

NOVEMBER 2005

ahaa

Association of Hispanic Advertising Agencies

Hispanic Media Share

What Top Advertisers
Are Spending...
Or Not?

haaf

Hispanic Advertising Agencies Foundation, Inc.

tns market
development

tns media intelligence





Background and Objectives

- The Hispanic Advertising Agencies Foundation, Inc. (HAAF), an affiliate of the Association of Hispanic Advertising Agencies (AHLA) commissioned TNS Media Intelligence and TNS Market Development to conduct a study that reviews media spending and allocation trends for the year 2004.
- The study reveals how individual companies and industries are allocating their advertising budgets to reach this increasingly important segment of the US population.
- The main objective for sharing these findings is to provide guidance for marketers on how to better align their media spending, more specifically, the Hispanic Media Share within the context of a dynamic and growing environment.
- With mergers and acquisitions occurring frequently in the last year, an observation of a fixed set of companies was no longer adequate and it called for a modification to consider the top 500 advertisers of every year.



Method overview

- The top 250 television & print advertisers were ranked based on general market media spending and Hispanic media spending.
- We focused on two subsets to create the key metric for this analysis, *Hispanic Media Share*:
 - Hispanic TV and Print spend, divided by
 - Total (Hispanic plus General Market) spend on TV and Print

“Print” media in this document refers to magazine and newspaper only

Method overview

HISPANIC TV

- Network – Telemundo; Univision, Telefutera
- Cable - Galavision
- Spot TV – 43 Spanish stations in 20 DMAs

GENERAL TV

- Network – ABC; CBS; Fox; NBC; Pax; UPN; WB
- Cable – 44 non-Spanish networks
- Spot TV – 136 non-Spanish stations in the same 20 DMAs

HISPANIC PRINT

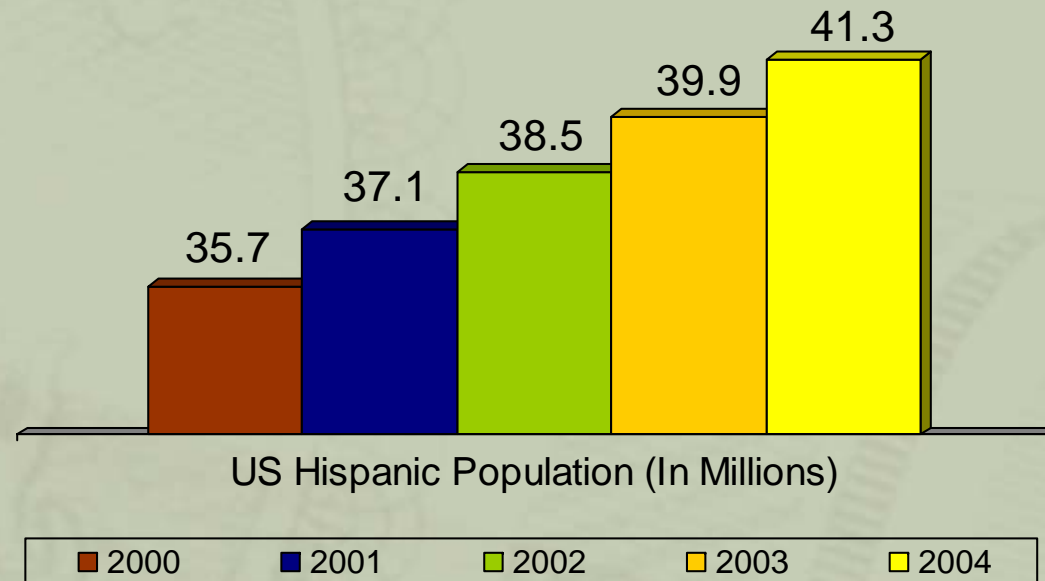
- 60 Spanish newspapers in 15 DMAs
- 47 Spanish magazines

GENERAL PRINT

- 66 non-Spanish newspapers in the same 15 DMAs
- 381 non-Spanish magazines

While Hispanic population and spending continued to rise...

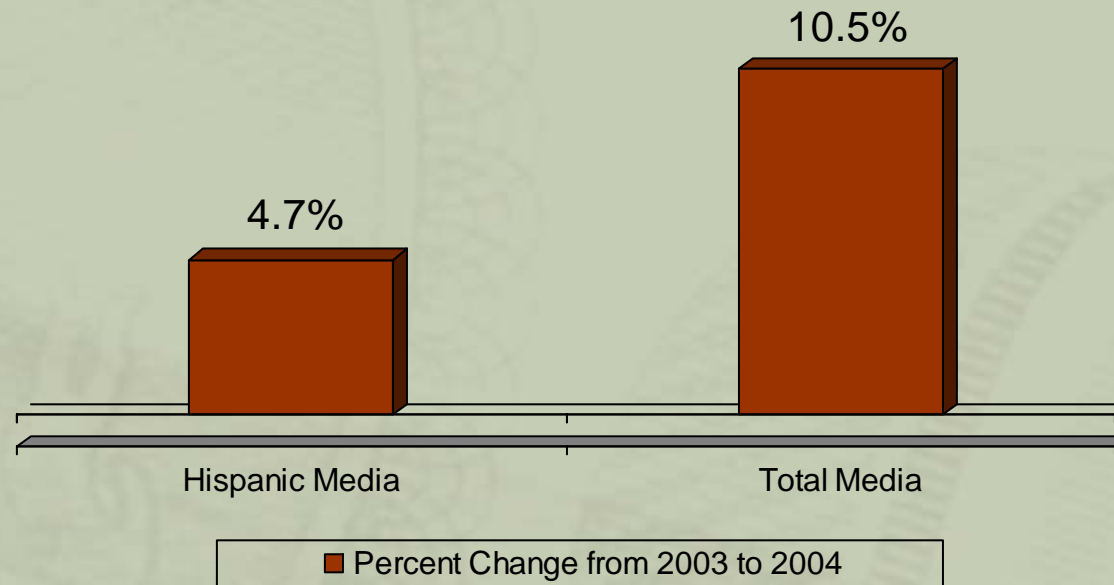
Hispanic Population



Source – Statistical Abstract of the United States for 2000-2003; Census Bureau Estimate for 2004

...and there was an overall growth in Total Hispanic Spend in 2004...

Percent Increase in TV & Print Spend from '03 to '04

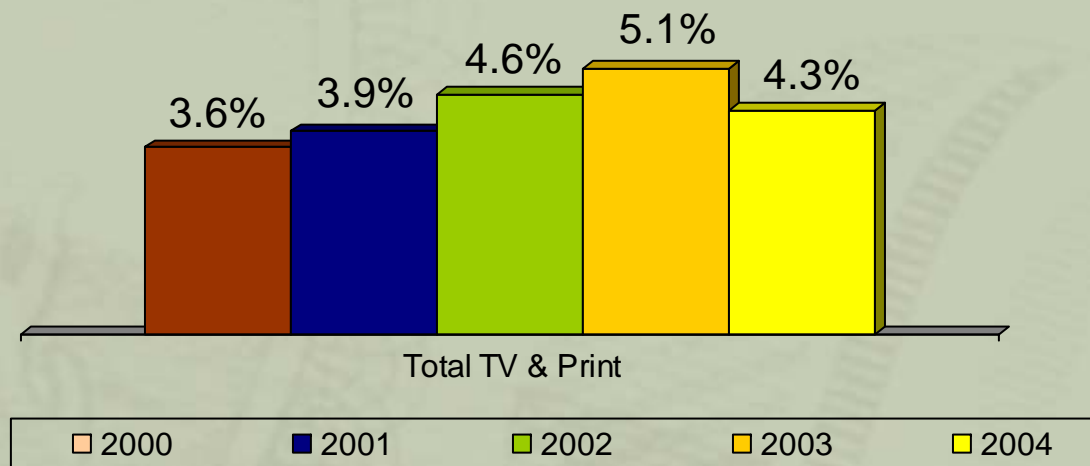


Note: Hispanic Media is based on commonly-measured properties in both years

Source: TNS Media Intelligence - Hispanic Media Share Study 2004

...the *share* of ad budget allocated to Hispanic media declined in 2004

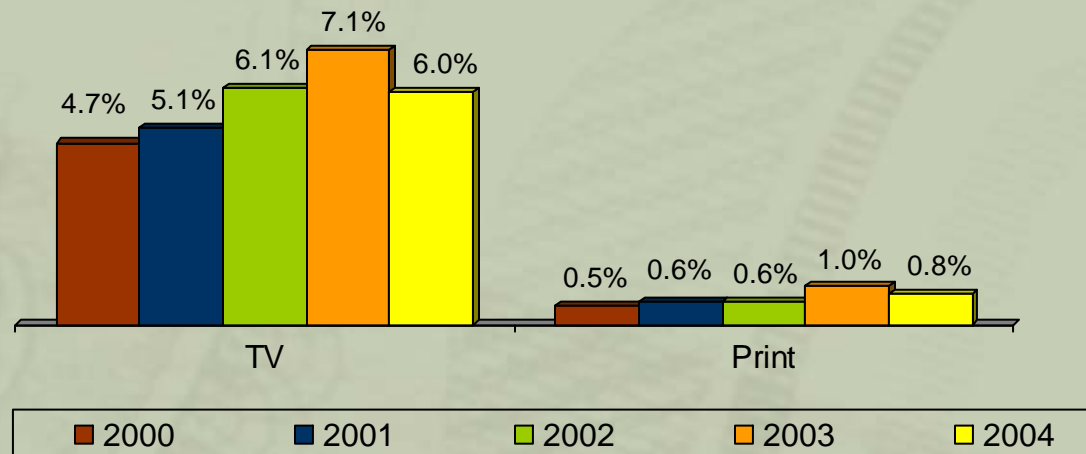
Top 500 Advertisers Hispanic Media Share



Source: TNS Media Intelligence - Hispanic Media Share Study 2004

This decline was driven largely by TV, as it comprises the larger part of the Hispanic spend

**Hispanic Media Share Trends
in TV and Print**





AHAA's Recommended Budget Allocation for National Marketers

- Based on previous spending studies, AHAA recommends a minimum spending target of 7% to 8% of national advertising budgets allocated to Spanish-language media and 6% to 7% to target Latinos in English.
 - Roughly one in ten Americans speaks Spanish (11%). Of that percentage, 65% are Spanish-dominant thus the recommended spending target is approximately 8%.
- AHAA has used allocation trends against this recommended spending level to identify developing and underdeveloped industries, as well as brands not yet delivering their full potential growth from the Hispanic segment due to underspending.

Yet even among leading advertisers like P&G and J&J Hispanic Share is below the AHAA recommended 8% Hispanic Media Share

| Hispanic Media Share Among Top 10 Advertisers 2004 | | | | | | |
|--|------------------------|---------------------------|--------------------------------------|-----------|----------------------------|-----------------------------|
| Ranked by Grand Total TV & Print Ad Spend in 2004 | | | | | | |
| Rank | | | Spend on Hispanic TV & Print (\$000) | | | |
| 2004 | Parent Company | 2004 Hispanic Media Share | 2004 | 2003 | % Change in Hispanic Spend | 2004 Grand Total TV + Print |
| 1 | PROCTER & GAMBLE CO | 6.2% | \$148,656 | \$169,809 | -12.5% | \$2,388,060 |
| 2 | GENERAL MOTORS CORP | 4.9% | 97,703 | 93,440 | 4.6% | 1,989,876 |
| 3 | TIME WARNER INC | 2.9% | 37,311 | 45,863 | -18.6% | 1,276,040 |
| 4 | DAIMLERCHRYSLER AG | 5.1% | 63,057 | 44,690 | 41.1% | 1,241,530 |
| 5 | FORD MOTOR CO | 4.4% | 52,305 | 56,807 | -7.9% | 1,201,000 |
| 6 | SBC COMMUNICATIONS INC | 5.0% | 54,987 | 26,673 | 106.2% | 1,101,213 |
| 7 | JOHNSON & JOHNSON | 5.9% | 62,965 | 49,458 | 27.3% | 1,059,598 |
| 8 | WALT DISNEY CO | 3.0% | 29,232 | 27,183 | 7.5% | 984,942 |
| 9 | ALTRIA GROUP INC | 4.1% | 36,886 | 31,904 | 15.6% | 891,503 |
| 10 | PFIZER INC | 1.8% | 14,906 | 21,012 | -29.1% | 844,469 |
| | Top 10 Totals | 4.6% | 598,008 | 566,839 | 5.5% | 12,978,229 |

Among the Top 10 Advertising *Categories*, Direct Response and Restaurants lead Hispanic Media Share

| 2004 Media Spend (\$000) by Category | | | | | |
|--------------------------------------|---|--|---|----------------|-------------|
| | | % of Spend Allocated to Hispanic | Spend on Hispanic TV & Print (\$000) Ranked by Grand Total | | |
| | | Media Spend | | | |
| Rank | Category | | General Media | Hispanic Media | Grand Total |
| 1 | NON DOMESTIC CAR TRUCK FACTORY AND DEALER | 2.9% | \$5,536,767 | \$167,906 | \$5,704,672 |
| 2 | DOMESTIC CAR TRUCK FACTORY AND DEALER | 5.1% | 5,168,711 | 277,637 | 5,446,348 |
| 3 | TELECOMMUNICATIONS SERVICES | 5.7% | 3,589,181 | 216,339 | 3,805,520 |
| 4 | PHARMACEUTICALS | 1.1% | 3,466,546 | 38,315 | 3,504,861 |
| 5 | LOCAL CLOTHING AND DEPARTMENT STORES | 5.8% | 2,849,889 | 175,574 | 3,025,463 |
| 6 | HEALTH AIDS | 4.3% | 2,720,706 | 122,603 | 2,843,308 |
| 7 | PACKAGED FOODS | 2.8% | 2,641,504 | 77,141 | 2,718,645 |
| 8 | RESTAURANTS | 6.4% | 2,448,964 | 166,705 | 2,615,669 |
| 9 | MOTION PICTURES | 2.7% | 2,540,381 | 70,241 | 2,610,622 |
| 10 | DIRECT RESPONSE | 10.1% | 1,809,588 | 203,321 | 2,012,909 |
| | Top 10 Category Total | 4.4% | 32,772,237 | 1,515,781 | 34,288,018 |

Note: Hispanic Media Share for Direct Response is driven by Lexicon, a direct marketer of various language learning products.

Among the Top 10 *Hispanic Advertisers*, Sears and McDonalds are the consumer brands leading Hispanic Media Share

| Top 10 Hispanic Media Spenders in 2004 | | | | | |
|--|------------------------------|---------------------------|--------------------------------------|-----------|--------------------------|
| Ranked by 2004 Hispanic Print & TV | | | | | |
| Rank | | | Spend on Hispanic TV & Print (\$000) | | |
| 2004 | Parent Company | 2004 Hispanic Media Share | 2004 | 2003 | Change in Hispanic Spend |
| 1 | LEXICON MARKETING CORP | 99.6% | \$177,616 | \$222,542 | -20.2% |
| 2 | PROCTER & GAMBLE CO | 6.2% | 148,656 | 169,809 | -12.5% |
| 3 | UNIVISION COMMUNICATIONS INC | 98.4% | 108,950 | 92,774 | 17.4% |
| 4 | SEARS HOLDINGS CORP | 14.6% | 108,595 | 119,086 | -8.8% |
| 5 | GENERAL MOTORS CORP | 4.9% | 97,703 | 93,440 | 4.6% |
| 6 | PEPSICO INC | 9.1% | 67,374 | 85,679 | -21.4% |
| 7 | DAIMLERCHRYSLER AG | 5.1% | 63,057 | 44,690 | 41.1% |
| 8 | JOHNSON & JOHNSON | 5.9% | 62,965 | 49,458 | 27.3% |
| 9 | MCDONALDS CORP | 13.0% | 59,790 | 64,048 | -6.6% |
| 10 | SBC COMMUNICATIONS INC | 5.0% | 54,987 | 26,673 | 106.2% |
| | Top 10 Totals | 9.5% | 949,694 | 968,199 | -1.9% |



The Ideal - AHAA Recommended Spending Levels

- Hispanic marketing is flourishing; yet, still more than 100 of the top 250 television and print advertisers are allocating less than one percent of their total budgets in these media to reach the influential U.S. Hispanic consumer.
- Growth is not keeping up with the demographics. The U.S. Hispanic population growth is outpacing overall growth in every age demographic, however many marketers and industry sectors aren't keeping pace.
- Only a handful of advertisers are spending appropriately. Most are extremely underspending and some brands are missing in action.
- Advertisers must increase their Hispanic budgets to adequately reach Spanish-speakers as well as allocate monies to reach English-speakers in a culturally relevant fashion.



Marketers should consider

- **Can your brand afford the variability in Hispanic Media Share as seen with 2004's declines?**
 - How is brand health among Hispanics? What about brand sales/share among this population?
- **Are retail/restaurant/direct response and related sectors seeing something your brand may be overlooking?**
 - They have first-hand observation of Hispanic brand usage. Do you?
- **Is your Hispanic Media Share matching the critical mass in the population?**
 - If not, does your brand stand to benefit from media spend analysis to this population?
- **Have you “stolen” from your Spanish-language dollars to reach out to English-speaking Hispanics?**
 - If so, are you short-changing both segments as well as your bottom line?
 - Should you be re-allocating dollars from your General Market budget?

Top 250 National Advertisers, Ranked By Total Spending for 2004 Media Spend in \$(000)

| Rank | Parent | Total TV + Print General | Total TV + Print Hispanic | Grand Total TV + Print | Hispanic Media Share |
|------|----------------------------|-----------------------------|------------------------------|---------------------------|-------------------------|
| 1 | PROCTER & GAMBLE CO | 2,239,404 | 148,656 | 2,388,060 | 6.2% |
| 2 | GENERAL MOTORS CORP | 1,892,173 | 97,703 | 1,989,876 | 4.9% |
| 3 | TIME WARNER INC | 1,238,729 | 37,311 | 1,276,040 | 2.9% |
| 4 | DAIMLERCHRYSLER AG | 1,178,473 | 63,057 | 1,241,530 | 5.1% |
| 5 | FORD MOTOR CO | 1,148,695 | 52,305 | 1,201,000 | 4.4% |
| 6 | SBC COMMUNICATIONS INC | 1,046,225 | 54,987 | 1,101,213 | 5.0% |
| 7 | JOHNSON & JOHNSON | 996,633 | 62,965 | 1,059,598 | 5.9% |
| 8 | WALT DISNEY CO | 955,710 | 29,232 | 984,942 | 3.0% |
| 9 | ALTRIA GROUP INC | 854,617 | 36,886 | 891,503 | 4.1% |
| 10 | PFIZER INC | 829,563 | 14,906 | 844,469 | 1.8% |
| 11 | TOYOTA MOTOR CORP | 800,973 | 38,540 | 839,513 | 4.6% |
| 12 | NISSAN MOTOR CO LTD | 818,312 | 17,926 | 836,238 | 2.1% |
| 13 | VERIZON COMMUNICATIONS INC | 719,513 | 45,147 | 764,661 | 5.9% |
| 14 | GLAXOSMITHKLINE PLC | 740,489 | 2,298 | 742,787 | 0.3% |
| 15 | SEARS HOLDINGS CORP | 633,113 | 108,595 | 741,708 | 14.6% |
| 16 | PEPSICO INC | 670,844 | 67,374 | 738,218 | 9.1% |
| 17 | SONY CORP | 686,501 | 30,103 | 716,604 | 4.2% |
| 18 | GE GENERAL ELECTRIC CO | 644,223 | 19,455 | 663,677 | 2.9% |
| 19 | LOREAL SA | 617,286 | 27,595 | 644,881 | 4.3% |
| 20 | NEWS CORP LTD | 600,736 | 8,578 | 609,314 | 1.4% |
| 21 | HONDA MOTOR CO LTD | 545,892 | 21,764 | 567,656 | 3.8% |
| 22 | SPRINT CORP | 524,562 | 1,267 | 525,829 | 0.2% |
| 23 | YUM BRANDS INC | 479,825 | 27,390 | 507,216 | 5.4% |
| 24 | NOVARTIS AG | 498,232 | 2,892 | 501,124 | 0.6% |
| 25 | NATIONAL AMUSEMENTS INC | 483,051 | 9,471 | 492,522 | 1.9% |

Source: TNS Media Intelligence - Hispanic Media Share Study 2004

Top 250 National Advertisers, Ranked By Total Spending for 2004 Media Spend in \$(000) - continued

| Rank | Parent | Total TV + Print General | Total TV + Print Hispanic | Grand Total TV + Print | Hispanic Media Share |
|------|------------------------------|-----------------------------|------------------------------|---------------------------|-------------------------|
| 26 | UNILEVER | 449,073 | 22,996 | 472,069 | 4.9% |
| 27 | MCDONALDS CORP | 401,212 | 59,790 | 461,003 | 13.0% |
| 28 | HYUNDAI CORP | 420,863 | 36,507 | 457,371 | 8.0% |
| 29 | CITIGROUP INC | 453,811 | 1,602 | 455,413 | 0.4% |
| 30 | GILLETTE CO | 425,428 | 11,469 | 436,897 | 2.6% |
| 31 | GENERAL MILLS INC | 421,656 | 9,969 | 431,625 | 2.3% |
| 32 | ANHEUSER-BUSCH COS INC | 398,496 | 17,537 | 416,033 | 4.2% |
| 33 | WAL-MART STORES INC | 342,130 | 54,132 | 396,262 | 13.7% |
| 34 | US GOVT | 354,673 | 36,788 | 391,461 | 9.4% |
| 35 | CLOROX CO | 363,641 | 19,025 | 382,666 | 5.0% |
| 36 | HOME DEPOT INC | 353,238 | 29,208 | 382,446 | 7.6% |
| 37 | TARGET CORP | 361,892 | 15,624 | 377,516 | 4.1% |
| 38 | GENERAL MOTORS CORP DLR ASSN | 359,752 | 14,540 | 374,292 | 3.9% |
| 39 | NESTLE SA | 364,570 | 5,362 | 369,931 | 1.4% |
| 40 | GENERAL MOTORS CORP LOC DLR | 346,127 | 19,953 | 366,080 | 5.5% |
| 41 | ASTRAZENECA PLC | 360,636 | 128 | 360,765 | 0.0% |
| 42 | FORD MOTOR CO DLR ASSN | 342,628 | 17,593 | 360,221 | 4.9% |
| 43 | VOLKSWAGEN AG | 339,429 | 11,331 | 350,760 | 3.2% |
| 44 | COCA-COLA CO | 318,524 | 27,479 | 346,003 | 7.9% |
| 45 | KELLOGG CO | 313,625 | 24,423 | 338,049 | 7.2% |
| 46 | FORD MOTOR CO LOC DLR | 324,145 | 11,939 | 336,084 | 3.6% |
| 47 | SC JOHNSON & SON INC | 315,817 | 7,985 | 323,802 | 2.5% |
| 48 | MARS INC | 317,025 | 5,601 | 322,626 | 1.7% |
| 49 | FEDERATED DEPT STORES INC | 313,613 | 4,566 | 318,179 | 1.4% |
| 50 | DELL COMPUTER CORP | 312,532 | 47 | 312,579 | 0.0% |

Source: TNS Media Intelligence - Hispanic Media Share Study 2004

Top 250 National Advertisers, Ranked By Total Spending for 2004 Media Spend in \$(000) - continued

| Rank | Parent | Total TV + Print General | Total TV + Print Hispanic | Grand Total TV + Print | Hispanic Media Share |
|------|----------------------------|-----------------------------|------------------------------|---------------------------|-------------------------|
| 51 | DEUTSCHE TELEKOM AG | 288,050 | 21,675 | 309,725 | 7.0% |
| 52 | AMERICAN EXPRESS CO | 305,334 | 189 | 305,523 | 0.1% |
| 53 | GAP INC | 296,625 | 8,232 | 304,858 | 2.7% |
| 54 | RECKITT BENCKISER PLC | 294,673 | 9,847 | 304,519 | 3.2% |
| 55 | JC PENNEY CO INC | 285,618 | 16,864 | 302,482 | 5.6% |
| 56 | MAY DEPT STORES CO | 292,600 | 4,463 | 297,063 | 1.5% |
| 57 | MERCK & CO INC | 287,758 | 6,285 | 294,043 | 2.1% |
| 58 | HEWLETT-PACKARD CO | 290,266 | 289 | 290,555 | 0.1% |
| 59 | VISA USA INC | 279,449 | 10,207 | 289,656 | 3.5% |
| 60 | TOYOTA MOTOR CORP LOC DLR | 276,550 | 8,394 | 284,944 | 2.9% |
| 61 | WENDYS INTL INC | 262,778 | 20,047 | 282,825 | 7.1% |
| 62 | CAPITAL ONE FINANCIAL CORP | 280,557 | 0 | 280,557 | 0.0% |
| 63 | CAMPBELL SOUP CO | 267,428 | 2,416 | 269,844 | 0.9% |
| 64 | DIRECTV GROUP INC | 235,742 | 32,664 | 268,406 | 12.2% |
| 65 | MAZDA MOTOR CORP | 260,373 | 1,499 | 261,871 | 0.6% |
| 66 | IBM CORP | 261,655 | 203 | 261,858 | 0.1% |
| 67 | MASTERCARD INTL INC | 245,635 | 14,303 | 259,938 | 5.5% |
| 68 | BEST BUY CO INC | 242,489 | 14,275 | 256,764 | 5.6% |
| 69 | SABMILLER PLC | 232,320 | 23,529 | 255,849 | 9.2% |
| 70 | DAIMLERCHRYSLER AG LOC DLR | 247,191 | 4,868 | 252,059 | 1.9% |
| 71 | LOWES COS INC | 234,846 | 14,837 | 249,683 | 5.9% |
| 72 | TEXAS PACIFIC GROUP | 221,078 | 23,934 | 245,013 | 9.8% |
| 73 | KOHL'S CORP | 228,837 | 3,635 | 232,471 | 1.6% |
| 74 | WYETH | 217,154 | 14,143 | 231,297 | 6.1% |
| 75 | CADBURY SCHWEPPES PLC | 219,300 | 9,739 | 229,040 | 4.3% |

Source: TNS Media Intelligence - Hispanic Media Share Study 2004

Top 250 National Advertisers, Ranked By Total Spending for 2004 Media Spend in \$(000) - continued

| Rank | Parent | Total TV + Print General | Total TV + Print Hispanic | Grand Total TV + Print | Hispanic Media Share |
|------|-------------------------------|-----------------------------|------------------------------|---------------------------|-------------------------|
| 76 | MICROSOFT CORP | 226,642 | 1,460 | 228,103 | 0.6% |
| 77 | MITSUBISHI MOTORS CORP | 225,023 | 807 | 225,830 | 0.4% |
| 78 | DREAMWORKS SKG | 225,289 | 215 | 225,504 | 0.1% |
| 79 | SANOFI-AVENTIS | 222,299 | 602 | 222,900 | 0.3% |
| 80 | TOYOTA MOTOR CORP DLR ASSN | 210,896 | 8,843 | 219,738 | 4.0% |
| 81 | KIMBERLY-CLARK CORP | 209,248 | 10,161 | 219,410 | 4.6% |
| 82 | DOCTORS ASSOC INC | 206,909 | 9,188 | 216,097 | 4.3% |
| 83 | AT&T CORP | 177,478 | 37,693 | 215,171 | 17.5% |
| 84 | SCHERING-PLOUGH CORP | 211,886 | 2,510 | 214,396 | 1.2% |
| 85 | BERKSHIRE HATHAWAY INC | 211,932 | 119 | 212,050 | 0.1% |
| 86 | IAC/INTERACTIVECORP | 210,094 | 59 | 210,153 | 0.0% |
| 87 | NIKE INC | 198,972 | 793 | 199,765 | 0.4% |
| 88 | BAYER AG GROUP | 194,261 | 3,518 | 197,780 | 1.8% |
| 89 | ALLSTATE CORP | 188,340 | 7,749 | 196,089 | 4.0% |
| 90 | NEXTEL COMMUNICATIONS INC | 181,101 | 4,460 | 185,561 | 2.4% |
| 91 | MATTEL INC | 181,535 | 211 | 181,746 | 0.1% |
| 92 | LEXICON MARKETING CORP | 628 | 177,616 | 178,244 | 99.6% |
| 93 | STATE FARM MUTUAL AUTO INS CO | 163,002 | 11,654 | 174,656 | 6.7% |
| 94 | HONDA MOTOR CO LTD LOC DLR | 173,256 | 1,341 | 174,597 | 0.8% |
| 95 | VALASSIS COMMUNICATIONS INC | 161,765 | 1,460 | 163,225 | 0.9% |
| 96 | DARDEN RESTAURANTS | 159,750 | 2,713 | 162,463 | 1.7% |
| 97 | SARA LEE CORP | 154,837 | 4,112 | 158,949 | 2.6% |
| 98 | DAIMLERCHRYSLER AG DLR ASSN | 153,218 | 4,652 | 157,871 | 2.9% |
| 99 | BANK OF AMERICA CORP | 148,274 | 7,135 | 155,409 | 4.6% |
| 100 | NISSAN MOTOR CO LTD LOC DLR | 150,409 | 4,688 | 155,098 | 3.0% |

Source: TNS Media Intelligence - Hispanic Media Share Study 2004

Top 250 National Advertisers, Ranked By Total Spending for 2004 Media Spend in \$(000) - continued

| Rank | Parent | Total TV + Print General | Total TV + Print Hispanic | Grand Total TV + Print | Hispanic Media Share |
|------|-----------------------------------|-----------------------------|------------------------------|---------------------------|-------------------------|
| 101 | FRYS ELECTRONICS INC | 151,543 | 137 | 151,680 | 0.1% |
| 102 | ESTEE LAUDER COS INC | 148,428 | 2,829 | 151,257 | 1.9% |
| 103 | RADIO SHACK CORP | 140,875 | 9,599 | 150,474 | 6.4% |
| 104 | OFFICE OF NATIONAL DRUG CONTROL | 135,603 | 14,525 | 150,129 | 9.7% |
| 105 | ELI LILLY & CO/ICOS CORP | 149,602 | 0 | 149,602 | 0.0% |
| 106 | UNITED PARCEL SERVICE/AMERICA INC | 146,708 | 288 | 146,997 | 0.2% |
| 107 | CENDANT CORP | 138,291 | 4,948 | 143,239 | 3.5% |
| 108 | CARNIVAL CORP & PLC | 140,169 | 163 | 140,332 | 0.1% |
| 109 | CIRCUIT CITY STORES INC | 137,724 | 1,765 | 139,489 | 1.3% |
| 110 | BAYER CORP/GLAXOSMITHKLINE PLC | 137,232 | 0 | 137,232 | 0.0% |
| 111 | ADOLPH COORS CO | 127,897 | 6,361 | 134,258 | 4.7% |
| 112 | MACANDREWS & FORBES HOLDINGS INC | 134,035 | 178 | 134,213 | 0.1% |
| 113 | BRISTOL-MYERS SQUIBB CO | 133,014 | 5 | 133,019 | 0.0% |
| 114 | RJ REYNOLDS TOBACCO HOLDINGS INC | 132,711 | 69 | 132,779 | 0.1% |
| 115 | DIAGEO PLC | 130,876 | 536 | 131,411 | 0.4% |
| 116 | PETMED EXPRESS INC | 130,031 | 0 | 130,031 | 0.0% |
| 117 | CANON INC | 127,711 | 36 | 127,747 | 0.0% |
| 118 | PROGRESSIVE CORP | 126,719 | 32 | 126,751 | 0.0% |
| 119 | FUJI HEAVY INDUSTRIES LTD | 125,660 | 0 | 125,660 | 0.0% |
| 120 | ABBOTT LAB | 120,629 | 3,338 | 123,968 | 2.7% |
| 121 | TRACINDA CORP | 119,165 | 1,189 | 120,354 | 1.0% |
| 122 | MORGAN STANLEY | 119,877 | 74 | 119,950 | 0.1% |
| 123 | BMW AG | 117,372 | 2,358 | 119,730 | 2.0% |
| 124 | SOUTHWEST AIRLINES | 98,120 | 18,780 | 116,900 | 16.1% |
| 125 | HASBRO INC | 114,587 | 1,406 | 115,992 | 1.2% |

Source: TNS Media Intelligence - Hispanic Media Share Study 2004

Top 250 National Advertisers, Ranked By Total Spending for 2004 Media Spend in \$(000) - continued

| Rank | Parent | Total TV + Print General | Total TV + Print Hispanic | Grand Total TV + Print | Hispanic Media Share |
|------|-------------------------------------|-----------------------------|------------------------------|---------------------------|-------------------------|
| 126 | ROYAL PHILIPS ELECTRONICS NV | 112,641 | 0 | 112,641 | 0.0% |
| 127 | KA O CORP | 112,060 | 0 | 112,060 | 0.0% |
| 128 | LVMH MOET HENNESSY LOUIS VUITTON SA | 111,284 | 290 | 111,574 | 0.3% |
| 129 | ENERGIZER HOLDINGS INC | 100,936 | 9,889 | 110,825 | 8.9% |
| 130 | UNIVISION COMMUNICATIONS INC | 1,751 | 108,950 | 110,701 | 98.4% |
| 131 | DOMINOS PIZZA INC | 99,061 | 10,402 | 109,463 | 9.5% |
| 132 | HERSHEY FOODS CORP | 101,309 | 7,211 | 108,520 | 6.6% |
| 133 | LEVI STRAUSS & CO | 106,500 | 1,033 | 107,533 | 1.0% |
| 134 | APPLEBEES INTL INC | 106,579 | 22 | 106,601 | 0.0% |
| 135 | JP MORGAN CHASE & CO | 104,273 | 986 | 105,259 | 0.9% |
| 136 | APPLE COMPUTER INC | 105,167 | 0 | 105,167 | 0.0% |
| 137 | WOMENS MARKETING INC | 103,318 | 0 | 103,318 | 0.0% |
| 138 | ADVANCE PUBLICATIONS INC | 102,397 | 904 | 103,301 | 0.9% |
| 139 | HALLMARK CARDS INC | 103,142 | 6 | 103,149 | 0.0% |
| 140 | CHURCH & DWIGHT CO INC | 102,265 | 633 | 102,898 | 0.6% |
| 141 | EASTMAN KODAK CO INC | 102,070 | 117 | 102,188 | 0.1% |
| 142 | AMERIQUEST MORTGAGE CO | 80,743 | 21,137 | 101,880 | 20.7% |
| 143 | FEDEX CORP | 100,722 | 228 | 100,950 | 0.2% |
| 144 | DEUTSCHE POST AG | 100,686 | 3 | 100,688 | 0.0% |
| 145 | CONAGRA FOODS INC | 100,297 | 282 | 100,580 | 0.3% |
| 146 | VF CORP | 100,280 | 28 | 100,308 | 0.0% |
| 147 | DILLARD INC | 98,294 | 1,413 | 99,707 | 1.4% |
| 148 | HYUNDAI CORP LOC DLR | 95,720 | 2,241 | 97,961 | 2.3% |
| 149 | WILLIAM WRIGLEY JR CO | 93,196 | 4,616 | 97,811 | 4.7% |
| 150 | LIONS GATE ENTERTAINMENT CORP | 92,057 | 2,972 | 95,030 | 3.1% |

Source: TNS Media Intelligence - Hispanic Media Share Study 2004

Top 250 National Advertisers, Ranked By Total Spending for 2004 Media Spend in \$(000) - continued

| Rank | Parent | Total TV + Print General | Total TV + Print Hispanic | Grand Total TV + Print | Hispanic Media Share |
|------|-------------------------------------|-----------------------------|------------------------------|---------------------------|-------------------------|
| 151 | WACHOVIA CORP | 93,210 | 250 | 93,460 | 0.3% |
| 152 | COMCAST CORP | 90,718 | 1,709 | 92,427 | 1.8% |
| 153 | WALGREEN CO | 84,455 | 7,045 | 91,500 | 7.7% |
| 154 | CABLEVISION SYSTEMS CORP | 90,246 | 298 | 90,544 | 0.3% |
| 155 | ALBERTO-CULVER CO | 89,953 | 41 | 89,994 | 0.0% |
| 156 | ALBERTSONS INC | 80,945 | 7,825 | 88,770 | 8.8% |
| 157 | ROYAL CARIBBEAN INTL | 87,646 | 1,051 | 88,696 | 1.2% |
| 158 | TAP PHARMACEUTICALS INC | 88,484 | 6 | 88,490 | 0.0% |
| 159 | MERVYNS DEPT STORES | 84,460 | 3,942 | 88,402 | 4.5% |
| 160 | CHARLES SCHWAB CORP | 88,331 | 0 | 88,331 | 0.0% |
| 161 | BRADFORD EXCHANGE LTD | 87,910 | 5 | 87,915 | 0.0% |
| 162 | COLGATE-PALMOLIVE CO | 72,519 | 15,326 | 87,845 | 17.4% |
| 163 | BERTELSMANN AG | 87,199 | 636 | 87,835 | 0.7% |
| 164 | ROYAL DUTCH/SHELL GROUP OF COS | 86,327 | 1,052 | 87,379 | 1.2% |
| 165 | BRISTOL-MYERS SQUIBB/SANOFI-AVENTIS | 87,355 | 0 | 87,355 | 0.0% |
| 166 | SAMSUNG GROUP | 87,061 | 81 | 87,142 | 0.1% |
| 167 | ADIDAS-SALOMON AG | 84,736 | 0 | 84,736 | 0.0% |
| 168 | FMR CORP | 84,494 | 3 | 84,497 | 0.0% |
| 169 | SPORTS AUTHORITY INC | 84,068 | 69 | 84,136 | 0.1% |
| 170 | CARLSON COS INC | 83,909 | 45 | 83,954 | 0.1% |
| 171 | BOSE CORP | 83,267 | 33 | 83,300 | 0.0% |
| 172 | TOYS-R-US INC | 73,788 | 8,548 | 82,336 | 10.4% |
| 173 | PEOPLEPC INC | 80,833 | 0 | 80,833 | 0.0% |
| 174 | UNITED ONLINE INC | 79,634 | 0 | 79,634 | 0.0% |
| 175 | BEIERSDORF AG | 79,360 | 159 | 79,519 | 0.2% |

Source: TNS Media Intelligence - Hispanic Media Share Study 2004

Top 250 National Advertisers, Ranked By Total Spending for 2004 Media Spend in \$(000) - continued

| Rank | Parent | Total TV + Print General | Total TV + Print Hispanic | Grand Total TV + Print | Hispanic Media Share |
|------|---------------------------------|-----------------------------|------------------------------|---------------------------|-------------------------|
| 176 | WASHINGTON MUTUAL INC | 70,957 | 8,117 | 79,075 | 10.3% |
| 177 | DANONE GROUPE SA | 78,709 | 56 | 78,765 | 0.1% |
| 178 | BRINKER INTL INC | 78,431 | 3 | 78,434 | 0.0% |
| 179 | CASTALIAN MUSIC LLC | 67,737 | 9,223 | 76,960 | 12.0% |
| 180 | INTEL CORP | 76,703 | 0 | 76,703 | 0.0% |
| 181 | DAIRY MGT INC | 75,283 | 909 | 76,192 | 1.2% |
| 182 | HEARST CORP | 66,658 | 7,740 | 74,398 | 10.4% |
| 183 | GATEWAY INC | 74,178 | 12 | 74,190 | 0.0% |
| 184 | OFFICE DEPOT INC | 70,353 | 3,342 | 73,695 | 4.5% |
| 185 | XEROX CORP | 73,385 | 115 | 73,500 | 0.2% |
| 186 | SYNERGISTICS MARKETING INC | 73,207 | 0 | 73,207 | 0.0% |
| 187 | LIMITED INC | 72,462 | 7 | 72,469 | 0.0% |
| 188 | BOWFLEX INC | 71,541 | 0 | 71,541 | 0.0% |
| 189 | NINTENDO CO LTD | 68,778 | 2,440 | 71,217 | 3.4% |
| 190 | MAYTAG CO | 70,334 | 2 | 70,335 | 0.0% |
| 191 | RE/MAX INTL INC | 68,459 | 1,688 | 70,147 | 2.4% |
| 192 | SHERWIN-WILLIAMS CO | 68,505 | 486 | 68,992 | 0.7% |
| 193 | MARRIOTT INTL INC | 67,703 | 773 | 68,475 | 1.1% |
| 194 | FORTUNE BRANDS INC | 67,875 | 0 | 67,875 | 0.0% |
| 195 | DE BEERS CONSOLIDATED MINES LTD | 67,519 | 0 | 67,519 | 0.0% |
| 196 | AFLAC INC | 63,123 | 4,216 | 67,339 | 6.3% |
| 197 | EBAY INC | 67,264 | 0 | 67,265 | 0.0% |
| 198 | JOHNSON & JOHNSON/MERCK & CO | 57,872 | 9,135 | 67,007 | 13.6% |
| 199 | SIGNET GROUP PLC | 63,836 | 1,386 | 65,223 | 2.1% |
| 200 | SUZUKI MOTOR CO LTD | 64,698 | 71 | 64,769 | 0.1% |

Source: TNS Media Intelligence - Hispanic Media Share Study 2004

Top 250 National Advertisers, Ranked By Total Spending for 2004 Media Spend in \$(000) - continued

| Rank | Parent | Total TV + Print General | Total TV + Print Hispanic | Grand Total TV + Print | Hispanic Media Share |
|------|-----------------------------------|-----------------------------|------------------------------|---------------------------|-------------------------|
| 201 | ECHOSTAR COMMUNICATIONS CORP | 59,300 | 5,250 | 64,550 | 8.1% |
| 202 | BP PLC | 61,204 | 2,542 | 63,746 | 4.0% |
| 203 | TEMPUR-PEDIC INC | 63,448 | 1 | 63,448 | 0.0% |
| 204 | NOKIA CORP | 58,634 | 4,484 | 63,118 | 7.1% |
| 205 | MUSCLETECH RESEARCH & DEV INC | 62,988 | 55 | 63,043 | 0.1% |
| 206 | GEORGIA-PACIFIC CORP | 59,927 | 1,774 | 61,701 | 2.9% |
| 207 | UAL CORP | 61,659 | 5 | 61,664 | 0.0% |
| 208 | AMERICAN ASSN OF RETIRED PERSONS | 52,928 | 8,116 | 61,044 | 13.3% |
| 209 | LUXOTTICA GROUP SPA | 60,243 | 651 | 60,894 | 1.1% |
| 210 | UBS AG | 60,144 | 42 | 60,186 | 0.1% |
| 211 | EARTHLINK INC | 59,923 | 0 | 59,923 | 0.0% |
| 212 | BALLY TOTAL FITNESS HOLDINGS CORP | 35,502 | 24,064 | 59,567 | 40.4% |
| 213 | AMR CORP | 53,355 | 5,789 | 59,145 | 9.8% |
| 214 | MATSUSHITA ELECTRIC IND CO LTD | 58,151 | 717 | 58,868 | 1.2% |
| 215 | ALLIED DOMECQ PLC | 57,871 | 956 | 58,827 | 1.6% |
| 216 | SCOOTER STORE INC | 58,258 | 0 | 58,258 | 0.0% |
| 217 | ZALE CORP | 55,947 | 2,054 | 58,000 | 3.5% |
| 218 | WHIRLPOOL CORP | 57,775 | 0 | 57,775 | 0.0% |
| 219 | MEDIA NETWORKS INC | 57,754 | 0 | 57,754 | 0.0% |
| 220 | HEINEKEN NV | 51,215 | 6,306 | 57,521 | 11.0% |
| 221 | HILTON HOTELS CORP | 57,037 | 165 | 57,203 | 0.3% |
| 222 | SAFEWAY INC | 54,909 | 1,676 | 56,585 | 3.0% |
| 223 | STAPLES INC | 55,449 | 534 | 55,983 | 1.0% |
| 224 | LEONARD GREEN & PARTNERS | 55,710 | 0 | 55,710 | 0.0% |
| 225 | PAPA JOHNS INTL INC | 54,830 | 612 | 55,442 | 1.1% |

Source: TNS Media Intelligence - Hispanic Media Share Study 2004

Top 250 National Advertisers, Ranked By Total Spending for 2004 Media Spend in \$(000) - continued

| Rank | Parent | Total TV + Print General | Total TV + Print Hispanic | Grand Total TV + Print | Hispanic Media Share |
|------|-----------------------------------|-----------------------------|------------------------------|---------------------------|-------------------------|
| 226 | ELECTRONIC ARTS INC | 54,767 | 377 | 55,144 | 0.7% |
| 227 | H&R BLOCK INC | 52,717 | 2,340 | 55,057 | 4.2% |
| 228 | ROOMS TO GO INC | 48,827 | 6,110 | 54,936 | 11.1% |
| 229 | T ROWE PRICE GROUP INC | 54,678 | 0 | 54,678 | 0.0% |
| 230 | DISCOVERY COMMUNICATIONS INC | 54,512 | 105 | 54,618 | 0.2% |
| 231 | OUTBACK STEAKHOUSE INC | 53,829 | 774 | 54,603 | 1.4% |
| 232 | AVON PDTS INC | 46,457 | 8,087 | 54,544 | 14.8% |
| 233 | AMERICAN LEGACY FOUNDATION | 51,511 | 2,982 | 54,493 | 5.5% |
| 234 | PLAYTEX PDTS INC | 54,181 | 266 | 54,448 | 0.5% |
| 235 | SELECT COMFORT CORP | 54,232 | 0 | 54,232 | 0.0% |
| 236 | COMBE INC | 52,994 | 599 | 53,592 | 1.1% |
| 237 | BROWN-FORMAN CORP | 53,183 | 171 | 53,353 | 0.3% |
| 238 | JM SMUCKER CO | 52,649 | 620 | 53,269 | 1.2% |
| 239 | TYCO INTL LTD | 52,520 | 225 | 52,745 | 0.4% |
| 240 | XM SATELLITE RADIO INC | 52,538 | 1 | 52,540 | 0.0% |
| 241 | ACTIVISION PUBLISHING INC | 52,332 | 1 | 52,332 | 0.0% |
| 242 | BURLINGTON COAT FACTORY WRHS CORP | 51,981 | 37 | 52,018 | 0.1% |
| 243 | KROGER CO | 49,426 | 2,445 | 51,871 | 4.7% |
| 244 | ADVANTICA RESTAURANT GROUP INC | 50,017 | 1,718 | 51,735 | 3.3% |
| 245 | VIVENDI UNIVERSAL SA | 45,297 | 6,394 | 51,691 | 12.4% |
| 246 | SAKS INC | 50,942 | 163 | 51,105 | 0.3% |
| 247 | TJX COS INC | 46,731 | 4,145 | 50,876 | 8.1% |
| 248 | COMPAGNIE GENERALE DES MICHELIN | 49,453 | 1,167 | 50,620 | 2.3% |
| 249 | CVS CORP | 49,915 | 647 | 50,563 | 1.3% |
| 250 | ALLERGAN INC | 50,517 | 6 | 50,524 | 0.0% |

Source: TNS Media Intelligence - Hispanic Media Share Study 2004

Top 250 National Advertisers, Ranked By Hispanic Spending for 2004 Media Spend in \$(000)

| Rank | Parent | Total TV + Print Hispanic | Total TV + Print General | Grand Total TV + Print | Hispanic Media Share |
|------|------------------------------|------------------------------|-----------------------------|---------------------------|-------------------------|
| 1 | LEXICON MARKETING CORP | 177,616 | 628 | 178,244 | 99.6% |
| 2 | PROCTER & GAMBLE CO | 148,656 | 2,239,404 | 2,388,060 | 6.2% |
| 3 | UNIVISION COMMUNICATIONS INC | 108,950 | 1,751 | 110,701 | 98.4% |
| 4 | SEARS HOLDINGS CORP | 108,595 | 633,113 | 741,708 | 14.6% |
| 5 | GENERAL MOTORS CORP | 97,703 | 1,892,173 | 1,989,876 | 4.9% |
| 6 | PEPSICO INC | 67,374 | 670,844 | 738,218 | 9.1% |
| 7 | DAIMLERCHRYSLER AG | 63,057 | 1,178,473 | 1,241,530 | 5.1% |
| 8 | JOHNSON & JOHNSON | 62,965 | 996,633 | 1,059,598 | 5.9% |
| 9 | MCDONALDS CORP | 59,790 | 401,212 | 461,003 | 13.0% |
| 10 | SBC COMMUNICATIONS INC | 54,987 | 1,046,225 | 1,101,213 | 5.0% |
| 11 | WAL-MART STORES INC | 54,132 | 342,130 | 396,262 | 13.7% |
| 12 | FORD MOTOR CO | 52,305 | 1,148,695 | 1,201,000 | 4.4% |
| 13 | VERIZON COMMUNICATIONS INC | 45,147 | 719,513 | 764,661 | 5.9% |
| 14 | TOYOTA MOTOR CORP | 38,540 | 800,973 | 839,513 | 4.6% |
| 15 | AT&T CORP | 37,693 | 177,478 | 215,171 | 17.5% |
| 16 | TIME WARNER INC | 37,311 | 1,238,729 | 1,276,040 | 2.9% |
| 17 | ALTRIA GROUP INC | 36,886 | 854,617 | 891,503 | 4.1% |
| 18 | US GOVT | 36,788 | 354,673 | 391,461 | 9.4% |
| 19 | HYUNDAI CORP | 36,507 | 420,863 | 457,371 | 8.0% |
| 20 | DIRECTV GROUP INC | 32,664 | 235,742 | 268,406 | 12.2% |
| 21 | SONY CORP | 30,103 | 686,501 | 716,604 | 4.2% |
| 22 | WALT DISNEY CO | 29,232 | 955,710 | 984,942 | 3.0% |
| 23 | HOME DEPOT INC | 29,208 | 353,238 | 382,446 | 7.6% |
| 24 | VENEVISION INTL | 28,041 | | 28,041 | 100.0% |
| 25 | LOREAL SA | 27,595 | 617,286 | 644,881 | 4.3% |

Top 250 National Advertisers, Ranked By Hispanic Spending for 2004 Media Spend in \$(000) - continued

| Rank | Parent | Total TV + Print Hispanic | Total TV + Print General | Grand Total TV + Print | Hispanic Media Share |
|------|-----------------------------------|------------------------------|-----------------------------|---------------------------|-------------------------|
| 26 | COCA-COLA CO | 27,479 | 318,524 | 346,003 | 7.9% |
| 27 | YUM BRANDS INC | 27,390 | 479,825 | 507,216 | 5.4% |
| 28 | KELLOGG CO | 24,423 | 313,625 | 338,049 | 7.2% |
| 29 | BALLY TOTAL FITNESS HOLDINGS CORP | 24,064 | 35,502 | 59,567 | 40.4% |
| 30 | TEXAS PACIFIC GROUP | 23,934 | 221,078 | 245,013 | 9.8% |
| 31 | SABMILLER PLC | 23,529 | 232,320 | 255,849 | 9.2% |
| 32 | UNILEVER | 22,996 | 449,073 | 472,069 | 4.9% |
| 33 | HONDA MOTOR CO LTD | 21,764 | 545,892 | 567,656 | 3.8% |
| 34 | DEUTSCHE TELEKOM AG | 21,675 | 288,050 | 309,725 | 7.0% |
| 35 | AMERIQUEST MORTGAGE CO | 21,137 | 80,743 | 101,880 | 20.7% |
| 36 | WENDYS INTL INC | 20,047 | 262,778 | 282,825 | 7.1% |
| 37 | GENERAL MOTORS CORP LOC DLR | 19,953 | 346,127 | 366,080 | 5.5% |
| 38 | GE GENERAL ELECTRIC CO | 19,455 | 644,223 | 663,677 | 2.9% |
| 39 | CLOROX CO | 19,025 | 363,641 | 382,666 | 5.0% |
| 40 | SOUTHWEST AIRLINES | 18,780 | 98,120 | 116,900 | 16.1% |
| 41 | NISSAN MOTOR CO LTD | 17,926 | 818,312 | 836,238 | 2.1% |
| 42 | FORD MOTOR CO DLR ASSN | 17,593 | 342,628 | 360,221 | 4.9% |
| 43 | ANHEUSER-BUSCH COS INC | 17,537 | 398,496 | 416,033 | 4.2% |
| 44 | JC PENNEY CO INC | 16,864 | 285,618 | 302,482 | 5.6% |
| 45 | TARGET CORP | 15,624 | 361,892 | 377,516 | 4.1% |
| 46 | COLGATE-PALMOLIVE CO | 15,326 | 72,519 | 87,845 | 17.4% |
| 47 | PFIZER INC | 14,906 | 829,563 | 844,469 | 1.8% |
| 48 | LOWES COS INC | 14,837 | 234,846 | 249,683 | 5.9% |
| 49 | GENERAL MOTORS CORP DLR ASSN | 14,540 | 359,752 | 374,292 | 3.9% |
| 50 | OFFICE OF NATIONAL DRUG CONTROL | 14,525 | 135,603 | 150,129 | 9.7% |

Source: TNS Media Intelligence - Hispanic Media Share Study 2004

Top 250 National Advertisers, Ranked By Hispanic Spending for 2004 Media Spend in \$(000) - continued

| Rank | Parent | Total TV + Print Hispanic | Total TV + Print General | Grand Total TV + Print | Hispanic Media Share |
|------|-------------------------------|------------------------------|-----------------------------|---------------------------|-------------------------|
| 51 | MASTERCARD INTL INC | 14,303 | 245,635 | 259,938 | 5.5% |
| 52 | BEST BUY CO INC | 14,275 | 242,489 | 256,764 | 5.6% |
| 53 | WYETH | 14,143 | 217,154 | 231,297 | 6.1% |
| 54 | AUTOZONE INC | 13,806 | 26,150 | 39,956 | 34.6% |
| 55 | FORD MOTOR CO LOC DLR | 11,939 | 324,145 | 336,084 | 3.6% |
| 56 | STATE FARM MUTUAL AUTO INS CO | 11,654 | 163,002 | 174,656 | 6.7% |
| 57 | GILLETTE CO | 11,469 | 425,428 | 436,897 | 2.6% |
| 58 | VOLKSWAGEN AG | 11,331 | 339,429 | 350,760 | 3.2% |
| 59 | FIRST DATA CORP | 10,492 | 10,667 | 21,159 | 49.6% |
| 60 | DOMINOS PIZZA INC | 10,402 | 99,061 | 109,463 | 9.5% |
| 61 | PAYLESS SHOESOURCE INC | 10,323 | 39,837 | 50,160 | 20.6% |
| 62 | VISA USA INC | 10,207 | 279,449 | 289,656 | 3.5% |
| 63 | KIMBERLY-CLARK CORP | 10,161 | 209,248 | 219,410 | 4.6% |
| 64 | GENERAL MILLS INC | 9,969 | 421,656 | 431,625 | 2.3% |
| 65 | ENERGIZER HOLDINGS INC | 9,889 | 100,936 | 110,825 | 8.9% |
| 66 | INTERBREW SA | 9,879 | 29,347 | 39,226 | 25.2% |
| 67 | RECKITT BENCKISER PLC | 9,847 | 294,673 | 304,519 | 3.2% |
| 68 | CADBURY SCHWEPES PLC | 9,739 | 219,300 | 229,040 | 4.3% |
| 69 | RADIO SHACK CORP | 9,599 | 140,875 | 150,474 | 6.4% |
| 70 | NATIONAL AMUSEMENTS INC | 9,471 | 483,051 | 492,522 | 1.9% |
| 71 | YAHOO INC | 9,446 | 20,800 | 30,245 | 31.2% |
| 72 | CASTALIAN MUSIC LLC | 9,223 | 67,737 | 76,960 | 12.0% |
| 73 | DOCTORS ASSOC INC | 9,188 | 206,909 | 216,097 | 4.3% |
| 74 | JOHNSON & JOHNSON/MERCK & CO | 9,135 | 57,872 | 67,007 | 13.6% |
| 75 | TOYOTA MOTOR CORP DLR ASSN | 8,843 | 210,896 | 219,738 | 4.0% |

Source: TNS Media Intelligence - Hispanic Media Share Study 2004

Top 250 National Advertisers, Ranked By Hispanic Spending for 2004 Media Spend in \$(000) - continued

| Rank | Parent | Total TV + Print Hispanic | Total TV + Print General | Grand Total TV + Print | Hispanic Media Share |
|------|----------------------------------|------------------------------|-----------------------------|---------------------------|-------------------------|
| 76 | NEWS CORP LTD | 8,578 | 600,736 | 609,314 | 1.4% |
| 77 | TOYS-R-US INC | 8,548 | 73,788 | 82,336 | 10.4% |
| 78 | TOYOTA MOTOR CORP LOC DLR | 8,394 | 276,550 | 284,944 | 2.9% |
| 79 | GAP INC | 8,232 | 296,625 | 304,858 | 2.7% |
| 80 | WASHINGTON MUTUAL INC | 8,117 | 70,957 | 79,075 | 10.3% |
| 81 | AMERICAN ASSN OF RETIRED PERSONS | 8,116 | 52,928 | 61,044 | 13.3% |
| 82 | AVON PDTS INC | 8,087 | 46,457 | 54,544 | 14.8% |
| 83 | SC JOHNSON & SON INC | 7,985 | 315,817 | 323,802 | 2.5% |
| 84 | ALBERTSONS INC | 7,825 | 80,945 | 88,770 | 8.8% |
| 85 | ALLSTATE CORP | 7,749 | 188,340 | 196,089 | 4.0% |
| 86 | HEARST CORP | 7,740 | 66,658 | 74,398 | 10.4% |
| 87 | HERSHEY FOODS CORP | 7,211 | 101,309 | 108,520 | 6.6% |
| 88 | BANK OF AMERICA CORP | 7,135 | 148,274 | 155,409 | 4.6% |
| 89 | WALGREEN CO | 7,045 | 84,455 | 91,500 | 7.7% |
| 90 | TYSON FOODS INC | 6,590 | 32,411 | 39,001 | 16.9% |
| 91 | VIVENDI UNIVERSAL SA | 6,394 | 45,297 | 51,691 | 12.4% |
| 92 | ADOLPH COORS CO | 6,361 | 127,897 | 134,258 | 4.7% |
| 93 | HEINEKEN NV | 6,306 | 51,215 | 57,521 | 11.0% |
| 94 | MERCK & CO INC | 6,285 | 287,758 | 294,043 | 2.1% |
| 95 | ROOMS TO GO INC | 6,110 | 48,827 | 54,936 | 11.1% |
| 96 | AMR CORP | 5,789 | 53,355 | 59,145 | 9.8% |
| 97 | MARS INC | 5,601 | 317,025 | 322,626 | 1.7% |
| 98 | NESTLE SA | 5,362 | 364,570 | 369,931 | 1.4% |
| 99 | ECHOSTAR COMMUNICATIONS CORP | 5,250 | 59,300 | 64,550 | 8.1% |
| 100 | CENDANT CORP | 4,948 | 138,291 | 143,239 | 3.5% |

Source: TNS Media Intelligence - Hispanic Media Share Study 2004

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Top 250 National Advertisers, Ranked By Hispanic Spending for 2004 Media Spend in \$(000) - continued

| Rank | Parent | Total TV + Print Hispanic | Total TV + Print General | Grand Total TV + Print | Hispanic Media Share |
|------|-----------------------------|------------------------------|-----------------------------|---------------------------|-------------------------|
| 101 | BELLSOUTH CORP | 4,878 | 32,919 | 37,796 | 12.9% |
| 102 | DAIMLERCHRYSLER AG LOC DLR | 4,868 | 247,191 | 252,059 | 1.9% |
| 103 | NISSAN MOTOR CO LTD LOC DLR | 4,688 | 150,409 | 155,098 | 3.0% |
| 104 | DAIMLERCHRYSLER AG DLR ASSN | 4,652 | 153,218 | 157,871 | 2.9% |
| 105 | WILLIAM WRIGLEY JR CO | 4,616 | 93,196 | 97,811 | 4.7% |
| 106 | FEDERATED DEPT STORES INC | 4,566 | 313,613 | 318,179 | 1.4% |
| 107 | NOKIA CORP | 4,484 | 58,634 | 63,118 | 7.1% |
| 108 | MAY DEPT STORES CO | 4,463 | 292,600 | 297,063 | 1.5% |
| 109 | NEXTEL COMMUNICATIONS INC | 4,460 | 181,101 | 185,561 | 2.4% |
| 110 | PUBLIX SUPERMARKETS INC | 4,220 | 20,333 | 24,553 | 17.2% |
| 111 | AFLAC INC | 4,216 | 63,123 | 67,339 | 6.3% |
| 112 | TJX COS INC | 4,145 | 46,731 | 50,876 | 8.1% |
| 113 | SARA LEE CORP | 4,112 | 154,837 | 158,949 | 2.6% |
| 114 | S&P CO | 3,950 | 24,497 | 28,447 | 13.9% |
| 115 | MERVYNS DEPT STORES | 3,942 | 84,460 | 88,402 | 4.5% |
| 116 | CHATTEM INC | 3,695 | 45,123 | 48,818 | 7.6% |
| 117 | KOHL'S CORP | 3,635 | 228,837 | 232,471 | 1.6% |
| 118 | RAZOR & TIE DIRECT LLC | 3,622 | 45,572 | 49,194 | 7.4% |
| 119 | BAYER AG GROUP | 3,518 | 194,261 | 197,780 | 1.8% |
| 120 | WELLS FARGO & CO | 3,446 | 21,629 | 25,074 | 13.7% |
| 121 | CONSTELLATION BRANDS INC | 3,372 | 40,966 | 44,338 | 7.6% |
| 122 | OFFICE DEPOT INC | 3,342 | 70,353 | 73,695 | 4.5% |
| 123 | ABBOTT LAB | 3,338 | 120,629 | 123,968 | 2.7% |
| 124 | CONSOLIDATED STORES CORP | 3,132 | 39,026 | 42,158 | 7.4% |
| 125 | IHOP CORP | 3,082 | 23,797 | 26,879 | 11.5% |

Source: TNS Media Intelligence - Hispanic Media Share Study 2004

Top 250 National Advertisers, Ranked By Hispanic Spending for 2004 Media Spend in \$(000) - continued

| Rank | Parent | Total TV + Print Hispanic | Total TV + Print General | Grand Total TV + Print | Hispanic Media Share |
|------|-------------------------------|------------------------------|-----------------------------|---------------------------|-------------------------|
| 126 | FEDERAL NATL MORTGAGE ASSN | 3,068 | 41,237 | 44,306 | 6.9% |
| 127 | KAISER PERMANENTE | 3,008 | 19,327 | 22,334 | 13.5% |
| 128 | AMERICAN LEGACY FOUNDATION | 2,982 | 51,511 | 54,493 | 5.5% |
| 129 | LIONS GATE ENTERTAINMENT CORP | 2,972 | 92,057 | 95,030 | 3.1% |
| 130 | NOVARTIS AG | 2,892 | 498,232 | 501,124 | 0.6% |
| 131 | ESTEE LAUDER COS INC | 2,829 | 148,428 | 151,257 | 1.9% |
| 132 | DARDEN RESTAURANTS | 2,713 | 159,750 | 162,463 | 1.7% |
| 133 | CALIFORNIA STATE OF | 2,657 | 42,792 | 45,448 | 5.8% |
| 134 | BP PLC | 2,542 | 61,204 | 63,746 | 4.0% |
| 135 | SCHERING-PLOUGH CORP | 2,510 | 211,886 | 214,396 | 1.2% |
| 136 | KROGER CO | 2,445 | 49,426 | 51,871 | 4.7% |
| 137 | NINTENDO CO LTD | 2,440 | 68,778 | 71,217 | 3.4% |
| 138 | CAMPBELL SOUP CO | 2,416 | 267,428 | 269,844 | 0.9% |
| 139 | COUNTRYWIDE FINANCIAL CORP | 2,374 | 23,933 | 26,307 | 9.0% |
| 140 | BMW AG | 2,358 | 117,372 | 119,730 | 2.0% |
| 141 | H&R BLOCK INC | 2,340 | 52,717 | 55,057 | 4.2% |
| 142 | GLAXOSMITHKLINE PLC | 2,298 | 740,489 | 742,787 | 0.3% |
| 143 | CKE RESTAURANTS INC | 2,288 | 25,615 | 27,903 | 8.2% |
| 144 | HYUNDAI CORP LOC DLR | 2,241 | 95,720 | 97,961 | 2.3% |
| 145 | MCCORMICK & CO INC | 2,195 | 40,814 | 43,009 | 5.1% |
| 146 | INTERBOND CORP | 2,186 | 39,978 | 42,163 | 5.2% |
| 147 | EMPIRE TODAY LLC | 2,055 | 28,855 | 30,910 | 6.6% |
| 148 | ZALE CORP | 2,054 | 55,947 | 58,000 | 3.5% |
| 149 | INGKA HOLDINGS AB | 1,873 | 28,704 | 30,577 | 6.1% |
| 150 | BUSH FOR PRESIDENT COMMITTEE | 1,870 | 37,455 | 39,326 | 4.8% |

Source: TNS Media Intelligence - Hispanic Media Share Study 2004

Top 250 National Advertisers, Ranked By Hispanic Spending for 2004 Media Spend in \$(000) - continued

| Rank | Parent | Total TV + Print Hispanic | Total TV + Print General | Grand Total TV + Print | Hispanic Media Share |
|------|--------------------------------|------------------------------|-----------------------------|---------------------------|-------------------------|
| 151 | GEORGIA-PACIFIC CORP | 1,774 | 59,927 | 61,701 | 2.9% |
| 152 | CIRCUIT CITY STORES INC | 1,765 | 137,724 | 139,489 | 1.3% |
| 153 | ADVANTICA RESTAURANT GROUP INC | 1,718 | 50,017 | 51,735 | 3.3% |
| 154 | NEWMARKET CAPITAL GROUP LP | 1,716 | 27,265 | 28,981 | 5.9% |
| 155 | AFC ENTERPRISES | 1,712 | 16,974 | 18,686 | 9.2% |
| 156 | COMCAST CORP | 1,709 | 90,718 | 92,427 | 1.8% |
| 157 | RE/MAX INTL INC | 1,688 | 68,459 | 70,147 | 2.4% |
| 158 | ROSS STORES INC | 1,685 | 26,752 | 28,437 | 5.9% |
| 159 | SAFEWAY INC | 1,676 | 54,909 | 56,585 | 3.0% |
| 160 | HYUNDAI CORP DLR ASSN | 1,610 | 45,127 | 46,737 | 3.4% |
| 161 | CITIGROUP INC | 1,602 | 453,811 | 455,413 | 0.4% |
| 162 | LEVITZ FURNITURE CORP | 1,579 | 29,236 | 30,816 | 5.1% |
| 163 | SIX FLAGS INC | 1,539 | 35,963 | 37,502 | 4.1% |
| 164 | CHEVRONTEXACO CORP | 1,536 | 30,343 | 31,879 | 4.8% |
| 165 | MAZDA MOTOR CORP | 1,499 | 260,373 | 261,871 | 0.6% |
| 166 | MAZDA MOTOR CORP LOC DLR | 1,483 | 48,167 | 49,650 | 3.0% |
| 167 | SONIC CORP | 1,481 | 47,645 | 49,126 | 3.0% |
| 168 | MICROSOFT CORP | 1,460 | 226,642 | 228,103 | 0.6% |
| 169 | VALASSIS COMMUNICATIONS INC | 1,460 | 161,765 | 163,225 | 0.9% |
| 170 | ITT EDUCATIONAL SERVICES INC | 1,420 | 48,185 | 49,605 | 2.9% |
| 171 | DILLARD INC | 1,413 | 98,294 | 99,707 | 1.4% |
| 172 | HASBRO INC | 1,406 | 114,587 | 115,992 | 1.2% |
| 173 | SIGNET GROUP PLC | 1,386 | 63,836 | 65,223 | 2.1% |
| 174 | FLORIDA STATE OF | 1,345 | 41,016 | 42,361 | 3.2% |
| 175 | HONDA MOTOR CO LTD LOC DLR | 1,341 | 173,256 | 174,597 | 0.8% |

Source: TNS Media Intelligence - Hispanic Media Share Study 2004

Top 250 National Advertisers, Ranked By Hispanic Spending for 2004 Media Spend in \$(000) - continued

| Rank | Parent | Total TV + Print Hispanic | Total TV + Print General | Grand Total TV + Print | Hispanic Media Share |
|------|---------------------------------|------------------------------|-----------------------------|---------------------------|-------------------------|
| 176 | US CELLULAR | 1,269 | 23,642 | 24,910 | 5.1% |
| 177 | SPRINT CORP | 1,267 | 524,562 | 525,829 | 0.2% |
| 178 | MCI INC | 1,196 | 40,549 | 41,745 | 2.9% |
| 179 | TRACINDA CORP | 1,189 | 119,165 | 120,354 | 1.0% |
| 180 | BMW AG DLR ASSN | 1,178 | 39,984 | 41,162 | 2.9% |
| 181 | COMPAGNIE GENERALE DES MICHELIN | 1,167 | 49,453 | 50,620 | 2.3% |
| 182 | ENTERPRISE RENT-A-CAR CO | 1,071 | 43,434 | 44,505 | 2.4% |
| 183 | ROYAL DUTCH/SHELL GROUP OF COS | 1,052 | 86,327 | 87,379 | 1.2% |
| 184 | ROYAL CARIBBEAN INTL | 1,051 | 87,646 | 88,696 | 1.2% |
| 185 | LEVI STRAUSS & CO | 1,033 | 106,500 | 107,533 | 1.0% |
| 186 | MENARD INC | 990 | 17,621 | 18,611 | 5.3% |
| 187 | JP MORGAN CHASE & CO | 986 | 104,273 | 105,259 | 0.9% |
| 188 | ALLIED DOMECQ PLC | 956 | 57,871 | 58,827 | 1.6% |
| 189 | PRUDENTIAL FINANCIAL INC | 938 | 35,780 | 36,719 | 2.6% |
| 190 | BEST WESTERN INTL INC | 934 | 17,203 | 18,137 | 5.1% |
| 191 | DAIRY MGT INC | 909 | 75,283 | 76,192 | 1.2% |
| 192 | ADVANCE PUBLICATIONS INC | 904 | 102,397 | 103,301 | 0.9% |
| 193 | BRIDGESTONE CORP | 895 | 34,078 | 34,973 | 2.6% |
| 194 | DEMOCRATIC NATIONAL COMMITTEE | 820 | 13,324 | 14,143 | 5.8% |
| 195 | MITSUBISHI MOTORS CORP | 807 | 225,023 | 225,830 | 0.4% |
| 196 | NIKE INC | 793 | 198,972 | 199,765 | 0.4% |
| 197 | QWEST COMMUNICATIONS INTL INC | 778 | 24,941 | 25,719 | 3.0% |
| 198 | OUTBACK STEAKHOUSE INC | 774 | 53,829 | 54,603 | 1.4% |
| 199 | MARRIOTT INTL INC | 773 | 67,703 | 68,475 | 1.1% |
| 200 | NATIONWIDE MUTUAL INSURANCE CO | 764 | 13,345 | 14,109 | 5.4% |

Source: TNS Media Intelligence - Hispanic Media Share Study 2004

Top 250 National Advertisers, Ranked By Hispanic Spending for 2004 Media Spend in \$(000) - continued

| Rank | Parent | Total TV + Print Hispanic | Total TV + Print General | Grand Total TV + Print | Hispanic Media Share |
|------|----------------------------------|------------------------------|-----------------------------|---------------------------|-------------------------|
| 201 | BOISE CASCADE PDTS CORP | 733 | 41,013 | 41,745 | 1.8% |
| 202 | MATSUSHITA ELECTRIC IND CO LTD | 717 | 58,151 | 58,868 | 1.2% |
| 203 | CONOCOPHILLIPS | 717 | 16,704 | 17,421 | 4.1% |
| 204 | TEXAS STATE OF | 708 | 26,415 | 27,122 | 2.6% |
| 205 | HEILIG-MEYERS CO | 673 | 27,238 | 27,911 | 2.4% |
| 206 | LUXOTTICA GROUP SPA | 651 | 60,243 | 60,894 | 1.1% |
| 207 | CVS CORP | 647 | 49,915 | 50,563 | 1.3% |
| 208 | RITE AID CORP | 638 | 20,272 | 20,910 | 3.0% |
| 209 | MITSUBISHI MOTORS CORP LOC DLR | 636 | 38,357 | 38,993 | 1.6% |
| 210 | BERTELSMANN AG | 636 | 87,199 | 87,835 | 0.7% |
| 211 | CHURCH & DWIGHT CO INC | 633 | 102,265 | 102,898 | 0.6% |
| 212 | JM SMUCKER CO | 620 | 52,649 | 53,269 | 1.2% |
| 213 | PAPA JOHNS INTL INC | 612 | 54,830 | 55,442 | 1.1% |
| 214 | SANOFI-AVENTIS | 602 | 222,299 | 222,900 | 0.3% |
| 215 | COMBE INC | 599 | 52,994 | 53,592 | 1.1% |
| 216 | MENS WEARHOUSE INC | 597 | 17,734 | 18,331 | 3.3% |
| 217 | POLYMEDICA CORP | 575 | 49,002 | 49,577 | 1.2% |
| 218 | DIAGEO PLC | 536 | 130,876 | 131,411 | 0.4% |
| 219 | PC RICHARD & SON INC | 535 | 44,370 | 44,906 | 1.2% |
| 220 | STAPLES INC | 534 | 55,449 | 55,983 | 1.0% |
| 221 | SLEEPY'S THE MATTRESS PROF | 507 | 22,999 | 23,506 | 2.2% |
| 222 | KERRY FOR PRESIDENT COMMITTEE | 502 | 22,525 | 23,026 | 2.2% |
| 223 | CLEAR CHANNEL COMMUNICATIONS INC | 487 | 2,211 | 2,698 | 18.0% |
| 224 | SHERWIN-WILLIAMS CO | 486 | 68,505 | 68,992 | 0.7% |
| 225 | LA WEIGHT LOSS MEDICAL GROUP | 470 | 12,110 | 12,581 | 3.7% |

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Top 250 National Advertisers, Ranked By Hispanic Spending for 2004 Media Spend in \$(000) - continued

| Rank | Parent | Total TV + Print Hispanic | Total TV + Print General | Grand Total TV + Print | Hispanic Media Share |
|------|-------------------------------------|------------------------------|-----------------------------|---------------------------|-------------------------|
| 226 | BMW AG LOC DLR | 467 | 36,721 | 37,187 | 1.3% |
| 227 | TRIARC COS INC | 442 | 31,199 | 31,641 | 1.4% |
| 228 | IDEAVILLAGE.COM | 426 | 49,769 | 50,195 | 0.8% |
| 229 | MILK INDUSTRY FOUNDATION | 411 | 46,118 | 46,529 | 0.9% |
| 230 | ROLEX WATCH CO SA | 399 | 33,125 | 33,523 | 1.2% |
| 231 | NORDSTROM INC | 387 | 30,659 | 31,046 | 1.2% |
| 232 | LOEWS CORP | 378 | 32,481 | 32,859 | 1.2% |
| 233 | ELECTRONIC ARTS INC | 377 | 54,767 | 55,144 | 0.7% |
| 234 | SIX CONTINENTS PLC | 372 | 25,308 | 25,679 | 1.4% |
| 235 | CVS CORP/JEAN COUTU GROUP | 345 | 16,801 | 17,147 | 2.0% |
| 236 | QUIZNOS CORP | 326 | 27,892 | 28,218 | 1.2% |
| 237 | UNITED HEALTH FOUNDATION | 325 | 25,432 | 25,757 | 1.3% |
| 238 | AETNA INC | 321 | 20,720 | 21,041 | 1.5% |
| 239 | LIBERTY TRAVEL INC | 320 | 29,678 | 29,998 | 1.1% |
| 240 | PEP BOYS MANNY MOE & JACK | 309 | 25,516 | 25,825 | 1.2% |
| 241 | CABLEVISION SYSTEMS CORP | 298 | 90,246 | 90,544 | 0.3% |
| 242 | LAS VEGAS NV | 293 | 35,733 | 36,027 | 0.8% |
| 243 | LVMH MOET HENNESSY LOUIS VUITTON SA | 290 | 111,284 | 111,574 | 0.3% |
| 244 | HEWLETT-PACKARD CO | 289 | 290,266 | 290,555 | 0.1% |
| 245 | UNITED PARCEL SERVICE/AMERICA INC | 288 | 146,708 | 146,997 | 0.2% |
| 246 | CONAGRA FOODS INC | 282 | 100,297 | 100,580 | 0.3% |
| 247 | MOTOROLA INC | 276 | 33,727 | 34,003 | 0.8% |
| 248 | CALLAWAY GOLF CO | 274 | 36,583 | 36,856 | 0.7% |
| 249 | ABN AMRO HOLDING NV | 269 | 19,758 | 20,027 | 1.3% |
| 250 | PLAYTEX PDTS INC | 266 | 54,181 | 54,448 | 0.5% |

Source: TNS Media Intelligence - Hispanic Media Share Study 2004