

2013 POST

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THE QUEST TO CLOSE THE AD GAP

UNIVISION'S CESAR CONDE BELIEVES HISPANIC TELEVISION WILL CONTINUE TO GROW. CONVINCING CLIENTS TO PARTICIPATE REMAINS AN INDUSTRY FRUSTRATION.

Univision Networks president Cesar Conde is excited about the attention Spanish-language television—and forthcoming English-language offerings targeting Latinos—is getting from the mainstream media. In this Q&A with Adam R Jacobson, Conde discusses his network's plans for 2013, including its digital initiatives and the vital importance of research in making the proper programming decisions across all screens.

Adam R Jacobson: Spanish-language television continues to attract the lion's share of Hispanic advertising dollars, and new networks have emerged in the last year—namely MundoFox, Univision Deportes, TLNovelas, and the revamped NuvoTV. It's clear that the thirst for Spanish-language television hasn't slowed. Yet NuvoTV and Univision's forthcoming English-language network Fusion, the joint venture with ABC News, may reinforce the idea that younger Hispanics are consuming less Spanish-language television and that the primary audience for Spanish-language TV is now 35+. Do advertisers understand the continued need and importance of Spanish-language television, despite the surge in English-preferred Hispanics?

Cesar Conde: As evidenced by the number of new Hispanic offerings cropping up across the media industry these days, the size, importance and influence of the U.S. Hispanic community is finally receiving the widespread acknowledgement it deserves. These new offerings validate that Spanish-language media is driving this growth. There are still some advertisers who have yet to fully embrace the economic opportunity they have when targeting the Hispanic viewer as their consumer. The math shows that the number of active brands in Spanish-language advertising is still lagging behind our English-language peers. Univision's advertising partners do understand that in order to effectively connect with Hispanic consumers, content and messaging needs to be in-culture and in-language. These partners

have witnessed first-hand the power of Spanish-language media. The challenge for us all is to close the ad gap.

ARJ: Univision seems to be a communications company in transformation, with TeleFutura becoming UniMás and Fusion's launch set for Q3. Can you summarize the key drivers, in terms of programming and content, for these networks?

CC: UniMás provides an alternative to the Univision Network by delivering content from some of the most highly acclaimed Spanish-language producers in the world: Televisa, Caracol Television and RTI Colombia. UniMás delivers more action, more drama and more sports than [predecessor network TeleFutura]. Fusion will provide English-language

news, information, lifestyle and entertainment content, but through a Hispanic lens.

ARJ: What sets the Univision Network apart from its competitors has much to do with its access to Televisa programming—namely telenovelas. What is some of the key programming and content of interest to advertisers?

CC: Univision Network's relationship with Televisa gives us an enormous competitive advantage. We recently reached a milestone by beating NBC for the first time in an in-season sweep. This proves that we provide content that is appealing to Hispanics throughout the country. We also provide U.S.- produced

social media consumption. Research will always be important, and as audiences add more platforms and devices to their viewing habits, everyone in the industry will be playing catch-up. Like everyone else, we are exploring ways to help our partners measure their campaigns across multiple platforms. In fact, Univision, along with several other media companies, recently partnered with Nielsen for a pilot program that measures online TV.

ARJ: Television networks, in many ways, are no longer “television networks” but multiplatform media sources that now incorporate digital and social platforms. How is Univision managing the content development

Hispanics that today is available in more than 240 million devices—including Xbox, Samsung, and Kindle. At our recent NewFront event, we unveiled Flama, our new digital destination that will house original made-for-web content including recurrent series across a variety of genres, from comedy to documentary, in addition to ancillary editorial and the best in social features.

ARJ: Where do you see Hispanic television networks, from a programming and content perspective, in 2023? Will younger Hispanics include Spanish-language media television in their weekly viewing habits?

CC: Spanish-language media is alive

“The size, importance and influence of the U.S. Hispanic community is finally receiving the widespread acknowledgement it deserves.”

productions and co- productions from Univision Studios. These shows include the highly popular *Nuestra Belleza Latina* and *Mira Quien Baila* franchises, which continue to deliver audiences. The same can be said for our “tentpole” event telecasts, including *Premio Lo Nuestro*, *Premios Juventud*, and the Latin GRAMMY Awards.

ARJ: Research is vital for continued growth of the U.S. Hispanic market, both from a programming and marketing perspective. How important is quality research in determining the best programming for all of Univision's networks? Is there enough quality research in the Hispanic market today?

CC: The growth of digital and mobile platforms has increased the need for a single metric—or a combined metric that properly takes into account digital and

and rollout of programming for these new content-delivery vehicles?

CC: There is a huge demand for premium content on interactive platforms. We know consumer consumption patterns continue to change, and as an industry we are evolving to meet the needs of our audiences. In particular, Hispanics use digital devices in big numbers and are early technology adopters. We recognize these trends and own the intersection of the two growth opportunities in media: Hispanic and digital. Therefore, we are focused on delivering a Univision-branded experience everywhere our audience is.

Our digital strategy is centered on bringing content from our platforms to life through technology. That is why in 2012 we introduced UVideos, the only bilingual digital video network for

and thriving. While most of the English-language broadcast networks struggle to find growth, Univision has delivered gains and continues to attract young audiences. In fact, our strongest demographic performance is among Adults 18-34. Certainly, a growing number of this segment is bilingual. Yet, Nielsen ratings show they are seeking out and choosing the Univision Network. Out of the 25 most-watched shows during the 2012-13 season for bilingual Hispanics aged 18-34, 18 of these shows were on Univision. We also continue to deliver younger viewers during prime-time than our English-language broadcast peers—viewers with a median age that is at least 10 years younger. Univision continues to change and expand from what was once a niche broadcast network into a multiplatform media powerhouse that reflects the young, dynamic audience we serve. ■

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POPULATION GROWTH FORECAST

In 2000 Latinos surpassed Blacks as the largest multicultural group. In 2011 Hispanics comprised 16.4% of the total U.S. population. By 2016, nearly 18% of the population will be Hispanic – accounting for 58.4 million. According to Census Bureau estimates, nearly 34% of Hispanics will be younger than the age of 18 by 2017. This compares to 24% of the total population. Additionally, more than half of Hispanic women are between 18 and 54 years of age. This compares to 47% of Hispanic men.

Pew Hispanic Center tabulations of 2000 Census and 2011 American Community Survey data show that North Carolina's Hispanic population in 2011 is nearly 120% higher than in 2000. At the same time, Maryland's Hispanic population is 112% higher and Minnesota's Hispanic population is 120% higher. The most significant change was seen in South Carolina, where the Hispanic population is 155% larger than in 2000. Hispanic population growth from 2001 to 2011 accounted for 52% of total U.S. population growth.

According to a Geoscape analysis of Census Bureau data appearing in Hispanic Market Overview 2012, Charlotte is the leading DMA in percentage gain for Hispanic population growth between 1990 and 2016. Atlanta and Raleigh are second and third, respectively, followed by the Orlando-Daytona Beach-Melbourne and Minneapolis-St. Paul DMAs. Central Florida has seen rapid growth from Puerto Ricans and Mexicans, while the Twin Cities has seen the arrival of Mexicans and Central Americans.

While much attention is given to the top 10 Hispanic DMAs, it is important to note that the number of Hispanics who reside outside of the Census Bureau's Metropolitan Statistical Areas (MSAs) increased by 7.7% from 2006 to 2011. The population of Hispanics outside principal cities grew by 8.5% during the same period.

The West and South are the areas with the largest concentration of Hispanics. The percentage of Hispanics in the West has grown by 34.3% from 2000-2010, to 40.8% of the nation's Hispanic population. At the same time, the percentage of Hispanics in the Midwest increased by nearly 50% from 2000-2010, to 9.2% of the nation's Hispanic population.

HISPANICS BY NATIONAL HERITAGE

According to 2010 American Community Survey data examined by Pew Hispanic Center, there are 50.7 million documented Latinos in the U.S. Of this population, roughly 32.9 million are Mexican, 4.7 million are Puerto Rican, and 1.9 million are Cuban. Salvadorans comprise 1.8 million of the total Hispanic population, while Dominicans number 1.5 million, Guatemalans are 1.1 million in number, Colombians represent 972,000 Hispanics, and Hondurans account for 731,000 Hispanics nationwide.

HISPANIC HOUSEHOLD INCOME AND HOUSEHOLD EXPENDITURES

According to the U.S. Census Bureau's report Income, Poverty, and Health Insurance Coverage in the United States: 2011, the median household income of all U.S. Hispanics was statistically flat in 2011, compared to 2010, at \$38,624. Hispanic household income is greater than that of Blacks but less than Whites and Asians. However, median household incomes for all non-Hispanics declined from 2010 to 2011.

Hispanics consume more than the average American household in many categories. According to data from the Bureau of Labor Statistics, Hispanics' average spending on food, beverages, housing, apparel and clothing, transportation, health care, entertainment, and personal insurance and pensions is \$41,981. This compares to \$35,311 for Blacks, \$56,308 for Asians, and \$50,723 for White non-Hispanics.

AVERAGE ANNUAL EXPENDITURES OF ALL CONSUMER UNITS BY RACE/HISPANIC ORIGIN (In Dollars)

Type	All CUs	White	Asian	Black	Hispanic
Food	6372	6585	7565	4524	6094
Food at home	3753	3870	3905	2880	3784
Food away from home	2619	2715	3660	1645	2310
Housing	16895	17224	20395	13503	15983
Apparel	1725	1704	2150	1755	2002
Transportation	7658	7950	8784	5302	7156
Health care	3126	3351	2498	1763	1568
Entertainment	2693	2894	2270	1404	1664
Personal Insurance and pensions	5471	5674	7117	3550	4230

Source: U.S. Bureau of Labor Statistics, Consumer Expenditures in 2009

HISPANIC TELEVISION AD SPENDING

According to Kantar Media, Spanish-language television enjoyed a 15% jump in measured ad spending between 2011 and 2012. This reflects ad spending at Univision, Telemundo, TeleFutura and Azteca América in addition to four undisclosed Spanish-language cable television networks and 73 local Spanish-language television stations. By comparison, Spanish-language television enjoyed an 8.3% jump in measured ad spending between 2010 and 2011. For the second straight year, Kantar Media notes that higher sell-out levels at over-the-air networks served as the chief catalyst for the growth. This was particularly apparent in Q4 2012, when Spanish-language television ad spending surged 20% from the same period a year earlier.

These growth percentages do not include MundoFox, which launched in Q3. Also absent from these percentages are two new Univision cable networks—Univision TLN Novelas and Univision Deportes.

TOP 10 METROPOLITAN AREAS BY TOTAL POPULATION

A September 2012 analysis of 2010 American Community Survey data by the Pew Research Center finds that 45% of the nation's Hispanic population lives in 10 metropolitan areas.

METRO AREA	HISPANIC POPULATION	TOTAL POPULATION
LOS ANGELES-LONG BEACH	5.7	12.8
NEW YORK-NE NEW JERSEY	4.2	17.8
HOUSTON-BRAZORIA, TX	2.0	5.6
RIVERSIDE-SAN BERNARDINO	2.0	4.2
CHICAGO	1.9	9.2
DALLAS-FORT WORTH	1.7	6.3
MIAMI-HIALEAH	1.6	2.4
PHOENIX	1.1	3.8
SAN ANTONIO	1.1	2.0
SAN FRANCISCO-OAKLAND-VALLEJO, CA	1.1	4.9

Source: Pew Hispanic Center tabulations of the 2010 American Community Survey (1% IPUMS)

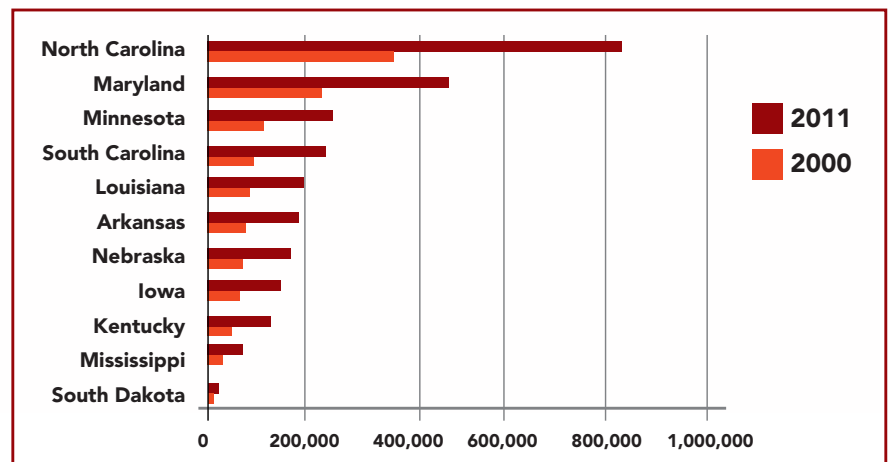
DMA Rank by Hispanic TV HHs	DMA Name	Hispanic TV HHs	Cable and/or ADS	
			HHs	%
1	Los Angeles	1,868,200	1,443,480	77.3
2	New York	1,251,460	1,179,950	94.3
3	Miami-Ft. Lauderdale	666,230	623,140	93.5
4	Houston	561,390	358,500	63.9
5	Dallas-Ft. Worth	506,020	346,730	68.5
6	Chicago	492,170	400,740	81.4
7	Phoenix (Prescott)	391,770	269,570	68.8
8	San Antonio	388,800	329,550	84.8
9	San Francisco-Oakland-San Jose	382,460	350,170	91.6
10	Harlingen (Rio Grande Valley)	294,640	192,670	65.4

TOP 10 HISPANIC DMAs

In terms of Hispanic share of the total population, Miami is the top market. New York ranks No. 8, while Chicago ranks tenth.

Source: Nielsen TV UEs/Cabletelevision Advertising Bureau.

HISPANIC POPULATION BY STATE – 2000-2011



DIGITAL AD SPENDING

According to the 2012 IAB Internet Advertising Revenue Report, digital advertising revenue reached a new high during 2012—\$36.6 billion. This marks a 15% rise over 2011, based on PwC U.S./IAB data tabulations. In particular, mobile dollars

surged by 111% from 2011, to \$3.4 billion in 2012. Mobile accounts for 9% of total internet ad revenue in 2012. Dollars devoted to digital video climbed by 29% from 2011 to 2012, accounting for \$2.3 billion. Search revenue in 2012 totaled \$16.9 billion, accounting for 46% of

all 2012 digital revenue.

Retail advertisers continue to outpace other categories in their investment in digital media, accounting for 20% of all ad spending. The financial services category is a distant second, accounting for 13% of 2012 digital revenue. ■

THE NEW FALL SEASON

BROADCAST NETWORKS

Univision/UniMás

Univision's message to advertisers attending its May 14 Upfront presentation at the New Amsterdam Theater focused not so much on the hot new shows set to air in 2013-14 on its two broadcast networks and on its **Galavisión** cable network, but on Univision's ability to reach Hispanics anytime and anywhere—thanks to its rich array of multiplatform opportunities. "We're offering advertisers two bites of the same apple," Univision EVP/Ad Sales Steve Mandala told reporters in a pre-Upfront conference call. Additionally, bilingual digital video network UVideos and Flama, a new digital platform with original video content targeting Hispanic millennials, are what Univision Networks President Cesar Conde says allows his company "to provide fans with more content than what is on TV."



Even so, Univision and UniMás aren't wavering from their ratings-winning recipe of Televisa-supplied telenovelas, Mexican League soccer coverage, and Univision-produced



competition shows, entertainment specials and award shows, and non-scripted programming. Univision is gearing up for the launch of two new highly anticipated telenovelas—*La Tempestad*, starring Latin heartthrob and *Dancing With The Stars* competitor William Levy and former Miss Universe Ximena Navarrete, and *Mentir Para Vivir*, starring David Zepeda and Mayrín Villanueva. For both soaps, digital and social media will be used extensively to further drive fan interest in story lines.

Soccer and cinema has guided UniMás through the successful Q1 transformation from Telefutura. With a focus on Hispanic men aged 18-34, UniMás is already receiving industry buzz for its telenovela *Metastasis*—a Hispanic take on AMC's *Breaking Bad* that's set in the U.S. The show bows in early 2014. Other big shows heading to UniMás include *La Viuda Negra*, a telenovela focused on a Miami druglord in the 1970s and 1980s; soccer-themed series *La Selección*; and *Gossip Girl Acapulco*, offering a peek at the scandalous lives of the beach city's elite population. Classic Mexican television programs and sports will also likely help Galavisión in maintaining its top-dog status among Spanish-language cable television networks.

What will also likely resonate with ad buyers is the surprise

announcement that acclaimed film director Robert Rodriguez fledgling English-language El Rey Network is now a part of the Univision family. The inaugural lineup is set to include scripted dramas, animated series, and comedies, in addition to a "top secret" action/adventure series from Roberto Orci set to start filming in June. Also part of El Rey is *From Dusk 'Til Dawn: The Series*, based on Rodriguez's feature film of the same title.

Telemundo

NBCUniversal's flagship Spanish-language television network on May 5 debuted *La Voz Kids*—a Hispanic take on NBC's smash hit *The Voice* that puts the focus on Latino contestants age 7 to 14. The three judges: Bachata king Prince Royce, Mexican pop queen Paulina Rubio, and top Regional Mexican star Roberto Tapia. Advertisers in the first hour of *La Voz Kids* included Skittles candies, Denny's, KFC, Target, Dr Pepper, m&M's, Kellogg's Special K, L'Oreal, and Burger King; lead sponsors are AT&T, State Farm, and Ford. With early indications pointing to continued ratings success, *La Voz Kids* has been confirmed for a second season, Telemundo executives announced at its May 14 Upfront.



Network-produced telenovelas and original programming that give advertisers the opportunity for product integration and cross-platform marketing continue to represent Telemundo's core attractions. Among the new novelas set to debut in 2013-14: *Dama y Obrero*, a tale of love and a construction worker; *La Impostora*, which blends romance and false identities; *Reina de Corazones*, featuring a newlywed, organized crime, and a case of amnesia; and *Camelia la Tejana*, with a plotline wrapped around crime and passion. Also getting early buzz is a program co-produced by Ryan Seacrest Productions that will put two well-known music icons face-to-face in a competition show with a working title of *Duelo Musical: Super Estrella*.

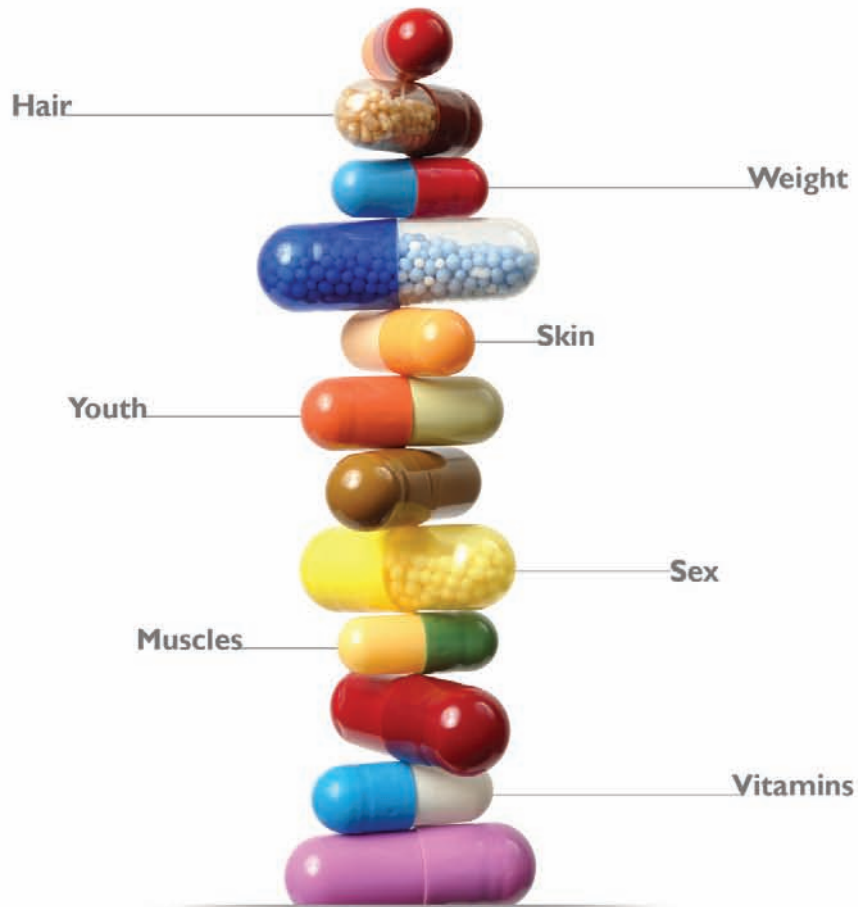
Daytime programming gets a boost with *Entre Grandes y Chicos* (working title), a game show putting adults and kids in role reversal challenges; and *Suelta la Sopa*, a daily entertainment news program.



Estrella TV

Liberman Broadcasting-owned Estrella TV, which will celebrate year No. 4 this fall, has steadily risen the ratings to solidify

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itself as the No. 4 Spanish-language network in the U.S. This has been accomplished through the production of variety series, sketch comedy programs, and competition shows that have proven popular with Spanish-dominant and bilingual audiences in Hispanic markets across the U.S.

In an interview for the *2013 Post Hispanic Upfront Television Guide*, Estrella TV EVP/Network Sales and Marketing Judy Kenny and COO Winter Horton note that two new additions to the network's lineup are front and center in Estrella TV's discussions with advertisers:

- *Noches con Platanito*—Picture Jimmy Fallon or Jimmy Kimmel, but dressed as *The Simpsons*' famed fictional character Krusty the Clown. That sums up what viewers can enjoy when they tune in to view "Platanito," a comedian who first rose to fame on Mexico's pay television TeleHit network. Thanks to fan support and the opportunity to reignite his career after exiting TeleHit in early 2012, Platanito's new show—which debuted in April—is already off and rolling with comedy routines and celebrity interviews.
- *Noticiero Estrella TV*, the network's 5:30pm national newscast, on April 25 introduced veteran journalist Myrka Dellanos as its new anchor. But that's not Dellanos' only role at Estrella TV: Later this summer she'll helm an hour-long interview show, *En Exclusiva con Myrka Dellanos*. The program will take on an entertainment focus, focusing on celebrities and newsmakers, in a style similar to Barbara Walters.

Other shows of note at Estrella TV include a Saturday night variety program hosted by "La Chupitos," a female comedian who also serves as one of the hosts of the network's music-focused competition show *Tengo Talento, Mucho Talento*.

The variety show takes its cues from NBC's long-running *Saturday Night Live*.

Lastly, Estrella TV in late summer will unveil *Estrellas en Guerra*, a celebrity competition show defined by physical endurance challenges playing for the benefit of charities. The network created a customized set featuring swimming pools and lots of padding, with ABC's *Wipeout* as its inspiration.



Azteca América

The Azteca brand is ubiquitous in Mexico, with

its Canal 7 and Canal 13 major national draws among television viewers. In the U.S., the Azteca América network taps into its strong name value among first-generation Mexican immigrants by offering a variety of telenovelas, scripted programs, entertainment-focused talk shows, and sports centered on Mexican first-division soccer.

Among the top shows shared with advertisers at a May 13 event in New York are *El Coffee Break*, an hour-long news and entertainment program helmed by Carlos Magaña, Carolina Mateu, Adriana Yañez and Naibe Reynoso airing live from Los Angeles in the 9am slot. An hour later in the 10am slot is *Entre Nos*, featuring Patricia Arbulu in a Barbara Walters-styled interview program featuring guests from the world of entertainment, sports and politics. In prime-time in a timeslot that was unconfirmed at press time is *La Isla*, a reality show set on a beach featuring everyday men and women pitted against celebrities in various "survival of the fittest" tasks.

MundoFox

One year ago, MundoFox existed only as an idea. Today, the Spanish-language television network boasts 63 affiliates and a full day of programming that network executives boast is uniquely

produced for the U.S. Hispanic market.

Among the programs MundoFox EVP/chief marketing officer Oswald Mendez is particularly pleased with less than a year into the network's existence is *Minuto para Ganar*—the Spanish-language version of the prime-time offering *Minute to Win It*. Also likely to grab the attention of advertisers is *El Capo*, a Colombian telenovela that follows the story of a fictional drug lord. The latter program moved from UniMás' former incarnation, TeleFutura, in 2009. Season 3 was confirmed at its Upfronts. Another big announcement is the August debut of the one hour *El Factor X*—the Spanish-language take on Fox's *X Factor*. On weekends, MundoFox will air the FX crime drama *The Bridge*, starting one week after its run on the English network. In related news, Fox cable net Utilisima is being renamed Fox Life, featuring home and lifestyle programming by day and reality shows by night.



Mega TV

At Miami-based Mega TV, Berry Jasin, VP/National Sales for parent company SBS, is particularly excited about the addition of Charytín to the network's lineup; her first show for Mega TV aired April 29. *Charytín* will feature guest interviews, sketches, songs, and interactive games that tap into the use of social media—something new for Mega TV.

Charytín takes the 9pm slot, which results in a shift to the 8pm hour for famed Cuban émigré Alexis Valdés and his variety-oriented live entertainment show *Esta Noche Tu Night*. Remaining in the 7pm slot is a variety program



helmed by Fernando Hidalgo. Meanwhile, “radio en television” simulcasts of three radio shows on SBS radio stations—*El Circo* (from *La Mega* in Puerto Rico), *El Mandril* (airing on SBS’s regional Mexican stations), and *El Jukeo* (from *Mega 97.9* in New York)—can be found on Mega TV’s national feed between 6am–2pm ET, giving advertisers a dual-medium advertising opportunity.

CNN Latino

For 16 years, the CNN brand has served Spanish-speakers in the U.S. and throughout Latin America via its CNN en Español pay television network. Now, thanks to the evolution of the U.S. Hispanic population, CNN has created a news, lifestyle, documentary and talk show block designed to air on broadcast



television stations exclusively in the U.S.

Dubbed CNN Latino, the

netlet is designed as an alternative to programming found on Telemundo and Univision and boasts a schedule that sees shows airing between 3pm and midnight. On May 2, CNN en Español SVP/GM Cynthia Hudson-Fernández led the network’s Upfront, at which CNN Latino programming was introduced. Among the highlights: The roundtable topical discussion show *Contrastes con Camila Egaña*, female-friendly lifestyle and fashion program *CNN Vida*, *Showbiz Latino*, and the Fernando del Rincon-helmed nightly newscast *Panorama USA*. Meanwhile, the flagship 24/7 CNN en Español network will be airing a golf-centered lifestyle show, *Vive el Golf with Lorena Ochoa*; and shoulder programming for the 2014 FIFA World Cup in Brazil.

Vme

The Spanish-language education

network styled after PBS was set to hold an Upfront presentation mid-afternoon May 15. Its mix of programs ranges from the long-running music interview show *Estudio Billboard* to *Los Kennedy*, a dubbed version of the controversial eight-episode mini-series starring Greg Kinnear and Katie Holmes as John F. and Jackie Kennedy. Child-friendly fare airs in the AM hours.

CABLE NETWORKS

Discovery Networks

Discovery U.S. Hispanic’s May 14 Upfront at New York’s Gotham Hall put the focus on how their viewers feel a deep emotional connection to the programs shown on both Discovery en Español and Discovery Familia, which was profiled ahead of its older sibling in a bid to get media planners to think about the network when seeking to attract Hispanic moms. The network is driven by such infant-friendly fare as *Mecanimales* (Animal Mechanicals), part of its Discovery Kids block; while new series include dubbed-into-Spanish airings of Family SOS with Jo Frost, and beauty and home shows *La bella y la bestia* and *Locos por la Casa*. At Discovery en Español, dubbed airings of *Bear Grylls: Escape from Hell* is matched with wildlife documentaries *Mundo Profundo* (Underworld) and *Africa*. However, it is the network’s focused on soccer (with *Armando el Mundial*) and the launch of a new genre—VROOM—with programs targeting car lovers that seek to reinforce the network’s male strength, compared to the female and kids focus of Discovery Familia.

ESPN Deportes

Soccer and *social* are the two big takeaways from ESPN Deportes’ 2013–14 Upfront event, held separately from

big brother ESPN on May 15 at New York’s Hearst Tower. Studio program *#Redes*, which literally takes its cues from fan-fueled Twitter feeds and Facebook updates, is set for another big year, with sports journalist Carolina Guillén continuing to drive each program’s topics for discussion.

Another returning centerpiece of ESPN Deportes’ programming is the studio analysis and highlights show *Fútbol Picante*, which continues to be a leading destination for Mexican League fans. But ESPN Deportes’ devotion to soccer doesn’t stop at live action and studio shows: the documentary-style *Capitales de Fútbol* is back with a whole new tour of soccer-crazed cities in what the network hopes will serve as welcomed pre-World Cup programming. Furthermore, *Destino Fútbol* will offer features on soccer superstars of yesterday and today, including Diego Maradona and Lionel Messi.

Gringos at the Gate explores the rivalry between Mexico and the U.S. on the soccer pitch, presented in documentary style. Additionally, *Dream Job: El Reportero* returns for its third installment later in 2013, with the search on for a social media reporter to join the team heading to the World Cup in Brazil in 2014. The soccer-focused afternoon sports talk show *Jorge Ramos y Su Banda*, airing simultaneously on ESPN Deportes Radio, also remains a fixture for the network. Meanwhile, ESPN Deportes scores a coup by landing the 2013 NBA Finals—marking the first time a Spanish-language television network will provide coverage in the U.S.

Fox Deportes

Studio shows such as *Central Fox* and *La última Palabra* have helped Fox Deportes to become the top-rated Hispanic sports

network among Hispanic viewers 2+ and adults 18-49 in both total-day and prime-time.



At the same time, UEFA soccer telecasts and the popular Copa Libertadores

and Copa Sudamericana soccer tournaments continue to serve as big draws for the network. According to Nielsen, an April 20 UEFA Champions League match between Barcelona and Bayern Munich gave the network No. 1 total-day bragging rights for the week. Fox Deportes is also the home for live coverage of Barclays Premier League teams, airing live Sunday mornings and in encore presentations for the remainder of the week.

Major League Baseball also attracts plenty of viewers, while UFC telecasts, NASCAR and NCAA College Football are areas of growth opportunity for advertisers seeking to get in on the ground floor of nascent programming choices.

mun2

The big news with NBC Universal's mun2 cable television network is



the August 2013 arrival of Barclays English Premiere League soccer coverage—a

result of NBC's acquisition of U.S. rights, previously held by Fox.

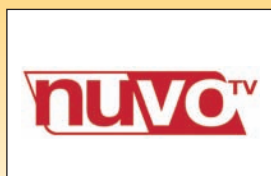
New mun2 original programming is reality-based: *Viva Los Vargas* follows the life of two-time world boxing champion Fernando Vargas; *Reinas de Reality* puts the cameras on real estate partners Jackie Mateos and Liz Perez; and *Horoscopus* features sisters Vicky and Marisol Terrazas, the lead singers

of regional Mexican act Horoscopus de Durango.

Also getting notice is *Al Tiro Con La Bronca*, a weekly program featuring the VJ and radio host and her vivid commentary on love, fashion, life and the opposite sex.

NuvoTV

The team behind NuvoTV—SVP/ Ad Sales Craig Geller and recently installed head of programming Bill



Hilary—and one Jennifer Lopez are committed to delivering viewers “modern

Latino entertainment.” What makes NuvoTV unique is that all of it is in English. NuvoTV's lineup includes a wide variety of reality programming and chat shows featuring such Latin notables as Wilmer Valderrama (*That '70s Show*) and Mario Lopez, who joined JLo at NuvoTV's May 15 Upfront presentation. NuvoTV's leading shows include *Operation Osmin*, featuring Cuban fitness trainer Osmin Hernandez; *Miami Ink*; and the *Model Latina* franchise. The network's stand-up comedy franchise *Stand Up and Deliver* is also being pitched as a prime destination for bilingual, bicultural viewers—in particular Hispanic millennials.

Ms. Lopez comes in the picture by delivering NuvoTV original content set to debut in Q2 and Q3 2013, the result of a partnership between the network and the celebrity that includes giving Lopez part-ownership in the network and shows from her Nuyorican Productions.

Tr3s

It was a circus—literally—for the Viacom-owned, Hispanic-themed

pay network targeting millennials on May 15, as Tr3s closed out the 2013 Hispanic Upfronts with an extravaganza punctuated by a performance from reggaeton pioneer Daddy Yankee, Tr3s' brand ambassador.

New shows gaining the spotlight at Tr3s include *Familia de Circo*, which takes viewers behind the scenes of a 40-year family-run circus under the antics and clashing egos of five Mexican brothers; a Miami-flavored Latin take on reality show *Cake Boss* with the working title *Divas de Azúcar*; *Niñas Mal 2*, a sequel to the successful 2010 young adult telenovela featuring “wild and charming high-society charm school girls;” and *Fortuna*, a telenovela focused on casino underworld activities. The Tr3s lineup also adds Ricardo Arjona to its signature *Unplugged* live music series and puts regional Mexican music in the spotlight with *Remexa*. Lastly, Tr3s has embraced the *Comedy Central Roast* franchise with the first-ever Latin Roastee—controversial Mexican comedian Hector Suarez. The show tapes in Mexico City.



Also of note among Hispanic pay television networks is **Go!TV**, which offers a steady diet of Bundesliga (German), AFA (Argentine), and Uruguayan first-league matches, in addition to UEFA Euro U-17 coverage and select Brazilian soccer matches. Al Jazeera Media Network's **beIN Sport en Español** has also quickly garnered attention for its coverage of Spain's La Liga and Italy's Serie A soccer leagues and as the U.S. home of *Barça TV*, featuring FC Barcelona—arguably one of the world's most popular sports teams. Cycling is also found on beIN Sport en Español, with coverage of Giro d'Italia.

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BRAND EVOLUTION, IGNITED BY TELEVISION

TECATE REVS UP SALES WITH INNOVATIVE RETHINK OF HISPANIC CREATIVE

In 2009, Heineken USA beer brand Tecate had a clear plan of action for reaching Hispanic consumers: Bring the cultural context of the brand from Mexico and show how first-generation immigrants to the U.S. were living it.

Felix Palau, VP/Marketing for both Tecate and sister *cerveza* brand Indio, is unapologetic for the brand's approach to building its stateside sales, and the resulting television campaign tied to that effort.

"It was never going to work," Palau says. The bulk of the creative that aired on Spanish-language television centered on images and themes that showed the strength and tenacity of hard-working Hispanic men and their strong "carácter." Common professions of recent immigrants, including the meat processing plant worker, were integral to Tecate's campaign, "Con Carácter." Despite the positive messages shown on screen, the efforts were perhaps too serious—and too close to home—for its target audience.

Tecate lost significant sales volume between 2009 and 2011. Brand executives huddled to determine why the campaign failed to connect with what was perceived as Tecate's core audience—Mexican men who have been in the U.S. for less than 10 years. What went wrong? "The consumer said that this communication is reflecting my day-to-day activities, and that was the least thing they wanted to see," Palau says. "It's about having fun."

Perhaps taking a cue from Bud Light's "real men of genius" campaign, Palau decided to break the mold of Mexican beers by standing out from the pack. In doing so,

Tecate's new mantra was to "bring back the *hombre*" and salute the Hispanic male for all that they do, in particular in non-work situations. At the same time, Tecate set out to create a more masculine product design for its bottles and cans, unveiled in June 2012. To further place its stamp on the *hombre*, Tecate brand messaging was placed



far away from the beer aisle and smack dab alongside male personal products—including condoms.

But it was fun, irreverent Spanish-language television advertising created by its Mexico-based agency of record, Olabuenaga Chemistri, which became the centerpiece of its re-envisioned efforts. In late April, a trio of spots debuted that Palau believes successfully tweaked the "Con Carácter" theme in Tecate's favor.

In one spot, a bride tosses her wedding bouquet behind her head at her reception, and it keeps getting thrown back to her by a "real man of character." A second commercial features a woman who arrives at home and is taken aback by a trail of rose pedals and candles that leads to the refrigerator. Once there, she opens the refrigerator door—and is immediately asked to get her *hombre* a beer since she

happens to be there. A third spot shows a man coming home late from a night out who has forgotten his keys. He phones a group of mariachis, who show up to serenade his wife. She promptly opens the door, unknowing that her *hombre* was locked out. Narration closes the spot with the tag line, *A man knows there is always another way in.*

"Are we becoming more culturally relevant to the customer? Yes," Palau declares. In the first quarter of 2013 alone, he notes, Tecate brands enjoyed 45% year-over-year growth. Tecate Light is the fastest-growing light beer in the Western Hemisphere, he adds. Handled by MediaVest MV42, the media buy for the recently launched campaign—"Es Fácil Ser Hombre"—includes Univision, Telemundo, UniMás, Galavision, Estrella TV, Fox Deportes, ESPN Deportes, Univision Deportes, Azteca América, and NuvoTV. While national in scope, Tecate will focus the campaign on key markets in California, Texas, Arizona, and New Mexico, in addition to Chicago, where English-language radio spots and OOH developed by Dallas-based shop Inspire! for Tecate Light will complement spot TV in an effort to target bilingual, bicultural *hombres*.

In addition to traditional creative, Tecate is now ubiquitous with respect to marquee boxing events, including four installments of bouts featuring Manny Pacquiao and Juan Manuel Marquez broadcast as pay-per-view events on HBO. In its fourth year, *Solo Boxeo Tecate* is now a staple of UniMás' Saturday night lineup, a holdover from the network's transformation from Telefutera.

Such efforts aren't likely to wane under Palau's watch. He concludes, "The best way to reach the whole of consumers is through Spanish-language network television." ■

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