

A SUPPLEMENT TO
AdvertisingAge

HISPANIC

FACTS

PACK

2004 EDITION

ANNUAL GUIDE TO HISPANIC ADVERTISING & MARKETING

43 MILLION LATIN LOVERS AND YOUR BRAND IS GETTING NO ACTION?

CONILL

NEW YORK • LOS ANGELES • MIAMI

The Latino Ideas Company

Talk to us, and make the latino consumer fall in love with your brand.
We have made these brands Lovemarks in the Latino Market.



HISPANIC FACT PACK

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

THE ONLY THING growing at a more explosive rate these days than the U.S. Hispanic population is perhaps the interest marketers, media companies and agencies have in tapping into this highly desirable market. *Advertising Age*, a longtime leader in covering Hispanic marketing and media, decided to assemble a top-line look at this market, in this first-ever Hispanic Fact Pack. Its pages offer valuable, hard-to-find data about demographic trends, marketer spending, Hispanic media and leading Hispanic agencies.

Annual measured spending on Hispanic media already reaches \$3.4 billion as more marketers enter this hot space for the first time, add new brands and increase existing budgets. There is an explosive array of media choices, including new cable channels and newspaper launches in the under-served Hispanic print market. Forecasts call for 15% revenue growth in 2004 for Spanish-language TV alone.

There are 40 million U.S. Hispanics, representing about 13% of the population. And they are a diverse group. One in three are under 18. Two in five are foreign-born. Two-thirds are of Mexican descent. Over half watch English-language TV. Sixteen million are eligible to vote. Their purchasing power is a stunning \$581 billion.

In 2003, advertisers allocated 5.2% of their budgets to the Hispanic market, according to a study by the Association of Hispanic Advertising Agencies. The two biggest ad categories, for both the Hispanic and the general market, are package goods and automobiles. Marketers of pharmaceuticals and financial services have been slower to target Latinos, spending just 0.9% and 2.1% of their budgets, respectively, on Hispanic media, according to a recent study.

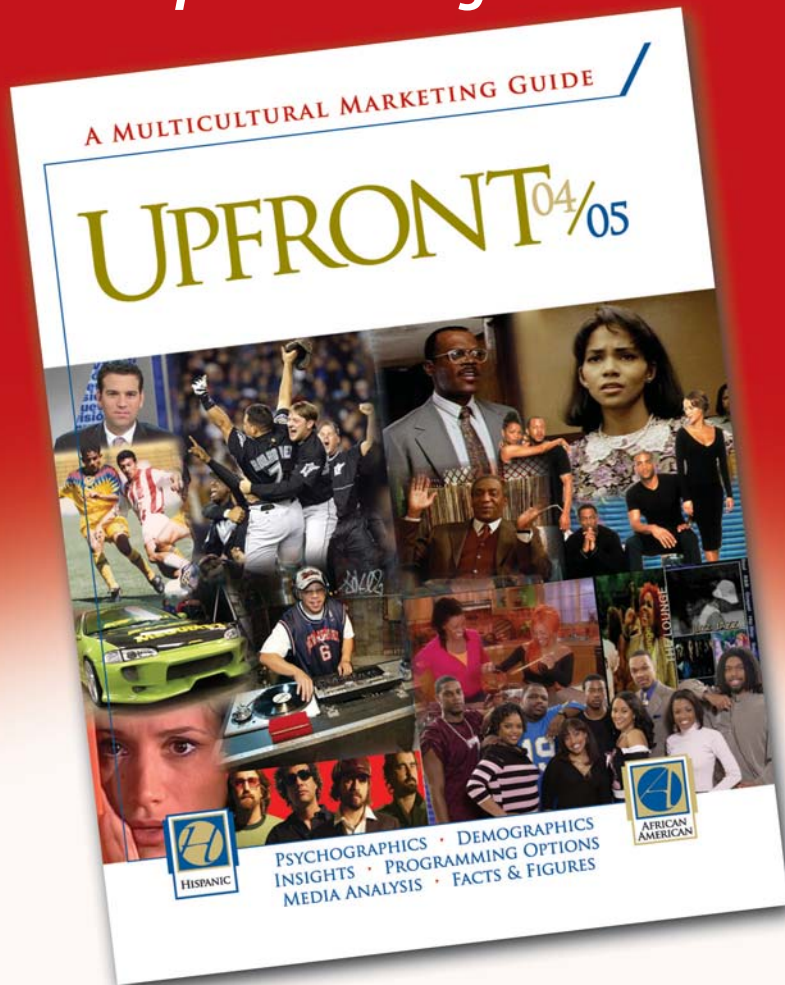
Still, marketing to Hispanics is by far the most active multicultural effort, and Hispanic agency revenue growth outpaces that of traditional agencies. In a recent study by the Association of National Advertisers' multicultural marketing committee, 70% of respondents said they market to Hispanics, compared to 59% for African-Americans and 27% for Asian-Americans.

This Hispanic Fact Pack, available in print and online, includes a ranking of leading advertisers in the market, a snapshot of the Hispanic media world, including the most popular TV shows for Latino audiences and a ranking of the top Hispanic ad agencies. *Ad Age* is committed to helping our audience understand and navigate the U.S. Hispanic marketplace. We believe this Fact Pack will be an invaluable tool for marketers and media companies to figure out how to tap this valuable segment of the population.

—Scott Donaton
Editor, *Advertising Age*

Just Published!

The new road map for reaching multicultural consumers with the power of targeted TV.



Comprehensive data and insights for planning cable advertising strategies that create powerful connections with the Hispanic and African-American markets.

To obtain a free copy, E-mail cynthiap@cabletvadbureau.com.

CAB Cabletelevision Advertising Bureau
www.onetvworld.org

CONTENTS

Advertising & Marketing

Top 50 advertisers in Hispanic media	8,10
Top 10 advertisers & brands in Hispanic newspapers	12
Top 10 advertisers & brands in Hispanic magazines	13
Top 25 advertisers on Spanish-language TV	14
Top 25 brands on Spanish-language TV	15
Top 20 Hispanic-owned companies	16
Top 10 vehicle brands & Hispanic share of U.S. vehicle market.....	17

Agencies

Top 25 Hispanic ad agencies	19
Hispanic Creative Advertising Awards.....	20,21

Media

Hispanic ad spending by medium	23
Top Hispanic DMAs by media spending, Top 10 Hispanic daily newspapers	24
Leading Hispanic magazines	25
Top 10 radio formats, Top 10 Hispanic radio stations	26
Top 10 Hispanic local TV markets	27
Top Spanish-language cable networks, Hispanic TV network viewership	28
Top Spanish-language cable programs	29
Top English-language cable programs among Hispanic viewers	31
Top Spanish-language network TV programs	32
Top English-language network TV programs among Hispanic viewers.....	33
Satellite TV share of Hispanic HHs, Media product usage by Hispanics	35

Demographics

Projected U.S. Hispanic pop., U.S. pop. by Hispanic origin & race	37
U.S. Hispanic population by age group, 2002	38
Projected U.S. Hispanic population by age group, 2010	39
Top 25 U.S. Hispanic markets.....	40
Social & economic data for U.S. Hispanics	41
Language usage by U.S. Hispanic adults	42

For news and data on the Hispanic marketplace, visit the Hispanic Marketing section of AdAge.com (QwikFIND: AAP58A), and sign up for email alerts to be contacted whenever new stories are posted.

ADVERTISING & MARKETING

Top advertiser in U.S. Hispanic media in 2003

PROCTER & GAMBLE CO. SPENDS \$169.8 MILLION

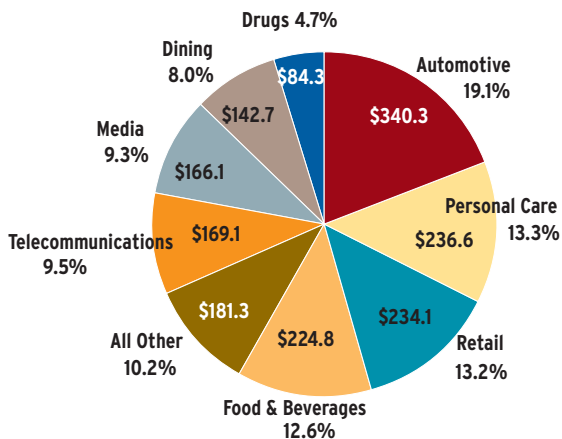
Content, sources for marketer rankings

BY ANY MONITORING SERVICE'S ACCOUNT, Hispanic advertising will increase well into the double-digits this year, although the starting points for spending in 2003 vary among those following the industry.

The Association of Hispanic Advertising Agencies, in a comprehensive study in early 2004, placed total measured spending at \$3.4 billion for 2003, a number tied closely to TNS Media Intelligence/CMR, which began surveying Hispanic TV in 1999 and Hispanic print in 2003. And spending is top-heavy: AHAA's top 50 Hispanic marketers, broken out by category spending below, account for just over 50% of the \$3.4 billion.

Hispanic Business, which has worked up Hispanic ad estimates for years and has begun using TNSMI/CMR as one of its sources, places 2003 spending at a more conservative \$2.8 billion. It draws its aggregate from a slightly different media set. *Hispanic Business'* top 50, like AHAA's, basically accounts for half its market total.

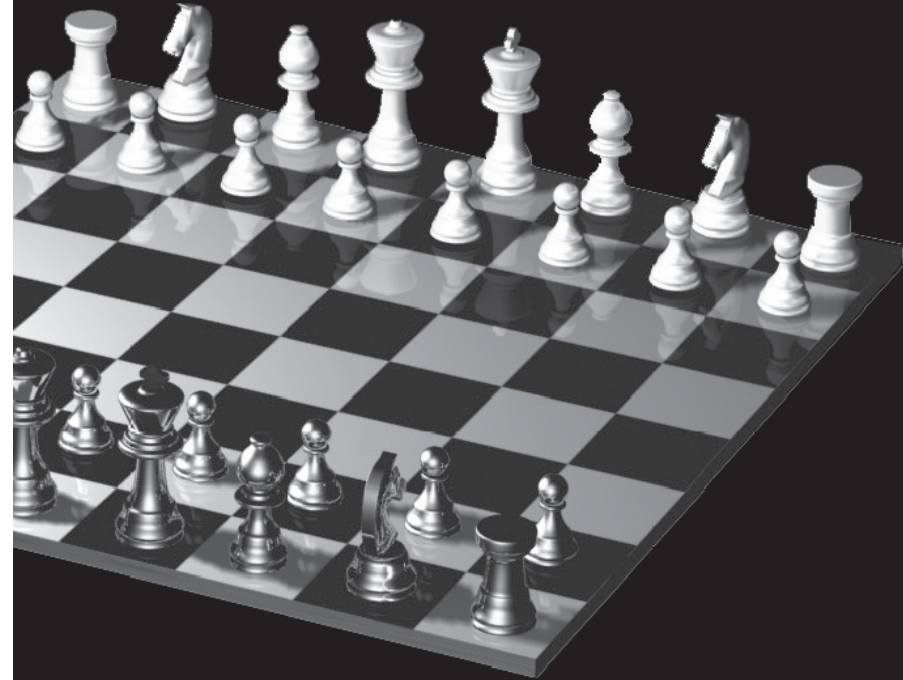
Ad Spending by Category in U.S. Hispanic Media



Data are for top 50 marketers in Hispanic TV and print based on figures from TNSMI/CMR and Santiago Solutions Group for the Assn. of Hispanic Advertising Agencies. Categories are assigned by *Advertising Age*. Dollars are in millions.

The US Hispanic Magazine Market IS NOT BLACK & WHITE

STRATEGY — KNOW-HOW — EXPERTISE



EDITORIAL
Televisa

The leading Spanish Language print-media company

Vanidades • TVyNovelas • Cristina La Revista • Men's Health En Español
Cosmopolitan En Español • BuenHogar • Harper's Bazaar En Español
Marie Claire En Español • Maxim En Español • Travel+Leisure En Español
National Geographic En Español • Caras Puerto Rico • Furia Musical

New York salesny@editorialtelevisa.com
Phone: (212) 838-7220

Los Angeles salesla@editorialtelevisa.com
Phone: (323) 655-0535

Miami salesmiami@editorialtelevisa.com
Phone: (305) 871-6400

Puerto Rico ventas1@editorialtelevisapr.com
Phone: (787) 758-1170

TOP 50 ADVERTISERS IN HISPANIC MEDIA

Dollars are in millions. The top 50 advertisers were selected from a group of 250 top advertisers ranked by TV and print measured media expenditures in U.S. Hispanic media for 2003. *Represents Hispanic media share of a marketer's collective media spending in the general and the Hispanic market. Because a major intent of the chart is to see this relationship of Hispanic dollars to general market dollars, *Advertising Age* selected top advertisers whose Hispanic totals did not exceed 70% of their overall measured ad totals. Data is from TNS Media Intelligence/CMR and Santiago Solutions Group for the Association of Hispanic Advertising Agencies. *Chart continues on Page 10.*

RANK	MARKETER	2003 HISP. PRINT & TV SPEND	% OF TOTAL*
1	Procter & Gamble Co.	\$169.8	7.8
2	Sears, Roebuck & Co.	119.1	20.9
3	General Motors Corp.	93.4	5.0
4	PepsiCo	85.7	11.2
5	McDonald's Corp.	64.0	13.8
6	Ford Motor Co.	56.8	5.3
7	Toyota Motor Corp.	56.4	7.2
8	Johnson & Johnson	49.5	4.9
9	AT&T Corp.	46.8	24.9
10	Time Warner	45.9	3.7
11	DaimlerChrysler	44.7	4.5
12	U.S. Government	44.5	12.4
13	MCI	42.5	14.9
14	SABMiller	40.1	18.8
15	Bally Total Fitness Holdings Corp.	39.4	66.6
16	Verizon Communications	35.7	5.5
17	Clorox Co.	32.2	7.7
18	Altria Group	31.9	3.8
19	Wal-Mart Stores	31.8	9.4
20	Sony Corp.	31.7	4.2
21	Home Depot	30.7	8.3
22	Hyundai Motor Co.	30.4	7.9
23	L'Oreal	27.5	4.9
24	Walt Disney Co.	27.2	2.8
25	Castalian Music	27.1	30.7

The best time to drive home
your message is when your
customer is driving home.



Prime drive time isn't just mornings anymore. Between 4-6 PM, aka shopping prime time, radio reaches an in-car audience of nearly 80 million hourly*. So if you want ROI, think AM and FM. For more information, call the Radio Advertising Bureau at 1-800-252-RADIO. Or email us at marketing@rab.com. Remember, your customers are listening.

TOP 50 ADVERTISERS IN HISPANIC MEDIA

Dollars are in millions. Data from TNS Media Intelligence/CMR and Santiago Solutions Group for the Association of Hispanic Advertising Agencies. **General Electric is a combination of GE and the portion of Vivendi Universal it purchased in May 2004. *This ranking is continued from page 8.*

RANK	MARKETER	2003 HISP. PRINT & TV SPEND	% OF TOTAL*
26	Yum! Brands	\$26.8	5.2
27	SBC Communications	26.7	4.8
28	Coca-Cola Co.	23.7	9.4
29	J.C. Penney Co.	22.8	6.8
30	Honda Motor Co.	22.7	4.4
31	Kellogg Co.	22.0	7.4
32	General Electric Co.**	21.8	3.6
33	Anheuser-Busch Cos.	21.5	6.1
34	Pfizer	21.0	2.5
35	Burger King Corp.	20.9	9.6
36	Nissan Motor Co.	20.3	2.7
37	Southwest Airlines	20.0	16.2
38	Unilever	19.7	4.0
39	Colgate-Palmolive Co.	19.6	19.8
40	Target Corp.	17.6	4.2
41	Deutsche Telekom	17.4	6.5
42	News Corp.	17.0	3.1
43	Wendy's International	15.9	6.4
44	Volkswagen	15.6	4.4
45	Domino's Pizza	15.0	17.1
46	Viacom	14.8	2.9
47	Wyeth	13.8	5.6
48	State Farm Mutual Auto Ins. Co.	13.5	9.0
49	EMI Group	12.2	59.9
50	RadioShack Corp.	12.1	8.5

Hit Your Market!

Founded in 1983, Spanish Broadcasting System is the nation's largest Hispanic radio broadcaster. The Company currently owns and/or operates 25 radio stations located in six of the nation's top-ten Hispanic markets, including Los Angeles, Puerto Rico, New York, Miami, San Francisco and Chicago.

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



SPANISH BROADCASTING SYSTEM 

SBS TOWER • 2601 SOUTH BAYSHORE DRIVE, PH II, COCONUT GROVE, FLORIDA 33133 • NASDAQ SYMBOL—SBSA

WWW.SPANISHBROADCASTING.COM

TOP 10 ADVERTISERS IN HISP. NEWSPAPERS

Dollars are in thousands. Data from TNS Media Intelligence/CMR. Data include five Spanish-language newspapers in Chicago, four each in New York and San Francisco, three each in Los Angeles and Miami, two each in Dallas, Houston, Phoenix, San Diego and San Antonio, and one in Washington.

RANK	MARKETER	2003 AD SPENDING
1	AT&T Wireless	\$3,792.3
2	News Corp.	3,084.3
3	Sears, Roebuck & Co.	2,617.3
4	Federated Department Stores	2,413.9
5	J.C. Penney Co.	2,297.5
6	SBC Communications	2,106.3
7	Rooms To Go	2,062.4
8	Time Warner	1,922.6
9	Kmart Corp.	1,922.0
10	Best Buy Co.	1,629.7

TOP 10 BRANDS IN HISPANIC NEWSPAPERS

Dollars are in thousands. Data from TNS Media Intelligence/CMR. Data include five Spanish-language newspapers in Chicago, four each in New York and San Francisco, three each in Los Angeles and Miami, two each in Dallas, Houston, Phoenix, San Diego and San Antonio, and one in Washington.

RANK	BRAND	2003 AD SPENDING
1	AT&T wireless service	\$2,372.0
2	Rooms To Go furniture stores	2,062.4
3	Sears department stores	2,048.6
4	Kmart stores	1,834.9
5	Best Buy stores	1,618.2
6	Rhino Sky satellite service	1,442.1
7	Home Depot home centers	1,403.4
8	CarePlus healthcare insurance	1,355.7
9	Citibank financial services	1,223.7
10	BrandsMart USA stores	1,194.5

TOP 10 ADVERTISERS IN HISPANIC MAGS

Dollars are in thousands. Data from TNS Media Intelligence/CMR.

RANK	MARKETER	2003 AD SPENDING
1	Procter & Gamble Co.	\$15,633.6
2	Ford Motor Co.	11,708.7
3	General Motors Corp.	9,066.3
4	L'Oreal	7,108.0
5	Estee Lauder Co.	5,585.2
6	DaimlerChrysler	4,654.7
7	Toyota Motor Corp.	3,835.2
8	Johnson & Johnson	3,671.9
9	Time Warner	3,131.1
10	Altria Group	3,084.2

TOP 10 BRANDS IN HISPANIC MAGAZINES

Dollars are in thousands. Data from TNS Media Intelligence/CMR.

RANK	BRAND	2003 AD SPENDING
1	Thibel drugs & toiletries	\$2,575.7
2	Toyota Sienna minivans	2,194.9
3	Aricept Alzheimer's Rx drug	1,800.0
4	Ford F-Series trucks	1,767.9
5	Crest Whitestrips dental whiteners	1,750.2
6	Chevrolet Silverado trucks	1,440.7
7	Maya Sales drugs & toiletries	1,374.5
8	Ford Motor Co. corporate	1,285.9
9	Crest Whitening Plus toothpaste	1,226.0
10	Ford Explorer trucks	1,204.9

TOP 25 ADVERTISERS ON SPANISH-LANGUAGE TV

Dollars are in millions. Data, from TNS Media Intelligence/CMR, represent spending on U.S. Spanish-language network TV (Univision, Telemundo and TeleFutura networks) and cable (Galavision).

RANK	MARKETER	2003 AD SPENDING
1	Procter & Gamble Co.	\$145.8
2	Sears, Roebuck & Co.	120.5
3	PepsiCo	76.3
4	General Motors Corp.	68.5
5	McDonald's Corp.	54.0
6	Toyota Motor Corp.	45.5
7	Johnson & Johnson	43.9
8	MCI	40.8
9	AT&T Corp.	39.2
10	Bally Total Fitness Holdings Corp.	38.2
11	Americatel Corp.	37.0
12	SABMiller	35.9
13	U.S. Government	35.9
14	Time Warner	33.3
15	Clorox Co.	30.5
16	Sony Corp.	28.7
17	Wal-Mart Stores	28.2
18	Home Depot	27.8
19	Altria Group	26.1
20	Ford Motor Co.	26.1
21	Castalian Music	26.0
22	DaimlerChrysler	24.8
23	Hyundai Corp.	23.8
24	Verizon Communications	22.1
25	Coca-Cola Co.	20.8

TOP 25 BRANDS ON SPANISH-LANGUAGE TV

Dollars are in millions. Data, from TNS Media Intelligence/CMR, represent spending in U.S. Spanish-language network TV (Univision, Telemundo and TeleFutura networks) and in cable (Galavision).

RANK	BRAND	2003 AD SPENDING
1	McDonald's restaurants	\$51.4
2	Bally Total Fitness Club	38.2
3	Miller Lite beer	33.7
4	Sears stores	33.6
5	10-10-987 long distance service	29.6
6	10-10-123 long distance service	29.5
7	Home Depot stores	27.0
8	Sears appliances	26.0
9	Castalian Music recording	25.6
10	10-10-345 long distance service	24.0
11	Wal-Mart stores	22.8
12	Verizon Wireless phone service	22.1
13	Coca-Cola beverages	20.8
14	Paquete remedies	20.2
15	Burger King restaurants	19.5
16	Pepsi-Cola beverages	18.8
17	Southwest Airlines	17.1
18	T-Mobile Wireless service	15.0
19	J.C. Penney stores	15.0
20	Wendy's restaurants	14.2
21	U.S. Army	13.4
22	Hongosan remedies	12.7
23	Viagra impotence Rx drug	12.7
24	Mystic recorded music	12.5
25	Gatorade beverages	12.5

TOP 20 HISPANIC-OWNED COMPANIES

Dollars are in millions and are for calendar year 2003. Data from *Hispanic Business* magazine. Sales figures appear as reported to *Hispanic Business* by authorized company representatives. Many companies submit financial statements. "NA" indicates not on list in 2002. *Hispanic-controlled publicly held companies. (1) dba Perry Ellis International. (2) formerly known as First Equity Mortgage Co.

RANK	COMPANY	HEADQUARTERS	2003 REVENUE	% CHG
1	Burt Automotive Network	Centennial, Colo.	\$1,629.6	10.3
2	Brightstar Corp.	Miami	1,282.0	51.1
3	Related Group of Florida	Miami	1,082.0	58.4
4	MasTec*	Coral Gables, Fla.	873.9	4.3
5	Palladium Equity Partners	New York	844.0	NA
6	Molina Healthcare*	Long Beach, Calif.	789.5	23.4
7	Elder Automotive Group	Troy, Mich.	729.6	8.3
8	Pharmed Group Holdings	Miami	591.8	7.0
9	Ancira Enterprises	San Antonio	575.0	-11.5
10	Lou Sobh Automotive	Duluth, Ga.	497.2	16.4
11	Lopez Foods	Oklahoma City	400.0	30.3
12	Diez Group	Dearborn, Mich.	370.0	0.0
13	International Bancshares Corp.*	Laredo, Texas	335.7	362.0
14	Movado Group*	Lyndhurst, N.J.	330.2	10.0
15	Supreme International*(1)	Miami	305.8	0.0
16	Quirch Foods Co.	Miami	297.0	32.0
17	Ruiz Food Products	Dinuba, Calif.	232.0	17.2
18	Mike Shaw Automotive	Denver, Colo.	219.2	8.9
19	First Equity Mortgage Bankers(2)	Miami	205.0	NA
20	Century HomeBuilders	Miami	201.2	-28.1

TOP VEHICLE BRANDS AMONG HISPANICS

Based on first quarter 2004 and calendar year 2003 total new vehicle registrations. Data from R. L. Polk & Co.

RANK	BRAND	1ST QTR. 2004 UNIT VOLUME	% CHG	FULL YEAR 2003 UNIT VOLUME	% CHG
1	Toyota	37,353	15.5	145,819	14.5
2	Ford	36,989	15.4	159,718	15.9
3	Chevrolet	31,550	13.1	143,938	14.3
4	Honda	22,077	9.2	91,935	9.2
5	Nissan	21,890	9.1	70,900	7.1
6	Dodge	15,458	6.4	66,204	6.6
7	GMC	8,992	3.7	37,652	3.8
8	Hyundai	5,623	2.3	26,356	2.6
9	Jeep	5,380	2.2	20,546	2.0
10	Mazda	4,643	1.9	NA	NA

HISPANIC SHARE OF U.S. NEW VEHICLE REGISTRATIONS

Based on total new vehicle registrations by year. Data from R. L. Polk & Co.

YEAR	HISPANIC UNIT VOLUME	HISPANIC MARKET SHARE %
2003	1,003,652	6.0
2002	1,026,977	6.1
2001	971,244	5.7
2000	922,718	5.2
1999	798,519	4.8

AGENCIES

Largest Hispanic ad agency by 2003 revenue

BROMLEY COMMUNICATIONS AT \$32.9 MILLION

Hispanic Creative Advertising Awards

24 AGENCIES TAKE HOME AWARDS

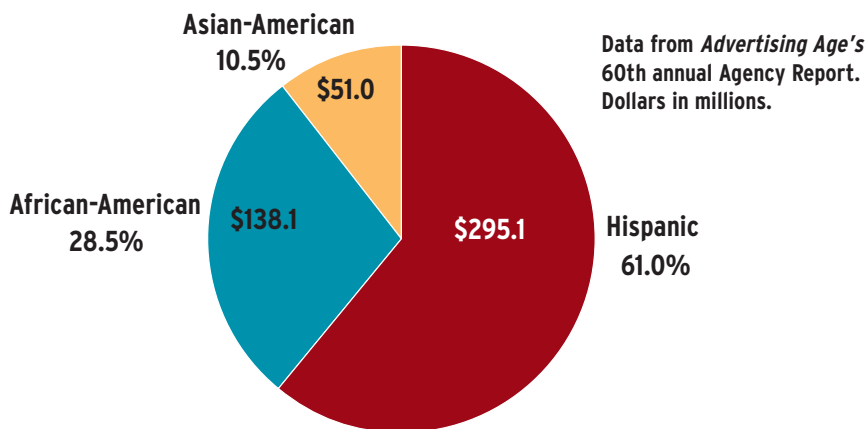
Content, sources for agency rankings

HISPANIC AGENCIES SCORED 16.6% growth to \$295.1 million in U.S. revenue in 2003, surpassing volume and growth of two other agency multicultural specialties, African-American (\$138.1 million/13%) and Asian-American (\$51 million/5.8%), according to *Advertising Age's* 60th annual Agency Report (April 19, 2004).

That Hispanic volume represents 2.9% of an estimated \$10.05 billion in revenue generated by all traditional U.S. agencies including multicultural shops, up from 2.7% in 2002. Hispanic market growth reflected in the agencies serving that market is not lost on the world's top marketing organizations, which among them, own all or part of 11 of the top 25 Hispanic agencies on the *Ad Age* chart.

The big publicly held companies are attracted to Hispanic agencies. These companies, led by the world's top four—Omnicom Group, WPP Group, Interpublic Group of Cos. and Publicis Groupe—are increasingly packaging their multicultural shops, marketing services units and general market agencies into "seamless" juggernauts to claim larger pieces of the multiple marketing programs of the nation's top clients.

U.S. Multicultural Agency Revenue in 2003



TOP 25 HISPANIC AGENCIES

Dollars are in millions. *Figures are *Advertising Age* estimates. *Ad Age* collected the data for the 60th annual Agency Report (*AA*, April 19, 2004). Parent holding companies may own only a minority stake. Interpublic Group of Cos.' GlobalHue is one of the largest agencies in the Hispanic market but is not listed in this table because it does not break out its figures by cultural specialty.

RANK	AGENCY [HOLDING COMPANY AFFILIATION]	HEADQUARTERS	2003 REVENUE	% CHG
1	Bromley Communications* [Publicis]	San Antonio	\$32.9	10.0
2	Bravo Group* [WPP]	New York	31.8	14.0
3	Dieste, Harmel & Partners* [Omnicom]	Dallas	23.0	37.7
4	Zubi Advertising Services	Coral Gables, Fla.	16.4	10.1
5	La Agencia de Orci & Asociados	Los Angeles	14.2	NA
6	Lapiz Integrated Hispanic Mktg* [Publicis]	Chicago	12.4	11.0
7	Lopez Negrete Communications	Houston	12.1	50.7
8	Del Rivero Messianu DDB* [Omnicom]	Coral Gables, Fla.	11.2	12.0
9	Mendoza Dillon & Asociados* [WPP]	Aliso Viejo, Calif.	11.0	-14.7
10	Casanova Pendrill Publicidad* [IPG]	Costa Mesa, Calif.	10.7	11.0
11	WING Latino Group* [Grey]	New York	9.1	13.3
12	Vidal Partnership	New York	8.9	-9.0
13	Conill Advertising* [Publicis]	New York	8.5	15.3
14	Accentmarketing* [IPG]	Coral Gables, Fla.	8.4	11.0
15	Castells & Asociados Advertising	Los Angeles	6.5	12.7
16	LatinWorks Marketing	Austin, Texas	6.4	15.7
17	Cartel Group	San Antonio	6.3	-17.2
18	San Jose Group	Chicago	6.1	1.7
19	Ornelas & Associates	Dallas	5.0	23.7
20	Acento	Los Angeles	4.9	6.5
21	HeadQuarters Advertising	San Francisco	4.7	6.0
22	Reynardus & Moya Advertising	New York	4.7	-25.9
23	Siboney USA* [IPG]	Miami	4.3	6.9
24	Anita Santiago Advertising	Santa Monica, Calif.	3.9	31.8
25	Al Punto	Tustin, Calif.	3.1	24.0

HISPANIC CREATIVE ADVERTISING AWARDS

TWENTY-FOUR DIFFERENT agencies from a record 467 agency entries came away with Gold, Silver and Bronze in *Advertising Age's* 5th annual Hispanic Creative Advertising Awards contest in 2003. The contest, held in cooperation with the Association of Hispanic Advertising Agencies, was judged by a panel of three Hispanic agency creative directors, a commercials director, three senior Hispanic marketers and two *Ad Age* editors. Awards were reported in the Marketing to Hispanics special report (AA, Sept. 15, 2003), and can be found on AdAge.com at [QwikFIND aao97g](http://QwikFIND.aao97g).

The 6th annual Hispanic Creative Advertising Awards winners will be announced in an awards ceremony October 1 in New York, and published in a special report October 4 in *Ad Age* and on AdAge.com. Presiding over the jury of Hispanic creative executives and Hispanic marketers for those awards will be Toni Segarra, 42, founder and chief creative officer of S,C,P,E, in Barcelona.

AWARD WINNERS

BEST OF SHOW	MARKETER/BRAND	CAMPAIGN
Grupo Gallegos, Long Beach, Calif.	MetroPCS	"Family," "Locker"
GOLD/TV		
Vidal Partnership, New York	Heineken USA	"Macarena"
Creative on Demand, Coral Gables, Fla.	Volkswagen Beetle	"Hop In"
La Finca Creativa, New York	Latino Film Festival	"Credits"
Del Rivero Messianu DDB, Coral Gables, Fla.	McDonald's	"Dishwasher"
GOLD/RADIO		
Vidal Partnership, New York	Heineken USA	"Gritos"
Creative on Demand, Coral Gables, Fla.	Volkswagen	"Sportscaster Driver"
GOLD/PRINT		
J. Walter Thompson, Puerto Rico	Energizer Batteries	"Train" "Mnstr Truck" "Spaceship" "R2D2"
Badillo Nazca Saatchi & Saatchi, Puerto Rico	Lexus RX330	"Closet"
GOLD/NON-TRADITIONAL MEDIA		
Grupo Gallegos, Long Beach, Calif.	American Red Cross	"T-Shirt/Short Sleeve"
La Comunidad, Miami Beach	Nordstrom	"Espejos" "Agua" "Enfermeras" "Gimnasios"
GOLD/OUT-OF-HOME		
Conill, Torrance, Calif.	Toyota 4Runner	"Snake," "Kitchen," "Toilet Paper"
GOLD/INTERACTIVE		
La Agencia de Orca & Asoc., Los Angeles	Honda Civic	"Silhouettes," "Thumbprint"
Lopez Negrete Communications, Houston	Lopez Negrete Communications	LopezNegrete.com



BEST OF SHOW: METROPCS CAMPAIGN, GRUPO GALLEGOS

While some Americans value brevity, Latinos are stereotyped as talkers. That difference is reflected in Grupo Gallegos' clever Best of Show-winning spots for MetroPCS and its cellular service. As a young man chats on his cell phone, oblivious to his surroundings, he wordily repeats everything four or five times, using synonyms to say the same thing slightly differently. In a six-month tracking study, Hispanic brand awareness of MetroPCS grew from 9% to 44%.

AWARD WINNERS, CONTINUED

SILVER/TV	MARKETER/BRAND	CAMPAIGN
Vidal Partnership, New York	Cingular	"Mini-Minutes"
Badillo Nazca Saatchi & Saatchi, Puerto Rico	Toyota Echo	"Atraccion"
Conill, Torrance, Calif.	Toyota Sienna	"Family Research"
Casanova Pendrill, Irvine, Calif.	California Lottery	"My Car"
Lapiz, Chicago	Coca-Cola Classic	"Back-Ups"
Wing Latino Group, Los Angeles	Alzheimer's Association	"Feliz Cumpleanos"
LatinWorks, Austin, Texas	Miller Brewing Co., Miller Lite	"Tuna"
Vidal Partnership, New York	Wendy's International	"English Class"
SILVER/RADIO		
La Agencia de Orca & Asociados, Los Angeles	Maldef	"Maldef"
Grupo Gallegos, Long Beach, Calif.	MetroPCS	"Friends"
Wing Latino Group, Puerto Rico	Pearle Vision	"Nachos"
Creative on Demand, Coral Gables, Fla.	Volkswagen	"New York (Food, Slang & Name)"
SILVER/PRINT		
Badillo Nazca Saatchi & Saatchi, Puerto Rico	Da Luigi Restaurant	"Before & After"
Badillo Nazca Saatchi & Saatchi, Puerto Rico	Johnson & Johnson, Mylanta	"Napoleon"
Badillo Nazca Saatchi & Saatchi, Puerto Rico	Toyota Corolla	"Parking"
SILVER/INTERACTIVE		
Arteaga & Arteaga, Puerto Rico	Arnaldo Roche	Arnaldo Roche

MEDIA

Hispanic prime-time TV viewership

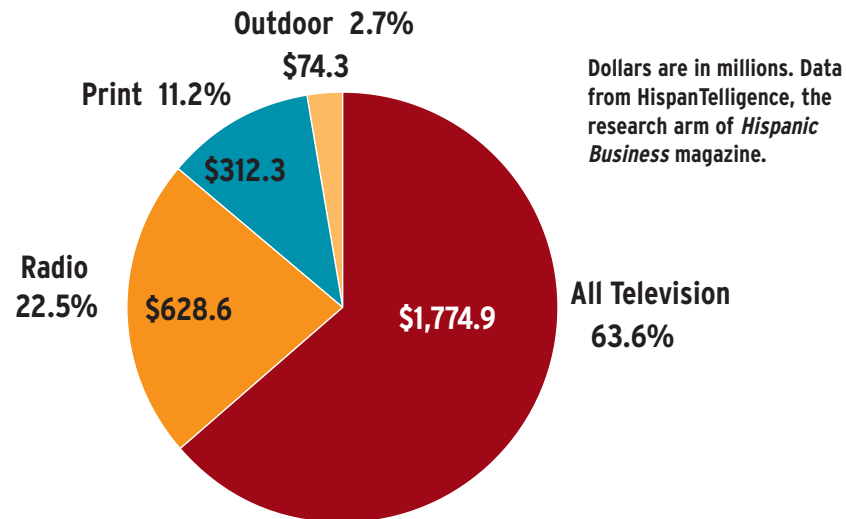
TELENOVELAS ABET UNIVISION'S 17.4 RATING

Content, sources for media ranking

HISPANIC MEDIA IS BURGEONING. The sector's TV households grew by 8.6% from 2003 to 2004. Hispanic radio in all its zany color—from Spanish, Mexican, Ranchera, Tropical and Tejano to the more laid-back Spanish/Variety, Beautiful Music and Adult Christian formats—is now the sixth most popular format in the U.S. New cable networks are testing the market: As of April 2004, Nielsen Media Research reports seven networks reaching at least 15% of Hispanic market coverage, but knocking on that coverage "door" were Cine Latino, Canal Sur, GolTV and VH1 Uno among others. In network TV, Hispanics have pushed Fox above ABC, NBC and CBS in ratings by Hispanic households thanks largely to "The Swan," "American Idol" and "The Simpsons."

And then there's newspapers. There are fewer than 20 Spanish-language dailies published in the U.S. while weeklies like *La Raza* in Chicago (audited circulation of 192,132) abound. The nation's biggest media combines and their lead dailies are quickly claiming their ground in the dailies' market. Of the top 10 dailies listed on Page 24, five are associated with English-language dailies or their parent companies. Tribune Co., Chicago, is seeking to make *Hoy* the first national Spanish-language paper by launching editions city by city.

U.S. Advertising Spending in Hispanic Media



HISPANIC AD SPENDING BY MEDIUM

Dollars are in millions. Data from HispanTelligence, the research arm of *Hispanic Business*. National totals are based on input from TNS Media Intelligence/CMR, advertisers, media industry experts, advertising agencies and public records.

MEDIUM	AD \$ 2003	AD \$ 2002	% CHG
Network/national TV	\$1,216.8	\$1,014.0	20.0
Local TV	558.1	507.4	10.0
National radio	180.3	170.1	6.0
Local radio	448.3	419.0	7.0
National newspapers	95.0	90.5	5.0
Local newspapers	143.7	135.7	5.9
Magazines	73.6	61.3	20.2
Out-of-home	74.3	65.6	13.3
Total	2,790.1	2,463.4	13.3

**We're 17,
hot and
eager to
score**

...new business.

So, if you share the same feelings, call us. We're the only independent Hispanic agency to offer you in-house specialized departments for advertising, media planning and buying, PR, promotions, interactive, direct marketing, research and language services. Plus, we can be very discreet.



New Business: Rose Roeder rroeder@laagencia.com 310.444.7300

TOP HISPANIC DMA'S BY MEDIA SPENDING

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

MARKET	TV		RADIO		PRINT		TOTAL	
	2003	% CHG	2003	% CHG	2003	% CHG	2003	% CHG
Los Angeles	\$283.2	5.7	\$148.2	4.8	\$86.2	3.1	\$517.6	5.0
Miami-Fort Lauderdale	107.5	11.2	87.2	5.3	45.0	4.7	239.7	7.7
New York	94.6	9.3	80.2	1.7	42.0	4.4	216.8	5.4
Houston	52.2	7.5	53.2	8.5	7.7	5.6	113.1	7.9
Chicago	45.9	7.0	42.2	25.5	19.3	9.9	107.3	14.2
SF-Oakland-San Jose	39.9	11.0	26.0	6.1	4.6	5.3	70.4	8.8
Dallas	32.1	8.5	26.0	7.9	7.3	4.0	65.4	7.7
San Antonio	21.3	3.0	30.1	5.0	3.2	3.6	54.5	4.1
Phoenix	25.6	11.0	12.2	6.8	16.0	13.4	53.9	10.7
San Diego	26.4	13.6	17.1	7.0	4.7	4.7	48.2	10.3
Total for top 10	728.6	7.9	522.4	6.5	235.9	5.0	1,486.9	7.0

TOP 10 HISPANIC DAILY NEWSPAPERS

Circulation based on latest available data from Audit Bureau of Circulations and Circulation Verification Council. Ad dollars, in thousands, from TNS Media Intelligence/CMR. *La Nacion's* circulation is unaudited.

RANK	NEWSPAPER	CITY	CIRCULATION	AD REVENUE
1	La Opinion	Los Angeles	126,628	\$39,978
2	Hoy	New York	109,598	21,457
3	El Nuevo Herald	Miami	90,480	60,129
4	Diario las Americas	Miami	61,285	4,442
5	Al Dia	Dallas	53,258	NA
6	El Diario la Prensa	New York	50,019	29,113
7	Diario la Estrella	Dallas/Fort Worth	21,800	NA
8	El Tiempo de Laredo	Laredo, Texas	21,400	NA
9	La Nacion	Washington	10,000	3,242
10	The News Gram (bilingual)	San Antonio	6,030	NA

LEADING HISPANIC MAGAZINES

Paid circulation numbers are actual and most are for 2003 audits. *Estylo* and *Vogue en Espanol* are for 2002 and 2001, respectively. Many of these publications have sizable circulation outside the U.S., for example, Spanish editions of *Newsweek* and *Motor Trend* only circulate 8,000 and 25,000, respectively, of their copies in the U.S. ***Vista* is a newspaper-distributed magazine. Source: SRDS and Audit Bureau of Circulation. Ad spending, in millions, is from TNS Media Intelligence/CMR.

RANK	MAGAZINE	U.S. MEASURED ADVERTISING	FREQUENCY	PAID CIRCULATION
1	Vanidades	\$31.2	biweekly	95,332
2	People en Espanol	29.3	monthly	425,127
3	Latina	17.5	monthly	308,439
4	Glamour en Espanol	12.6	monthly	64,973
5	RD Selecciones	12.2	monthly	331,239
6	Cosmopolitan en Espanol	11.2	monthly	53,691
7	Vogue en Espanol	10.8	monthly	82,003
8	Hispanic Business	8.6	monthly	64,336
9	Eres	8.4	biweekly	178,398
10	Newsweek en Espanol	6.9	weekly	115,000
11	Vista**	6.5	monthly	NA
12	Hispanic Network Magazine	6.1	bimonthly	198,000
13	Hispanic Magazine	6.1	monthly	270,829
14	Prevention en Espanol	6.0	monthly	240,158
15	Motor Trend en Espanol	5.1	monthly	116,000
16	Men's Health en Espanol	3.1	monthly	35,000
17	Cristina la Revista	2.6	monthly	76,617
18	Buenhogar	2.1	monthly	226,661
19	Estylo Magazine	1.6	8X year	137,600
20	TV y Novelas	1.3	biweekly	120,000

TOP 10 RADIO FORMATS BY AGE GROUP

Formats ranked by share of 12+ listening audience of 223,253,000. In reading the chart, the Hispanic format holds an 8.4% share of all radio listeners aged 12 and older and is strongest, at 13.1%, in the 25-34 age group. Data from Radio Advertising Bureau based on format information provided the RAB by Arbitron Format Trends Report, Fall 2002.

RANK	FORMAT	SHARE % BY AGE GROUP				
		12+	12-17	18-24	25-34	35-44
1	News/Talk/Info	16.5	1.7	3.7	9.6	14.2
2	Adult Contemporary	14.7	7.0	11.2	16.0	17.7
3	Contemporary Hit Radio	12.1	42.5	26.8	15.2	8.6
4	Urban	9.1	17.3	13.6	10.4	9.0
5	Rock	8.7	5.8	10.2	11.5	13.3
6	Hispanic	8.4	5.6	11.4	13.1	8.9
7	Country	8.2	4.7	6.5	6.9	8.6
8	Oldies	7.7	2.8	4.3	4.8	7.8
9	Alternative	5.0	9.9	9.7	7.9	4.8
10	New Adult Cont./Smooth Jazz	3.1	0.6	0.9	1.7	3.0
	All Other	6.5	2.1	1.7	2.9	4.1

TOP 10 HISPANIC RADIO STATIONS

Dollars are in millions. Data based on estimates for 2002 gross revenue and format from BIA Financial Network. Owners' abbreviations: SBS for Spanish Broadcasting System; UNI for Univision Communications.

RANK	STATION	MARKET	FORMAT	EST. REV. '02	OWNER
1	WSKQ-FM	New York	Spanish	\$36.3	SBS
2	KSCA-FM	Los Angeles	Ranchera	31.0	UNI
3	KLVE-FM	Los Angeles	Spanish/Variety	30.0	UNI
4	KLTN-FM	Houston	Mexican	27.9	UNI
5	WAMR-FM	Miami	Span./Beautiful Music	19.0	UNI
6	WPAT-FM	New York	Spanish	14.4	SBS
7	WOJO-FM	Chicago	Mexican/Tropical	14.2	UNI
8	WLEY-FM	Chicago	Mexican	14.1	SBS
9	KOVE-FM	Houston	Contemp./Spanish	13.5	UNI
10	KLAX-FM	Los Angeles	Span./Mexican	13.4	SBS

TOP 10 HISPANIC LOCAL TV MARKETS

Data from Nielsen Media Research. Household (HH) figures are actual. *Estimates as of Jan. 1, 2004, and used throughout '03-'04 TV season beginning Sept. 22, 2003 **% of Hispanic households where only Spanish or mostly Spanish is spoken by all persons 2 yrs. old+ in the home.

RANK	MARKET	HISPANIC TV HH	TOTAL TV HH	HISP. % OF ALL*	DOMIN.**
1	Los Angeles	1,690,907	5,402,260	31.3	48.2
2	New York	1,187,589	7,376,330	16.1	44.2
3	Miami	584,656	1,510,740	38.7	66.6
4	Houston	427,066	1,848,770	23.1	47.5
5	Chicago	421,533	3,399,460	12.4	52.0
6	Dallas	351,931	2,255,970	15.6	50.7
7	San Francisco	344,170	2,440,920	14.1	41.9
8	San Antonio	334,253	736,240	45.4	25.1
9	Phoenix	265,499	1,561,760	17.0	44.5
10	Harlingen, Texas	243,265	297,390	81.8	46.9
	Total for top 10	5,850,870			
	Top 10's share of all	55.4%			

For nine years, we've quietly gone about our business. Quietly, in a two-time Ad Age Multicultural Agency of the Year, Adweek Southwest Agency of the Year, multiple Effie and ANA Multicultural Excellence Award-winning, Cannes Lion-roaring sort of way. Call Tony Dieste or Warren Harmel at 214-800-3500.

Speak softly and carry a big reel.



www.diesteharmel.com

TOP SPANISH-LANGUAGE CABLE NETWORKS

Data from Nielsen Media Research's NHTI coverage of Hispanic households (HH) as supplied by Galavision. There are 7,100,000 Hispanic cable households out of 10,570,000 Hispanic TV households. Networks in chart are only those with coverage of 15% or more on April 1, 2004. Among other networks: Cine Latino, Canal Sur, Go!TV and VH1 Uno.

RANK	CABLE NETWORK	CABLE COVERAGE % OF ALL HISPANIC TV HH	SHARE % OF HISPANIC CABLE HH
1	Galavision	55.9	83.2
2	Mun2	30.7	45.7
3	Fox Sports Espanol	28.6	42.6
4	MTV Espanol	18.2	27.1
5	HBO Latino	17.8	26.5
6	Discovery en Espanol	15.5	23.1
7	CNN en Espanol	15.0	22.3

HISPANIC TV NETWORK VIEWERSHIP

Data from Nielsen Hispanic Television Index based on Hispanic prime-time viewership from 7 p.m. to 11 p.m. from Sept. 22, 2003 to May 16, 2004. Rating is % of Hispanic TV HH (10,570,000); share is % of those HHs with TV sets in use and watching the network. P+ counts total viewing persons in those Hispanic TV households tuned in to the network.

RANK	NETWORK	HISPANIC HH RATING	HISPANIC HH SHARE	HISPANIC HH IN RATING (000)	HISPANIC P+ SHARE	HISPANIC P+ VIEWERS
1	Univision	17.4	18.0	1,838	25	3,134
2	Telemundo	5.4	9.0	569	8	955
3	Fox	4.5	7.0	473	6	726
4	TeleFutura	3.4	6.0	362	5	651
4	ABC	3.4	5.0	355	4	534
4	NBC	3.4	6.0	360	4	537
7	CBS	2.7	4.0	282	3	410
7	WB	2.4	4.0	254	3	362
9	UPN	2.0	3.0	209	3	315
10	PAX	0.4	1.0	45	1	65

TOP SPANISH-LANGUAGE CABLE PROGRAMS

Data from Nielsen Hispanic Homevideo Index. Households and viewers are measured in thousands. Measurement period was 24 hours, Monday through Sunday from March 29, 2004 to April 25, 2004. Programs under five minutes and breakouts are excluded. Average Hispanic viewers (VWRs) are the number of persons in Hispanic households viewing the program.

RANK	PROGRAM [MONTH/DAY IN '04]	NETWORK	HISP. HH RATING	AVG. HISP. HH	AVG. HISP. VWRs
1	El Chavo [4/13]	Galavision	2.7	280	659
2	El Chapulin Colorado [4/15]	Galavision	2.1	225	396
2	El Chavo [4/12]	Galavision	2.1	224	389
2	El Chavo [4/15]	Galavision	2.1	219	401
5	El Chavo [4/20]	Galavision	1.9	206	399
5	El Chavo [4/21]	Galavision	1.9	203	386
5	El Chapulin Colorado [4/12]	Galavision	1.9	202	374
5	Selena Especial [3/13]	Galavision	1.9	201	414
9	El Chavo [4/23]	Galavision	1.8	195	453
9	El Chapulin Colorado [4/13]	Galavision	1.8	191	497
9	El Chapulin Colorado [3/30]	Galavision	1.8	186	428
12	El Chapulin Colorado [4/20]	Galavision	1.7	184	424
12	El Chavo [4/08]	Galavision	1.7	181	417
12	Futbol Liga Mex. Sat-2 [4/24]	Galavision	1.7	179	287
12	Copa Libertadores [4/8]	Fox Sports Esp.	1.7	177	325
16	El Chapulin Colorado [3/31]	Galavision	1.6	174	364
16	Chespirito [4/20]	Galavision	1.6	172	273
16	El Chavo [4/14]	Galavision	1.6	167	329
16	Futbol Liga Mex. Sat-2 [4/10]	Galavision	1.6	166	350
20	El Chavo [4/2]	Galavision	1.5	162	292
20	El Chapulin Colorado [4/14]	Galavision	1.5	160	311
20	Chespirito [4/02]	Galavision	1.5	156	278
20	Los Reporteros [4/13]	Galavision	1.5	155	325
20	El Chavo [3/29]	Galavision	1.5	154	319
20	El Chavo [3/31]	Galavision	1.5	154	274
20	Chespirito [4/21]	Galavision	1.5	154	225

AHAA 17TH SEMI-ANNUAL CONFERENCE

SEPTEMBER 29 - OCTOBER 1, 2004

PLAZA HOTEL | NEW YORK, NEW YORK

Featuring Ad Age's 6th Annual Hispanic Creative Advertising Awards

Friday, October 1

For the latest
information
visit our
website at
www.ahaa.org

For more
information
on sponsorship
opportunities
or membership
contact us at
info@ahaa.org.



ahaa

Association of Hispanic Advertising Agencies

TOP ENGLISH-LANGUAGE CABLE PROGRAMS AMONG HISPANIC VIEWERS

Data from Nielsen Hispanic Homevideo Index. Households and viewers are in thousands. Measurement period was 24 hours, Mon. -Sun. from Mar. 29, 2004 to Apr. 25, 2004. There are 10,570,000 Hispanic TV households. Chart is read: No. 1 "WWE Raw Zone" was viewed by 456,000 Hispanic HHs on April 5, 2004, representing 4.3% of the nation's 10,570,000 Hispanic TV households. Average Hispanic viewers (VWRs) are the number of persons in Hispanic TV households viewing the program.

RANK	PROGRAM [MONTH/DAY IN '04]	NETWORK	HISP. HH RATING	AVG. HISP. HH	AVG. HISP. VWRs
1	WWE Raw Zone [4/5]	Spike TV	4.3	456	641
2	WWE Raw Zone [3/29]	Spike TV	4.2	448	577
3	WWE Raw Zone [3/29]	Spike TV	4.1	430	569
4	WWE Raw Zone [4/19]	Spike TV	3.9	416	581
5	SpongeBob Upick Live [4/5]	Nickelodeon	3.8	407	615
6	SpongeBob [4/3]	Nickelodeon	3.7	395	597
6	Pup Named Scooby Doo [4/12]	Cartoon Ntwk.	3.7	391	492
6	Punk'd [4/25]	MTV	3.7	389	558
9	WWE Raw Zone [4/5]	Spike TV	3.6	385	515
9	Fairly Odd Parents [4/7]	Nickelodeon	3.6	384	606
9	SpongeBob [4/12]	Nickelodeon	3.6	382	571
9	Fairly Odd Parents [4/10]	Nickelodeon	3.6	379	494
9	Pimp My Ride [4/8]	MTV	3.6	379	505
9	Ed, Edd n Eddy [4/9]	Cartoon Network	3.6	379	567
9	Fairly Odd Parents [3/30]	Nickelodeon	3.6	377	536
9	SpongeBob [4/17]	Nickelodeon	3.6	376	546
17	Danny Phantom [4/11]	Nickelodeon	3.5	375	510
17	WWE Raw Zone [4/19]	Spike TV	3.5	372	537
17	Baby Looney Tunes [4/12]	Cartoon Network	3.5	370	458
17	Fairly Odd Parents [4/8]	Nickelodeon	3.5	369	536
17	SpongeBob [4/4]	Nickelodeon	3.5	369	493
17	Fairly Odd Parents [4/11]	Nickelodeon	3.5	368	538
17	SpongeBob Marathon [4/3]	Nickelodeon	3.5	367	591

TOP SPANISH-LANGUAGE NETWORK TV PROGRAMS AMONG HISPANIC VIEWERS

Ranked by Hispanic viewership. Households and viewers are measured in thousands. Data from Nielsen Hispanic Homevideo Index. Univision airs all Top 20 programs. Measurement period was Hispanic prime time (7 p.m.-11 p.m.), Monday through Sunday from March 29, 2004 to April 25, 2004. Programs under five minutes and breakouts are excluded. Average Hispanic viewers (VWRs) are the number of persons in Hispanic households tuned in to the program.

RANK	PROGRAM [TIME]	HISP. HH RATING	AVG. HISP. HH	AVG. HISP. VWRS
1	Mariana de la Noche [Tuesday]	20.5	2,163	3,893
2	Mariana de la Noche [Monday]	20.2	2,136	3,893
3	Mariana de la Noche [Wednesday]	19.8	2,094	3,882
4	Mariana de la Noche [Thursday]	18.6	1,966	3,599
5	Bajo la Misma Piel [Tuesday]	17.9	1,892	3,311
6	Bajo la Misma Piel [Monday]	17.8	1,885	3,301
6	Mariana de la Noche [Friday]	17.8	1,884	3,267
6	Bajo la Misma Piel [Wednesday]	17.8	1,880	3,343
9	Amar Otra Vez [Wednesday]	17.7	1,875	3,156
9	Amar Otra Vez [Tuesday]	17.7	1,872	3,187
11	Bajo la Misma Piel [Thursday]	17.5	1,852	3,189
12	Don Francisco Presenta [Wednesday]	17.4	1,841	3,122
12	Amar Otra Vez [Monday]	17.4	1,835	3,125
14	Amar Otra Vez [Thursday]	16.9	1,783	3,097
15	Cristina [Monday]	16.6	1,756	2,905
16	Amar Otra Vez [Friday]	16.0	1,688	2,691
17	Bajo la Misma Piel [Friday]	15.4	1,629	2,874
18	Sabado Gigante [Saturday]	14.8	1,563	2,792
18	Casos de la Vida Real Especial [Tuesday]	14.8	1,562	2,611
20	Cine Especial 2 [Sunday 4/11]	14.4	1,526	2,804

TOP ENGLISH-LANGUAGE NETWORK TV PROGRAMS AMONG HISPANIC VIEWERS

Ranked by Hispanic viewership. Households and viewers are measured in thousands. Source is Nielsen Hispanic Homevideo Index. Measurement period was Hispanic prime time (7 p.m.-11 p.m.), Monday through Sunday from March 29, 2004 to April 25, 2004. Programs under five minutes and breakouts are excluded. Average Hispanic viewers (VWRs) are the number of persons in Hispanic households tuned in to the network.

RANK	PROGRAM [TIME]	NETWORK	HISP. HH RATING	AVG. HISP. HH	AVG. HISP. VWRS
1	The Swan premiere spcl. [4/07]	FOX	8.2	869	1,405
2	American Idol [Wed.]	FOX	8.1	858	1,363
2	American Idol [Tues.]	FOX	8.1	854	1,344
4	American Idol-Wed. shows [4/14]	FOX	8.0	842	1,323
5	Friends spcl. [4/22]	NBC	7.7	813	1,152
6	Apprentice	NBC	7.1	747	1,188
7	WWE Smackdown!	UPN	6.7	703	1,188
8	The Simpsons [Sun.]	FOX	6.3	668	1,202
8	Friends spcl. [4/15]	NBC	6.3	662	898
10	ABC Spcl. Pres. [4/4]	ABC	6.1	647	1,068
10	Friends	NBC	6.1	644	900
10	The Simpsons spcl. [4/11]	FOX	6.1	641	1,122
13	Fear Factor	NBC	5.8	617	1,060
14	That '70s Show	FOX	5.7	601	867
15	The Swan	FOX	5.6	596	881
15	O.C.	FOX	5.6	591	888
17	The Simpsons	FOX	5.4	576	1,061
18	E.R.	NBC	5.1	542	794
18	Will & Grace	NBC	5.1	542	773
18	CSI	CBS	5.1	541	799

ADVERTISING AGE'S HISPANIC COVERAGE: as vibrant & extensive as the market itself

- Authoritative editorial coverage of Hispanic marketing
- A monthly multicultural section in *Advertising Age*
- An annual "Marketing to Hispanics" Special Report
- An annual Fact Pack of Hispanic Data
- Dedicated Hispanic marketing section on AdAge.com
- Essential Hispanic marketing news text alerts at AdAge.com
- Annual Hispanic Creative Advertising Awards
- Special custom section on Multicultural Marketing and Media

A leading authority on Hispanic advertising, marketing and media news for over 20 years.

In print and online, *Ad Age* covers the stories that matter. As business opportunities emerge, and interest in the Hispanic market grows, *Ad Age* is there to make sure readers get the information they need.

If you want your message front and center with this interested audience, contact your sales representative or Jeff Burch, Advertising Director, at (212) 210-0280 or jburch@crain.com.

AdvertisingAge

AdAge.com

SATELLITE TV SHARE OF HISPANIC TV HOUSEHOLDS

Data from Nielsen Media Research. Nielsen Alternative Delivery Sources based on Nielsen People Meter sample, November 1999, 2000 and 2001 and January 2003 and 2004. Data indicate there are some 1.8 million U.S. Hispanic TV households that subscribe to at least one direct broadcasting service (DBS) and receive DirecTV Para Todos or Dish Latino.

TV HOUSEHOLDS	PERCENT OF TV HOUSEHOLDS WITH DBS					
	2004	2003	2002	2001	2000	1999
Hispanic	16.8	14.5	10.9	9.3	5.1	2.2
Total U.S.	17.5	15.4	12.9	12.3	9.2	6.8

MEDIA PRODUCT USAGE BY HISPANICS

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

PRODUCT	HISPANIC USAGE %	GENERAL MARKET USAGE %
Cable or satellite/digital TV	72	85
CD player	61	86
Caller ID	58	42
DVD player	52	60
Answering machine	49	78
Videogame system	48	37
PDA	10	14
Computer at home	49	74
Internet access at home	36	66
Internet access anywhere	45	75
Cell phone	61	65

AD AGE DATACENTER

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

This Hispanic Fact Pack is a supplement to *Advertising Age*, published June 21, 2004. Sources are shown in notes above each chart.

TO REACH US

Email DataCenter@AdAge.com; send mail to Advertising Age, 711 Third Ave., New York, N.Y. 10017 or call (212) 210-0100. Subscription and print single copy sales (888) 288-5900; Advertising (212) 210-0159; [AdAge.com editor@adage.com](mailto:AdAge.com_editor@adage.com)

DEMOGRAPHICS

U.S. Hispanic population in 2050

PROJECTED TO REACH 102.6 MILLION

Content, sources for demographic data

THE "BROWNING" OF AMERICA, a term used by essayist Richard Rodriguez in describing the influence of Hispanics on America from pop culture to education to religion, is captured in part by population trends.

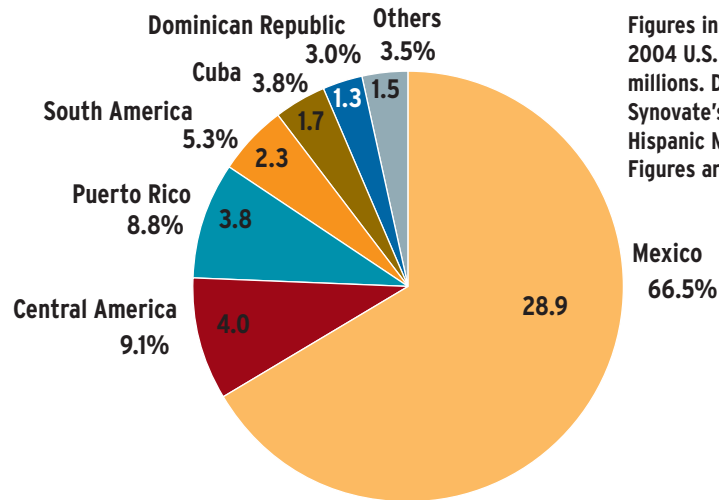
Hispanic is an overarching term for Americans whose origin or ancestry are traced to Mexico, Central America, the Caribbean and South America. By the U.S. Census Bureau's account, Hispanics reached a probably undercounted 38.8 million in 2002, or 13.4% of the U.S. population, and by 2050 they will account for a quarter of the U. S.

The influx is young: Median age for Hispanics is now about 27 years of age versus about 36 years of age for the entire population. Marketers are attracted to this youthful element, which in certain age groups represent far more than 13.4% of the population.

The Hispanic population is urban with 85% of all Hispanics living in 25 markets, six of which are in Texas and five in California. Los Angeles and New York pace all metro areas in total Hispanic population. In a dead heat for third are Chicago, Miami and Houston.

The one big demographic that sets Hispanics apart from the general population is language. Of all Hispanic adults, 50% speak mostly Spanish in the home, according to Simmons Market Research Bureau. And that's a big reason Spanish-language media are red hot.

U.S. Hispanic Population by Country or Region of Origin/Ancestry



Figures inside chart show 2004 U.S. population in millions. Data from Synovate's 2004 U.S. Hispanic Market Report. Figures are estimated.

PROJECTED U.S. HISPANIC POPULATION

Data from U.S. Census Bureau. Population figures are in thousands.

YEAR	HISPANIC POPULATION	TOTAL U.S. POPULATION	HISPANIC % OF TOTAL POP.
2002	38,761	288,369	13.4
2005	41,801	295,507	14.1
2010	47,756	308,936	15.5
2015	53,647	322,366	16.6
2020	59,756	335,805	17.8
2025	66,191	349,439	18.9
2030	73,055	363,584	20.1
2040	87,585	391,946	22.3
2050	102,560	419,854	24.4

U.S. POPULATION BY HISP. ORIGIN & RACE

Data from U.S. Census Bureau. Population figures are in thousands. Race is counted separately from Hispanic origin by the U.S. Census Bureau, as persons of Hispanic origin may be of any race.

RACE/ORIGIN	2002 POPULATION	% OF TOTAL POPULATION
Hispanic (all races)	38,761	13.4
Non-Hispanic (all races)	249,608	86.6
Total U.S.	288,369	100.0
White	232,647	80.7
Black	36,746	12.7
Asian	11,559	4.0
Two or more races	4,181	1.4
Amer. Indian/Alaska Native	2,752	1.0
Native Hawaiian/Pacific Islander	484	0.2
Total U.S.	288,369	100.0

HISPANIC POPULATION BY AGE GROUP, 2002

Data from U.S. Census Bureau. Population figures are in thousands.

AGE GROUP	U.S. HISPANIC POPULATION	TOTAL U.S. POPULATION	HISPANIC % TOTAL
Under 5	3,962	19,609	20.2
5 to 9	3,730	19,901	18.7
10 to 14	3,535	21,136	16.7
15 to 19	3,197	20,376	15.7
20 to 24	3,607	20,214	17.8
25 to 29	3,754	18,972	19.8
30 to 34	3,578	20,956	17.1
35 to 39	3,156	21,915	14.4
40 to 44	2,652	23,002	11.5
45 to 49	2,073	21,302	9.7
50 to 54	1,582	18,782	8.4
55 to 59	1,138	14,991	7.6
60 to 64	837	11,611	7.2
65 to 69	657	9,581	6.9
70 to 74	524	8,693	6.0
75 to 79	375	7,420	5.1
80 to 84	224	5,314	4.2
85 to 89	112	2,943	3.8
90 to 94	50	1,250	4.0
95 to 99	15	342	4.4
100+	3	59	5.1
Total	38,761	288,369	13.4
Median age (yrs)	26.8	35.7	

PROJECTED U.S. HISPANIC POPULATION, 2010

Data from U.S. Census Bureau. Population figures are in thousands.

AGE GROUP	PROJ. U.S. HISPANIC POPULATION	PROJ. TOTAL U.S. POPULATION	HISPANIC % TOTAL
Under 5	4,824	21,426	22.5
5 to 9	4,515	20,706	21.8
10 to 14	4,057	19,767	20.5
15 to 19	4,162	21,336	19.5
20 to 24	3,927	21,676	18.1
25 to 29	3,878	21,375	18.1
30 to 34	3,973	20,271	19.6
35 to 39	3,769	20,137	18.7
40 to 44	3,343	20,984	15.9
45 to 49	2,939	22,654	13.0
50 to 54	2,371	22,173	10.7
55 to 59	1,806	19,507	9.3
60 to 64	1,365	16,679	8.2
65 to 69	941	12,172	7.7
70 to 74	694	9,097	7.6
75 to 79	510	7,186	7.1
80 to 84	359	5,665	6.3
85 to 89	204	3,713	5.5
90 to 94	84	1,727	4.9
95 to 99	28	569	4.9
100+	6	114	5.3
Total	47,756	308,936	15.5
Median age (yrs)	27.1	36.0	

TOP 25 U.S. HISPANIC MARKETS

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

RANK	MARKET	HISPANIC POPULATION	HISPANIC % OF TOTAL
1	Los Angeles	7,811,100	44.5
2	New York	4,316,400	20.5
3	Chicago	1,838,000	19.0
4	Miami	1,836,800	43.1
5	Houston	1,822,600	33.4
6	Dallas-Fort Worth	1,509,700	23.5
7	San Francisco	1,491,800	21.3
8	San Antonio	1,293,700	60.3
9	Phoenix	1,208,000	27.2
10	McAllen, Texas	1,142,000	94.8
11	San Diego	927,600	31.2
12	Fresno-Visalia, Calif.	893,000	50.7
13	Sacramento, Calif.	892,400	24.1
14	El Paso, Texas	782,500	87.7
15	Albuquerque, N.M.	740,700	41.6
16	Denver	740,600	19.7
17	Washington	545,200	9.0
18	Philadelphia	534,300	6.9
19	Austin, Texas	471,700	29.0
20	Las Vegas	438,800	26.0
21	Atlanta	433,600	7.5
22	Orlando	432,200	13.2
23	Boston	417,700	6.6
24	Tampa, Fla.	415,400	10.4
25	Tucson-Nogales, Ariz.	385,900	35.4

SOCIAL & ECONOMIC DATA FOR U.S. HISPANICS

By ethnicity/origin. Data from U.S. Census Bureau. Data for 2002 and indicates percentages.

	ALL U.S. HISPANICS	MEXICAN	PUERTO RICAN	CUBAN	CENTRAL & S. AMER.	OTHER HISP.
Persons 25+						
High school grad +	57.0	50.6	66.8	70.8	64.7	74.0
Bachelors degree +	11.1	7.6	14.0	18.6	17.3	19.7
Family Income (2001)						
Less than \$5,000	4.1	4.0	5.1	3.7	4.2	3.8
\$5,000 to \$14,999	12.7	12.5	18.9	13.0	10.2	11.2
\$15,000 to \$24,999	17.6	18.4	19.1	17.0	14.6	16.3
\$25,000 to \$34,999	16.2	17.1	12.9	16.1	15.9	13.4
\$35,000 to \$49,999	17.3	17.8	14.2	15.1	18.6	14.9
\$50,000 to \$74,999	16.8	16.6	15.1	14.3	18.1	19.1
\$75,000 and over	15.3	13.6	14.8	20.9	18.4	21.2
Household Size						
One person	13.2	11.2	19.6	23.9	12.3	15.6
Two people	22.2	19.4	27.8	34.5	22.6	28.3
Three people	19.9	19.8	20.4	18.0	21.1	19.3
Four people	21.1	21.5	18.2	16.1	23.5	20.1
Five people	12.8	14.4	9.1	4.3	11.9	11.7
Six people	6.1	7.4	3.3	2.2	5.5	3.0
Seven people or more	4.8	6.3	1.5	1.0	3.2	2.0
Housing Units						
Owner-occupied	47.5	50.0	35.3	56.9	41.1	50.8
Renter-occupied	52.5	50.0	64.7	43.1	58.9	49.2

LANGUAGE USAGE BY U.S. HISPANIC ADULTS

Data from Simmons Market Research Bureau's Fall 2003 Full-Year National Consumer Study.

	ALL HISPANIC	% BY AGE GROUP					
	ADULTS	18-24	25-34	35-44	45-54	55-64	65+
SPEAK AT HOME:							
Only English	12.3	10.1	13.2	12.1	13.9	13.5	10.8
Mostly Eng., some Span.	20.9	22.9	19.6	19.1	25.8	15.6	23.7
Eng. & Span. equally	15.8	19.4	8.2	16.3	16.1	32.8	15.6
Mostly Span., some Eng.	29.8	35.2	31.3	31.2	26.7	20.3	22.5
Only Spanish	20.4	12.4	27.2	20.4	17.2	16.2	24.2
SPEAK OUTSIDE THE HOME:							
Only English	16.7	23.3	13.3	16.1	17.2	17.0	13.6
Mostly Eng., some Span.	32.0	33.5	29.5	34.4	37.5	27.0	27.4
Eng. & Span. equally	8.3	12.1	2.3	7.7	9.1	17.8	11.3
Mostly Span., some Eng.	24.9	19.1	35.0	23.0	20.8	21.0	17.5
Only Spanish	14.0	8.1	16.1	15.8	14.0	12.0	17.4
PREFER SPEAKING IN:							
Only English	17.2	24.8	17.0	13.6	16.3	17.4	11.5
Mostly Eng., some Span.	27.4	31.9	20.3	31.3	21.7	40.5	27.6
Mostly Span., some Eng.	24.5	23.9	26.8	23.2	32.3	13.9	19.2
Only Spanish	25.4	14.6	32.2	27.0	24.1	22.0	27.0
PREFER READING IN:							
Only English	33.2	38.0	28.2	28.2	36.5	49.0	31.5
Mostly Eng., some Span.	21.8	25.3	17.6	25.0	23.2	17.1	22.8
Mostly Span., some Eng.	16.7	14.5	22.9	17.7	12.6	10.3	10.3
Only Spanish	24.4	18.5	29.3	25.6	23.4	21.3	21.2
PREFER WATCHING TV IN:							
Only English	25.9	30.3	22.1	24.7	22.5	38.5	25.7
Mostly Eng., some Span.	29.9	32.3	26.9	25.7	42.0	29.5	26.8
Mostly Span., some Eng.	25.8	23.3	29.2	31.6	21.4	14.4	22.5
Only Spanish	13.8	7.7	19.0	13.6	10.6	14.6	14.5
PREFER LISTENING RADIO IN:							
Only English	23.4	31.3	20.9	23.5	19.0	24.2	20.6
Mostly Eng., some Span.	21.0	24.0	17.3	22.1	23.4	24.7	16.9
Mostly Span., some Eng.	25.6	24.8	28.0	22.7	31.0	19.4	24.4
Only Spanish	25.0	15.2	30.2	26.8	22.8	25.9	27.2

Shifting \$ from broadcast?



Put it in broadcast.

Tired of declining audiences and skyrocketing costs? Univision's audience is growing and our CPMs are more efficient than the Big 4. And we can significantly extend your reach without spending one *centavo* more. (Call us to find out how). Make Univision your "broadcast" broadcast alternative.

