisers and agencies alike are more than ever seeking the most efficient ways to bring a brand message to online Latinos. By 2006, more than 50

percent of all U.S. Hispanics had access to the internet. According to *Advertising Age,* Hispanic online advertising budgets increased 26 percent between 2007 and 2008.

Today, a vast array of sites targeting the U.S. Hispanic consumer are available for advertisers and agencies to consider and include in their client's online media budget. Until a few years ago, the process had once been arduous and time-consuming, as many U.S. Hispanic advertising agencies had little resources or a limited infrastructure in place for properly managing a multidimensional online budget. Also in the early 2000s, Latin American or non-Latino online advertising networks had started to target U.S. Hispanics.

Enter **Hola Networks**, born in autumn 2007 as the first online network to focus solely on the Latino audience in the U.S.

Rafael Monteiro, CEO and co-founder of Hola, oversees what he calls "a unique network model" for websites targeting the rapidly increasing number of U.S. Hispanic online users.

Hola Networks' very creation is tied to the twin-tiered growth seen in ad dollars and total users, and to the emergence of an online "long tail" in the U.S. Latino marketplace. "What is unique about Hola is that besides the typical network model, which usually consists of single managed ad inventory, is that Hola also represents major websites individually or independently," says Monteiro. "We can enable special projects for a client, and also provide sponsorships and product placements – things that a typical online ad network can't do."

Thus, a client that may not necessarily need a network buy can work individually with specific websites to best craft what's desired for those in charge of the brand's Hispanic online ad efforts.

Monteiro believes that operating in the U.S. Hispanic market "requires a lot of transparency," and control of the environments in which a brand message is delivered. Thus, consumer engagement through a page takeover or product integration carries with it a lot more relevance than a randomly placed skyscraper banner.

Hola enjoys an in-depth and exclusive relationship with key publishers including **Spanish Broadcasting System**'s **LaMusica.com** entertainment and music portal, its **Mega TV** online portal and the individual websites for the company's radio stations in the U.S. The same can be said of Hola's relationship with **Azteca América.**

Such sites, Monteiro says, can help expand an online campaign's total reach. "Not only should one concentrate their efforts on major websites, but they should also extend their campaign by including the vast array of websites that have smaller – but loyal – audiences."

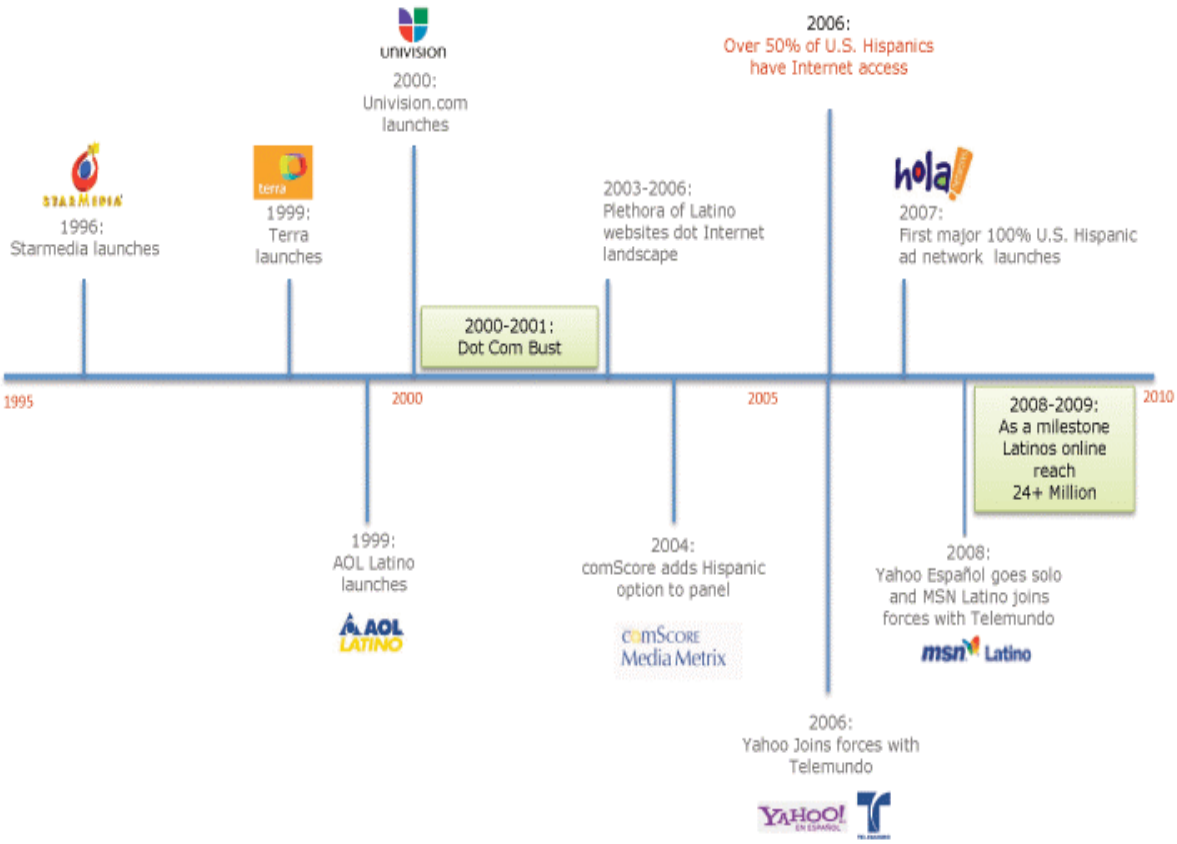
Monteiro has been active in the U.S. Hispanic online arena since the late 1990s, and considers himself a pioneer, having developed several pilot programs for Ford targeting Latino internet users within the U.S.

"I was very fortunate to be one of the very first internet ad executives to actively participate in the 'evangelization' of the internet in our industry," he says. "The industry already had some clear budgets and some clear strategies, but still had just

a handful of players and sites to distribute their campaign. We were at a moment where the clients and the agencies really needed more options, and more diversity. When Hola arrived, Hispanic advertisers no longer had to go back to their clients with just a handful of websites."

Even with myriad economic challenges across the U.S. advertising landscape, growth was seen by Hola in 2009. Continued growth is expected in 2010 and beyond, with social media applications the next step in the evolution of Hola's portfolio.

Key moments in the development of U.S. online Hispanic media



HISPANIC PRINT: NEWSPAPERS

El Clasificado: A Different Approach Leads To Growth

It's becoming ever rarer to share a success story that involves a newspaper. Yet one Southern California-based publication has excelled in achieving both strong circulation and sales growth.

What's unique about this publication has everything to do with its appeal.

"We're a consumer-oriented weekly magazine that offers no news," says **Joe Badame**, COO and co-founder of **El Clasificado.**

Founded in 1988, El Clasificado launched as a Spanish-language version of the once-common Pennysaver publications, tossed onto countless driveways and found in news racks within more urban areas.

Today, readership of El Clasificado continues to grow. In Badame's view, the continued demand for his publication is two-fold: El Clasificado is a trading post for Spanish speakers, and it's also a place for Hispanics to find work.

Badame also isn't shy in describing the publication as a "Craig's List in print" for Latinos across the region.

Craig's List, the hugely popular classified advertising website, has been one of several online portals that have steadily eroded the heart and soul of many daily and weekly newspapers. From job listings to yard sale notices and even personal ads, traffic has largely shifted away from the printed medium.

While the Los Angeles Times, Orange County Register, MediaNews Group publications and the Riverside Press-Enterprise have all been challenged by sites such as Craig's List, El Clasificado hasn't suffered as much. In fact, Badame says, El Clasificado has even emulated Craig's List by offering free online ads.

But the bread and butter of El Clasificado's business is directed toward its publication, which has a total circulation of 390,000. In the Los Angeles DMA, zoned publications can be found across Los Angeles, Riverside and San Bernardino Counties. Orange and Ventura Counties also enjoy their own editions. At the end of 2009, a Kern County edition serving Bakersfield and the largely Hispanic agricultural communities in the southern San Joaquin Valley debuted.

In late 2008, a San Diego County edition was launched. Plans are in the works for a North County edition, splitting the San Diego market into two zones. Additionally, the edition is distributed in Tijuana.

According to Badame, 2009 came in "right on target," with $14 million in revenue. For 2010, he expects El Clasificado to see at least $15 million in revenue. "We're profitable, and cash flowing. But we're more concerned about growing."

Badame's attitude toward business growth differs little from two decades ago, when he and his wife - CEO **Martha de la Torre -** launched El Clasificado. Until 1990,

Badame kept his day job as a CPA with Ernst & Young. It wasn't until 1998 that Badame and de la Torre, formerly the chief financial officer for Spanish-language daily La Opinión in Los Angeles, took a salary.

"Initially, the idea was to build the company up for two to three years and sell it to a bigger company," Badame admits.

Badame says El Clasificado has been profitable since 2000, after finally perfecting its distribution model. At first, the publication arrived at homes via direct mail, much like the Pennysaver's Southern California distribution. It didn't work, Badame notes, because of unfavorable demographics. "At an apartment complex, they would just leave the package in bulk out front."

Blowing through the company's capital fairly quickly, Badame and de la Torre shifted El Clasificado's distribution to door-to-door in order to cut costs. "That was cumbersome, and expensive," Badame says. "It wasn't as costly as mail; but that didn't work well either."

El Clasificado started to click with readers, and advertisers, with a shift to rack distribution. "In the Hispanic community news racks work well. You have a lot of foot traffic." That's quite unlike the non-Latino L.A. lifestyle, where hours of crawling on traffic-clogged freeways can be seen day and night.

"Areas like Huntington Park and East L.A. have rivers of foot

traffic," says Badame. "You cannot do this in a more white community. Bus stops, and a lot of the Metro stops, are some of our biggest distribution points."

El Clasificado has always enjoyed free distribution - something Badame considers one of the keys to its success. "All of our money comes off of advertising," he notes.

But don't expect to find a lot of national advertising in El Clasificado, although Badame wouldn't mind it. Rather, El Clasificado enjoys a highly diverse group of small business, mom-and-pop shops and the occasional regional player, such as Western Dental.

Furthermore, he notes, "No customer that is greater than one half a percent of total revenue, except for one insurance company that we are working with. We're big on mortgage brokers, realtors, attorneys, and insurance companies."

Badame believes this mix will help El Clasificado in achieving continued growth with its print-focused business model for at least the next three years, as the website gains traffic from an ever-increasing web savvy populace.

While Badame and de la Torre originally envisioned their sale of El Clasificado two decades ago, don't expect such a deal to come easily today. "I enjoy working in the Hispanic community; I love it."

He's also confident that print publications will never disappear, although paid-circulation newspapers will remain challenged.

"We started with six employees," he says. "We now have 130 full-timers and we're adding to the payroll every year. January 2010 was one of the best months in history, and we envision top-line growth of 10 percent to 12 percent this year."

Hispanic Newspapers: Bullish Attitude As Titles Turn The Tide

It's hardly a secret that the U.S. newspaper industry is in many ways engaged in a battle for survival. But some of the big owners and ad buyers for Spanish-language titles are positive that 2010 will be a good year. Speaking January 29 during his company's fourth quarter and full-year 2009 earnings conference call, **Gary Pruitt** - CEO of **The McClatchy Co.** - remarked, "Who would have thought we would have reported earnings growth in such a challenging year?"

Indeed, the owner of Miami's **El Nuevo Herald**, **La Estrella en Casa** in the Dallas-Ft. Worth market and **Vida de la Valle** in California's San Joaquin Valley reported 2009 net income of $54 million (65 cents per share), compared to a loss of nearly $4 million (5 cents) in 2008. Net income in the fourth quarter of 2009 was $25.8 million (31 cents), compared to a $27 million loss (33 cents) in the same period of 2008.

Yet all is not coming up roses for McClatchy - the company ended 2009 with debt outstanding of $1.95 billion, down approximately $174 million from the end of 2008 but still a monster figure. Cost-cutting has led to widespread layoffs and reduction in work hours at The Miami Herald in the last 12 months. Additionally, advertising revenue for its Florida newspapers - The Miami Herald, El Nuevo Herald and the Bradenton Herald - fell 27.4 percent to $169.6 million in the fourth quarter of 2009. In Texas, annual ad revenue dipped 25.3 percent, to $128 million. In the Golden State, McClatchy's newspapers suffered a 26.9 percent dip in annual revenue, to

$206.7 million.

The company did not break out revenue figures for its three Spanish-language print entities.

Meanwhile, there's been a flurry of activity at **impreMedia**, the largest publisher of daily and weekly Spanish-language newspapers in the U.S. On January 31, John Paton officially departed as CEO, taking a job at **The Journal Register Company**. Paton, who was already a member of the board of directors at Journal Register, is a co-founder of impreMedia and exited after six years. In his new role, he'll oversee a group of newspapers that includes Spanish-language weeklies in Norristown, Pennsylvania; Trenton, New Jersey; Kingston, New York; and Lorain, Ohio.

The search for Paton's replacement is on, with ex-Univision COO Mike Wortsman leading the company in the interim.

ImpreMedia was created in January 2004 as Los Angeles-market La Opinión's longtime owner, the Lozano family, combined businesses with New York's oldest and largest Spanish-language daily - **el diario/La Prensa**. The company's other newspapers are weeklies - **Rumbo in Houston, La Prensa in Orlando, El Mensajero in San Francisco** and **La Raza in Chicago**. ImpreMedia also produces the monthly newspaper supplement Vista magazine and La Vibra, an arts and entertainment feature. Additionally, the company has content-sharing agreements with McClatchy's Spanish-language publications dating to 2008 and recently forged a pact with weekly publication Atlanta Latino.

To combat a difficult revenue environment, impreMedia in November 2009 outsourced production duties for La Opinión, La Raza, La Prensa, El Mensajero and Rumbo to Mexico-based Business News Group. In August, the four weeklies saw a management consolidation that placed La Raza publisher Rubén Keoseyan in charge of the quartet, resulting in the exit of Rumbo publisher Bill Vincent.

But impreMedia remains the dominant player in the Hispanic newspaper industry, and in November expanded its online footprint through a content-sharing arrangement with AOL Latino. Dailies el diario/La Prensa and La Opinión enjoy huge market shares in their respective markets, while the Impre.com news and entertainment portal has emerged as a national networked hub for each of impreMedia's publications.

For more on impreMedia's print publications and the company's operations, click here.

Privately held **Tribune Co.** - owner of four Spanish-language newspapers and the ViveloHoy.com website - has come under scrutiny following the January 27 approval by a bankruptcy judge of 2009 bonus payments totaling $45.6 million to 10 senior executives and 710 managers. Tribune has been under Chapter 11 bankruptcy protection since December 2008.

Yet the company has expressed a deep commitment to its Hispanic-targeted products, perhaps moreso than any other non-Latino publisher that's expressed a desire to reach Spanish speakers. **Hoy Chicago**, the Tribune Co.-owned Spanish-language newspaper, in early January bumped its Monday-Thursday circulation to 75,000 copies - a 20 percent increase.

Tribune's big initiative for 2010 is **Tribune Hispanic**, a cross-platform "national media solutions group" created specifically to assist advertisers in reaching Spanish-speaking Latinos in a 360-degree manner. **John Trainor**, general manager of Hoy in Chicago, is overseeing the rollout of Tribune Hispanic, working closely with Hoy Los Angeles general manager Roaldo Morán.

"More than ever, national advertisers require innovative, consistent and engaging solutions to reach this unique consumer group," says Trainor. Translation: Hispanic "newspapers" are no longer just newspapers, with advertising opportunities now including print, online, television, mobile, out-of-home, digital signage and event marketing.

According to Trainor, 53 percent of Hispanic newspaper readers have been reading their favorite newspaper for three or more years. Furthermore, 63 percent of Hispanic newspaper readers frequently pay attention to the advertisements; 55 percent of these readers say they use coupons from the newspaper on a regular basis.

Tribune data show 1.7

million Hispanic consumers each week consuming Hoy Chicago, and weeklies **Hoy/Fin de Semana in Los Angeles**, **El Sentinel in Orlando** and **El Sentinel in Ft. Lauderdale, Florida**.

Trevor Hansen, CEO of San Diego-based media buying and planning firm **Ethnic Print Media Group**, is downright bullish on Spanish-language newspapers. "Compared to 2009, we definitely see a trend increase," he says. "We're anticipating good growth in 2010." Hansen believes there is a level of quality in Spanish-language newspapers that's quite strong, in particular in markets below the Top 20 Hispanic DMAs.

For the reader, good content and a strong community presence are leading Latinos to the Spanish-language titles. For the advertiser, event tie-ins and online integration have created strong ROI opportunities - especially when driving home brand messages on a local level. "The basis for leveraging local is particularly strong right now," Hansen notes.

Among the other major Spanish-language newspaper publishers seeing the most activity:

➢ **A.H. Belo Corp.** is the owner of the twice-weekly **Al Día,** serving Dallas-Ft. Worth. Published on Wednesdays and Saturdays by the Dallas Morning News, Al Día saw its frequency lowered from six days a week in February 2009. Belo also owns **La Prensa**, serving Southern California's Inland Empire and published by the Riverside Press-Enterprise. The publication is distributed weekly in 22 communities throughout Riverside and San Bernardino Counties.

➢ The **Ibarria Media Group**, based in Northern New Jersey, has seen strong sales and circulation growth with two weekly newspapers. **El Especial** offers current national and local news with a focus on entertainment, sports and health. **El Especialito** takes a more community-focused approach while maintaining a social, health, political and entertainment approach; El Especialito has 10 editions serving Hudson, Passaic, Essex, Union and Middlesex Counties in New Jersey; as well as The Bronx and Brooklyn and Miami-Dade County, Florida. In all, the publications are read by an audience totaling 1.5 million.

➢ Also serving greater New York's Latino population are two offerings from the **New York Daily News** - **Hora Hispana**, a Spanish-language weekly reaching 120,000 Latinos in the Five Boroughs; and **Viva New York**, an English-language pullout section seen in the Daily News on one Wednesday per month.

➢ **Diario Las Américas,** a Miami-based daily that competes with McClatchy's El Nuevo Herald, is the market's first publication to serve a group of readers that is largely comprised of Cuban-Americans who fled the Castro regime after 1960. The newspaper has a total daily paid circulation of over 45,000 and a Sunday circulation of over 48,000.

➢ **Hearst Corporation**'s Houston Chronicle publishes **La Voz de Houston**, a weekly distributed each Wednesday that enjoys a circulation of 100,000. The publication is one of several in a highly competitive marketplace that includes the tabloid-formatted weekly **Semana News** and impreMedia's **Rumbo**, which is distributed

each Friday and has a circulation mirroring that of La Voz. Rumbo evolved from a daily to a weekly print cycle in 2007.

➢ Privately held weekly **El Latino** in San Diego has enjoyed considerable growth in the shadow of Tijuana-based daily Fronteras and Los Angeles-based giant La Opinión. In November 2009, the leading weekly serving San Diego's Spanish speakers brought on board La Opinión's vice president of business development and partnerships - **Mike Cano** - as publisher. El Latino distributes 80,000 copies through the use of street racks and home delivery.

➢ Gannett's Arizona Republic, the daily newspaper serving metropolitan Phoenix, enjoys a partnership with locally owned weekly **La Voz** - a weekly available on Fridays that has a distribution of 60,000 copies. Additionally, Lavozarizona.com sees daily updates with news from the region and from Mexico. La Voz enjoys a healthy competition against weekly tabloid-formatted **Prensa Hispana**. The newspaper is distributed Wednesdays and has a circulation of approximately 65,000.

➢ The ever-growing Atlanta market is home to **MundoHispánico**, owned by Cox's Atlanta Journal-Constitution. The publication leads the pack in circulation and sales. Distributed each Thursday, the publication celebrated its 30th anniversary in 2009. Also available each Thursday is **Atlanta Latino**, which serves bilingual Latinos. **Georgia Latino News**, a bi-weekly title, is published every other Thursday, and takes a local focus to its coverage.

In addition to these publications are many other community-based weeklies serving both English-speaking and Spanish-speaking Latinos. Many are members of the National Association of Hispanic Publications (NAHP). For detailed information on NAHP member publications, visit http://www.nahp.org/member_publications/index.asp.

HISPANIC PRINT: MAGAZINES

2009: Tough Times For Latino Titles

The Great Recession of 2009 was felt strongest in the U.S. Hispanic market by Spanish-language magazines, distributed both regionally and nationally. **Carlos Pelay,** president of **Media Economics Group**, produces the **HispanicMagazineMonitor,** which tracks both ad dollars and ad pages at Latino titles.

Pelay has witnessed a year full of challenges for Hispanic magazines. The "major blow," he says, was the closure of *Selecciónes* - the Spanish-language publication of Reader's Digest that remains active in Europe and Latin America.

According to full-year 2009 data from HispanicMagazineMonitor, *Selecciónes* accounted for $5.2 million in ad dollars, or roughly 4 percent of the $140.84 million advertisers placed in the titles Media Economics Group tracks. *Selecciónes* ranked eighth by ad dollars for the year - even though its June 2009 issue was its last.

The Spanish-language magazine world also saw what's being billed as the temporary halt of *Fox Sports en Español Magazine*, which had been published by Cuatro Media since early 2006. Fox Sports en Español executives hope to restart the title this year under a different publisher.

Fashion and lifestyle title *Ocean Drive en* Español said goodbye to readers in April 2009 - just a month shy of its eighth anniversary. Also bidding farewell to the U.S. Hispanic market, in March 2009, were Megazines Group's female-targeted KENA - an offshoot of a highly successful Mexican magazine - and automotive glossy *Sobre Ruedas.*

The closures overshadowed the debut of two Spanish-language consumer publications - LATINO Magazine and Cocina al Maximo. Additionally, *ESPN Deportes La Revista,* the Spanish-language sports publication tied to the ESPN Deportes network, is jumping from six months a year distribution to a monthly platform. At the same time, the magazine is increasing its circulation from 55,000 to 65,000.

Sam Pagán, publisher of *ESPN Deportes La Revista*, commented, "There is an audience for the product as print publications continue to be one the most viable mediums of engagement among Hispanics." Blue-chip advertisers include Ford, The Wm Wrigley Jr. Company, Hennessey and Infinity Insurance.

New for 2010 is the entry into the U.S. Hispanic market for **Consumer Reports**. The respected publisher of product reviews and recommendations, which does not accept advertising so as its reports remain non-biased, is test-marketing a "Guía de Compras 2010." A soft-bound Reader's Digest-sized publication with a $10.95 price point, the Spanish-language guide includes an introduction by Julie Stav, a Cuban-American financial expert who appears on Univision radio and television stations.

➢ In 2009, just five publications took in more than $10 million in ad dollars. That being said, many Hispanic marketers are focusing their Spanish-language print budgets on the two leading publications - *People en Español* and *Latina*.

People en Español is the undisputed leader in the U.S. Hispanic market. In 2009, 32.2 percent of all dollars going to Spanish-language titles went to the sibling of popular entertainment magazine *People*. That being said, the $45.4 million seen by *People en Español* in 2009 is down 15 percent from 2008.

Only two of the top 10 magazines by ad dollars saw growth - *TV Notas* and *Ser Padres Espera*. The Maya Publishing Group title saw a 15 percent increase from 2008, finishing 2009 with $8.1 million. *Ser Padres Espera*, a Meredith Corporation publication, was known as *Espera* until April 2009 and was renamed to put more focus on the *Ser Padres* brand. The move worked - ad dollars jumped 111 percent, to $4.7 million.

Top 10 Hispanic Magazines by **Total Ad Spending** (January - December, 2009)
Source: HispanicMagazineMonitor.com/Media Economics Group

Rank	Title	Publisher	Total Dollars	% Share of Dollars	Total Dollars for previous year	% change (from previous year)
1	People en Espanol	Time, Inc.	$45,403,715	32.20%	$53,286,782	-14.80%
2	Latina	Latina Media Ventures, LLC	$25,571,386	18.20%	$35,278,457	-27.50%
3	TV y Novelas	Televisa Publishing	$15,730,268	11.20%	$18,837,223	-16.50%
4	Ser Padres	Meredith Corporation	$11,290,350	8.00%	$21,539,188	-47.60%
5	Siempre Mujer	Meredith Corporation	$11,056,060	7.90%	$12,753,510	-13.30%
6	Vanidades	Televisa Publishing	$8,870,213	6.30%	$14,938,155	-40.60%
7	TV Notas	Maya Publishing Group	$8,124,138	5.80%	$6,946,502	17.00%
8	Selecciones	Readers Digest	$5,242,800	3.70%	$12,992,565	-59.60%
9	Hispanic Business	Hispanic Business, Inc.	$4,824,781	3.40%	$7,268,646	-33.60%
10	Ser Padres Espera (was Espera)	Meredith Corporation	$4,723,640	3.40%	$2,241,560	110.70%
Totals: (displayed results)			**$140,837,351**	**100.00%**	**$186,082,588**	**-24.30%**

Source: Media Economics Group, (c) 2001-2009

Nevertheless, **ad dollars for 2009 totaled $173.5 million - a decline of 29.4 percent from 2008**, Pelay notes. Ad Pages totaled 7,266.48 for the year - a decline of 25.4 percent from 2008 on a same-title basis.

TOP 10 HISPANIC MAGAZINES BY AD SPENDING, 2009

By advertiser category, **Cosmetics Brands** emerged as the top contributor to the Spanish-language glossies that Media Economics Group/HispanicMagazineMonitor tracks. Cosmetics accounts for 7.8 percent of all ad dollars going to these magazines - $13.6 million in 2009.

Budgets remained strong overall last year, slipping just 1 percent from 2008. There were also budget increases for **Hair Care Brands** and **Baby/Children's Personal Care Brands**.

But those positives couldn't squelch the steep drainage of advertising dollars from such once-strong categories as **Automobile Manufacturers**. In 2008, the auto industry was responsible for $21.1 million in ads. At the end of 2009, just under $5.8 million was seen from car makers - a 72.6 percent slide. According to Pelay, automotive ad spending in Hispanic magazines peaked in 2007, at $38.3 million, and had already dipped 44.8 percent in 2008.

Department Stores also dramatically cut their advertising during 2009, as did **Apparel and Accessory Brands.** Furthermore, **Food and Drinking Establishments** cut their Spanish-language advertising dollars by 70.8 percent, to $2.7 million - the second-largest drop in 2009, Media Economics Group reports.

Ads for **Prescription Medications** dipped 70.2 percent, to $1.9 million. **Building Material and Garden Equipment Retailers** saw dollars dip by 65 percent, to $1.2 million. The biggest percentage decline in activity was seen in the **Books, Periodicals, Music and Video Retailers** category. In a near-collapse, this category saw ad dollars fall by 98.7 percent, to just $42,200.

Top 10 Hispanic Magazine Ad Categories by **Total Ad Spending** (January - December, 2009)
Source: HispanicMagazineMonitor.com/Media Economics Group

Rank	Sub-category	Total Dollars	% Share of Dollars	Total Dollars for previous year	% change (from previous year)
1	Cosmetics	$13,631,057	7.80%	$13,778,310	-1.07%
2	Haircare	$12,097,345	6.90%	$11,810,628	2.43%
3	Food products	$11,343,713	6.50%	$13,101,772	-13.42%
4	Department stores	$8,701,500	5.00%	$14,298,255	-39.14%
5	Insurance carriers & agents	$8,085,033	4.60%	$9,297,403	-13.04%
6	Direct response (nec)	$7,638,908	4.40%	$8,786,646	-13.06%
7	Personal Care - Baby/Children	$5,874,414	3.40%	$5,525,603	6.31%
8	Auto manufacturers	$5,789,629	3.30%	$21,133,235	-72.60%
9	Apparel & accessories	$5,630,571	3.20%	$9,721,982	-42.08%
10	Skincare (face)	$5,531,342	3.20%	$8,808,502	-37.20%
	Totals: (top 10)	**$84,323,512**	**100.00%**	**$116,262,336**	**-27.47%**

Has the Hispanic magazine industry hit rock-bottom, with recovery soon to arrive? "I certainly hope so," says Pelay. "It is not inconceivable that 2010 will see some closures of some smaller publications. The general expectation is that things will bottom out this year, and if automotive turns around it will definitely serve as a good signal for Hispanic magazines."

THE U.S. HISPANIC MARKET: TOP 20 DMAs

Hispanics can be found far and wide across the U.S. From small towns in Iowa and Kansas to cities in nearly every state, Latino populations have boomed thanks to continued immigration, new births and employment opportunities.

For years, it was understood that New York's Latino population consisted primarily of Puerto Ricans and Dominicans. In Los Angeles, Mexicans were viewed as the dominant - if not singular - driver of Hispanic consumer activity. In Miami, Hispanics of Cuban descent were seen as the main consumers of Spanish-language media.

Today, each of those markets are more diverse than ever. In New York, the population of Mexicans - largely from the state of Puebla - has surpassed 500,000. In Miami-Dade County's agricultural communities of Homestead and Florida City, an influx of first-generation immigrants has increased the market's population of Mexicans to nearly 111,000.

As the market's biggest Hispanic markets have become more ethnically diverse, the Latino population in these markets has matured, with many established segments now firmly in place. For the marketer, increased knowledge of Hispanic lifestyle and acculturation is now essential knowledge for the creation and success of any advertising effort.

Geoscape, which provides strategic analytics, market intelligence systems and data to corporations seeking to grow their multicultural business, each year examines in detail Hispanic population trends - offering them through its American Marketscape DataStream platform.

For this report, Geoscape provided top-line data for the Top 20 Hispanic Designated Market Areas (DMAs). Markets are listed in descending order, by rank. Spanish-language media outlets in each DMA accompany the Geoscape data, and is compiled by the JakeAdams Editorial Services and Research Consultancy.

1 LOS ANGELES

Total Population (2009): 17,595,237
Hispanic Population (2009): 7,881,105

Total Population - Estimated (2014): 18,120,622
Hispanic Population - Estimated (2014): 8,419,831

Annual Household Expenditures Total: Overall Aggregate - 2009 (in 000s): $328,063,728.64
Annual Household Expenditures Total: Hispanic Aggregate - 2009 (in 000s): $93,427,327.10

LANGUAGE USE
English Dependent: 1,289,241
Bilingual English Preferred: 1,795,214
Bilingual English/Spanish: 964,250
Bilingual Spanish Preferred: 1,473,548
Spanish Dependent: 1,576,220

LOCAL HISPANIC MEDIA

TELEVISION:
Telemundo KVEA-Channel 52 www.telemundo52.com
Non-affiliated (Telemundo-owned) KWHY-Channel 22
Univision KMEX-Channel 34
TeleFutura KFTR-Channel 46
Estrella TV KRCA-Channel 62 www.krca62.tv
Azteca América KAZA-Channel 54
MTV Tr3s KBEH-Channel 63 www.mtvtr3sla.com
LATV KJLA-Channel 57 www.kjla.com
V-me KCET-Channel 28.3

RADIO:
GLR Networks W Radio 690 XEWW-AM
Univision Radio KLVE-FM, KRCD-FM/KRCV-FM, KSCA-FM, KTNQ-AM
SBS KLAX-FM, KXOL-FM
Liberman Broadcasting KBUA-FM/KBUE-FM/KEBN-FM, KHJ-AM, KWIZ-FM
Lotus Communications KWKW-AM 1330/KWKU-AM 1220 (ESPN Deportes Radio)
Entravision KDLD-FM/KDLE-FM, KLLY-FM, KSSE-FM
Grupo Radio Centro KXOS-FM*
Radio Nueva Vida KLTX-AM, KMRO-FM

* Operated via a LMA with owner Emmis Communications; repped by Clear Channel Radio Sales

NEWSPAPERS:
El Clasificado
impreMedia La Opinión
Tribune Co. Hoy L.A.
Freedom Communications Excelsior
Eastern Group Publications Comet, Eastside Sun, Northeast Sun, Mexican American Sun

2 NEW YORK

Total Population (2009): 20,827,367
Hispanic Population (2009): 4,407,564

Total Population - Estimated (2014): 21,016,685
Hispanic Population - Estimated (2014): 4,632,116

Annual Household Expenditures Total: Overall Aggregate - 2009 (in 000s): $471,078,515.05
Annual Household Expenditures Total: Hispanic Aggregate - 2009 (in 000s): $60,188,963.38

LANGUAGE USE
English Dependent: 526,973
Bilingual English Preferred: 1,104,579
Bilingual English/Spanish: 629,622
Bilingual Spanish Preferred: 892,087
Spanish Dependent: 847,089

LOCAL HISPANIC MEDIA

TELEVISION:
Telemundo WNJU-Channel 47 www.telemundo47.com
Univision WXTV-Channel 41
TeleFutura WFUT-Channel 68
Azteca América WNYN-Channel 39
CV Network WPXO-Channel 34
Mega TV WRNN-Channel 48.2
V-me WNET-Channel 13.3

RADIO:
Univision Radio WADO-AM, WQBU-FM & WXNY-FM
SBS WPAT-FM & WSKQ-FM

NEWSPAPERS:
impreMedia el Diario/La Prensa, Hoy New York
Ibarria Media Group El Especial, El Especialito
New York Daily News Hora Hispana, Viva New York

3 HOUSTON

Total Population (2009): 6,088,439
Hispanic Population (2009): 2,068,760

Total Population - Estimated (2014): 6,696,232
Hispanic Population - Estimated (2014): 2,397,462

Annual Household Expenditures Total: Overall Aggregate - 2009 (in 000s): $109,125,186.29
Annual Household Expenditures Total: Hispanic Aggregate - 2009 (in 000s): $22,986,908.49

LANGUAGE USE
English Dependent: 289,694
Bilingual English Preferred: 491,323
Bilingual English/Spanish: 281,317
Bilingual Spanish Preferred: 365,492
Spanish Dependent: 415,871

LOCAL HISPANIC MEDIA

TELEVISION:
Telemundo KTMD-Channel 47 www.telemundohouston.com
Univision KXLN-Channel 45
TeleFutura KFTH-Channel 67
Estrella TV KZJL-Channel 61
Azteca América KUVM-Channel 34
TV Informa (Lotus) KHLM-Channel 43
Vasallovision KAZH-Channel 57 www.kazh57.com
Mega TV KJIB-Channel 29
V-me Channel 8.2

RADIO:
Univision Radio KAMA-FM, KLAT-AM, KRTX-AM, KLTN-FM & KOVE-FM
Liberman Broadcasting KEYH-AM, KQUE-AM, KIOX-FM, KJOJ-FM, KNTE-FM, KQQK-FM, KTJM-FM
CBS Radio KLOL-FM
ESPN Deportes Radio KYST-AM

NEWSPAPERS:
impreMedia Rumbo
Houston Chronicle La Voz de Houston
Newspan Media Corp. Semana News

4 CHICAGO

Total Population (2009): 9,823,067
Hispanic Population (2009): 1,986,536

Total Population - Estimated (2014): 10,158,979
Hispanic Population - Estimated (2014): 2,199,654

Annual Household Expenditures Total: Overall Aggregate - 2009 (in 000s): $215,768,428.15
Annual Household Expenditures Total: Hispanic Aggregate - 2009 (in 000s): $26,353,022.92

LANGUAGE USE
English Dependent: 281,678
Bilingual English Preferred: 438,248
Bilingual English/Spanish: 262,162
Bilingual Spanish Preferred: 392,191
Spanish Dependent: 399,573

LOCAL HISPANIC MEDIA

TELEVISION:
Telemundo WSNS-Channel 44 www.telemundochicago.com
Univision WGBO-Channel 66
TeleFutura WXFT-Channel 60
Azteca América WCHU-Channel 61
Mega TV WOCK-Channel 13
V-me WTTW-Channel 11.4

RADIO:
Clear Channel WNUA-FM
Univision Radio WOJO-FM, WPPN-FM, WVIV-FM/WVIX-FM, WRTO-AM
SBS WLEY-FM

NEWSPAPERS:
Tribune Co. Hoy
impreMedia La Raza

5 MIAMI-FT. LAUDERDALE

Total Population (2009): 4,242,084
Hispanic Population (2009): 1,972,614

Total Population - Estimated (2014): 4,320,722
Hispanic Population - Estimated (2014): 2,121,584

Annual Household Expenditures Total: Overall Aggregate - 2009 (in 000s): $76,728,341.69
Annual Household Expenditures Total: Hispanic Aggregate - 2009 (in 000s): $32,680,441.86

LANGUAGE USE
English Dependent: 112,715
Bilingual English Preferred: 508,714
Bilingual English/Spanish: 290,893
Bilingual Spanish Preferred: 412,658
Spanish Dependent: 494,292

LOCAL HISPANIC MEDIA

TELEVISION:
Telemundo WSCV-Channel 51 www.telemundo51.com
Univision WLTV-Channel 23
TeleFutura WAMI-Channel 69
Mega TV WSBS-Channel 22
América TeVe WJAN-Channel 41
Gen TV WGEN-Channel 8
CV Network WFUN-Channel 48
LATV WPLG-Channel 10.2

RADIO:
GLR Networks WSUA-AM Caracol 1260
Univision Radio WAMR-FM, WAQI-AM, WRTO-FM, WQBA-AM
SBS WCMQ-FM, WRAZ-FM, WRMA-FM, WXDJ-FM
Clear Channel WMGE-FM
ESPN Deportes Radio WOCN-AM
Fútbol de Primera/Unión Radio Venezuela WURN-AM
Fenix Broadcasting WRHC-AM, WWFE-FM

NEWSPAPERS:
McClatchy Co. El Nuevo Herald
Americas Publishing Diario Las Américas
Ibarria Media Group El Especial
Tribune Co. El Sentinel

6 DALLAS-FT. WORTH

Total Population (2009): 7,111,841
Hispanic Population (2009): 1,931,404

Total Population - Estimated (2014): 7,890,212
Hispanic Population - Estimated (2014): 2,312,590

Annual Household Expenditures Total: Overall Aggregate - 2009 (in 000s): $135,402,025.18
Annual Household Expenditures Total: Hispanic Aggregate - 2009 (in 000s): $22,311,651.20

LANGUAGE USE
English Dependent: 290,072
Bilingual English Preferred: 411,049
Bilingual English/Spanish: 227,305
Bilingual Spanish Preferred: 343,502
Spanish Dependent: 439,808

LOCAL HISPANIC MEDIA

TELEVISION:
Telemundo KXTX-Channel 39 www.telemundodallas.com
Univision KUVN-Channel 23
TeleFutura KSTR-Channel 49
Mega TV KODF-Channel 26
Estrella TV KMPX-Channel 29

RADIO:
Univision Radio KDXX-FM, KESS-FM, KFLC-AM, KFZO-FM, KLNO-FM
CBS Radio KMVK-FM
Liberman Broadcasting KBOC-FM, KNOR-FM, KTCY-FM, KZMP-AM, KZZA-FM

NEWSPAPERS:
A.H. Belo Corp. Al Día
McClatchy Co. La Estrella en Casa

7 SAN FRANCISCO-OAKLAND-SAN JOSE

Total Population (2009): 6,953,092
Hispanic Population (2009): 1,582,387

Total Population - Estimated (2014): 7,176,262
Hispanic Population - Estimated (2014): 1,717,624

Annual Household Expenditures Total: Overall Aggregate - 2009 (in 000s): $180,383,705.84
Annual Household Expenditures Total: Hispanic Aggregate - 2009 (in 000s): $24,117,970.74

LANGUAGE USE
English Dependent: 358,369
Bilingual English Preferred: 357,408
Bilingual English/Spanish: 178,214
Bilingual Spanish Preferred: 258,891
Spanish Dependent: 268,732

LOCAL HISPANIC MEDIA

TELEVISION:
Telemundo KSTS-Channel 48 www.telemundo48.com
Univision KDTV-Channel 14
TeleFutura KFSF-Channel 66
Estrella TV KTNC-Channel 42
Azteca América KBWB-Channel 20.4
V-me KTEH-Channel 54.2, KQED-Channel 9.4, KQET-Channel 25.3

RADIO:
Univision Radio KSOL-FM/KSQL-FM, KVVF-FM, KBRG-FM
SBS KRZZ-FM
Clear Channel KSJO-FM
Duharte Broadcasting KZSF-AM

NEWSPAPERS:
impreMedia El Mensajero
Media News Group Fronteras

8 PHOENIX

Total Population (2009): 5,249,107
Hispanic Population (2009): 1,541,554

Total Population - Estimated (2014): 6,066,400
Hispanic Population - Estimated (2014): 1,912,325

Annual Household Expenditures Total: Overall Aggregate - 2009 (in 000s): $96,066,542.66
Annual Household Expenditures Total: Hispanic Aggregate - 2009 (in 000s): $16,793,261.82

LANGUAGE USE
English Dependent: 356,579
Bilingual English Preferred: 346,319
Bilingual English/Spanish: 174,814
Bilingual Spanish Preferred: 218,644
Spanish Dependent: 264,780

LOCAL HISPANIC MEDIA

TELEVISION:
Telemundo KTAZ-Channel 39
Univision KTVW-Channel 33
TeleFutura KFPH-Channel 35
Estrella TV KVPA-Channel 42
Lotus Communications KPHE-Channel 44
MTV Tr3s KEJR-Channel 43
Azteca América KPDF-Channel 41

RADIO:
Univision Radio KHOT-FM, KOMR-FM/KQMR-FM
Entravision KMIA-AM, KDVA-FM/KVVA-FM, KLNZ-FM
Sun City Communications KVIB-FM
Radio Campesina KNAI-FM

NEWSPAPERS:
Elvira Espinosa La Voz
Manny Garcia Prensa Hispana

9 SAN ANTONIO

Total Population (2009): 2,404,081
Hispanic Population (2009): 1,305,189

Total Population - Estimated (2014): 2,651,157
Hispanic Population - Estimated (2014): 1,461,697

Annual Household Expenditures Total: Overall Aggregate - 2009 (in 000s): $38,301,743.92
Annual Household Expenditures Total: Hispanic Aggregate - 2009 (in 000s): $14,943,770.15

LANGUAGE USE
English Dependent: 308,339
Bilingual English Preferred: 446,730
Bilingual English/Spanish: 163,495
Bilingual Spanish Preferred: 143,863
Spanish Dependent: 124,749

LOCAL HISPANIC MEDIA

TELEVISION:
Telemundo KVDA-Channel 60
Univision KWEX-Channel 41
TeleFutura KNIC-Channel 17
Azteca América KTDF-Channel 18/KVDF-Channel 31
V-me KLRN-Channel 9.3
LATV KSAT-Channel 12.2

RADIO:
Univision Radio KCOR-AM, KBBT-FM, KGSX-FM, KROM-FM, KXTN-FM
Border Media KLEY-FM, KRIO-FM, KSAH-FM, KHHL-FM
D&E Broadcasting KEDA-AM

NEWSPAPERS:
San Antonio Express-News Conexión

10 McALLEN-BROWNSVILLE-HARLINGEN

Total Population (2009): 1,223,710
Hispanic Population (2009): 1,100,976

Total Population - Estimated (2014): 1,377,248
Hispanic Population - Estimated (2014): 1,237,102

Annual Household Expenditures Total: Overall Aggregate - 2009 (in 000s): $11,461,319.47
Annual Household Expenditures Total: Hispanic Aggregate - 2009 (in 000s): $9,108,739.49

LANGUAGE USE
English Dependent: 71,172
Bilingual English Preferred: 294,495
Bilingual English/Spanish: 199,242
Bilingual Spanish Preferred: 203,929
Spanish Dependent: 197,795

LOCAL HISPANIC MEDIA

TELEVISION:
Telemundo KTLM-Channel 40 www.telemundo40.com
Univision KNVO-Channel 48
TeleFutura KTFV-Channel 32/KVTF-Channel 20
Azteca América KNDF-Channel 57/KBDF-Channel 64

RADIO:
Univision Radio KGBT-AM & FM, KBTQ-FM
Entravision KKPS-FM & KNVO-FM
Border Media KESO-FM 92.7/XHRR-FM, XHCAO-FM, XHAVO-FM

NEWSPAPERS:
Freedom Communications El Nuevo Heraldo, La Frontera - Noticias del Valle

11 SACRAMENTO-STOCKTON-MODESTO

Total Population (2009): 4,033,937
Hispanic Population (2009): 1,030,261

Total Population - Estimated (2014): 4,272,044
Hispanic Population - Estimated (2014): 1,170,167

Annual Household Expenditures Total: Overall Aggregate - 2009 (in 000s): $79,065,309.15
Annual Household Expenditures Total: Hispanic Aggregate - 2009 (in 000s): $12,957,997.51

LANGUAGE USE
English Dependent: 306,032
Bilingual English Preferred: 240,239
Bilingual English/Spanish: 103,938
Bilingual Spanish Preferred: 124,264
Spanish Dependent: 145,901

LOCAL HISPANIC MEDIA

TELEVISION:
Telemundo KCSO-Channel 33
Univision KUVS-Channel 19
TeleFutura KTFK-Channel 64
V-me KVIE-Channel 6.3

RADIO:
Entravision KRCX-FM & KXSE-FM
Bustos Media KBAA-FM, KLMG-FM, KTTA-FM

NEWSPAPERS:
McClatchy Co. Vida En El Valle

12 FRESNO-VISALIA

Total Population (2009): 1,939,261
Hispanic Population (2009): 1,006,230

Total Population - Estimated (2014): 2,090,819
Hispanic Population - Estimated (2014): 1,132,033

Annual Household Expenditures Total: Overall Aggregate - 2009 (in 000s): $25,664,242.62
Annual Household Expenditures Total: Hispanic Aggregate - 2009 (in 000s): $9,145,486.93

LANGUAGE USE
English Dependent: 218,186
Bilingual English Preferred: 228,934
Bilingual English/Spanish: 123,893
Bilingual Spanish Preferred: 147,575
Spanish Dependent: 176,130

LOCAL HISPANIC MEDIA

TELEVISION:
Telemundo KNSO-Channel 51 www.telemundofresno.com
Univision KFTV-Channel 21
TeleFutura KTFF-Channel 41/48/61
Mega TV KSDI-Channel 33.2
V-me KVPT-Channel 18.3
Azteca América KMSG-Channel 39
Estrela TV KFRE-Channel 59.2

RADIO:
Univision Radio KLLE-FM, KOND-FM, KRDA-FM
Clear Channel KFSO-FM
Radio Campesina KUFH-FM

NEWSPAPERS:
McClatchy Co. Vida En El Valle

13 SAN DIEGO

Total Population (2009): 2,991,460
Hispanic Population (2009): 928,275

Total Population - Estimated (2014): 3,061,323
Hispanic Population - Estimated (2014): 995,210

Annual Household Expenditures Total: Overall Aggregate - 2009 (in 000s): $58,822,844.99
Annual Household Expenditures Total: Hispanic Aggregate - 2009 (in 000s): $10,676,552.56

LANGUAGE USE
English Dependent: 171,563
Bilingual English Preferred: 237,069
Bilingual English/Spanish: 116,793
Bilingual Spanish Preferred: 150,962
Spanish Dependent: 146,253

LOCAL HISPANIC MEDIA

TELEVISION:
Telemundo XHAS-Channel 33 www.telemundo33.com
Univision KBNT-Channel 17
TeleFutura KDTF-Channel 36
Azteca América KZSD-Channel 41
V-me KPBS-Channel 15.2
Estrella TV KSDX-Channel 29

RADIO:
GLR Networks W Radio 690 XEWW-AM
Univision Radio KLNV-FM & KLQV-FM
Uniradio XEMO-AM, XHTY-FM, XERCN-AM, XHA-FM, XHFG-FM
MVS Comunicaciones XHGLX-FM, XHOCL-FM, XTIM-FM
Radio Imagen XLTN-FM

NEWSPAPERS:
Laina & Associates Inc. El Latino
San Diego Union-Tribune Enlace
Healy Media Inc. Diario San Diego

14 DENVER

Total Population (2009): 4,037,798
Hispanic Population (2009): 852,016

Total Population - Estimated (2014): 4,381,762
Hispanic Population - Estimated (2014): 988,854

Annual Household Expenditures Total: Overall Aggregate - 2009 (in 000s): $92,344,822.14
Annual Household Expenditures Total: Hispanic Aggregate - 2009 (in 000s): $11,433,737.25

LANGUAGE USE
English Dependent: 293,632
Bilingual English Preferred: 167,956
Bilingual English/Spanish: 79,780
Bilingual Spanish Preferred: 92,103
Spanish Dependent: 121,717

LOCAL HISPANIC MEDIA

TELEVISION:
Telemundo KDEN-Channel 25
Univision KCEC-Channel 50
TeleFutura KTFD-Channel 14
Azteca América KZCO-Channel 27
V-me KRMA-Channel 18DT

RADIO:
Entravision KMXA-AM, KJMN-FM & KXPK-FM
Latino Communications KBNO-AM

15 EL PASO

Total Population (2009): 966,985
Hispanic Population (2009): 762,271

Total Population - Estimated (2014): 1,039,126
Hispanic Population - Estimated (2014): 831,438

Annual Household Expenditures Total: Overall Aggregate - 2009 (in 000s): $11,647,196.60
Annual Household Expenditures Total: Hispanic Aggregate - 2009 (in 000s): $7,549,581.70

LANGUAGE USE
English Dependent: 76,306
Bilingual English Preferred: 233,573
Bilingual English/Spanish: 124,207
Bilingual Spanish Preferred: 123,321
Spanish Dependent: 122,754

LOCAL HISPANIC MEDIA

TELEVISION:
Telemundo KTDO-Channel 48
Univision KINT-Channel 26
TeleFutura KTFN-Channel 65
Azteca América KAEP-Channel 42

RADIO:
Entravision KINT-FM, KSVE-AM & KYSE-FM
Univision Radio KAMA-AM, KBNA-AM & FM
MVS Comunicaciones XHPX-FM
Grupo Radio Mexico XEJ-AM, XHTO-FM, XHNZ-FM 107.5, XHIM-FM 105.1, XHEM-FM 103.5

NEWSPAPERS:
El Diario El Diario de El Paso
El Paso Times El Paso y Más

16 ALBUQUERQUE-SANTA FE

Total Population (2009): 1,866,498
Hispanic Population (2009): 755,592

Total Population - Estimated (2014): 1,983,502
Hispanic Population - Estimated (2014): 892,695

Annual Household Expenditures Total: Overall Aggregate - 2009 (in 000s): $30,450,423.98
Annual Household Expenditures Total: Hispanic Aggregate - 2009 (in 000s): $9,502,193.14

LANGUAGE USE
English Dependent: 273,786
Bilingual English Preferred: 222,925
Bilingual English/Spanish: 78,818
Bilingual Spanish Preferred: 66,071
Spanish Dependent: 55,039

LOCAL HISPANIC MEDIA

TELEVISION:
Telemundo KTEL-Channel 47
Univision KLUZ-Channel 41
TeleFutura KTFQ-Channel 14
Azteca América KQDF-Channel 25
Estrella TV KOAT-Channel 7.2

RADIO:
Univision Radio KJFA-FM & KKRG-FM
Entravision KRZY-AM & FM
El Camino KKNS-AM

17 WASHINGTON, DC

Total Population (2009): 6,208,940
Hispanic Population (2009): 733,110

Total Population - Estimated (2014): 6,525,130
Hispanic Population - Estimated (2014): 851,731

Annual Household Expenditures Total: Overall Aggregate - 2009 (in 000s): $160,094,808.58
Annual Household Expenditures Total: Hispanic Aggregate - 2009 (in 000s): $12,462,122.30

LANGUAGE USE
English Dependent: 99,261
Bilingual English Preferred: 172,922
Bilingual English/Spanish: 91,295
Bilingual Spanish Preferred: 130,302
Spanish Dependent: 148,651

LOCAL HISPANIC MEDIA

TELEVISION:
Telemundo WZDC-Channel 25
Univision WFDC-Channel 14
TeleFutura WMDO-Channel 47
Azteca América WQAW-Channel 29
V-me Comcast 269/MPT

RADIO:
CBS Radio WLZL-FM
ZGS WILC-AM

NEWSPAPERS:

The Washington Post El Tiempo Latino
Washington Hispanic

18 ATLANTA

Total Population (2009): 6,667,831
Hispanic Population (2009): 701,380

Total Population - Estimated (2014): 7,569,240
Hispanic Population - Estimated (2014): 903,386

Annual Household Expenditures Total: Overall Aggregate - 2009 (in 000s): $141,653,252.25
Annual Household Expenditures Total: Hispanic Aggregate - 2009 (in 000s): $8,945,719.43

LANGUAGE USE
English Dependent: 83,290
Bilingual English Preferred: 115,135
Bilingual English/Spanish: 64,298
Bilingual Spanish Preferred: 111,018
Spanish Dependent: 229,971

LOCAL HISPANIC MEDIA

TELEVISION:
Univision WUVG-Channel 34
TeleFutura WUVG-Channel 34.2
Telemundo Comcast 73/Channel 47
Azteca América WUVM-Channel 4

RADIO:
Clear Channel WBZY-FM
Davis Broadcasting WNSY-FM/WLKQ-FM

NEWSPAPERS:
Atlanta Journal-Constitution MundoHispánico
Farid Sadri Atlanta Latino
Margarita Wiechard Georgia Latino News

19 PHILADELPHIA

Total Population (2009): 7,871,642
Hispanic Population (2009): 683,853

Total Population - Estimated (2014): 8,051,201
Hispanic Population - Estimated (2014): 767,198

Annual Household Expenditures Total: Overall Aggregate - 2009 (in 000s): $170,657,840
Annual Household Expenditures Total: Hispanic Aggregate - 2009 (in 000s): $9,109,303.56

LANGUAGE USE
English Dependent: 124,197
Bilingual English Preferred: 186,376
Bilingual English/Spanish: 103,352
Bilingual Spanish Preferred: 95,502
Spanish Dependent: 94,601

LOCAL HISPANIC MEDIA

TELEVISION:
Telemundo WWSI-Channel 62
Univision WUVP-Channel 65
TeleFutura WFPA-Channel 28
Azteca América WZPA-Channel 26

RADIO:
Clear Channel WUBA-AM
Davidson Media Group WEMG-AM

20 ORLANDO-DAYTONA BEACH-MELBOURNE

Total Population (2009): 3,706,345
Hispanic Population (2009): 670,496

Total Population - Estimated (2014): 4,141,649
Hispanic Population - Estimated (2014): 841,515

Annual Household Expenditures Total: Overall Aggregate - 2009 (in 000s): $66,238,969.97
Annual Household Expenditures Total: Hispanic Aggregate - 2009 (in 000s): $8,572,335.09

LANGUAGE USE
English Dependent: 89,829
Bilingual English Preferred: 220,571
Bilingual English/Spanish: 110,222
Bilingual Spanish Preferred: 102,930
Spanish Dependent: 90,524

LOCAL HISPANIC MEDIA

TELEVISION:
Telemundo WTMO-Channel 40
Univision WVEN-Channel 26
TeleFutura WOTF-Channel 43

RADIO:
Clear Channel WRUM-FM
Entravision WNUE-FM

NEWSPAPERS:
Tribune Co. El Sentinel
impreMedia La Prensa

ACKNOWLEDGMENTS

HOLA NETWORKS is the largest display advertising and performance-based internet network focused exclusively on serving the needs of U.S. Hispanic advertisers and premium website publishers. Created by Hispanic online ad sales veterans and internet business development pioneers, HOLA NETWORKS has been expressly developed to specifically address the wants and needs of Hispanic media companies so they can further diversify their online media strategies.

HOLA NETWORKS brings together the sophisticated tools and expertise from a general market Internet organization and the credibility and marketing know-how from an active U.S. Hispanic internet advertising sales organization – Hispanic Online Advertising Inc.

HOLA NETWORKS provides extended reach across branded websites to over 6 million US Hispanics and delivers millions of impressions monthly.

HOLA NETWORKS utilizes OpenAdstream®, one of the top ad serving technologies in the world. This enables us to offer clients the same level of sophistication in technology and optimization capabilities that is currently available in the general market.

Contact:
2100 Ponce De Leon Blvd., Suite 1010
Coral Gables, FL 33134
Phone: 305-460-8288

Telemundo Communications Group - *The Hispanic Media Company of Today and The Future*

INNOVATION

Welcome to the Hispanic media company of today and the future, where collaborative innovation is the culture — and the best way to engage Hispanic consumers. By design, The Telemundo Communications Group thrives on pushing the creative envelope and understands the importance of creating custom solutions for your brands. Whether it is writing compelling storylines, reshaping commercial pods or creating unique broadband series, we are the bridge where Hispanic culture, entertainment and commerce meet.

INSIGHT

The Telemundo Communications Group is a proven leader in Hispanic consumer research. We offer a wide variety of syndicated and custom proprietary research solutions to help you target, analyze and enhance your Hispanic marketing initiatives. Access real-time data and cutting edge analyses to discover what makes Hispanics try, consume and love your products.

INTEGRATION

Be a part of the story. The Telemundo Communications Group can weave your brand organically into our original prime-time novelas, reality series and daily shows across multiple touch points. Plus, we can measure the performance of our branded entertainment in primetime every night. There's no better way to make your brand the star.

Whether it's on-air, online, onsite or on-the-go, sports, specials, late-breaking news or blockbuster novelas, The Telemundo Group's custom innovative solutions surround and engage your target across all touch points.

Contact: Network Sales- Mike Rodriguez, Telemundo, Senior Vice President, Sales and Marketing - Michael.rodriguez@nbcuni.com; 212-664-7417
Local Sales- Enrique Perez, Telemundo, Senior Vice President, Station Sales - Enrique.perez@nbcuni.com; 212-664-3036

Grupo Latino de Radio (GLR) is part of Union Radio, holding company for Grupo PRISA's radio assets. With more than 1,220 stations in 10 countries, we are the pre-eminent Spanish-language radio group in the world — 26 million people tune into Union Radio's programs each day. GLR operates two radio stations in the U.S. — Caracol 1260 WSUA-AM in Miami and W Radio 690 XEWW-AM in Los Angeles. GLR Networks is the production and distribution arm that supplies Spanish-language radio stations in the U.S. with world-class news services (*Minuto 60* or *Minuto Deportivo*, among others), sports (exclusive radio rights for Chivas de Guadalajara, coverage of six more teams in the Mexican first-division soccer league, exclusive radio rights for Copa Santander Libertadores and Copa Nissan Sudamericana, Rumbo a Sudafrica with Jorge Campos, and more), Entertainment (De Paisano a Paisano) and community programming (Cita con el Doctor), as well as a variety of musical formats (40 Principales and Flash Grupero).

For more information, please contact Luigi Bellizzi: 305 644 6641 – lbellizzi@glrnetwork.com

El Clasificado is a dynamic Hispanic media company offering a variety of unique verticals to capture specific niches within the grassroots Latino Hispanic community:

- **Quinceañeras:** Quinceanera.com, with over 50,000 monthly online visitors, serves its audience a weekly e-newsletter, two special print supplements and a biannual Expo. Approximately 3,000 Latinas and their families planning for the traditional Quinceañera celebration attend El Clasificado's biannual Expo. Advertising opportunities include web/newsletter banners, event sponsorships and print supplement ads.

- **Small Business Owners:** "Su Socio de Negocios" offers Spanish speaking Latino micro-entrepreneurs the latest business news, relevant articles on Su Socio de Negocios.com, as well as key presentations and resources through the series of free expos, breakfast networking events and weekly e-newsletter of the same name. Advertising opportunities include web/newsletter banners and event sponsorships.
- **Latino Families:** The "Salud y Niños" biweekly e-newsletter and special print supplement cover health and wellness issues predominant in the Latino community. Advertising opportunities include web/newsletter banners, event sponsorship, print ads and more.

For advertising information, please contact Leslie Smith (800) 518-7030 or lsmith@elclasificado.com

ESPN Deportes is a 24/7 Spanish-language cable television network and serves the U.S. Hispanic market along with the ESPN Deportes Radio network. The brand is also represented in print, with the full-color glossy publication ESPN Deportes La Revista.

ESPN Deportes has become the No. 1 Spanish-language network for sports news and information since being added to Nielsen's Hispanic sample. In 2009, ESPN Deportes delivered more hours of sports news and information programming than any other Spanish-language network. ESPN Deportes finished 2009 as the most watched and highest rated Spanish-language sports cable network, averaging 40,000 household impressions, out-delivering its closest competitor by 32%. The network delivered the largest average audience overall and across all male demos: 39,257 (P2+), 14,795 (M18-34); 22,500 (M18-49) and 18,548 (M25-54) - almost doubled the network's closest competitor. In 2009, ESPN Deportes had 44 of the top 50 highest-rated sports news/commentary shows on Spanish-language cable.

Contact: Santa Brito - 212-456-0252

Terra Networks is a leading Internet company and original digital content producer with a primary focus on the U.S. Hispanic experience. Its portal (www.terra.com) features News, Music, Sports, Entertainment and video platform TerraTV in English and Spanish. Terra reaches the broadest audience in the U.S. Hispanic market, according to comScore Media Metrix and Nielsen/Net Ratings, and offers interactive tools and unites the most relevant professional and user generated content, offering a unique experience to the user.

Terra is part of Terra Latin America. With presence in 18 countries Terra Latin America has approximately 70 million unique visitors per month, 12 million unique users per month on Terra TV, with an average of 90 million streamings per month and a collection of 280 thousand videos.

Terra Latin America is the leading internet company in the region with portals in Argentina, Brazil, Chile, Colombia, Costa Rica, Ecuador, El Salvador, United States, Guatemala, Honduras, México, Nicaragua, Panamá, Perú, Puerto Rico, Dominican Republic, Uruguay and Venezuela.

THE FLORIDA STATE UNIVERSITY

Online Course On Hispanic Marketing From FSU Every Semester

Starting January, May and August of every year, Florida State University offers an online course on Hispanic Marketing Communication, under the direction of Dr. Felipe Korzenny. This is a "3000 level" course and can be used for academic credit and continuing education. The course addresses changing demographics, language, cultural insights, psychographics, positioning, strategy, media and research, among other topics. The course is designed for those already in their professions who would like to have a forum to discuss their experiences and learn about trends and emerging ideas. A certificate of completion is issued to students who fulfill all the course requirements.

For further information and registration please contact Jennifer Boss at inquiries@campus.fsu.edu.

The Center for Hispanic Marketing Communication at Florida State University also offers an undergraduate minor, a graduate certificate, and a Master's in Integrated Marketing Communication with an emphasis on Hispanic Marketing Communication. Visit http://hmc.comm.fsu.edu for more information.

Geoscape® provides strategic consulting, analytics, market intelligence systems and data to corporations seeking growth by capitalizing on opportunities in culturally-diverse consumer and business segments. The online Geoscape Intelligence System (GIS), the DirecTarget® database enrichment system and a variety of geo-demographic, consumer, business and media databases enable actionable insights that lead our clients to gain significant business advantages. Geoscape® is pleased to have served most of the Fortune 500 corporations over the last several years. Geoscape® is a privately held company based in Miami and owned by Goldman Sachs, Inc. and César M. Melgoza, Founder & CEO. Geoscape Europe BV was established in 2002 by César M. Melgoza, Lex ten Veen and later Ron Cohen, serving the greater European community from headquarters in The Netherlands.

We are an award-winning, internationally recognized firm with hundreds of clients across various industries. Among our diverse clients are: Allstate, BlueCross Blue Shield (various), British Telecom, Comcast, ConAgra, Farmers Insurance, H&R Block, Humana, Kroger, Nestlé, Publix, Qwest, Telemundo, TracFone, Traveler's, Univision, Wal-Mart, and hundreds more.

The Geoscape team brings a wealth of industry knowledge and expertise coupled with cultural insights and analytical brainpower that is unmatched in this dynamic industry. Geoscape's Founder & CEO, César M. Melgoza, is a well-known thought leader and innovative pioneer and has recruited a wide variety of highly talented professionals.

Geoscape stands at the forefront of understanding the significant growth opportunities that America's fast growing new mainstream consumers represent for corporations today. We are poised to provide clients actionable intelligence and competitive advantages by helping them capitalize on this exciting growth potential.

Value Proposition Geoscape helps our clients achieve significant growth by discovering and acting upon opportunities arising from America's rapidly growing cultural diversity.

What we Do Geoscape provides business intelligence via strategic consulting, data-driven analytics, databases and automated systems to help our clients gain competitive advantages via business development, marketing, media and distribution.

Unique Strengths Geoscape's unique strengths include deep cultural insights backed by quantitative and qualitative analysis, experience across industries, sound methodologies fueled by creative thinking, market knowledge and expertise—all driven by our passion for innovation and client satisfaction. Our Geoscape Intelligence System (GIS) is a peerless "software-as-service" platform due to its combination of unique databases and friendly web-based interface. Our DirecTarget® database enrichment platform provides unique CultureCoding™ capabilities for consumer segmentation and customer relationship management (CRM).

How We Work Geoscape is an ally and resource for our clients. We are called upon at many points in the planning and execution process in the areas of: corporate strategy, media, distribution, marketing, customer segmentation and research. We work as collaborators with clearly defined objectives that deliver measurable results to create long-term business advantages.

CONTACT INFO: Geoscape 2100 W. Flagler St. Miami, FL 33135 / 888-211-9353
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Do you need to know which advertisers are targeting Hispanic or African American audiences in the United States and how much they're spending?

Media Economics Group provides competitive intelligence on magazine and online advertising that is targeted to the Hispanic and African-American markets. Sell, buy and plan advertising and make informed strategic decisions with help from Media Economics Group proprietary data and software.

Our clients have access to our detailed database of multicultural advertising activity via our easy-to-use, proprietary web-based media application. For a complete list of the magazines and web sites monitored, please contact us.

Current services include BlackMagazineMonitor, BlackWebMonitor, HispanicMagazineMonitor and HispanicWebMonitor

Media Economics Group clients include some of the leading media companies and advertising agencies in the country including: Accentmarketing, Batanga.com, Conill Advertising, Hispanic Business, Impremedia, Meredith Corp., MindShare Multicultural, *People en Español*, Siboney USA, Tapestry Partners, Televisa Publishing + Digital, Univision Interactive Media, Vidal Partnership, and Telemundo Digital among others.

Contact: Carlos Pelay, 704-841-2030

FROM THE AUTHOR

How many times have you been asked by a client, "Explain to me the Hispanic market"?

Answering such a question isn't easy. A plethora of information exists, but finding a summary of all of the hot topics in one document presentable to an advertiser, media buyer or planner, or Hispanic marketing executive has been an uncommon task.

The Hispanic Market Overview - 2010 is designed to offer those interested in learning more about the strong value marketing to U.S. Latinos presents to a company seeking long-term brand growth and consumer passion.

This first report could not be possible without the support of our advertising sponsors and content partners, listed in the Acknowledgements section of the Hispanic Market Overview. Special thanks to Rafael Monteiro and the team at Hola Networks for the visionary spark that led to the creation of this report, and to Gene Bryan at HispanicAd.com for his invaluable assistance and guidance on the marketing, distribution and sponsorships of this report.

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