

28

Median age of
U.S. Hispanics, vs.
38 for overall
U.S. population

11th Annual

HISPANIC

FACT PACK

8%

Hispanic media
spending growth
in 2013

\$335
MILLION

P&G 2013 Hispanic
measured ad spending,
up 36%

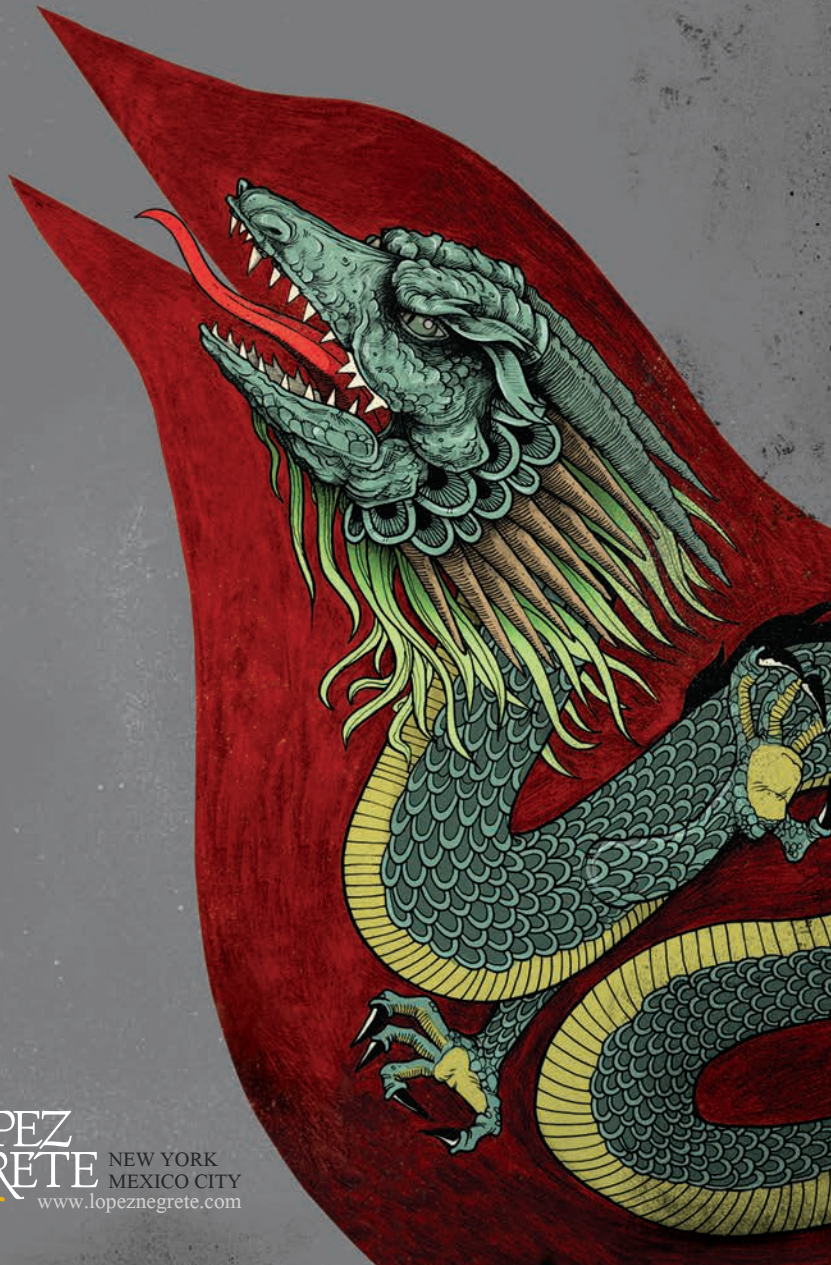
2013 ad spending
in Hispanic media

\$8B

49%

Percentage of
U.S. Hispanic
internet users
on Twitter

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Hispanic marketing, media, agencies and demographics

BUOYED BY MARKETERS' growing interest in Hispanic millennials as consumers and trendsetters, the Hispanic media market continues to outpace overall growth in media spending. In 2013, U.S. Hispanic media spending rose by 8.1% to \$8.3 billion, way ahead of the overall increase of just 0.9% in U.S. measured-media spending (Page 6).

The top 50 Hispanic marketers were even more enthusiastic, boosting their total Hispanic media spending by 14.2%, led by No. 1 marketer Procter & Gamble Co., up 36% (Page 8). AT&T, at No. 2, and L'Oréal, No. 4, increased their spending by 26% and 38%, respectively.

The 2014 World Cup gave marketers an opportunity to drill down in their Hispanic efforts. Kraft Foods Group's "Flavor of the Championship" program used its social-media monitoring hub to suggest appropriate recipes for World Cup viewing parties. J.C. Penney Co. focused its World Cup effort on Latinas and liked the results so well that Grupo Gallegos' Spanish-language ads ran on English-language networks, too—in Spanish.

Univision's own World Cup exposure—viewer-ship was up 34% over the 2010 tournament—came at a good time as the private-equity investor group that bought Univision in 2007 for \$13.7 billion is believed to be shopping the Spanish-language media giant around for up to \$20 billion. The next two World Cups, though, will air on Spanish-language network Telemundo, part of Comcast Corp.'s NBC Universal, which handles Hispanic across all its platforms through the Hispanic Enterprises and Content division.

Media and technology companies continue to create new Hispanic roles. Twitter hired Nuria

Santamaria as its first multicultural lead in late 2013; Ad Age honored her as one of the 2014 Women to Watch. Liz Sarachek Blacker, Terra's chief revenue officer, is joining CC Media Holdings' Clear Channel Media and Entertainment as exec VP of Hispanic strategy and sales effective August 2014.

Research shows that Hispanics over index on technology, and their use of smartphones makes that clear: Hispanics are more likely to download apps, chat, stream video, listen to music and play games than non-Hispanics (Page 34).

U.S. Hispanic agencies' revenue grew by 5.7% in 2013 to \$597 million. In the 50 largest U.S. Hispanic agencies ranking, LatinWorks took the top slot for the first time, following a steady rise from No. 16 a decade ago to No. 3 in last year's report. Lopez Negrete Communications, the biggest independent, also moved up two slots, to No. 2.

Agencies are still jumping into the Hispanic market. Sapient Corp.'s SapientNitro acquired La Comunidad in December 2013.

Interpublic Group of Cos.' Deutsch last year started a Hispanic practice called DLatino.

In agency honors, Alma was named Multicultural Agency of the Year, with Lopez Negrete Communications and Conill as runners-up. LatinWorks won a spot on Ad Age's Agency A-List.

The Hispanic media-buying market is still divided between full-service Hispanic shops with their own media departments and Hispanic units within specialist media agencies (Page 42). The specialist agencies now fill the top six slots and get the efficiency of using general-market staff and resources for basic work while relying on leaner multicultural groups to add that expertise.

— LAUREL WENTZ

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HISPANICS
OVER
INDEX ON
TECHNOLOGY



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Largest Hispanic media agencies in 2013

By estimated U.S. revenue from Hispanic activities

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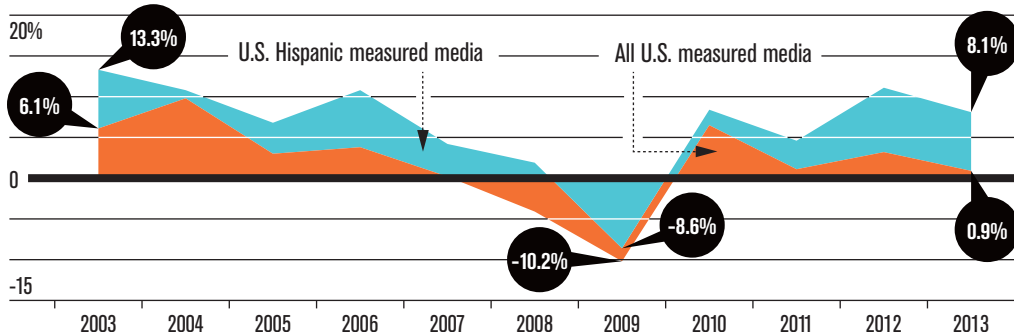
Crain

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MARKETERS

Hispanic media spending growth rates

Versus all U.S. measured-media ad spending growth, 2003 to 2013



Sources: All U.S. media data from Kantar Media. Hispanic data for 2009 through 2013 are Ad Age DataCenter estimates (see chart below). Hispanic media data from 2003 through 2008 from HispanTelligence, research arm of Hispanic Business, based on input from Kantar Media, media industry experts, advertising agencies and public records.

Hispanic major-media ad spending in 2013

Gross U.S. ad spending. Dollars in millions

MEDIUM	U.S. ADVERTISING SPENDING IN HISPANIC MEDIA			PERCENT OF TOTAL	
	2013	2012	% CHG	2013	2012
Broadcast network TV	\$4,618	\$4,206	9.8	55.6%	54.7%
Spot TV	1,269	1,343	-5.5	15.3	17.5
Cable TV networks	215	246	-12.4	2.6	3.2
Subtotal TV¹	6,102	5,794	5.3	73.5	75.4
Newspaper	779	683	14.1	9.4	8.9
Magazine	333	294	13.3	4.0	3.8
Other print	40	39	2.6	0.5	0.5
Subtotal print²	1,153	1,016	13.5	13.9	13.2
Spot radio ³	466	431	8.0	5.6	5.6
Internet ⁴	580	440	31.8	7.0	5.7
Total	\$8,301	\$7,681	8.1	100.0	100.0

Totals by media are gross ad revenue. Sources: 1. TV data are measured media from Kantar Media (kantarmedia.us). Excludes ad spending for Univision Prepaid MasterCard (Tarjeta Prepagada Univision MasterCard), a prepaid card launched by MasterCard and Univision in 2009 and issued by Bancorp Bank. 2. Print data from Latino Print Network and include some internet advertising. Newspapers include classified. Other print includes annuals, catalogs, journals, newsletters and yellow pages. Print includes Puerto Rican publications as well as Mexican border publications with U.S. circulation. Kantar Media also measures Hispanic newspapers and magazines. 3. Spot radio data from Nielsen (nielsen.com). 4. Internet data are Ad Age DataCenter estimates of all forms of internet advertising (revised for 2012 using guidance from industry sources). Kantar Media also monitors Spanish-language websites.



LIVE SPORTS WINS

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Accessible Everywhere



SOURCE: NIELSEN, LIVE+SO, HISPANIC P18-49 US AA PROJ (UNITS); NFL: 9/10/12-12/22/12, 9/9/13-12/23/13; NBA: 10/30/12-4/17/13, 10/29/13-4/6/14; MLB: 4/4/12-9/23/12, 3/31/13-9/22/13 SUNDAYS ONLY; BCS SERIES: 1/1/13-1/7/13, 1/14-1/6/14; LIGA MX: 7/2/12-5/3/13, 7/19/13-4/27/14. LIVE GAMES ONLY, EXCLUDING LIGA MX PLAYOFFS.

50 largest spenders in Hispanic media

Companies ranked by U.S. measured-media spending

RANK	MARKETER	U.S. MEASURED-MEDIA SPENDING (\$ IN THOUSANDS)	
		2013	% CHG
1	Procter & Gamble Co.	\$334,825	36.0
2	AT&T	124,723	26.0
3	Guthy-Renker Corp.	122,872	63.2
4	L'Oréal	122,531	38.0
5	McDonald's Corp.	111,362	3.4
6	St. Jude Children's Research Hospital	107,572	201.0
7	Deutsche Telekom (T-Mobile)	98,710	-10.1
8	Dish Network Corp.	96,919	10.8
9	State Farm Mutual Auto Insurance Co.	93,012	25.5
10	Walmart Stores	92,120	61.1
11	General Motors Co.	91,372	24.5
12	A&Z Pharmaceutical	84,848	329.8
13	Toyota Motor Corp.	81,912	-6.4
14	SABMiller (MillerCoors)	79,717	33.8
15	Mars Inc.	77,299	48.7
16	Verizon Communications	71,311	-23.9
17	General Mills	70,412	-14.6
18	SoftBank Corp. (Sprint)	68,634	-3.4
19	Nissan Motor Co.	67,252	53.8
20	Fiat Chrysler Automobiles	62,446	8.3
21	Church & Dwight Co.	62,166	91.1
22	Comcast Corp.	60,965	-4.2
23	Ford Motor Co.	58,846	17.1
24	Allstate Corp.	55,175	31.1
25	Sears Holdings Corp.	54,947	-2.5

RANK	MARKETER	U.S. MEASURED-MEDIA SPENDING (\$ IN THOUSANDS)	
		2013	% CHG
26	Anheuser-Busch InBev	\$54,485	12.1
27	Aderans Co. (Bosley)	52,669	458.4
28	Target Corp.	51,549	3.8
29	Kellogg Co.	49,204	-11.7
30	Kraft Foods Group	47,980	-25.3
31	Home Depot	47,113	-7.8
32	Broadcasting Media Partners (Univision) ¹	43,779	-34.5
33	Time Warner Cable	43,531	25.2
34	Hershey Co.	42,058	91.4
35	Yum Brands	41,835	29.8
36	Suave Y Facil	41,652	1713.2
37	Constellation Brands	41,391	30.5
38	Johnson & Johnson	40,109	68.8
39	Colgate-Palmolive Co.	39,440	15.9
40	Clorox Co.	39,249	7.8
41	J.C. Penney Co.	38,943	-9.5
42	Genomma Lab International	38,625	-84.9
43	Micro Ear	37,880	1933.9
44	Grupo Televisa	37,872	-21.9
45	Nestlé	37,143	-4.7
46	Macy's	36,635	-3.8
47	Walt Disney Co.	35,315	1.9
48	U.S. Government	34,784	26.7
49	Walker Advertising	34,311	5.6
50	PepsiCo	33,648	59.2

Total (dollars in millions)		\$3,393	14.2
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Source: Ad Age DataCenter analysis of data from Kantar Media (kantarmedia.us). Data represent the sum of broadcast TV and cable networks, Spanish-language magazines (including PIB-monitored Spanish-language magazines), Spanish-language newspapers, Spanish-language spot TV and Spanish-language websites. 1. Excludes ad spending for Univision Prepaid MasterCard (Tarjeta Prepagada Univision MasterCard), a prepaid card launched by MasterCard and Univision in 2009 and issued by Bancorp Bank.



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Largest spenders by Hispanic medium

Companies ranked by U.S. measured-media spending

MAGAZINE

RANK	MARKETER	U.S. MEASURED-MEDIA SPENDING (\$ IN THOUSANDS)	
		2013	% CHG
1	Procter & Gamble Co.	\$48,667	9.0
2	L'Oréal	35,528	51.5
3	Unilever	7,848	83.8
4	Mars Inc.	6,996	58.5
5	Estée Lauder Cos.	6,918	27.7
6	Kimberly-Clark Corp.	5,923	35.4
7	Colgate-Palmolive Co.	5,873	96.5
8	Time Inc.	5,266	7.2
9	Johnson & Johnson	3,665	-20.9
10	Kellogg Co.	3,229	-21.6
Top 10		\$129,913	25.8

BROADCAST AND CABLE NETWORK TV

RANK	MARKETER	U.S. MEASURED-MEDIA SPENDING (\$ IN THOUSANDS)	
		2013	% CHG
1	Procter & Gamble Co.	\$275,314	45.6
2	Guthy-Renker Corp.	120,770	65.9
3	St. Jude Children's Research Hospital	102,809	NA
4	Dish Network Corp.	90,569	17.6
5	McDonald's Corp.	89,954	3.5
6	State Farm Mutual Auto Insurance Co.	88,942	33.1
7	L'Oréal	84,487	38.0
8	A&Z Pharmaceutical	83,893	NA
9	Deutsche Telekom (T-Mobile)	82,723	-9.7
10	General Motors Co.	78,917	29.4
Top 10		\$1,098,378	44.9

NEWSPAPER

RANK	MARKETER	U.S. MEASURED-MEDIA SPENDING (\$ IN THOUSANDS)	
		2013	% CHG
1	Sears Holdings Corp.	\$7,188	-3.8
2	Target Corp.	5,963	11.5
3	Walmart Stores	5,762	82.0
4	SoftBank Corp. (Sprint)	5,302	NA
5	Interbond Corp of America	3,669	-14.8
6	Macy's	3,484	-17.7
7	Kohl's Corp.	3,439	6.9
8	Best Buy Co.	3,433	-2.1
9	AT&T	3,286	NA
10	Fry's Electronics	3,098	NA
Top 10		\$44,624	32.9

SPOT TV

RANK	MARKETER	U.S. MEASURED-MEDIA SPENDING (\$ IN THOUSANDS)	
		2013	% CHG
1	Time Warner Cable	\$43,373	26.5
2	AT&T	43,190	-19.1
3	Comcast Corp.	32,452	-2.9
4	Nissan Motor Co.	23,963	108.8
5	McDonald's Corp.	18,894	2.8
6	Rooms To Go	16,580	-8.3
7	Broadcasting Media Partners (Univision)	16,500	-29.9
8	Genomma Lab International	14,968	93.4
9	Fiat Chrysler Automobiles	14,455	-32.4
10	Deutsche Telekom (T-Mobile)	12,660	-3.8
Top 10		\$237,034	0.9

Source: Ad Age DataCenter analysis of data from Kantar Media (kantarmedia.us). Data represent the sum of broadcast TV and cable networks, Spanish-language magazines (including PIB-monitored Spanish-language magazines), Spanish-language newspapers, Spanish-language spot TV and Spanish-language websites. Ad spending data are from Spanish-language TV stations. Automotive dealers and associations are excluded. Excludes ad spending for Univision Prepaid MasterCard (Tarjeta Prepagada Univision MasterCard), prepaid card launched by MasterCard and Univision in 2009 and issued by Bancorp Bank.

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From all the numbers you've seen in this book,
this is the one you should remember.

ALMA

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2014 Multicultural Agency of the Year according to Ad Age numbers. www.almaad.com

Largest Hispanic spot radio advertisers

Companies ranked by U.S. measured spot radio spending

RANK	MARKETER	U.S. MEASURED-MEDIA SPENDING (\$ IN THOUSANDS)	
		2013	% CHG
1	Deutsche Telekom (T-Mobile)	\$13,724	43.3
2	Broadcasting Media Partners (Univision)	10,463	-30.3
3	McDonald's Corp.	9,380	9.0
4	Comcast Corp.	9,287	8.9
5	AT&T	9,094	31.7
6	Sears Holdings Corp.	7,372	6.4
7	Walmart Stores	6,279	38.1
8	SoftBank Corp. (Sprint)	5,750	41.5
9	LBI Media Holdings	5,556	27.9
10	Ford Motor Co.	5,269	NA
Total		\$82,174	19.6

Source: Nielsen (nielsen.com). Nielsen monitors 91 Hispanic stations in 26 markets.

How Hispanics are driving digital growth

Monthly time spent by Hispanic consumers vs. the total U.S. population

Using a game console



Watching video on internet



Mobile subscribers watching video on a mobile phone



Source: Nielsen Digital Consumer report (nielsen.com).

10 largest advertisers on Hispanic websites

By 2013 display ad impressions in ComScore Hispanic Ad Focus sites

RANK	MARKETER	IMPRESSIONS ON HISPANIC SITES	TOTAL IMPRESSIONS	PERCENT HISPANIC	HISPANIC INDEX
1	AT&T	1,890,419	90,680,329	2.08%	125
2	Procter & Gamble Co.	1,330,466	22,504,965	5.91	353
3	Toyota Motor Corp.	602,720	22,204,418	2.71	162
4	General Motors Co.	569,210	23,049,439	2.47	148
5	Fiat Chrysler Automobiles	568,623	24,326,537	2.34	140
6	Verizon Communications	530,228	28,253,831	1.88	112
7	FMR (Fidelity Investments)	520,666	7,261,358	7.17	428
8	Ford Motor Co.	500,693	17,860,533	2.80	168
9	Nissan Motor Co.	480,281	15,663,595	3.07	183
10	American Express Co.	436,046	30,562,169	1.43	85
Total internet		72,877,790	4,354,973,798	1.67	100

Source: ComScore (comscore.com). Impressions are in thousands. Impressions are for desktop display only and exclude broadband video and search. Numbers rounded. See P. 28 for information on ComScore's Hispanic Ad Focus category. Hispanic Index = % of Advertiser Ad Impressions on Hispanic Ad Focus Sites / % of Total Internet Ad Impression on Hispanic Ad Focus Sites x 100. Index of 100 indicates average Hispanic representation.

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MEDIA

Hispanic language preferences

By media type for ages 18 and up

RESPONSES BY PERCENT	READING	WATCHING TV	LISTENING TO RADIO	WHEN ONLINE
Only in English	38.2%	33.4%	28.9%	53.4%
Mostly in English, but some in Spanish	25.3	31.9	29.9	19.6
Mostly in Spanish, but some in English	14.9	21.1	20.0	12.5
Only in Spanish	20.6	12.8	19.4	13.3
In some other language	1.0	0.9	0.9	1.1

Source: Experian Marketing Services (experian.com/marketing-services). Data based on Experian Marketing Services' Simmons National Hispanic Consumer Study, Winter 2014, for the dates of Jan. 27, 2013, through March 11, 2014. Base: Hispanics who indicated a language preference. Numbers may not add to 100 due to rounding.

25 largest Hispanic Designated Market Areas

By Hispanic TV households in 2013

RANK	DESIGNATED MARKET AREA	HISPANIC TV HOMES	PERCENT OF U.S.	RANK	DESIGNATED MARKET AREA	HISPANIC TV HOMES	PERCENT OF U.S.
1	Los Angeles	1,967,440	13.4%	14	Fresno-Visalia, Calif.	261,410	1.8%
2	New York	1,425,800	9.7	15	Denver	246,160	1.7
3	Miami-Fort Lauderdale, Fla.	735,740	5.0	16	El Paso, Texas (Las Cruces)	243,000	1.7
4	Houston	651,300	4.4	17	Orlando-Daytona Beach-Melbourne, Fla.	240,510	1.6
5	Dallas-Fort Worth, Texas	546,480	3.7	18	Philadelphia	238,130	1.6
6	Chicago	535,980	3.7	19	Washington, D.C. (Hagerstown, Md.)	225,870	1.5
7	San Francisco-Oakland-San Jose, Calif.	441,590	3.0	20	Tampa-St. Petersburg, Fla. (Sarasota)	219,500	1.5
8	San Antonio	437,740	3.0	21	Atlanta	181,420	1.2
9	Phoenix (Prescott, Ariz.)	379,850	2.6	22	Austin, Texas	178,100	1.2
10	Harlingen, Texas ¹	315,690	2.2	23	Boston (Manchester, N.H.)	171,170	1.2
11	Sacramento-Stockton-Modesto, Calif.	286,690	2.0	24	Las Vegas	161,980	1.1
12	San Diego	267,430	1.8	25	Tucson, Ariz. (Sierra Vista)	128,640	0.9
13	Albuquerque-Santa Fe, N.M.	263,530	1.8	Total U.S.		14,686,110	12.7%

Source: Nielsen (nielsen.com). Estimates as of Jan. 1, 2014, effective Sept. 28, 2013. 1. Includes Harlingen, Weslaco, Brownsville and McAllen, Texas.

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Spanish-language broadcast network TV prime-time program leaders

Ranked by Hispanic persons ages 2+¹

RANK	PROGRAM, DAY	ORIGINATOR	NUMBER OF TELECASTS	TOTAL DURATION	RATING: PERCENT OF HISPANIC HOUSEHOLDS LIVE +7	HISPANIC HOUSEHOLDS LIVE +7 (000)	RATING: PERCENT OF HISPANIC PERSONS LIVE +7	HISPANIC PERSONS LIVE +7 (000)
1	Lo Que La Vida Me Robó Wed	Univision	4	237	16.5%	2,424	8.0%	3,967
2	Lo Que La Vida Me Robó Thu	Univision	4	239	16.6	2,435	8.0	3,966
3	Lo Que La Vida Me Robó Tue	Univision	4	237	16.7	2,454	8.0	3,959
4	Lo Que La Vida Me Robó Mon	Univision	4	240	16.6	2,433	7.8	3,888
5	Lo Que La Vida Me Robó Fri	Univision	4	235	15.4	2,258	7.3	3,630
6	Por Siempre Mi Amor Thu	Univision	2	120	13.3	1,957	6.2	3,098
7	Por Siempre Mi Amor Fri	Univision	2	124	12.5	1,839	6.2	3,063
8	Por Siempre Mi Amor Wed	Univision	2	120	13.0	1,903	6.0	2,992
9	Qué Pobres Tan Ricos Tue	Univision	4	240	12.7	1,873	6.0	2,962
10	Por Siempre Mi Amor Mon	Univision	2	120	12.5	1,831	5.9	2,953

Source: Nielsen (nielsen.com). Rating is the % of Hispanic TV households tuned to the program. Households and viewers are in thousands. May 2014 (4/28/14 - 5/25/14), Hispanic Prime (Mon-Sun 7p-11p). Viewing estimates include Live viewing plus 7 days of timeshifted viewing. Excludes breakouts, specials and programs less than five minutes in duration. 1. Spanish-language broadcast networks.

English-language broadcast network TV prime-time program leaders

Ranked by Hispanic persons ages 2+¹

RANK	PROGRAM, DAY	ORIGINATOR	NUMBER OF TELECASTS	TOTAL DURATION	RATING: PERCENT OF HISPANIC HOUSEHOLDS LIVE +7	HISPANIC HOUSEHOLDS LIVE +7 (000)	RATING: PERCENT OF HISPANIC PERSONS LIVE +7	HISPANIC PERSONS LIVE +7 (000)
1	Modern Family	ABC	4	124	5.6%	820	2.3%	1,135
2	Dancing with the Stars	ABC	4	453	5.1	747	2.2	1,074
3	The Big Bang Theory	CBS	4	124	4.8	709	2.0	1,000
4	Blacklist	NBC	3	177	4.5	662	2.0	978
5	The Voice	NBC	4	484	4.6	674	1.9	966
6	The Voice Tue	NBC	4	303	4.3	627	1.9	962
7	Resurrection	ABC	1	61	4.0	589	1.7	854
8	Castle	ABC	3	177	3.9	573	1.6	778
9	24: Live Another Day	Fox	3	240	3.4	492	1.5	757
10	NCIS	CBS	3	180	3.6	531	1.5	752

Source: Nielsen (nielsen.com). Rating is the % of Hispanic TV households tuned to the program. Households and viewers are in thousands. May 2014 (4/28/14 - 5/25/14), Hispanic Prime (Mon-Sun 7p-11p). Viewing estimates include Live viewing plus 7 days of timeshifted viewing. Excludes breakouts, specials and programs less than five minutes in duration. 1. English-language broadcast networks.



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Spanish-language cable TV prime-time program leaders

Ranked by Hispanic persons ages 2+¹

RANK	PROGRAM, DAY	ORIGINATOR	NUMBER OF TELECASTS	TOTAL DURATION	RATING: PERCENT OF HISPANIC HOUSEHOLDS LIVE +7	HISPANIC HOUSEHOLDS LIVE +7 (000)	RATING: PERCENT OF HISPANIC PERSONS LIVE +7	HISPANIC PERSONS LIVE +7 (000)
1	Liga MX Sun 05/18/14	Univision Deportes	1	171	3.4%	500	1.6%	807
2	Fútbol Estelar León	Mun2 Cable	1	126	3.0	445	1.6	776
3	Liga MX L	Univision Deportes	5	634	2.7	397	1.3	656
4	Liga MX (Pt) Sat	Univision Deportes	2	255	2.0	289	0.9	438
5	Fútbol Central 05/18/14	Univision Deportes	1	22	1.2	183	0.5	268
6	La Rosa De Guadalupe II P	Galavisión	4	240	0.9	132	0.5	235
7	Mexican First Division L	ESPN Deportes	1	125	1.0	147	0.4	207
8	Fútbol Estelar León Final	Mun2 Cable	1	125	0.9	128	0.4	192
9	Vecinos I	Galavisión	20	600	0.9	129	0.4	189
10	Vecinos II	Galavisión	23	690	0.9	127	0.4	184

Source: Nielsen (nielsen.com). Rating is the % of Hispanic TV households tuned to the program. Households and viewers are in thousands. May 2014 (4/28/14 - 5/25/14), Hispanic Prime (Mon-Sun 7p-11p). Viewing estimates include Live viewing plus 7 days of timeshifted viewing. Excludes breakouts, specials and programs less than five minutes in duration. 1. Spanish-language cable networks.

English-language cable TV prime-time program leaders

Ranked by Hispanic persons ages 2+¹

RANK	PROGRAM	ORIGINATOR	NUMBER OF TELECASTS	TOTAL DURATION	RATING: PERCENT OF HISPANIC HOUSEHOLDS LIVE +7	HISPANIC HOUSEHOLDS LIVE +7 (000)	RATING: PERCENT OF HISPANIC PERSONS LIVE +7	HISPANIC PERSONS LIVE +7 (000)
1	Princess and the Frog	Disney Channel	1	105	4.4%	651	2.3%	1,161
2	Tarzan	Disney Channel	1	95	3.3	484	2.0	991
3	NBA Playoffs - Conference Finals L	TNT	3	468	4.4	647	1.9	962
4	NBA Playoffs - Conference Finals L	ESPN	2	325	4.2	619	1.8	919
5	Despicable Me	Disney Channel	1	105	2.9	422	1.7	838
6	Tangled	Disney Channel	1	105	3.3	484	1.6	773
7	Dr. Seuss Cat in the Hat	Cartoon Network	1	109	3.2	463	1.5	724
8	NBA Playoffs - Round 2 L	TNT	13	2,116	3.2	473	1.3	653
9	Meet the Robinsons	Disney Channel	1	100	2.4	357	1.2	600
10	Geek Charming	Disney Channel	1	110	2.3	342	1.2	588

Source: Nielsen (nielsen.com). Rating is the % of Hispanic TV households tuned to the program. Households and viewers are in thousands. May 2014 (4/28/14 - 5/25/14), Hispanic Prime (Mon-Sun 7p-11p). Viewing estimates include Live viewing plus 7 days of timeshifted viewing. Excludes breakouts, specials and programs less than five minutes in duration. 1. English-language cable networks.

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A TREND

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Hispanic TV network viewership

Broadcast TV networks ranked by Hispanic persons ages 2+¹

RANK	ORINATOR, PARENT	NUMBER OF TELECASTS	TOTAL DURATION (MINUTES)	PERCENT OF HISPANIC HOUSEHOLDS LIVE +7	HISPANIC HH SHARE LIVE +7	HISPANIC HOUSEHOLDS LIVE +7 (000)	PERCENT OF HISPANIC VIEWERS LIVE +7	HISPANIC P2 + SHARE LIVE +7	HISPANIC PERSONS LIVE +7 (000)
1	Univision Broadcasting Media Partners	100	6,480	10.8%	15.3%	1,589	5.0%	13.4%	2,490
2	Telemundo Comcast Corp's NBC Universal	100	6,720	5.5	8.7	806	2.5	7.6	1,243
3	UniMás Broadcasting Media Partners (Univision)	86	6,720	3.1	4.7	454	1.5	4.3	741
4	ABC Walt Disney Co.	84	5,280	2.9	4.2	422	1.2	3.4	601
5	NBC Comcast Corp.	73	5,289	2.3	3.5	340	1.0	2.7	480
6	CBS CBS Corp.	105	5,280	2.1	3.0	303	0.9	2.3	430
7	Fox 21st Century Fox	66	3,859	1.8	2.5	265	0.8	2.0	385
8	CW CBS Corp./Time Warner	40	2,400	1.0	1.3	148	0.4	1.0	203
9	Estrella Liberman Broadcasting	114	6,720	0.9	1.2	136	0.4	1.0	200
10	MundoFox 21st Century Fox	124	6,720	0.6	0.9	86	0.2	0.7	116
11	Ion Television Ion Media Networks	111	6,720	0.5	0.7	72	0.2	0.5	94
12	Azteca Grupo Salinas' Azteca	112	6,720	0.2	0.3	33	0.1	0.3	45
13	MeTV Weigel Broadcasting Co.	184	6,720	0.1	0.1	16	0.1	0.1	29
14	Bounce TV Bounce Media	148	6,720	0.1	0.1	9	0.0	0.1	12

Source: Nielsen (nielsen.com) based on Hispanic prime-time viewership from 7 p.m. to 11 p.m., Monday through Sunday (4/28/2014-5/25/2014). Strict daypart. Rating is % of Hispanic TV households; share is % of those households with TV sets in use and watching the network. P 2+ counts total Hispanic viewing persons in thousands tuned in to the network. Viewing estimates include 7 days of timeshifted viewing. Percent of households is the rating. Share is percent of TV sets in use.

Spanish-language cable networks

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

RANK	NETWORK, PARENT	CABLE COVERAGE AS % OF ALL HISPANIC TV HH	SHARE AS % OF HISPANIC CABLE HH
1	Galavisión Broadcasting Media Partners (Univision)	73.4	88.1
2	Mun2 Comcast Corp. (NBC Universal's Telemundo)	53.3	64.1
3	Tr3s Viacom's MTV	47.5	57.1
4	Fox Deportes 21st Century Fox	44.2	53.2
5	Univision Deportes Broadcasting Media Partners (Univision)	43.2	51.9
6	ESPN Deportes Walt Disney Co.	40.8	49.2
7	NuvoTV	33.7	40.5
8	Discovery en Español Discovery Communications	29.4	35.7
9	Fox Life 21st Century Fox	28.4	34.4
10	Discovery Familia Discovery Communications	28.1	34.2

Source: Nielsen May 2014 (nielsen.com). This table ranks the networks by penetration. There are 12.25 million Hispanic cable households out of 14.69 million Hispanic TV households (versus 11.19 million Hispanic cable households out of 14.10 Hispanic TV households in 2013). Networks are those with coverage of 20% or more. These are monthly averages of homes able to receive cable.

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ANA MARÍA CANSECO - UN NUEVO DÍA



ANDRES CANTOR - DEPORTES TELEMUNDO

Top radio stations among Hispanics

Among all formats by fall 2013 weekly cume persons

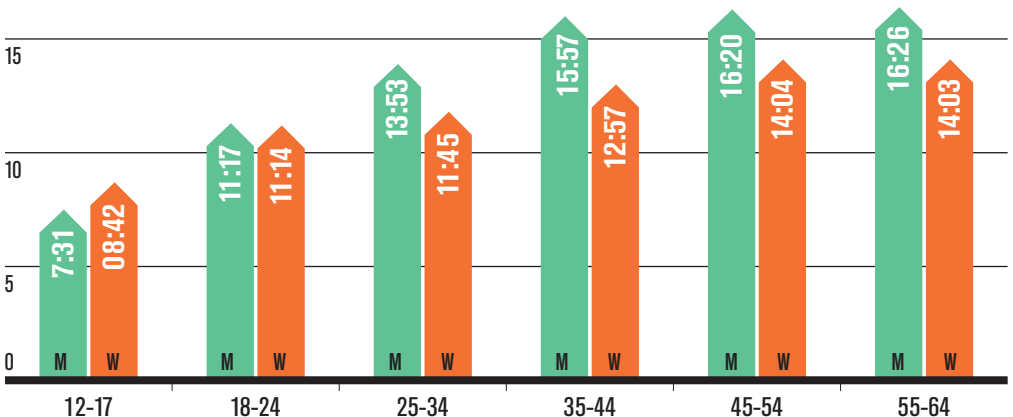
RANK	STATION, MARKET	FORMAT	OWNER ¹	WEEKLY CUME PERSONS ²	AVERAGE LISTENERS ³	TIME SPENT LISTENING ⁴
1	KIIS-FM Los Angeles	Pop contemporary hit radio	CCC	2,060,600	28,800	1:45
2	KAMP-FM Los Angeles	Pop contemporary hit radio	CBS	1,786,900	22,500	1:30
3	KLVE-FM Los Angeles	Spanish contemporary	Uni	1,784,900	38,800	2:45
4	WSKQ-FM New York	Spanish tropical	SBS	1,720,600	53,300	3:45
5	KPWR-FM Los Angeles	Rhythmic contemporary hit radio	Emmis	1,691,500	24,300	1:45
6	KBIG-FM Los Angeles	Hot adult contemporary	CCC	1,648,200	22,900	1:45
7	KSCA-FM Los Angeles	Mexican regional	Uni	1,525,600	30,000	2:30
8	KLAX-FM Los Angeles	Mexican regional	SBS	1,476,400	33,300	2:45
9	WXNY-FM New York	Spanish contemporary	Uni	1,409,000	40,600	3:30
10	KOST-FM Los Angeles	Adult contemporary	CCC	1,401,800	17,500	1:30

Source: Nielsen Audio Fall 2013 (nielsen.com/audio), persons 12+, Monday through Sunday, 6 a.m. to midnight. 1. CCC = Clear Channel Communications; SBS = Spanish Broadcasting System; Uni = Univision Communications; CBS = CBS Radio; Emmis = Emmis Communications. 2. Stations ranked by weekly cume persons, or the number of unique consumers per week. 3. Average number of listeners per quarter-hour. 4. Weekly time spent listening in hours and minutes.

Time spent listening to radio

Average weekly time spent listening (hh:mm) for all radio listening-Hispanics across the different age groups. Hispanic listeners age 12+ averaged 12 hours, 54 minutes per week.

20 hours:min



Source: Nielsen RADAR 121 (nielsen.com/audio), June 2014. Average weekly time spent listening (hh:mm) for all radio listening-Hispanics across the different age groups. Monday through Sunday, 6 a.m. to midnight.

Key Hispanic newspapers

In the 10 largest U.S. Hispanic markets

RANK	DESIGNATED MARKET AREA	KEY NEWSPAPERS, PARENT CO. (FREQUENCY)
1	Los Angeles	El Aviso Magazine ¹ El Aviso de Ocasión (weekly); El Clasificado ¹ EC Hispanic Media (weekly); Hoy Tribune Co. (twice a week); La Opinión ImpreMedia (daily); Unidos en el Sur de California Freedom Communications (weekly)
2	New York	El Diario La Prensa ImpreMedia (daily); El Especialito Ibarria Media Group (weekly); Impacto Latin News Impacto Latin News (weekly); La Tribuna Hispana USA La Tribuna Hispana (weekly)
3	Miami/Fort Lauderdale, Fla.	Diario Las Américas Diario Las Américas (daily); El Nuevo Herald McClatchy Co. (daily); El Sentinel Tribune Co. (weekly)
4	Houston	La Subasta La Subasta (weekly); La Voz de Houston Hearst Corp. (weekly); Semana News Semana News (weekly)
5	Chicago	Extra Bilingual Newspaper Tell-Cliff Corp. (weekly); Hoy Tribune Co. (daily); La Raza ImpreMedia (weekly); Reflejos Paddock Publications (weekly)
6	Dallas/Fort Worth, Texas	Al Día A.H. Belo Corp. (twice a week); El Hispano News El Hispano News (weekly); La Estrella En Casa McClatchy Co. (weekly); La Subasta La Subasta (weekly)
7	San Francisco/Oakland/ San Jose, Calif.	Alianza Metropolitana News Alianza Media Group (twice a month); El Mensajero ImpreMedia (weekly); El Observador [San Jose] El Observador Publications (weekly);
8	San Antonio	Conexión Hearst Corp. (weekly); La Prensa La Prensa (twice a week)
9	Phoenix/Prescott, Ariz.	La Voz Gannett Co. (weekly); Prensa Hispana Prensa Hispana (weekly); TV y Más ¹ Gannett Co. (weekly)
10	Harlingen/Weslaco/McAllen/ Brownsville, Texas	El Norte Editorial El Sol S.A. de C.V. (daily); El Nuevo Herald AIM Media Texas (daily); El Periódico USA Spanish Print Media (weekly)

Source: Guidance on key publications from Latino Print Network. Largest Hispanic markets from Experian Marketing Services (experian.com/marketing-services). Two of the nation's largest Hispanic newspapers serve the El Paso, Texas; Juarez, Mexico market. They are El Diario and El Norte. 1. These publications are newsprint magazines.

Largest Hispanic magazines

By gross advertising revenue

RANK	MAGAZINE, PARENT	AD REVENUE (IN MILLIONS)			AD PAGES		
		2013	2012	% CHG	2013	2012	% CHG
1	People en Español Time Inc.	\$84.7	\$83.4	1.5	1,051.61	1,098.58	-4.3
2	Vanidades Grupo Televisa	40.6	23.0	76.8	662.53	562.17	17.9
3	Latina Latina Media Ventures	35.5	32.6	9.0	715.26	669.61	6.8
4	Ser Padres Meredith Corp.	25.3	22.4	12.9	233.91	214.26	9.2
5	TV y Novelas Grupo Televisa	23.4	19.0	22.8	536.12	509.18	5.3
6	Siempre Mujer Meredith Corp.	18.3	19.2	-4.7	261.10	285.10	-8.4
7	Cosmopolitan for Latinas Hearst Corp.	14.5	7.4	94.6	224.63	119.32	88.3
8	Cosmopolitan en Español Grupo Televisa	10.3	6.3	63.1	414.71	334.52	24.0
9	Ser Padres Espera (formerly <i>Espera</i>) Meredith Corp.	6.0	4.8	25.3	139.81	115.81	20.7
10	TV Notas Maya Publishing Group	4.3	6.0	-27.5	488.95	676.22	-27.7
Total all magazines		\$283.9	\$247.8	14.6	5,935.70	5,990.51	-0.9

Source: Measured magazine ad spending from HispanicMagazineMonitor, a service of Media Economics Group. Figures exclude internet advertising and circulation revenue.

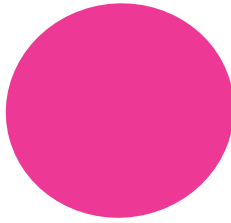
Largest U.S. multiplatform web properties

Among Hispanics by unique visitors

RANK	PROPERTY	UNIQUE VISITORS IN THOUSANDS	PERCENT REACH ¹	HISPANIC COMPOSITION PERCENT	INDEX
1	Google sites	36,512	95.3%	15.6%	102
2	Yahoo sites	33,204	86.6	14.9	97
3	Facebook	31,897	83.2	15.9	104
4	Microsoft sites	31,077	81.1	15.2	99
5	AOL	23,550	61.4	13.7	89
6	Amazon sites	22,578	58.9	14.2	93
7	Apple	21,548	56.2	15.8	103
8	Glam Media	19,862	51.8	16.0	104
9	Turner Digital (part of Time Warner)	19,006	49.6	15.0	98
10	Twitter.com	18,892	49.3	16.3	106
11	Pandora.com	17,707	46.2	20.8	136
12	eBay	15,790	41.2	15.8	103
13	Wikimedia Foundation sites	15,178	39.6	15.2	99
14	Comcast NBC Universal	14,895	38.9	16.3	106
15	CBS Interactive (part of CBS Corp.)	14,395	37.6	14.0	91
16	Ask Network (part of IAC/InterActiveCorp)	13,900	36.3	17.1	112
17	Weather Co.	11,824	30.8	11.7	76
18	Answers.com sites	11,268	29.4	16.7	109
19	Yelp	11,194	29.2	16.2	106
20	About (part of IAC/InterActiveCorp)	10,912	28.5	13.5	88
21	ESPN (part of Walt Disney Co.)	10,327	26.9	15.2	99
22	Hearst Corp.	10,265	26.8	13.9	91
23	Gannett sites	9,872	25.8	10.7	70
24	BuzzFeed.com	9,652	25.2	16.0	104
25	Disney Online (part of Walt Disney Co.)	9,487	24.7	16.7	109
Total internet		38,332	100.0	15.3	100

Source: ComScore (comscore.com), May 2014. To be included in Hispanic Ad Focus, entities must have at least 20% of their page views consumed by Hispanic audiences. Multiplatform data include both desktop and mobile platforms, and are inclusive of website, video and app content.
 1. Percent reach here is the percent of all Hispanic internet users.

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Largest U.S. Hispanic multiplatform web properties

From ComScore's Hispanic Ad Focus¹ category

MAY 2014 UNIQUE VISITORS IN THOUSANDS

RANK	PROPERTY	TOTAL DIGITAL POPULATION	DESKTOP	MOBILE	DESKTOP ONLY	MOBILE ONLY	DESKTOP/MOBILE OVERLAP
1	Univision Digital	6,566	1,893	4,897	1,669	4,673	225
2	Terra - Telefónica	2,383	1,231	1,171	1,212	1,152	19
3	Grupo Televisa	1,488	808	699	789	680	19
4	Telemundo Digital Network	1,321	1,022	330	991	299	31
5	Yahoo en Español	1,291	1,064	264	1,027	227	36
6	Musica.com	736	338	403	333	397	6
7	EHowEspañol.com	673	673	0	673	0	0
8	Prisa	649	631	22	627	18	4
9	Batanga sites	632	474	170	462	157	12
10	MSN Latino	544	535	12	533	9	3
Total internet: Hispanics		38,332	30,821	30,180	8,151	7,510	22,670

Source: ComScore (comscore.com), May 2014. Multiplatform data include both desktop and mobile platforms, and are inclusive of website, video and app content. 1. Hispanic Ad Focus category measures the entire U.S. audience at sites and other ad-supporting entities oriented toward the U.S. Hispanic audience.

Largest Hispanic websites

From ComScore's Hispanic Ad Focus¹ category

AMONG ALL HISPANICS

RANK	PROPERTY	UNIQUE VISITORS (000)	HISPANIC COMPOSITION ² PERCENT	INDEX
1	Univision Digital	1,535	78.1	578
2	Terra - Telefónica	1,144	62.8	464
3	Yahoo en Español	1,015	91.7	678
4	Telemundo Digital Network	766	79.9	591
5	EHowEspañol.com	673	88.2	652
6	Prisa	619	79.4	587
7	MSN Latino	535	91.4	676
8	Batanga sites	474	66.7	493
9	Grupo Televisa	447	88.2	652
10	Orange sites	379	47.0	348
Total		30,821	13.5	100

AMONG USERS WHO SPEAK PRIMARILY SPANISH

RANK	PROPERTY	UNIQUE VISITORS (000)	SPANISH-PRIMARY HISPANIC COMPOSITION ³ PERCENT	INDEX
1	Univision Digital	819	41.7	1,264
2	Terra - Telefónica	714	39.2	1,188
3	Yahoo en Español	713	64.5	1,955
4	EHowEspañol.com	472	62.0	1,879
5	Telemundo Digital Network	457	47.7	1,446
6	Prisa	415	53.2	1,614
7	MSN Latino	374	63.9	1,939
8	Batanga sites	300	42.3	1,282
9	Grupo Televisa	272	53.6	1,626
10	MamasLatinas.com	217	26.0	789
Total		7,514	3.3	100

Source: ComScore (comscore.com), May 2014. Data are for desktop only. 1. Hispanic Ad Focus category measures the entire U.S. audience at sites and other ad-supporting entities oriented toward the U.S. Hispanic audience. 2. Read Hispanic Composition as 91.7% of Yahoo en Español's audience is Hispanic. 3. Read Spanish-Primary Hispanic Composition as 64.5% of Yahoo en Español's audience is Hispanic and speaks primarily Spanish.

radio tv digital events

[MULTI-PLATFORM RESULTS]

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NEW YORK



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Social networking

Largest multiplatform web properties among U.S. Hispanics by unique visitors

RANK	PROPERTIES	UNIQUE VISITORS IN THOUSANDS	PERCENT REACH	HISPANIC COMPOSITION PERCENT	INDEX
1	Facebook	31,463	82.1%	15.9%	104
2	Twitter	18,892	49.3	16.3	106
3	LinkedIn	8,577	22.4	12.5	81
4	Pinterest	7,384	19.3	12.6	82
5	Tumblr	6,480	16.9	16.5	108
6	AddThis	3,476	9.1	14.4	94
7	Yahoo Profile	2,475	6.5	14.7	96
8	Goodreads	2,149	5.6	13.7	89
9	Quizlet	1,813	4.7	17.6	115
10	Ask.fm	1,504	3.9	27.9	182
Total internet: Hispanic all		38,332	100.0	15.3	100
Social Media - Social Networking		34,429	89.8	15.5	101

Source: ComScore (comscore.com), May 2014. Percent reach here is the percent of all Hispanic internet users (38.3 million). Multiplatform data include both desktop and mobile platforms, and are inclusive of website, video and app content. See notes on Page 28 for more about Hispanic Composition.

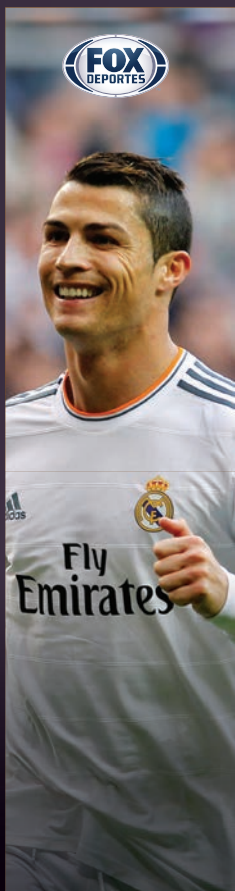
Attitudes toward social media

Site users who agree with the following statements

PEOPLE WHO AGREE	PERCENT HISPANIC	PERCENT NON-HISPANIC	PERCENT OF ALL
I am more likely to purchase products I see advertised on a social sharing/networking website.	10.9%	8.3%	8.6%
I am more likely to purchase products I see used or recommended by friends on social sharing/networking websites.	18.3	17.8	17.8
I like to follow my favorite brands or companies on social sharing/networking websites.	23.5	20.2	20.6
Social sharing/networking websites are a way for me to tell people about companies and products that I like.	23.9	20.2	20.8
I sometimes post ratings or reviews online for other consumers to read.	18.2	17.8	17.9
I pay attention to ratings and reviews posted online by other consumers.	27.1	29.3	28.9
I often click on links or items posted by other people on social sharing/networking websites.	29.0	33.8	33.1
I often access social sharing/networking websites from different devices.	29.8	33.1	32.6
I trust product information that I get from social sharing/networking websites more than other sources.	10.6	7.8	8.2

Source: Experian Marketing Services (experian.com/marketing-services). Data based on Experian Marketing Services' Simmons National Hispanic Consumer Study, Winter 2014, for the dates of Jan. 27, 2013, through March 11, 2014. Base: social-media users.

The fastest growing Spanish language portfolio in the U.S.



 MUNDOFOX







FOX Hispanic Media

CONEXIONES

AT THE INTERSECTION OF BRAND AND AUDIENCE



foxhispanicmedia.com

Nielsen, NTL, NHM, Live+SD data. Based on 2013-14 broadcast season to date versus 2012-13, 9/30/13-3/30/14 vs. 10/1/12-3/31/13. Primetime M-Sun 7-11P, Total Day Mon-Sun 6A-6A. Based on Adult 18-49 impressions. Subject to qualifications upon request.

Media usage: Average time in an average day spent on media-related activities

How online Hispanics consume media

ACTIVITY	HOURS SPENT PER ACTIVITY		
	HISPANIC	NON-HISPANIC	ALL CONSUMERS
Watching TV	3.3	3.5	3.5
Using internet on home computer	3.3	3.4	3.4
Play video games on tablet	2.2	1.3	1.5
Play video games on gaming console	2.1	1.5	1.5
Watching videos online	2.0	1.9	1.9
Using internet on a tablet	2.0	1.6	1.7
Listen to internet radio	1.9	1.9	1.9
Play video games on computer	1.9	1.9	1.9
Listen to MP3 player	1.9	1.5	1.6
Read e-books	1.8	2.0	1.9
Listen to radio	1.7	1.6	1.6
Using internet on phone	1.7	1.1	1.2
Play video games on portable console	1.6	1.5	1.5
Read books in print	1.6	1.5	1.5
Talking on cellphone	1.4	0.8	0.9
Play video games on cellphone	1.4	1.1	1.2
Instant messaging	1.4	1.6	1.5
Text/MMS on cellphone	1.3	1.1	1.1
Emailing	1.3	1.2	1.2
Read newspapers	1.2	0.9	0.9
Talking on a landline	1.2	0.7	0.7
Read magazines	0.7	0.8	0.7

Source: Experian Marketing Services (experian.com/marketing-services). Data based on Experian Marketing Services' Simmons New Media Study, Fall 2013, for the dates of Jan. 28, 2014 through Feb. 2, 2014. Each activity is the average among those who engage in that activity during a typical day.

Leading Hispanic Ad Focus Ad Networks

By unique visitors

RANK	AD NETWORK	UNIQUE VISITORS IN THOUSANDS	PERCENT REACH ¹	HISPANIC COMPOSITION PERCENT	INDEX
1	Batanga Network	25,384	11.1%	21.5%	159
2	Orange AdNetwork Americas	1,888	0.8	60.1	444
3	Hola Networks	1,430	0.6	21.4	158
4	Exponential - Tribal Fusion Hispanic	1,211	0.5	35.6	263

Source: ComScore (comscore.com), May 2014. To be included in Hispanic Ad Focus, entities must have at least 20% of their page views consumed by Hispanic audiences. 1. Percent reach here is the percent of all desktop internet users (227.9 million).

Leading Hispanic custom web entities

By unique visitors

RANK	CUSTOM ENTITY ²	UNIQUE VISITORS IN THOUSANDS	PERCENT REACH ¹	HISPANIC COMPOSITION PERCENT	INDEX
1	Pulpo Media	70,106	30.8%	16.1%	119
2	Batanga Media	37,588	16.5	21.5	159
3	Orange Advertising Americas	23,563	10.3	15.6	116
4	ADamigo	7,386	3.2	24.7	183

Source: ComScore (comscore.com), May 2014. 1. Percent reach here is the percent of all desktop internet users (227.9 million). 2. Some ComScore clients may want to make available additional combinations of URLs, called custom entities. These are used to demonstrate "true" reach of syndicated content, among other things.



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Mobile platform share among Hispanics

Smartphone and tablet ownership

SMARTPHONES

RANK	PLATFORM	SHARE	AUDIENCE
1	Google (Android)	55.9%	16,995
2	Apple (iOS)	38.1	11,592
3	Microsoft (Windows)	3.2	986
4	BlackBerry	2.5	773
5	Symbian	0.1	38
6	Other	0.1	20
Total		100.0	30,405

TABLETS

RANK	PLATFORM	SHARE	AUDIENCE
1	Google (Android)	56.4%	8,414
2	Apple (iOS)	47.0	7,011
3	Microsoft (Windows)	2.8	423
4	BlackBerry	0.7	101
5	HP	0.6	87
Total		100.0	14,925

Source: ComScore (comscore.com). Share based on three-month averages ended May 2014. Audience is in thousands.

Smartphone user activities

In the last seven days

CATEGORY	PERCENT WHO USED THIS FUNCTION IN THE LAST WEEK						ALL USERS
	HISPANIC	NON-HISPANIC	HISPANIC MILLENNIALS	NON-HISPANIC MILLENNIALS	HISPANIC 35+	NON-HISPANIC 35+	
Camera	51.5	51.6	54.2	53.4	48.4	50.5	51.5
Download app	66.4	61.3	66.8	62.1	65.9	60.8	62.1
Email	79.4	82.2	78.7	83.3	80.1	81.6	81.8
GPS	41.3	38.8	42.5	43.2	40.0	36.2	39.2
IM/chat	38.1	23.1	39.4	24.3	36.6	22.4	25.4
Listen to music	37.9	30.2	41.4	33.9	34.0	28.0	31.4
Play games	52.0	50.1	54.5	50.8	49.1	49.8	50.4
Read newspapers/periodicals	17.3	16.6	19.0	17.5	15.3	16.0	16.7
Social network/blog	74.1	69.3	77.1	73.2	70.8	67.0	70.0
Talk	91.6	92.0	91.4	92.0	91.8	92.0	91.9
Messaging	93.4	91.5	93.8	90.6	93.0	92.1	91.8
Visit websites	91.6	88.0	91.0	89.0	92.2	87.5	88.6
Watch/download/stream video	52.2	37.2	58.0	42.6	45.7	34.1	39.5

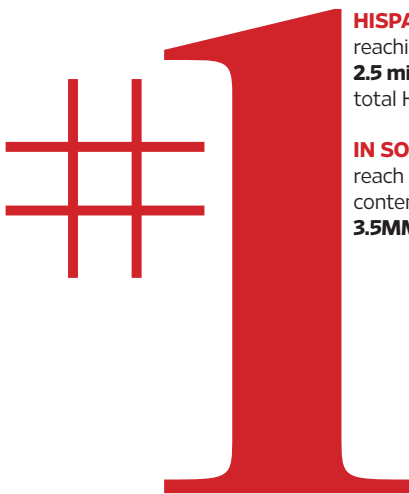
Source: Experian Marketing Services (experian.com/marketing-services). Data based on Experian Marketing Services' Simmons Connect Study, Fall 2013, for the dates of October 2013 through January 2014.

Purchases via device by category

Items purchased on PC, tablet or cellphone

CATEGORY	PERCENT WHO HAVE PURCHASED USING A . . .					
	PERSONAL COMPUTER		TABLET		CELLPHONE	
	HISPANIC	ALL ADULTS	HISPANIC	ALL ADULTS	HISPANIC	ALL ADULTS
Apparel/accessories	54.0%	59.4%	52.3%	47.4%	36.8%	29.4%
Electronics	50.9	51.6	51.8	41.5	31.5	20.8
Food	22.3	22.7	32.7	23.1	15.1	11.8
Stocks/bonds/mutual funds	12.9	14.0	19.7	15.1	6.5	6.2
Tickets to movies/events	45.5	45.1	40.8	34.1	19.4	15.4
Toys/games	38.1	33.4	43.7	34.9	17.6	11.7
Travel services/reservations	52.4	58.5	40.2	32.6	17.2	10.7
Auction items	24.0	24.5	26.9	25.6	21.2	13.9
Charitable donations	17.4	16.7	18.5	16.3	16.8	11.0
Books	41.9	43.0	43.7	45.8	14.6	13.9
Music	36.3	37.5	48.0	41.6	23.8	17.0

Source: Experian Marketing Services (experian.com/marketing-services). Data based on Experian Marketing Services' Simmons New Media Study, for the dates of January 26, 2014 through February 2, 2014. Base of device owners for each device (e.g.: 54% of Hispanics who own a computer have purchased apparel/accessories using their computer vs. 59% of all computer owners).



HISPANIC MAGAZINE reaching Hispanic millennials; **2.5 million out of 6.9 million** total Hispanic consumers

IN SOCIAL MEDIA reach among celebrity content sites; **3.5MM+** engaged fans

1-in-2
HISPANIC MILLENNIALS SEEK CELEB-INSPIRED BEAUTY LOOKS VS. 1-IN-4 OF GENERAL MARKET



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DEMOGRAPHICS

Population

U.S. Hispanic population: 54,071,370 on July 1, 2013

	U.S. POPULATION ESTIMATES (IN MILLIONS)				PERCENT OF TOTAL	
	2013	2010	CHANGE	% CHG	2013	2010
Hispanic or Latino	54.1	50.5	3.6	7.1	17.1%	16.3%
Not Hispanic	262.1	258.3	3.8	1.5	82.9	83.7
Total U.S. population	316.1	308.7	7.4	2.4	100.0	100.0

Source: Census Bureau. 2013 = estimate for July 1, 2013. 2010 = 2010 Census (April 1, 2010). Numbers rounded. More info: census.gov.

Hispanic share of 2013 U.S. population by age

More than half (53%) of the Hispanic population is below age 30

AGE	U.S. HISPANIC POPULATION (IN MILLIONS)	HISPANICS AS PERCENT OF U.S. POPULATION	AGE GROUP AS PERCENT OF HISPANIC POPULATION
Under 5	5.1	25.8%	9.5%
5-9	5.1	24.9	9.5
10-14	4.8	23.1	8.8
15-19	4.6	21.7	8.5
20-24	4.7	20.5	8.6
25-29	4.4	20.4	8.1
30-34	4.4	20.5	8.1
35-39	4.0	20.6	7.5
40-44	3.7	18.0	6.9
45-49	3.3	15.5	6.1
50-54	2.8	12.4	5.2
55-59	2.2	10.4	4.1
60-64	1.6	9.0	3.0
65-69	1.2	8.1	2.2
70-74	0.8	7.6	1.5
75-79	0.6	7.6	1.1
80-84	0.4	7.0	0.7
85+	0.4	5.9	0.7
Total	54.1	17.1	100.0

Median age for Hispanic population: 28.1

Median age for total U.S. population: 37.6

Source: Ad Age DataCenter analysis of data from Census Bureau. 2013 = estimate for July 1, 2013. Numbers rounded. More info: census.gov.

Discretionary spending in 2014

Dollars in billions by region and Designated Market Area

REGION/DESIGNATED MARKET AREA	HISPANIC MEAN DISCRETIONARY SPENDING	HISPANIC PERCENT OF TOTAL	TOTAL U.S. SPENDING	NON-HISPANIC SPENDING
South	\$70	10.8%	\$654	\$583
West	60	14.4	414	354
Northeast	22	6.7	334	311
Midwest	16	4.4	356	341
Los Angeles	\$26	26.2%	\$100	\$74
New York	15	11.6	132	116
Miami	12	44.0	27	15
San Antonio	9	38.2	25	15
Houston	8	28.2	29	21
Total	\$168	9.6%	\$1,758	\$1,589

Source: Experian Marketing Services (experian.com/marketing-services). Data based on Experian Marketing Services' Simmons National Hispanic Consumer Study, Winter 2014, for the dates of Jan. 27, 2013, through March 11, 2014. Dollars in billions. Table shows amount and proportion of nation's total discretionary spending contributed by Hispanics and their households by region and market, 2014. Discretionary purchases include household spending on items such as tobacco, alcohol, education, reading, personal care, apparel, dining out, donations, household furniture and numerous forms of entertainment.

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Do you?



AGENCIES

Creative awards: Hispanic agency winners

How they did at Cannes, U.S.H. Idea Awards and Wave Festival



LAPIZ WON AT WAVE FOR “STAINS HAPPEN”

CIRCULO CREATIVO'S U.S.H. Idea Awards pick the five best ideas in the Hispanic market. The 2014 winners: 1) Dieste's "Mutt Bombing" for Dallas Pets Alive photoshopped an adoptable dog into selfies on Instagram; 2) Conill's "Headlines From the Sky" for Toyota put messages on rooftop billboards to reap coverage from TV news helicopters covering the towing of the Endeavour space shuttle by a Toyota Tundra truck; 3) Alma's "First Customer" follows a teen's first day at his first-ever job, at McDonald's; 4) Conill's "Robocop" for an Argentine film festival plays on a Latin tendency to give kids absurd names; and 5) LatinWorks' latest Cine Las Americas work playing on absurd things said by real Latin America leaders.

Lapiz was the big winner at the Wave

Festival for Latin America with multiple print and outdoor awards for its dramatic "Stains Happen" campaign for Procter & Gamble's Gain with Oxi detergent and radio prizes for other P&G work. Dieste's "Mutt Bombing" won here, too, and Conill, La Comunidad, Alma, Y&R Bravo and LatinWorks were also winners at the Wave, organized by Meio & Mensagem, an Ad Age partner in Latin America.

At the Cannes Lions festival, Lions went to Conill's "Robocop," Grupo Gallegos for Alzheimer's Association work and LatinWorks for Cine Las Americas.

In Ad Age honors, Alma was named Multicultural Agency of the Year; Lopez Negrete Communications and Conill were runnersup. LatinWorks was in Ad Age's A-List of the 10 best U.S. agencies. — LAUREL WENTZ

50 largest U.S. Hispanic agencies

By U.S. revenue in 2013. Dollars in thousands

RANK	AGENCY, PARENT OR AFFILIATION (NETWORK)	HEADQUARTERS	KEY EXECUTIVES, TITLE	2013 REVENUE ¹	% CHG
1	LatinWorks* Omnicom ✓	Austin, Texas	Manny Flores, CEO & mg ptrn Alejandro Ruelas, CMO & mg ptrn Sergio Alcocer, pres & chief creative officer	\$36,332	22.5
2	Lopez Negrete Communications ✓	Houston	Alex López Negrete, pres & CEO	33,500	15.4
3	Bravo Group* WPP (Y&R)	Miami	Eddie Gonzalez, CEO Eric Hoyt, pres & COO	32,000	0.0
4	Conill* Publicis (Saatchi)	El Segundo, Calif.	Cynthia McFarlane, CEO & chairperson Carlos Martinez, pres	29,996	12.5
5	Dieste* Omnicom	Dallas	Tony Dieste, chmn & co-founder Greg Knipp, CEO	29,700	26.4
6	GlobalHue* ✓	Southfield, Mich.	Donald A. Coleman, chmn & CEO	28,219	-14.3
7	Alma* Omnicom (DDB)	Miami	Luis Miguel Messianu, pres & chief creative officer	25,000	25.4
8	Zubi Advertising Services ✓	Coral Gables, Fla.	Joe Zubizarreta, COO	19,000	0.0
9	Grupo Gallegos ✓	Huntington Beach, Calif.	John Gallegos, CEO	18,500	12.1
10	Wing* WPP (Grey)	New York	Michael Houston, CEO-Grey, N. Amer Sandra Alfaro, mg dir	14,649	-2.0
11	Casanova Pendrill* Interpublic (McCann)	Costa Mesa, Calif.	Ingrid Otero-Smart, pres & CEO	13,910	7.0
12	MGSCOMM ✓	Miami	Al García-Serra, chmn Manuel E. Machado, CEO	13,772	9.7
13	Vidal Partnership* ✓	New York	Manny Vidal, pres & CEO	13,140	0.0
14	La Comunidad* ✓ Sapient Corp.	Miami	José Mollá, co-founder & co-chief creative officer Joaquin Mollá, co-founder & co-chief creative officer	12,663	29.9
15	República ✓	Miami	Jorge A. Plasencia, chmn & CEO	11,900	11.2
16	Lapiz USA* Publicis (Leo Burnett)	Chicago	Gustavo Razzetti, exec VP & mg dir Laurence Klinger, exec VP & chief creative officer	11,505	4.6
17	De la Cruz Group ✓	Guaynabo, P.R.	René de la Cruz, chmn & CEO	10,828	-41.5
18	Marca Miami ✓ Marc USA	Coconut Grove, Fla.	Tony Nieves, pres	10,653	87.8
19	Moxie* Publicis (ZenithOptimedia)	Atlanta	Suzy Deering, CEO	10,522	6.0
20	Bromley Communications* Publicis	San Antonio	Ernest Bromley, chmn & CEO	9,872	-6.1

Dollars are in thousands. *Figures are Ad Age estimates. A check mark denotes agency reported minority-ownership certification by city, state or organization. Data are from Ad Age's 70th annual Agency Report (April 28, 2014). 1. Agencies are ranked by 100% of U.S. revenue unless Hispanic activities are less than 75% of revenue, in which case they are ranked at that percent of revenue. See additional notes on Page 41.

HISPANIC FACT PACK 2014

RANK	AGENCY, PARENT OR AFFILIATION (NETWORK)	HEADQUARTERS	KEY EXECUTIVES, TITLE	2013 REVENUE ¹	% CHG
21	Images USA ✓	Atlanta	Bob McNeil, pres & CEO	9,450	5.0
22	Richards/Lerma Richards Group	Dallas	Stan Richards, principal & creative dir Pete Lerma, principal	8,846	45.0
23	Cárdenas Marketing Network ✓	Chicago	Henry Cárdenas, CEO	8,698	-9.0
24	Moroch Partners ✓	Dallas	Tom Moroch, co-founder & chmn Pat Kempf, co-founder & vice chmn Rob Boswell, CEO	8,668	49.2
25	PM Publicidad ✓	Atlanta	Eduardo Perez, pres	8,500	21.4
26	D Expósito & Partners ✓	New York	Daisy Expósito-Ulla, chmn & CEO	8,227	10.4
27	Acento Advertising	Santa Monica, Calif.	Roberto Orci, pres & CEO	8,071	-20.4
28	FCB* Interpublic	New York	Howard Draft, exec chmn Carter Murray, ww CEO	7,800	-12.0
29	Axis Agency* Interpublic	West Hollywood, Calif.	Armando Azaragoza, pres	7,740	19.4
30	Walton Isaacson ✓	Culver City, Calif./Chicago	Cory Isaacson/Aaron Walton, ptrns	7,350	92.4
31	Prime Access	New York	Steven Millerman, CEO	7,050	NA
32	Lopito Ileana & Howie	Guaynabo, P.R.	Carlos J. Rodriguez, pres & chmn	6,610	1.4
33	Orci	Santa Monica, Calif.	Andrew Orci, CEO	6,609	-1.4
34	Castells & Asociados	Los Angeles	Liz Castells-Heard, pres & CEO	6,119	-24.5
35	LatinSphere Advertising	Long Beach, Calif.	Karla Lucia, mg ptrnr Cristina Quesada-Costa, mg ptrnr	5,924	20.8
36	Octagon* Interpublic	Norwalk, Conn.	Rick Dudley, CEO & pres	5,162	10.5
37	Latin3 ✓	Hollywood, Fla.	Matias Perel, founder & CEO	5,000	0.0
38	Hispanic Group	Miami	Jose Luis Valderrama, pres	4,318	-14.2
39	CreativeOnDemand*	Coconut Grove, Fla.	Daniel Marrero, ptrnr	4,271	0.0
40	AlPunto Advertising ✓	Tustin, Calif.	Eduardo Bottger, pres & exec creative dir Enrique Turégano, VP & bus strategist	4,200	0.0
41	Lowe Profero* Interpublic	New York	Wayne Arnold, global CEO Aaron Reitkopf, CEO, Americas Roberto Ramos, mg dir	4,000	0.0
42	GlobalWorks Group	New York	Yuri Radziewsky, chmn & CEO	3,800	NA

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HISPANIC FACT PACK 2014

RANK	AGENCY, PARENT OR AFFILIATION (NETWORK)	HEADQUARTERS	KEY EXECUTIVES, TITLE	2013 REVENUE ¹	% CHG
43	Riester	Phoenix	Tim Riester, CEO & pres Tom Ortega, chief creative officer	3,696	6.3
44	Velocidad* Omnicom (TBWA [Integer Group])	Lakewood, Colo.	Mike Sweeney, CEO-Integer Group	3,632	-65.3
45	VRTC	Houston	Eduardo Torres, U.S. exec pres Octavio Orozco, VP & genl mgr	3,485	-41.1
46	LatinMedios.com	Aventura, Fla.	Joel Bary, CEO	3,319	-10.9
47	Olson	Minneapolis	John Partilla, CEO	3,000	0.0
48	Sensis ✓	Los Angeles	Jose Villa, pres	2,889	80.6
49	Gravity Media	New York	Yuriy Boykiv, CEO	2,534	NA
50	Interlex Communications	San Antonio	Rudy Ruiz, pres & CEO	2,506	-65.9
Total and percent change for report's 101 units with Hispanic-American revenue				\$597 M	5.7

Dollars are in thousands. *Figures are Ad Age estimates. A check mark denotes agency reported minority-ownership certification by city, state or organization. Data are from Ad Age's 70th annual Agency Report (April 28, 2014). To appear in Ad Age's Agency Report 2015, fill out the questionnaire that can be found at AdAge.com/arq.

1. Agencies are ranked by 100% of U.S. revenue unless Hispanic activities are less than 75% of revenue, in which case they are ranked at that percent of revenue.

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UFC



CENTRAL FOX



GOLDEN BOY



VASCARI

Largest U.S. Hispanic media agencies

Agencies with more than \$3 million in estimated 2013 U.S. revenue from Hispanic media activities. Dollars in thousands

RANK	AGENCY, PARENT	HEADQUARTERS	KEY EXECUTIVES, TITLE	2013 REVENUE
1	Tapestry Publicis (SMG Multicultural) tapestrypartners.com	Chicago/Miami	Lia Silkworth, exec VP & mg dir	\$24,190
2	MV42 Publicis (SMG Multicultural) mediavestww.com	New York	Caleb Windover, sr VP & mg dir	19,349
3	ZO Multicultural Publicis (ZenithOptimedia) zenithoptimedia.com	New York	Lisa Torres, pres	15,109
4	MEC Bravo WPP (MEC) mecglobal.com	New York	Wilma Vale-Brennan, mg dir	13,670
5	Mindshare Multicultural WPP (Mindshare) mindshareworld.com	New York	Gonzalo Del Fa, pres-GroupM Multicultural	10,073
6	OMD Multicultural Omnicom (OMD) omd.com	Chicago	Trish Chuipek, pres-OMD Multicultural	9,405
7	Conill Publicis (Saatchi) conill.com	El Segundo, Calif./Miami	Brett Dennis, chief media comms officer	8,750
8	LatinWorks Omnicom (49%) latinworks.com	Austin, Texas	Keisha Andrews-Rangel, VP-media strategy Chloe King, grp media buying dir	5,650
9	GlobalHue Independent globalhue.com	Southfield, Mich.	Meg Bernot-Rodriguez, dir-media opers	5,480
10	Lopez Negrete Communications Independent lopeznegrete.com	Houston	Jim Irvine, sr dir-media strategies & channel integration	4,930
11	MediaCom Multicultural WPP (MediaCom) mediacom.com	New York	Jose Bello, mg dir	4,200
12	Casanova Pendrill Interpublic (McCann) casanova.com	Costa Mesa, Calif.	Roxane Garzon, media dir Diana Sheehan, media dir	4,100
13	Zubi Advertising Services Independent zubiad.com	Coral Gables, Fla.	Isabella Sanchez, VP-media integration	3,850
14	Bromley Communications Publicis bromley.biz	San Antonio	Kim Chance, media plng dir Anel Hooper, media buying dir	3,800
15	Carat Multicultural Dentsu (Dentsu Aegis Network) carat.com	New York	Malena Bustelo, sr VP & group media dir, multicultural	3,486
16	Acento Advertising Independent acento.com	Santa Monica, Calif.	Tony Aguilar-Arellano, ptnr & chief integration officer	3,113

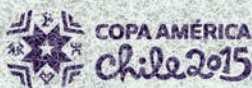
Source: Ad Age DataCenter. Revenue figures are Ad Age DataCenter estimates based on data collected for Agency Report 2014 (April 28, 2014) and additional data collected in June and July 2014.



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