

Nielsen
Ad Intelligence Spotlight on
**Multi-Cultural
Advertising**

October 2009



nielsen
.....

The Nielsen Company takes a close look at advertising targeted towards Spanish-Language and African-American segments.

Advertising by Medium

Advertising spending in Spanish-Language media for the 12-month period of July 2008 to June 2009 reached over \$5.5 billion. In total, ad revenue targeted towards this group was down 6.3% compared to the previous 12 months. Most spending was concentrated on National television. All media categories cut spending, ranging from National television dropping 2% to Local Newspapers at -20%.

Spanish-Language Media Spending	Q3 '08-Q2 '09 \$ mil	Q3 '07-Q2 '08 \$ mil	Pct. Change
Network & Cable TV	\$3,199.0	\$3,265.8	-2.0%
Spot TV	\$1,521.1	\$1,753.3	-13.2%
Spot Radio	\$569.0	\$586.8	-3.0%
National Magazine	\$146.7	\$177.9	-17.5%
Local Newspaper	\$88.6	\$111.3	-20.3%
Total	\$5,524.5	\$5,895.0	-6.3%

Source: The Nielsen Company

Advertising towards African-Americans also declined for the same time period. Overall, advertisers cut back 9.6%, with the greatest decrease seen in Syndicated TV (-48%). P&G, GlaxoSmithKline, and Wal-Mart all decreased their Syndicated budgets on African-American programming.

Cable TV showed a 6.7% growth with key advertisers Johnson & Johnson, Verizon Communications and General Electric all expanding their budgets. In addition, Green Bullion Financial Services significantly upped spending from under \$1 million to over \$9.5 million, contributing to the increase of Cable TV.

African-American Media Spending	Q3 '08-Q2 '09 \$ mil	Q3 '07-Q2 '08 \$ mil	Pct. Change
Spot Radio	\$794.1	\$851.4	-6.7%
Cable TV	\$529.0	\$495.7	6.7%
National Magazine	\$452.0	\$578.2	-21.8%
Syndicated TV	\$45.2	\$88.1	-48.7%
Network TV	\$27.3	\$31.5	-13.3%
Grand Total	\$1,847.6	\$2,044.9	-9.6%

Source: The Nielsen Company

Top Advertising Categories

Advertiser spending on Spanish-Language media within the top ten categories reached more than \$2.2 billion in July 2008 to June 2009. Factory Automotive and Dealer Associations spent \$381.7 million, making it the largest category, despite a substantial 40% decrease.

Although Automotive topped the list with the most spending, Satellite Communications Services had the most significant percentage increase within the top ten categories (+77.2%).

Spending by the top ten product categories advertising to African-Americans was \$499.7 million for July 2008 to June 2009, a 12.7% decline over the prior period. Most product categories decreased spending, ranging from -6.4% for Quick Service Restaurants to Automotive cutting back 33.5%.

Direct Response Products, Insurance, and Credit Services were the only categories to increase spending.

Nielsen Ad Intelligence Spotlight on Multi-Cultural Advertising

Top Spanish-Language Product Categories	Q3 '08-Q2 '09 \$ mil	Q3 '07-Q2 '08 \$ mil	Pct. Change
Automotive (Factory & Dealer Associations)	\$381.7	\$640.6	-40.4%
Wireless Telephone Services	\$334.8	\$319.5	4.8%
Quick Service Restaurant	\$322.8	\$293.1	10.1%
Department Stores	\$291.2	\$299.6	-2.8%
Direct Response Products	\$234.3	\$198.3	18.1%
Satellite Communication Svcs.	\$180.6	\$101.9	77.2%
Beer	\$166.6	\$166.3	0.2%
Auto Insurance	\$124.1	\$129.3	-4.1%
Legal Services	\$114.9	\$85.6	34.2%
Motion Pictures	\$104.7	\$118.2	-11.4%
Total Top 10 Categories	\$2,255.7	\$2,352.4	-4.1%

Source: The Nielsen Company

Top African-American Product Categories	Q3 '08-Q2 '09 \$ mil	Q3 '07-Q2 '08 \$ mil	Pct. Change
Automotive (Factory & Dealer Associations)	\$ 82.6	\$ 124.2	-33.5%
Quick Service Restaurants	\$ 72.4	\$ 77.4	-6.4%
Department Stores	\$ 62.3	\$ 78.0	-20.1%
Motion Picture	\$ 53.3	\$ 66.7	-20.0%
Wireless Telephone Svcs	\$ 50.6	\$ 60.7	-16.7%
Direct Response Products	\$ 46.7	\$ 37.4	24.7%
Pharmaceutical	\$ 44.5	\$ 54.1	-17.8%
Insurance	\$ 30.1	\$ 21.4	40.7%
Credit Services	\$ 29.2	\$ 21.5	35.7%
Restaurants	\$ 28.1	\$ 31.2	-10.1%
Total Top 10 Categories	\$ 499.7	\$ 572.6	-12.7%

Source: The Nielsen Company

About Multi-Cultural Media Measurement at Nielsen

Nielsen offers clients a complete view of multi-cultural advertising, measuring the following media:

Spanish-Language advertising:

- 5 television networks, 6 cable networks
- 53 local television stations across 27 markets
- 74 radio stations across 24 markets
- 8 local newspapers across 5 markets
- 20 national magazines

African American advertising:

Radio: 105 stations across 34 markets. The following formats were included: Black News & Talk, Gospel, Urban Reggaeton, Smooth Jazz, Urban, Urban AC, and Urban Oldies.

Network & Syndication TV: Programs with an African American audience composition of 50% or greater, resulting in 50 programs, plus the following programs of interest: "Showtime at the Apollo" and "Judge Mathis".

National Magazines: 12 national magazines

Cable TV: BET & TV One, as well as 229 programs across 31 additional networks provided the program achieves an African American audience comp of 50% or greater and African American p2+ projection of 100,000 or greater.

Please contact your Nielsen representative today for advertising information on any product category that interests you.