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June 16, 2003

Marlene H. Dortch
Secretary
Federal Communications Commission
445 12th Street, S.W.
Washington, D.C. 20554

Re: Ex parte filing; Applications for Transfer of Control of Hispanic Broadcasting Corp., and Certain Subsidiaries, Licensees of KGBT (AM, Harlingen, Texas *et al.* (Docket No. MB 02-235, FCC File Nos. BTC-20020723ABL, *et al.*)

Dear Ms. Dortch:

In support of the merger between Univision and Hispanic Broadcasting Corp., the Applicants have argued that Spanish-language broadcasting is not a market distinct from the general broadcasting market. They accuse Spanish Broadcasting System, Inc. ("SBS") and other opponents of the merger of embarking on an "unprecedented effort to partition the broadcast audience. . . . Those seeking the creation of such an artificial regulatory classification based solely upon a station's chosen program content rely upon an inaccurate stereotype of American Hispanics that suits their agenda."[1] To support their position, the parties would have the Commission believe that

- "Hispanic audiences rely heavily on English-language formatted stations;"[2]
- the Spanish-language media market is an 'amorphous' concept;[3]
- "there are numerous Spanish-language media sources available to Hispanic audiences;"[4]

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1 *Ex parte* letter from Scott Flick, Counsel for Univision Communications, Inc. and Roy Russo, Counsel for Hispanic Broadcasting Corp., to Chairman Powell, FCC, Docket No. MB 02-235, FCC File Nos. BTC-20020723ABL, *et. al.*, at 1 (May 14, 2003) ("*Univision Letter*").

2 Univision Letter at 3.

3 *Id.* at 2-3.

4 *Id.* at 4.

- "Spanish-formatted stations are not a fixed market unto themselves, but merely a format choice, which, like all format choices, is intended to reach a particular segment of the overall market, whether it be Hispanics, teenagers, or classical music fans;"[5] and
- "[t]he assertion of a single unified Spanish-language media market . . . implodes under even cursory examination."[6]

The applicants' most recent responses rely heavily upon data from Arbitron to support their position.[7] Given Arbitron's standing in the measurement of radio audience, that is understandable. It therefore is especially noteworthy that Arbitron has concluded "that language preference has a direct connection to radio listening."[8] In fact, it has initiated a comprehensive effort to introduce language weighting in 2006 to better account for Spanish-language listening preferences.[9]

SBS recently supplemented the record with two filings that largely undermine the applicants' contention about the listening and viewing habits of Spanish-speaking Americans. Included in those filings were marketing materials from some of the largest Hispanic-focused marketing firms in the nation as well as the responses of more than twenty advertising agencies and advertisers with special knowledge of the Hispanic community.[10] These filings demonstrate the existence of a separate advertising market which appeals to a unique category of broadcast listeners and viewers; namely, one determined by Spanish-language. In this case, as elsewhere, language is intrinsically important; it is also a reflection and a conveyer of content and of culture. The materials previously submitted, along with those attached here, address both competition and diversity, just as the Commission must in connection with its public interest determination on the permissibility of the requested transfers.

Considering the realities described by the agencies and advertisers about Spanish-language listeners and viewers, it should not be surprising that outside the Beltway Univision and HBC

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5 *Id.* at 5; *See also Consolidated Opposition to Petitions to Deny*, Docket No. MB 02-235, File Nos. BTC-20020723ABL, *et. al.*, filed by Hispanic Broadcasting Corp., at 9-10 (Sept. 18, 2002).

6 Univision Letter at 3.

7 It is worth noting that just last autumn HBC severely criticized Arbitron for allegedly undercounting Spanish-language radio listeners, indicating that it was "not at all sure those [Arbitron] numbers are correct." Kevin Downey, *Arbitron: We'll fix how we track Hispanics*, Media Life Magazine (Nov. 2, 2002), *available at* http://www.medialifemagazine.com/news2002/nov02/nov11/5_fri/news2friday.html.

8 Arbitron Presentation *Hispanic Initiatives Update*, Feb. 6, 2003 at 2.

9 *See* Arbitron Radio Advisory Council Minutes, March 26-27, 2003, *available at* http://www.arbitron.com/radio_stations/racmin03_03_customer.htm. ("Arbitron's decision to pursue Spanish-language weighting is based upon internal studies that show a correlation between Spanish-language usage by respondents and listening to Spanish-language radio stations in Arbitron's published radio listening estimates.")

10 *See* Presentation from Philip Verveer *at. al.*, Attorneys for SBS, to Marlene H. Dortch, Secretary, FCC, Docket No. MB 02-235, FCC File Nos. BTC-20020723ABL, *et. al.* (June 2, 2003); *See also* Presentation from Philip Verveer *at. al.*, Attorneys for SBS, to Marlene H. Dortch, Secretary, FCC, Docket No. MB 02-235, FCC File Nos. BTC-20020723ABL, *et. al.* (June 3, 2003).

consistently contradict the representations they have made to the Commission in this proceeding. These statements, made in the normal course of business, show a Spanish-language determined market in which television and radio compete with each other for Spanish-language listeners and viewers. However, SBS notes at the outset that it is not alone in identifying and appreciating the irony of these contradictions. As one journalist concluded, "[i]f the government rules that there is no separate Hispanic market and approves the deal, Univision will have won by denying the existence of the very market it helped to create."[11]

The material summarized below and attached to this letter more accurately demonstrates Univision's and HBC's perspective on the Spanish-language broadcasting market. Specifically, it shows that Spanish-language listeners and viewers significantly favor Spanish-language radio and television. It reveals that Spanish-language broadcasting is the principal mode of reaching this category of consumers and that nothing else comes close.

While the materials often conflict with representations made by the parties to the Commission, they should not be overlooked or dismissed as mere puffery. The marketing materials are intended to induce companies to spend significant sums on advertising and must be sufficiently reliable to persuade sophisticated advertisers to continue to do business with these companies. Moreover, statements derived from the applicants' SEC filings are attested under oath. Dismissing these statements out of hand, merely because they contradict statements in the record, would be contrary to the Commission's duty to not only review the record, but to "find substantial support in the record of [this] proceeding[]."[12] Courts have also made clear that "[e]vidence is insubstantial if it is overwhelmingly contradicted by other evidence."[13] The attached materials seriously call into question the assertions made by the Applicants to the Commission.

Spanish-Language Broadcasting Market.

Univision and HBC have asserted to the Commission that there is no separate Spanish-language media market -- that the notion "implodes under even cursory examination."[14] Their argument, however, is plainly inconsistent with their marketing materials. Univision, for example, in marketing materials for its South Florida Spanish-language station, tells advertisers that:[15]

- "Among Adults, Univision 23 WLTV delivers a significant <u>exclusive</u> audience. . . . 51.9% of WLTV-TV's audience does not watch any English television at all during the week!" (Attachment 1 at 31) (emphasis added).

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11 Juan Gonzalez, *Univision On the Verge of Monopoly*, New York Daily News, Jan. 14, 2003, at 26.

12 *WEBR, Inc. v. FCC*, 420 F.2d 158, 160 (D.C. Cir. 1969).

13 *O'Dell v. Shalala*, 44 F.3d 855, 858 (10th Cir. 1994).

14 Univision Letter at 3.

15 *See* Univision *Reaching the Lucrative South Florida Market* presentation (submitted as <u>Attachment 1</u>).

- "67% of those 1.6 million Hispanics [in South Florida] speak Spanish mostly or only at home (Spanish dominant). This means that if you do not target Hispanics over 1,055,000 Hispanics or 27% of the total Miami/Ft. Lauderdale population will not be effectively reached by your general market television advertising efforts." (Attachment 1 at 21) (emphasis added).
- "Among Hispanics nationwide, commercials in Spanish (as compared to commercials in English) are:
    - 5 times more persuasive than commercials in English.
    - 61% more effective at increasing awareness levels than commercials in English.
    - 57% more effective in terms of message comprehension than commercials in English.
    - Among Bilingual Hispanics, Spanish-language commercials are 3.4 times more persuasive!" (Attachment 1 at 22).
- "Accommodation Theory
    - The Accommodation Theory suggests that bilingual Hispanics-who are more likely to be using both Spanish and English media are extra-attuned to advertisers who go out of their way to reach them in Spanish.
    - The bilingual viewers feel especially positive toward the advertiser who makes the extra effort of creating and airing Spanish language spots.
    - Spanish dependant viewers expect to be advertised to in Spanish, 'Since I'm not available on English media, how else do you expect to reach me?'" (Attachment 1 at 23).

In addition, in materials prepared this year for its national sales efforts, Univision made the following claims:[16]

- "Hispanics are the market in the top DMAs." (Attachment 2 at 3) (emphasis in original).
- "Among bilingual households, the top 73 shows are on Univision." (Attachment 2 at 26) (emphasis added).
- "The Top 78 shows among Hispanics aged 18-49 are on Univision." (Attachment 2 at 25).
- "U.S. Hispanics speak Spanish at home regardless of age, regardless of education of head of household, regardless of household income." (Attachment 2 at 15).
- "Univision's programming is similar to English-language network formats, but is more culturally relevant to Hispanic audiences." (Attachment 2 at 23) (emphasis added).
- "The majority of Hispanics prefer to get information in Spanish and they want to be marketed to as Hispanics." (Attachment 2 at 16).

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16 *See* Univision *Reaching the Lucrative U.S. Hispanic Market* presentation (submitted as Attachment 2).

- "Hispanics are more likely to purchase brands which advertise in Spanish." (Attachment 2 at 17).
- "Even the highest rated English-language television shows underdeliver Hispanic adults 18-49." (Attachment 2 at 24).
- "Only Univision delivers a significant exclusive audience." (Attachment 2 at 31).

Univision's 10k filings with the Securities and Exchange Commission further buttress these facts:

- While it asserts to the FCC that the Spanish-language media market is 'amorphous,' it claims to be "the leading Spanish-language media company in the United States."[17]
- Univision "believes that the strong Spanish-language retention among Hispanics indicates that the Spanish-language media has been and will continue to be an important source of news, sports and entertainment for Hispanics."[18]

Similarly, HBC makes the following claims in its marketing materials:[19]

- "You can't reach HBC listeners on general market stations." (Attachment 4 at 25).
- "On average, Spanish radio stations duplicate less than 10% with English language stations." (Attachment 3 at 4.)
- "Commercials in Spanish are 57% more effective than commercials in English." (Attachment 4 at 14.)
- "Radio has a much stronger story to tell in the Hispanic market than it does in the general market." (Attachment 4 at 18).

Taken as a whole, these marketing materials, along with the SEC filings, are intended to convey a single message: if advertisers want to reach the fastest growing segment of the population they can only do so effectively by advertising in Spanish on these Spanish-language broadcast stations. They make clear that English-language broadcasting is not an adequate substitute because you cannot reach the Spanish-language listener and viewer on general market stations. This position, of course, accords with those materials SBS submitted to the Commission last week. It also demonstrates that the sources of diversity relevant to Spanish-speaking Hispanic Americans are Spanish-language broadcasters.

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17 Univision Letter at 2; Univision 2001 SEC Form 10-K Annual Report at 3; Univision 2002 SEC Form 10-K Annual Report at 5-6.

18 Univision 2001 SEC Form 10-K Annual Report at 9, Univision 2002 SEC Form 10-K Annual Report at 9.

19 HBC *Si* presentation and HBC *Hispanic Radio* presentation (submitted as Attachment 3 and Attachment 4, respectively).

Spanish-Language Radio And Television Broadcasting Market.

In addition to arguing that Spanish-language media is not a separate market, Univision and HBC have argued that the Commission should approve the transaction because it is a merger of a television company with a radio company. They contend that these two media do not compete with each other, "[t]hus, even if Hispanic audiences actually did limit themselves to Spanish-formatted radio and television stations, the merger would still have no impact upon competition."[20] Once again, Univision's and HBC's statements outside the Beltway belie their position at the Commission.

In a separate national sales presentation to advertisers, Univision appeals to advertisers not as a complement, but as a substitute for radio. City by city, Univision claims it strengths over radio as a medium that is more "influential, authoritative, exciting, and persuasive."[21] It asserts that Univision reaches more Hispanic adults than every Spanish radio station in each of the top 15 markets in the nation.[22] It also shows that it delivers more Hispanics than its nearest daily newspaper competitor (English or Spanish).[23]

HBC too believes that TV and radio are in the same market. In its marketing materials, it shows that "Spanish language radio out delivers Spanish TV across all HBC markets!"[24] HBC also notes that Spanish-radio has a particular place in the Spanish-language broadcast market because "[r]adio provides an important cultural touchstone, especially to a market that has a large segment of the audience driven by dependence and not just preference."[25]

These assertions make clear Univision's and HBC's understanding that they are competing with each other for advertising revenue. Each contends that advertisers should use its medium, instead of the other's, to reach an audience 'dependent' on Spanish-language broadcasting. The substitutability of these services from the perspective of Univision, HBC, and their advertisers can lead the FCC to only one conclusion; that these services are in the same market for economic and diversity purposes.[26]

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20 Univision Letter at 3.

21 Univision *Media Usage* presentation at 1 (submitted as Attachment 5).

22 *Id.* at 5-22.

23 *Id.* at 22-30.

24 Attachment 3 at 6.

25 Attachment 3 at 7 (emphasis added).

26 The FCC's ownership rules consider television and radio to be in the same market for diversity purposes. *See* 47 C.F.R. 73.3555(c). The recent review of the media ownership rules, which adjusted the level of cross-ownership at which harms will be presumed, maintains this market definition.

In conclusion, the merger between Univision and HBC will have significantly adverse consequences for Spanish-language broadcasting and for Spanish-speaking Hispanic Americans. As SBS has previously explained, this necessitates a detailed analysis of the relevant marketplace for economic and diversity purposes that is based on facts and not mere conclusory statements. In this case, the facts as revealed by the merging parties' own materials make clear the relevant market for the FCC's consideration. They show that there is a separate market for Spanish-language broadcasting that includes both television and radio broadcasters; that Spanish-speaking Americans rely uniquely upon Spanish-language broadcasting. Were the FCC to deny this fact, it would amount to a denial of 'the existence of the very market [Univision] helped to create.'

Respectfully submitted,

/s/ Philip L. Verveer

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ATTACHMENT 1

Univision

"Reaching the Lucrative South Florida Market"

Presentation

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Miami • Channel 23

TELEFUTURA

Miami•Channel 69

Reaching the Lucrative S. Fl Hispanic Market

Univision 23

Agenda

- Miami/ Ft. Lauderdale Market Overview
  - 2000 Census Information
- Communicating in Spanish
  - Roslow Research Study
  - DRI Use of Spanish
- Qualitative Research Information
  - Scarborough
  - DRI McGraw Hill
  - Simmons
- Station Information – WLTV-23
  - Nielsen Feb. 03 Ratings Review
  - Programming
  - Reach
- Next Steps

The Miami/Ft. Lauderdale Hispanic Marketplace

United States Census 2000

Miami/Ft.Lauderdale is the Nations 3rd Largest Hispanic Television Market

TELEVISION MARKET	TOTAL POPULATION	2000 HISPANIC POPULATION	HISPANIC %
Los Angeles*	16,151,492	6,462,818	40.0%
New York	20,181,238	3,750,741	18.6%
Miami/Ft.Laud	**3,955,969**	**1,575,942**	**39.8%**
Chicago	9,274,187	1,498,098	16.2%
Houston	5,006,796	1,413,293	28.2%

To compare Miami/Ft. Lauderdale is the 17th largest television market (total pop.) in the country.

Note: Television markets are based on current NSI DMA definitions and current county level data. Markets with counties that were only partially within a DMA boundary (*) were estimated based upon % of county assigned to the DMA by Nielsen (People 2+). Final Nielsen and Claritas DMA estimates may vary slightly.

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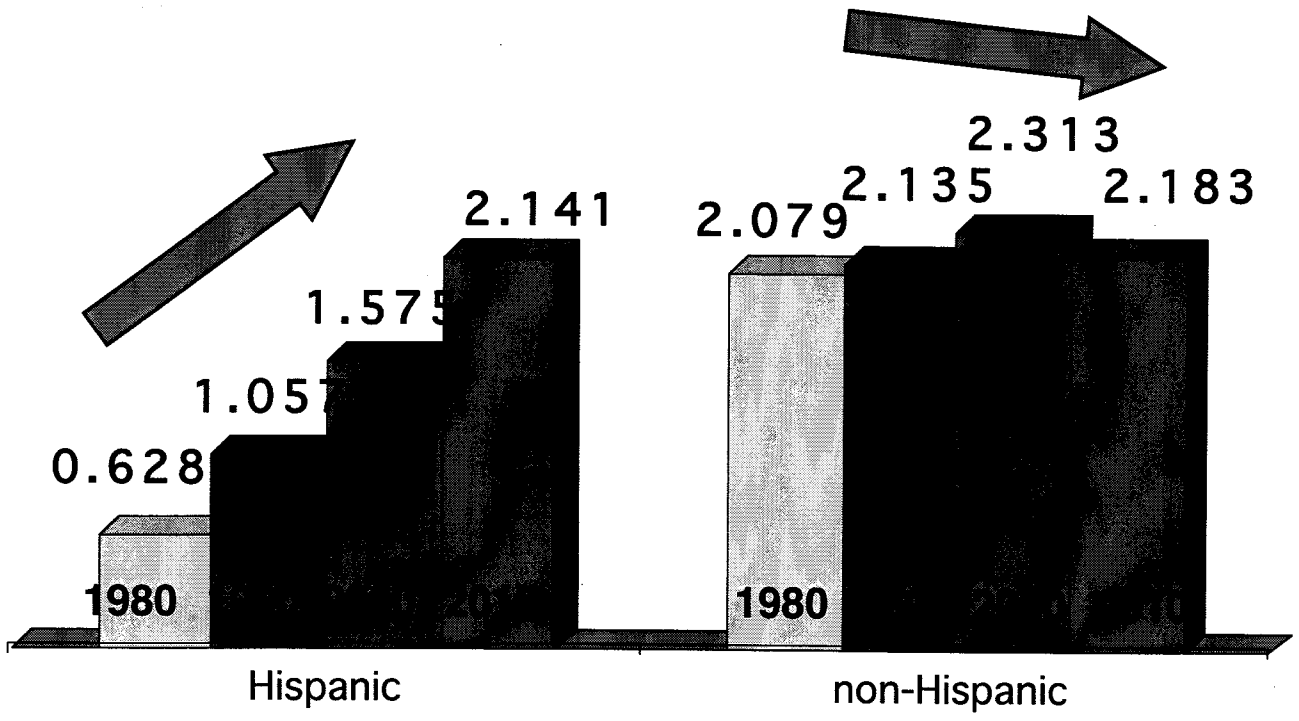
Miami/Ft.Lauderdale
Hispanic Concentration by County

COUNTY	2000 TOTAL POPULATION	2000 HISPANIC POPULATION	% HISPANIC	MEDIAN AGE	FAMILY SIZE
Dade	2,253,362	1,291,737	57%	35.6	3.35
Broward	1,623,018	271,652	19%	37.8	3.07
Monroe	79,589	12,553	16%	42.6	2.73
TOTAL DMA	3,955,969	1,575,942	40%	38.7	3.05

Source: Census 2000, March 2001 Release

From 1980 through 2010, the Hispanic population is expected to quadruple while the non-Hispanic population will decrease!

Miami-Ft. Lauderdale Projected Population Growth (in millions)



Miami - WLTV 23

Source: 1999 DRI/McGraw-Hill, "Hispanic Consumer Market Growth to 2010." 1980, 1990, 2000 U.S. Census.

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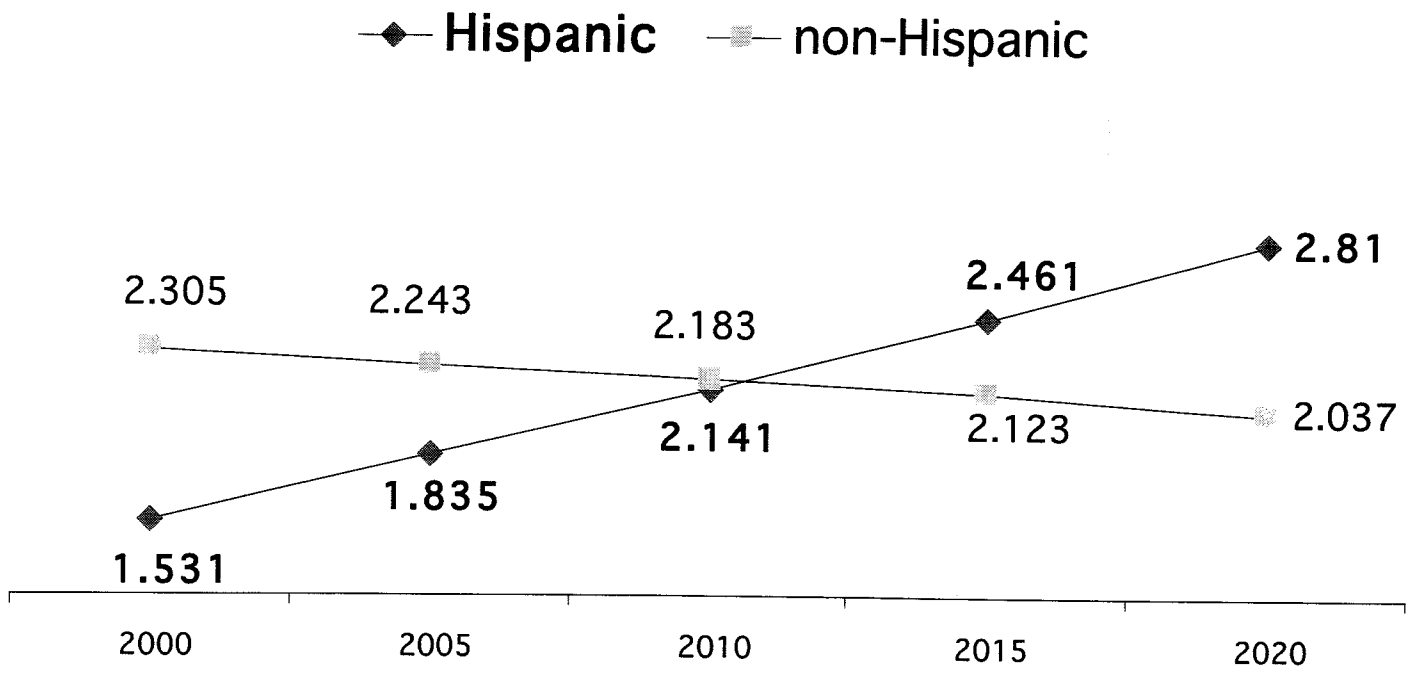
In approximately eight years, the Hispanic and non-Hispanic populations will be equal...

Miami-Ft. Lauderdale population projections 2000-2020



By 2015, Hispanics will out-number non-Hispanics.

Miami - WLTV 23

Source: Standard & Poor's 1999 DRI McGraw Hill Hispanic Consumer Market 1999

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2000 Census DMA Estimates
Population Counts: Hispanic 2000 vs. Hispanic 1990

DMA	Total Population	2000 Hispanic Population	Hispanic %	Total Population	1990 Hispanic Population	Hispanic %
Dade	2,253,362	1,291,737	57%	1,937,094	949,176	49%
Broward	**1,623,018**	**271,652**	**17%**	**1,255,488**	**108,439**	**9%**
Monroe	79,589	12,553	16%	78,024	9,580	12%
Bakersfield	576,595	240,318	42%	466,760	143,787	31%
Chicago	9,274,187	1,498,098	16%	8,364,129	897,436	11%
Dallas	5,765,860	1,175,982	20%	4,499,654	553,711	12%
Fresno	1,647,682	746,253	45%	1,361,675	481,282	35%
Houston	5,006,796	1,413,293	28%	4,021,279	818,601	20%
Los Angles	16,151,492	6,462,818	40%	14,391,321	4,705,525	33%
Miami	3,955,969	1,575,942	40%	3,270,606	1,071,426	33%
New York	20,181,238	3,750,741	19%	18,566,988	2,798,716	15%
Phoenix	3,941,798	899,779	23%	2,738,436	429,797	16%
Sacramento	3,420,581	687,206	20%	2,864,613	428,423	15%
San Antonio	2,027,879	1,034,931	51%	1,682,797	801,345	48%
San Francisco	6,685,623	1,288,283	19%	5,946,386	904,262	15%
Tucson	999,882	314,717	32%	794,180	214,862	27%
Total US	281,421,906	35,305,818	13%	248,709,873	22,354,059	9.0%

Note: Television markets are based on current NSI DMA definitions and current county level data. Markets with counties that were only partially within a DMA boundary (*) were estimated based upon % of county assigned to the DMA by Nielsen (People 2+). Final Nielsen and Claritas DMA estimates may vary slightly.

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2000 Census DMA Estimates
Hispanic 2000 increases over Hispanic 1990

DMA	1990-2000 +/- increase Hispanic Pop	1990-2000 +/- increase Total Pop	% growth 1991-2000 Hispanic	% growth 1991-2000 non-Hispanic	% growth 1991-2000 Total	Hispanic share of total growth
Dade	+342,561	+316,268	36%	-3%	16%	108%
Broward	**+204,344**	**+367,530**	**151%**	**18%**	29%	**56%**
Monroe	+2,973	+1,565	31%	-2%	2%	190%
Bakersfield	+96,531	+109,836	67%	4%	24%	88%
Chicago	+600,662	+910,058	67%	4%	11%	66%
Dallas	+622,271	+1,266,206	112%	16%	28%	49%
Fresno	+264,971	+286,007	55%	2%	21%	93%
Houston	+594,692	+985,517	73%	12%	25%	60%
Los Angles	+1,757,293	+1,760,172	37%	0%	12%	100%
Miami	+504,516	+685,363	47%	8%	21%	74%
New York	+952,025	+1,614,250	34%	4%	9%	59%
Phoenix	+469,982	+1,203,361	109%	32%	44%	39%
Sacramento	+258,783	+555,968	60%	12%	19%	47%
San Antonio	+233,586	+345,082	29%	13%	21%	68%
San Francisco	+384,021	+739,237	43%	7%	12%	52%
Tucson	+99,855	+205,702	47%	18%	26%	49%
Total US	+12,951,759	+32,712,033	58%	9%	13%	40%

Note: Television markets are based on current NSI DMA definitions and current county level data. Markets with counties that were only partially within a DMA boundary (*) were estimated based upon % of county assigned to the DMA by Nielsen (People 2+). Final Nielsen and Claritas DMA estimates may vary slightly.

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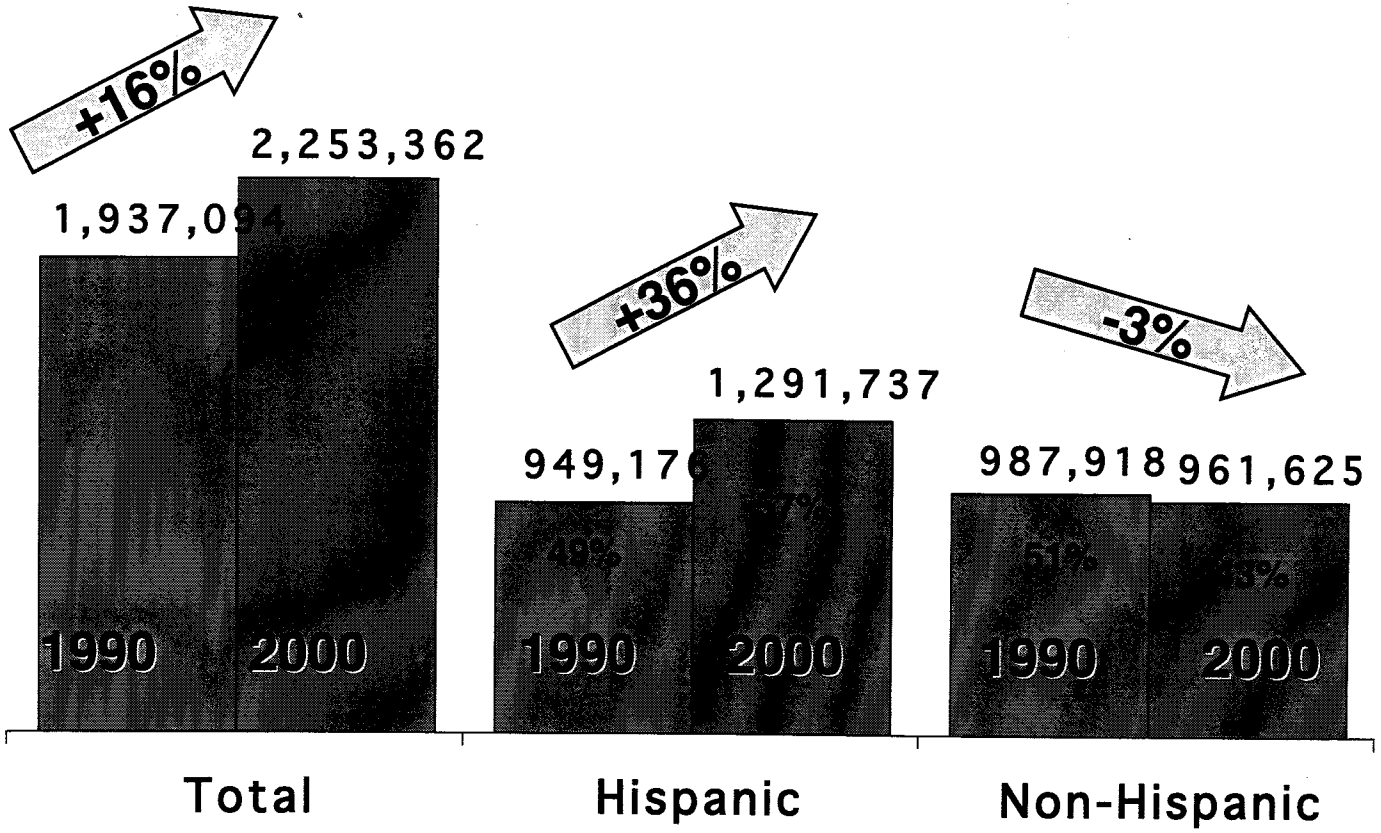
The Hispanic Population of Dade County represents the growth of Miami from 1990 to 2000!

Population Trend in Dade County



Miami - WLTV 23

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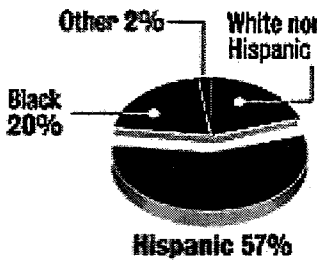
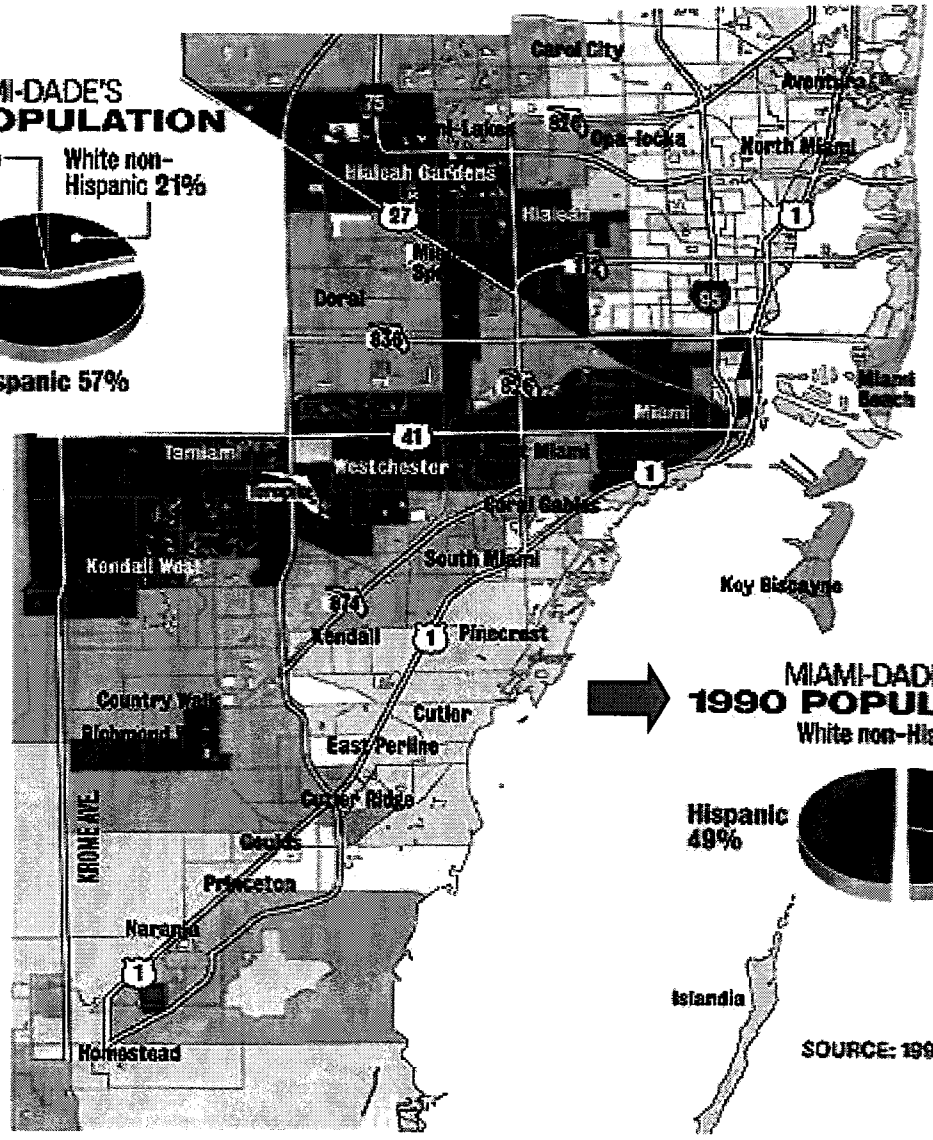
Source: 2000 Census, March Release

Hispanic Population – Dade

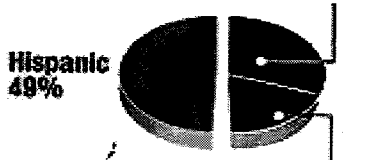
MIAMI-DADE'S
2000 POPULATION



SOURCE: 2000 Census



MIAMI-DADE'S
1990 POPULATION



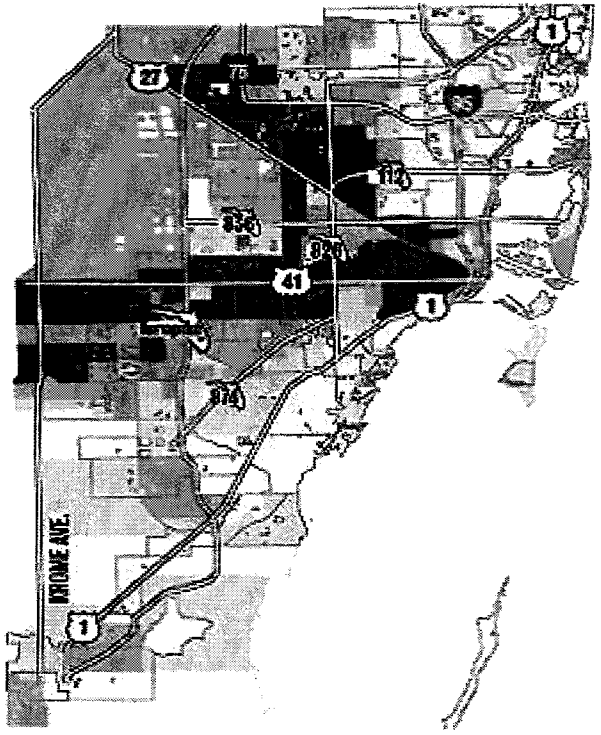
Islandia

SOURCE: 1990 Census

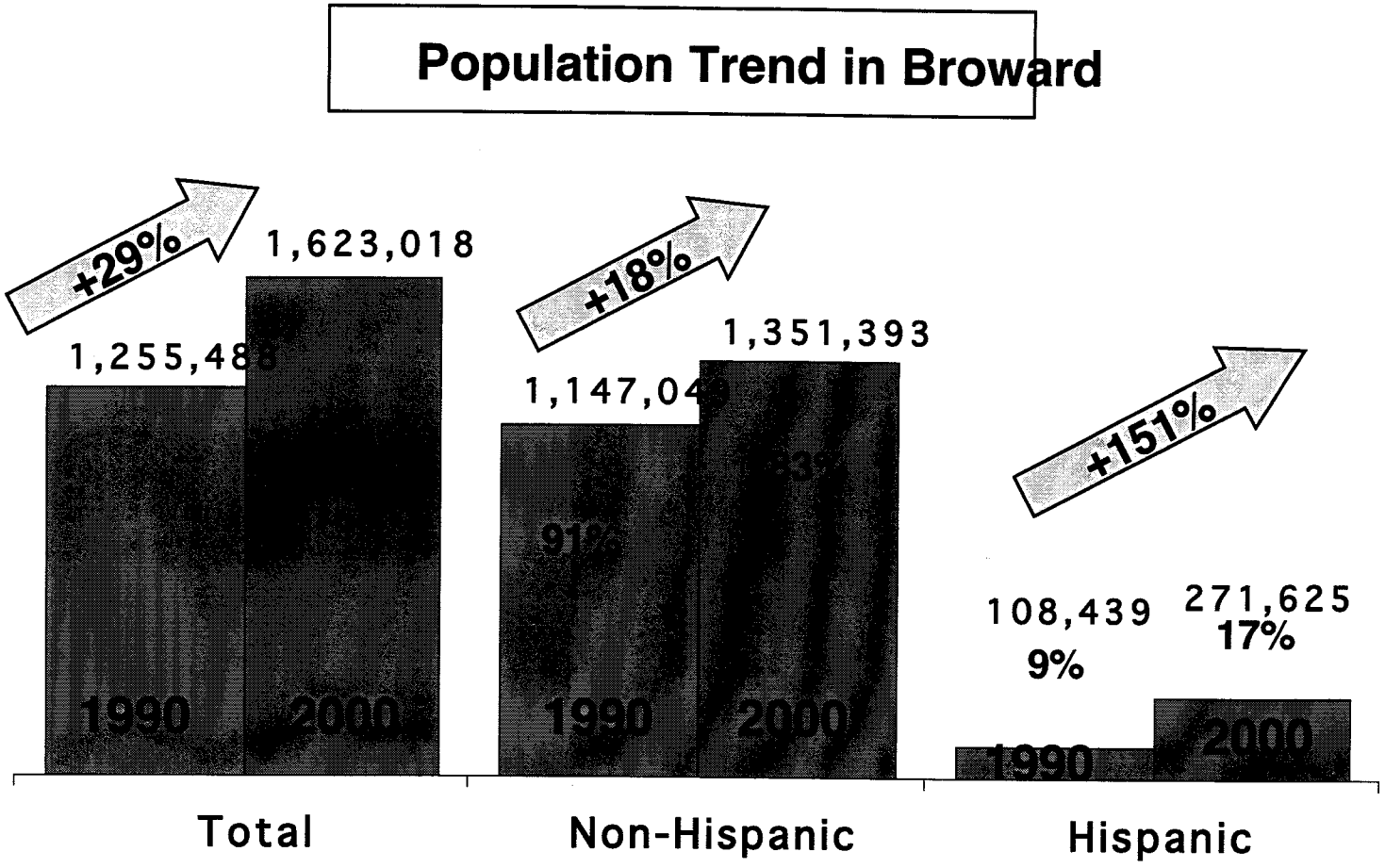
LEGEND

Less than 23% | 23% to 44% | 44% to 71% | 71% to 96%

NOTE: The white areas of the race/ethnicity maps are areas that have less than 10 people per square mile. These areas were not included in the analysis because the size of their populations skews the data.



The Hispanic Population of Broward County grew by 151% from 1990 to 2000!



Miami - WLTV 23

Source: 2000 Census, March Release

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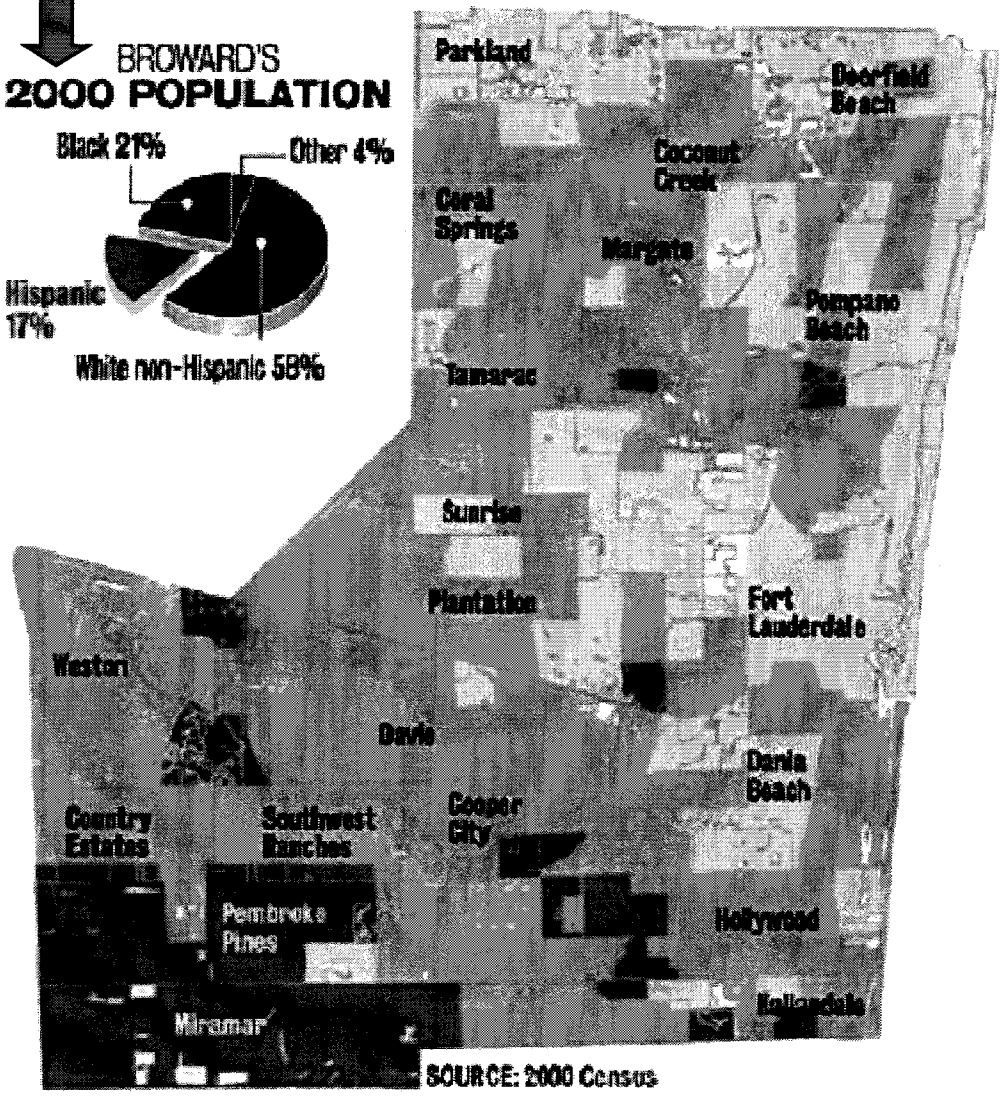
Hispanic Population - Broward

BROWARD'S
2000 POPULATION



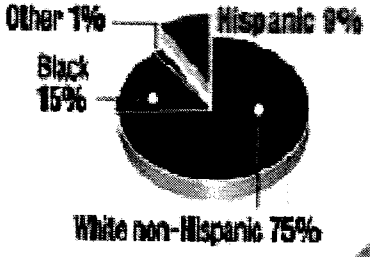
SOURCE: 2000 Census

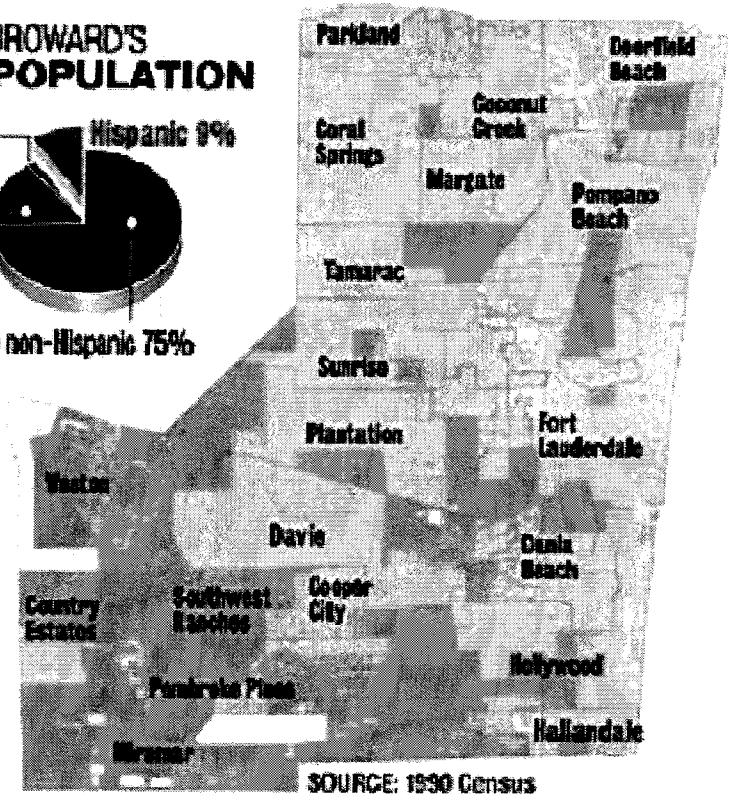
LEGEND

Less than 1% | 1% to 10% | 11% to 30% | 31% to 66%

NOTE: The white areas of the race/ethnicity maps are areas that have less than 10 people per square mile. These areas were not included in the analysis because the size of their populations skews the data.

BROWARD'S
1990 POPULATION





SOURCE: 1990 Census

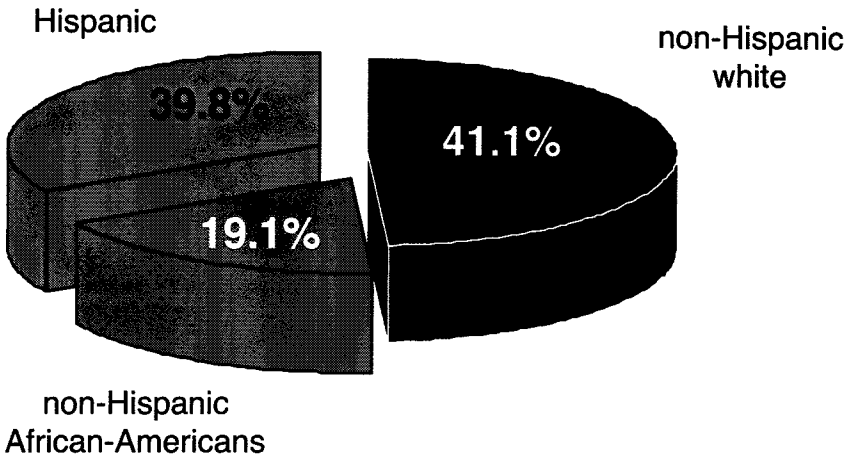
While the overall Hispanic population in Broward county is 17%, many of the cities have a greater percentage---

City, Place	2000 Population	Hispanic %
Davie	75,720	19%
Hallandale	34,282	19%
Hollywood	139,357	23%
Miramar	72,739	29%
Oakland Park	30,966	18%
Pembroke Pines	137,427	28%
Sunrise	85,779	17%
Weston	49,286	30%

Source: U.S. Census release March 2001

Market Ethnic Mix

South Florida is made up of various Latin American backgrounds!



Hispanic Origins

Cuba	44.9%
Puerto Rico	8.7%
Colombia	6.4%
Nicaragua	4.6%
Mexico	3.7%
Dominican Republic	3.0%
Peru	2.1%
Honduras	2.0%
Venezuela	1.9%
Spain	1.6%
Argentina	1.1%
Other	20.0%

Source: 2000 U.S. Census

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South Florida's Hispanic Household Income is on-par with the Market Average!!!

- South Florida Hispanics have a $52,465 annual household income.

(Total Market household income:$59,724)

Source: Standard & Poor's 1999 DRI McGraw Hill Hispanic Consumer Market 1999

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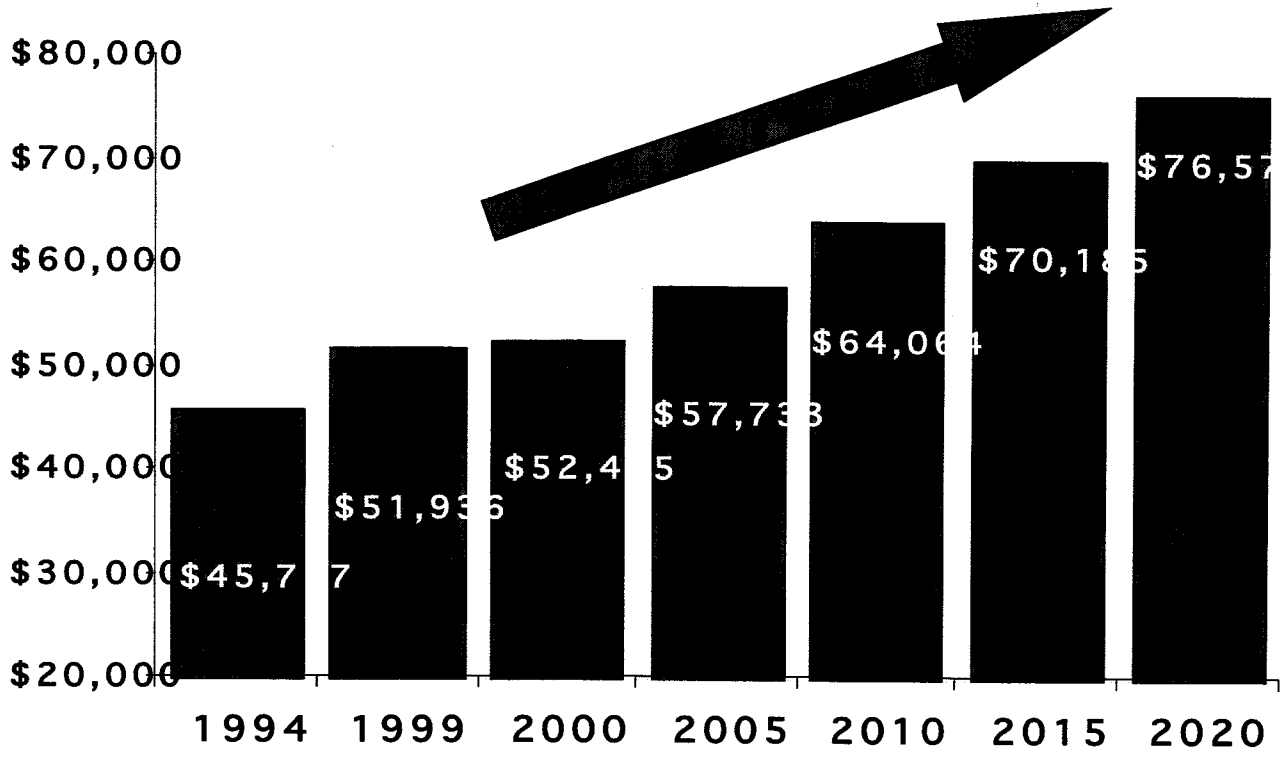
Average Hispanic Household Incomes are on the Rise!

By 2020, average Hispanic incomes will jump to nearly $77,000 on average!

Average Hispanic Household Income (in thousands)



Miami - WLTV 23

Source: 1994-2000 DRI/McGraw-Hill Consumer Expenditure Report, Miami/Ft. Lauderdale DMA.

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Hispanics Currently Add Nearly $27 Billion To The Local Economy! Are You Getting Your Share?

No matter what category, Hispanic spending has significantly increased since 1999!

Hispanic Spending By Category

Category	1999	2000	% Change
Personal Care Products	358 million	374 million	5%
Beer & Ale at home	255 million	272 million	7%
Food at home	3.1 billion	3.2 billion	3%
Health Care	2.6 billion	2.8 billion	8%
Clothing and Footwear	1.3 billion	1.5 billion	15%
Food away from home	1.3 billion	1.4 billion	8%
New & Used Vehicles	1.1 billion	1.2 billion	9%
Entertainment	799 million	887 million	11%
Gas, Electricity & Water	792 million	826 million	4%
Telephone	646 million	697 million	8%
Alcoholic Beverages	559 million	591 million	6%
TV's, radios, sound equipment	198 million	219 million	11%
Furniture & Floor coverings	250 million	268 million	7%
Computers & Software	67 million	72 million	7%
Gasoline & Motor Oil	646 million	729 million	23%
Other categories	2.4 billion	2.6 billion	8%

Miami - WLTV 23 Source: 1999 & 2000 DRI/McGraw-Hill Consumer Expenditure Report,Miami DMA.

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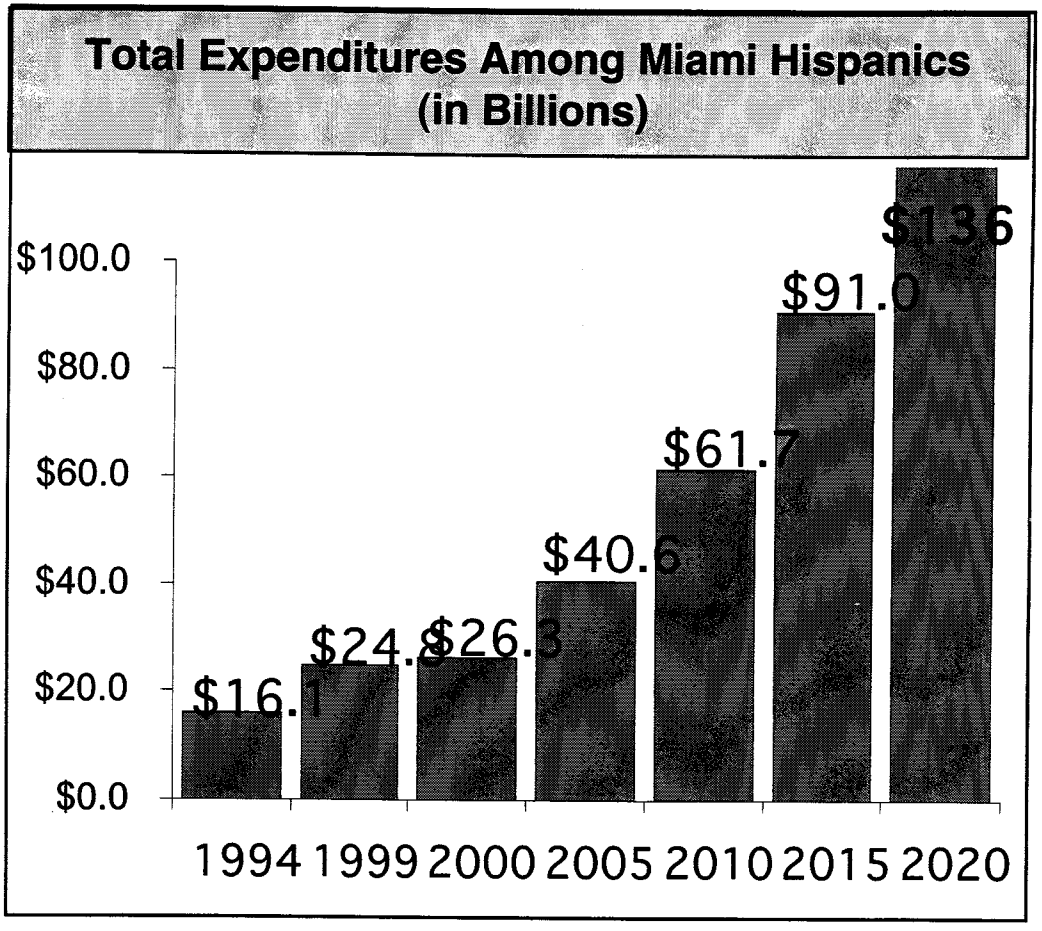
Hispanic Spending is Increasing Dramatically!

Miami Hispanics are projected to spend nearly $137 billion annually!

Total expenditures among Miami Hispanics are expected to almost triple in the next 10 years



Miami - WLTV 23

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Source: 1994-2000 DRI/McGraw-Hill Consumer Expenditure Report, Miami DMA.

Communicating in Spanish

•40% of South Florida's population is Hispanic which translates into nearly 1.6 million people!

•67% of those 1.6 million Hispanics speak Spanish mostly or only at home (Spanish Dominant).

•This means that if you do not target Hispanics over 1,055,000 Hispanics or 27% of the total Miami/Ft. Lauderdale population will not been effectively reached by your general market television advertising efforts!

Effectiveness of Spanish versus English Language Commercials Targeted to Hispanics

Among Hispanics nationwide, commercials in Spanish (as compared to commercials in English) are:

- 5 times more persuasive than commercials in English.
- 61% more effective at increasing awareness levels than commercials in English.
- 57% more effective in terms of message comprehension than commercials in English.
- Among Bilingual Hispanics, Spanish-language commercials are 3.4 times more persuasive!

Miami - WLTV 23

Source: Roslow Research Group 2000 "Advertising Effectiveness among Hispanics" (A18-49 in Los Angeles,New York, Miami & Houston)

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Accommodation Theory

The Accommodation Theory suggests that bilingual Hispanics-who are more likely to be using both Spanish and English media are extra-attuned to advertisers who go out of their way to reach them in Spanish.

The bilingual viewers feel especially positive toward the advertiser who make the extra effort of creating and airing Spanish language spots.

Spanish dependant viewers expect to be advertised to in Spanish, " Since I'm not available on English media, how else do you expect to reach me? "

Source: Roslow Research Group 2000 "Advertising Effectiveness among Hispanics Tee
(T12-17 in Los Angeles,New York, Miami & Houston)

Within the Hispanic Universe of S. Florida, Spanish is Spoken Equally at Home Among all Age Groups.

Miami-Ft. Lauderdale DMA % Hispanic speak Spanish at home (age 5+)

Age Bracket	% Hispanic
5-10 yrs	91.9
11-20 yrs	93.6
21-30 yrs	94.4
31-40 yrs	94.4
41-50 yrs	94.8
51-60 yrs	95.5
61-70 yrs	95.1
70+ yrs	93.5
All Ages	***94.3***

Miami - WLTV 23

Source: "The Use of Spanish in the Home" -- DRI/McGraw Hill September 1993
(based on 1990 Census of population language question)

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Within the Hispanic Universe of S. Florida, Spanish is Spoken Equally Among all Income Levels

Miami-Ft. Lauderdale DMA % Hispanic speak Spanish at home (age 5+)

HH Income	% Hispanic
Up to $5,000	94.1
$5,000-$10,000	94.0
$10,000-$20,000	93.4
$20,000-$30,000	95.5
$30,000-$40,000	93.8
$40,000-$50,000	94.5
$50,000-$60,000	96.7
$60,000-$70,000	95.1
$70,000-$80,000	95.9
$80,000+	95.1
All	**94.3**

Miami - WLTV 23

Source: "The Use of Spanish in the Home" -- DRI/McGraw Hill September 1993
(based on 1990 Census of population language question)

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From sign-on to sign-off, WLTV Univision 23 has been the #1 station in the Miami/Ft. Lauderdale DMA for the last 21 major books!

WLTV Household Rating/Share -- M-Sun/7a-1a

Survey Period	HH RTG/SHR	WLTV Rank
Feb 1998	5.6/12	#1
May 1998	5.0/12	#1
July 1998	5.0/12	#1
Nov 1998	5.8/14	#1
Feb 1999	6.2/14	#1
May 1999	5.5/13	#1
July 1999	5.7/13	#1
Nov 1999	5.8/13	#1
Feb 2000	6.4/14	#1
May 2000	5.5/13	#1

Survey Period	HH RTG/SHR	WLTV Rank
July 2000	4.9/11	#1
Nov 2000	5.3/12	#1
Feb 2001	5.1/12	#1
May 2001	4.7/11	#1
July 2001	4.3/10	#1
Nov 2001	5.3/11	#1
Feb 2002	5.0/11	#1
May 2002	4.6/10	#1
July 2002	4.4/10	#1
Nov 2002	4.9/10	#1
Feb 2003	5.3/11	#1

Source: NSI Miami-Ft. Lauderdale DMA Dates Cited

WLTV is the #1 station in the Miami-Ft. Lauderdale DMA, BAR NONE!!!

Monday-Sunday 6a-2a -- Rating/Share

	Adults 18-34	Adults 18-49	Adults 25-54
WLTV	2.8/17	2.6/13	2.8/13
WBZL	1.6/9	1.3/7	1.2/5
WSVN	1.5/9	2.1/11	2.4/11
WSCV	1.2/7	1.4/7	1.3/6
WTVJ	1.1/7	1.4/7	1.6/7
WBFS	1.0/6	1.0/5	0.9/4
WPLG	0.9/5	1.4/7	1.6/8
WFOR	0.9/5	1.4/7	1.8/8
WAMI	0.5/3	0.4/2	0.4/2
WPXM	0.0/0	0.1/0	0.1/0

Source: February 2003 NSI Miami-Ft. Lauderdale

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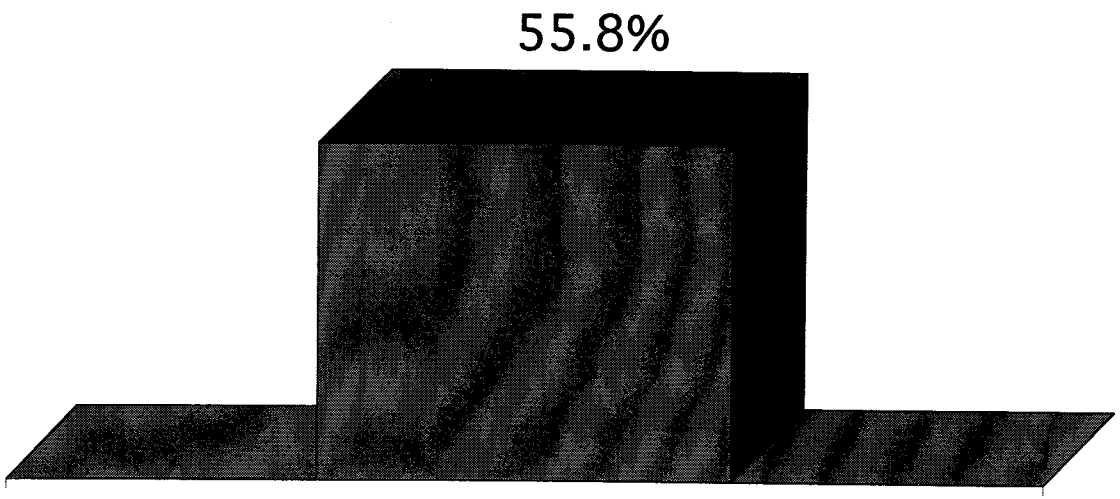
How Univision Programming Stacks Up Against the General Market

What They've Got		What We've Got
Talk/Game Shows/Soaps	DAYTIME	News/Talk/Variety/Novelas
Talk/*Oprah /Rosie O'Donnell*	EARLYFRINGE	Talk/*Gordo y la Flaca*
Local News/Network News	EARLYNEWS	Local News/Network News
Magazines	ACCESS	Magazines/ *Primer Impacto*
Various	PRIME	Novelas/Variety
Local News	LATENEWS	Local News/Network News
Baseball/Football/Basketball	SPORTS	Soccer/Boxing
Kids	WEEKEND	Kids/Movies/Variety

Schedules that don't include WLTV limit the campaign's reach into the South Florida marketplace

Rating Adults 25-54 – November 2000



Total Market Reach (NSI)

(187 TRP's)

Miami - WLTV 23

Source: NSI Nielsen Custom Study Miami-Ft. Lauderdale DMA

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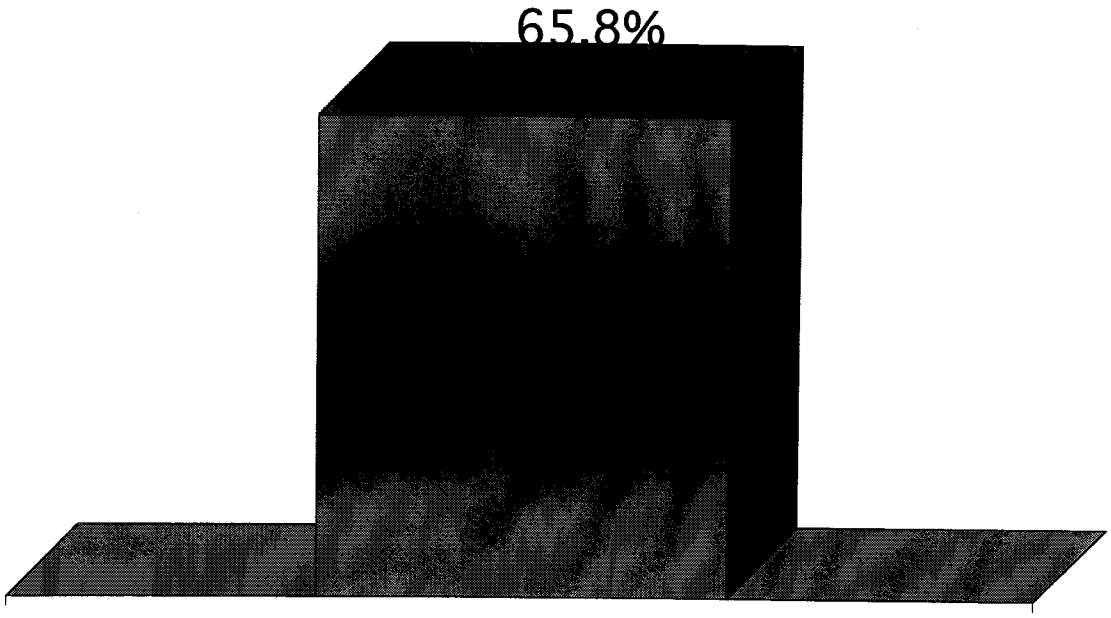
With WLTV, media schedules target Hispanics in their language of choice while increasing the total market reach---up 10 percentage points!!!

Rating Adults 25-54—November 2000



Total Market Reach (NSI)
(203 TRP's)

Miami - WLTV 23

Source: NSI Nielsen Custom Study Miami-Ft. Lauderdale DMA;
*take 12% from original schedule and apply same to buy WLTV spots

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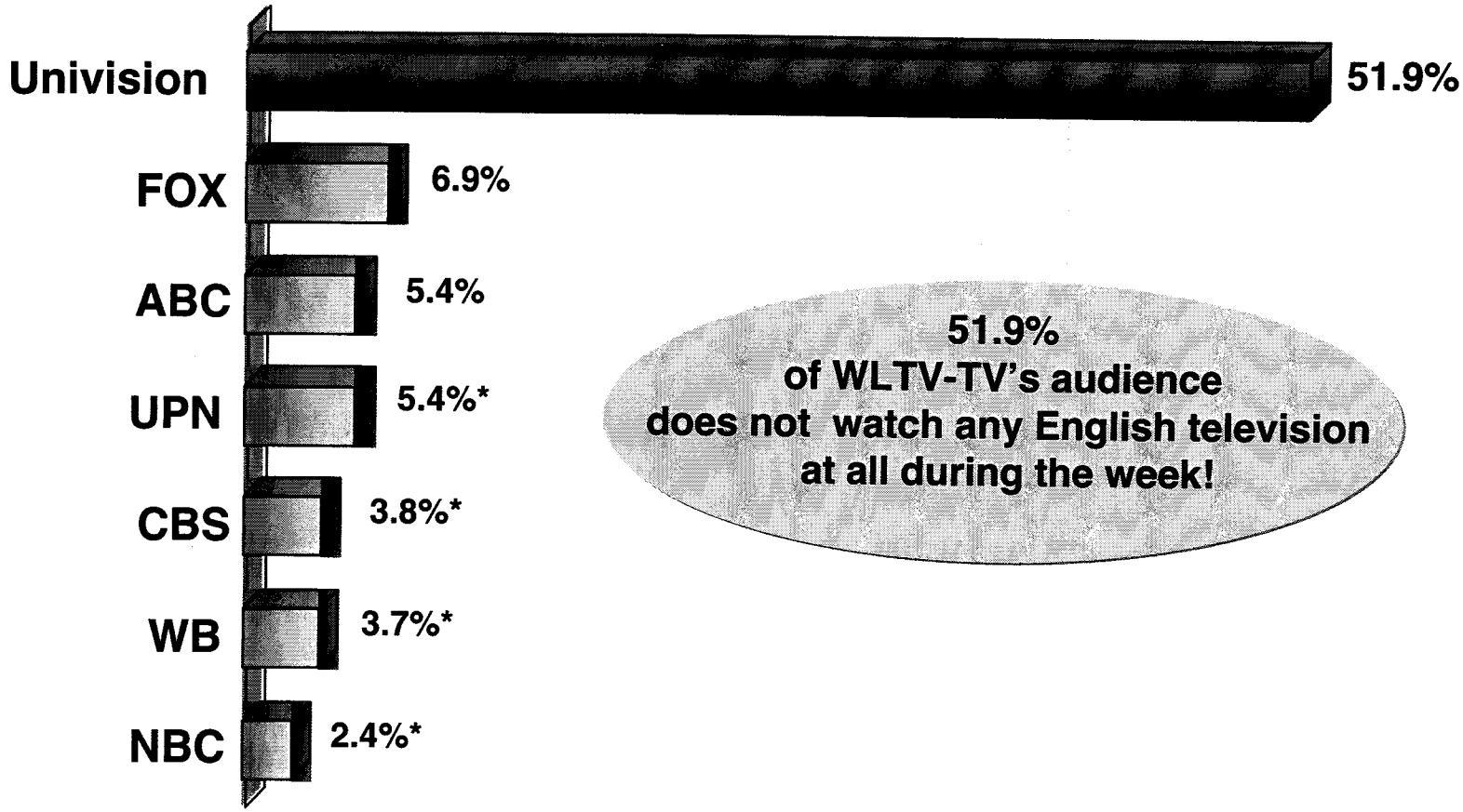
Among Adults, Univision 23 WLTV Delivers a Significant Exclusive Audience

Percent of each station's cume A18+ audience that did not watch other stations listed, Monday-Sunday, 6A-2A



51.9% of WLTV-TV's audience does not watch any English television at all during the week!

Miami - WLTV 23

Percent of Each Station's Weekly Cume Audience That Did NOT Watch Any of the Other Listed Stations
(Among Total Adults/Monday to Sunday 6:00A to 2:00A)
Source: Miami Scarborough: February 1999 - January 2000
* represents small sample size - for directional purposes

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WLTV reaches more viewers than any other station!!!

M-Su/ 6a-2a

	WLTV	WPLG	WTVJ	WFOR	WSVN	WSCV	WBZL	WBFS	WAMI	WPXM
A18-24	9,000	2,000	3,000	2,000	4,000	5,000	7,000	4,000	2,000	300
A25-34	18,000	6,000	7,000	6,000	10,000	6,000	8,000	5,000	3,000	200
A35-49	23,000	17,000	15,000	18,000	25,000	14,000	10,000	8,000	4,000	900
A50-64	23,000	18,000	17,000	20,000	17,000	11,000	5,000	3,000	4,000	800
A65+	27,000	23,000	18,000	30,000	22,000	11,000	5,000	3,000	3,000	2,000
A18+	101,000	67,000	60,000	75,000	78,000	48,000	35,000	23,000	15,000	4,00

Source: NSI 000's February 2003

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ATTACHMENT 2

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"Reaching the Lucrative U.S. Hispanic Market"

Presentation

Reaching the Lucrative U.S. Hispanic Market

Revised 2-6-2003

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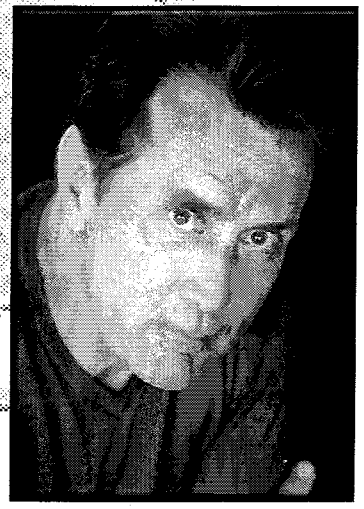
The Hispanic Culture Has Become Part of the American Mainstream...



... "Hispanics are Fast Becoming Simply Us"

Wall Street Journal, March 14, 2001

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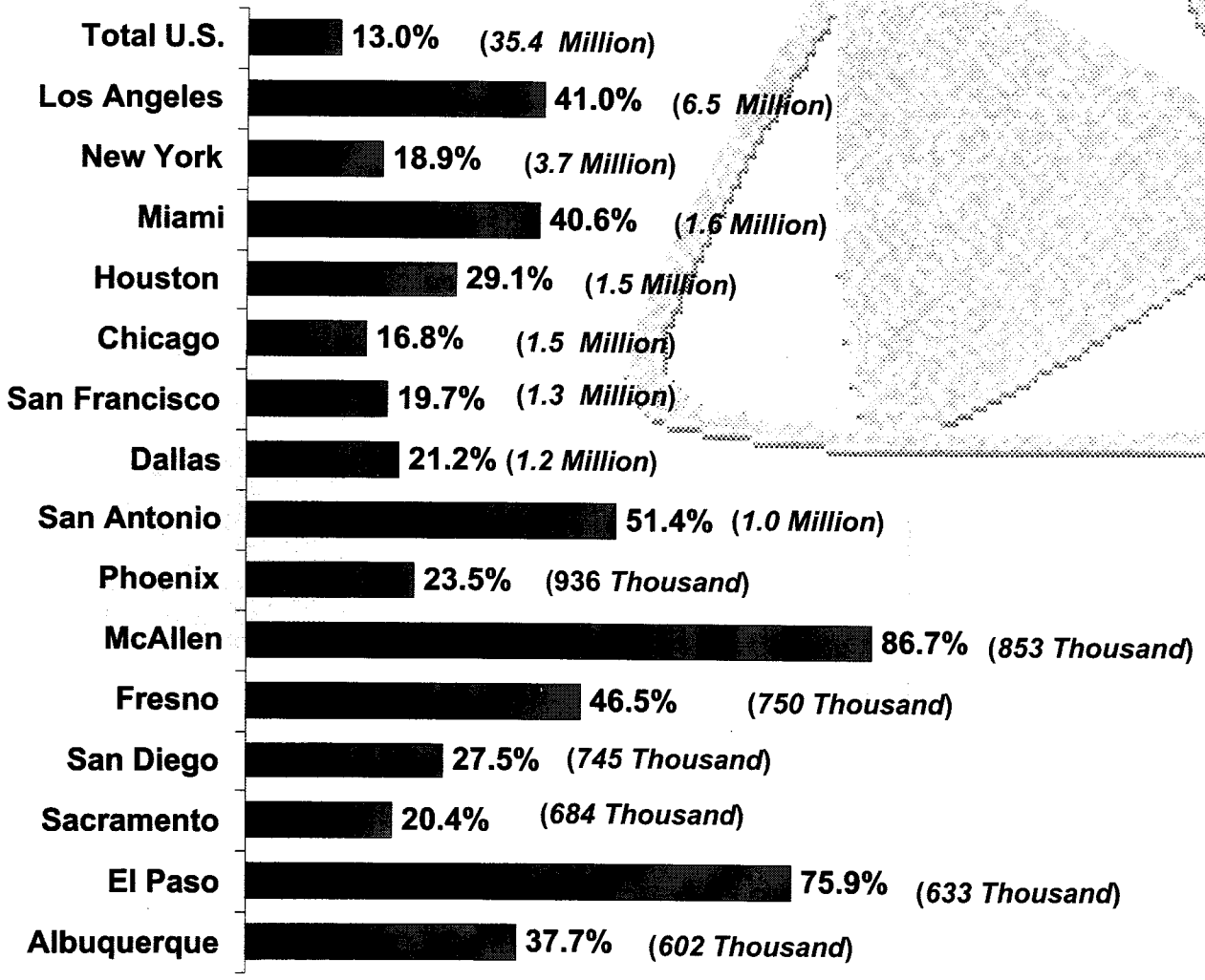
Hispanics are the Market in Top DMAs

Hispanic % of Total Persons (2+)



Source: Nielsen 2003 Universe Estimates (Top 15 Hispanic Markets)

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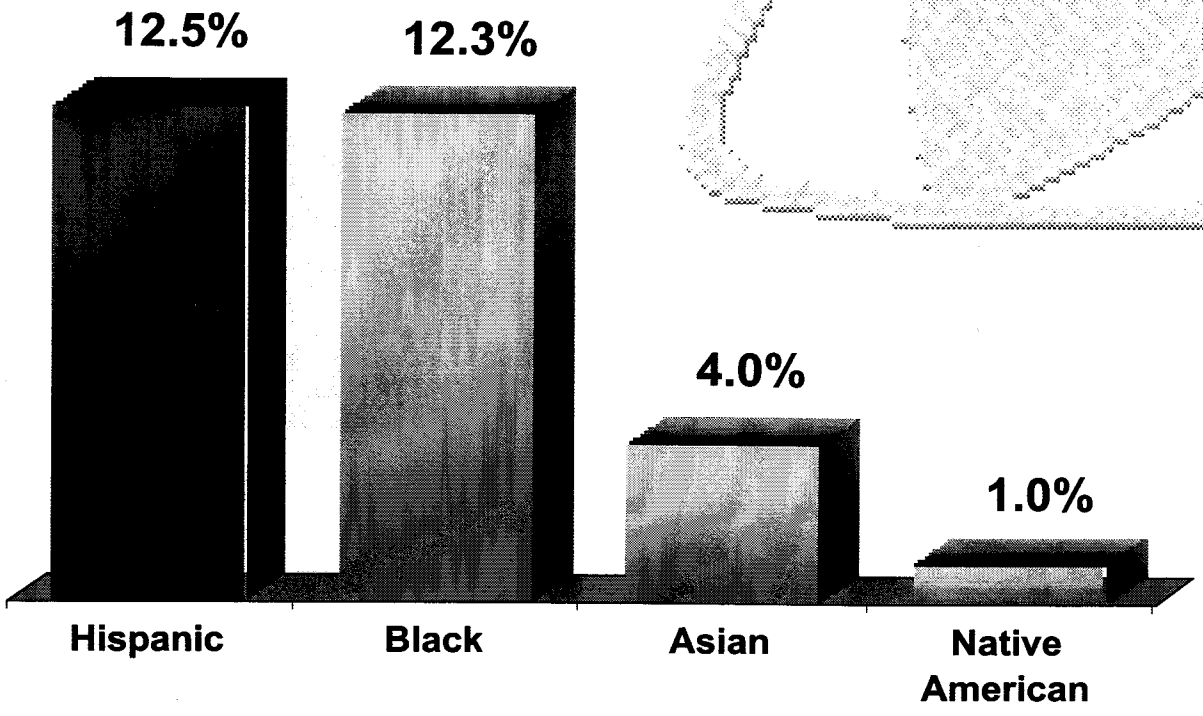
U.S. Hispanics Are the Single Largest Minority Group

Current Percent of Total U.S. Population



Source: 2000 U.S. Census, March 2001 Release

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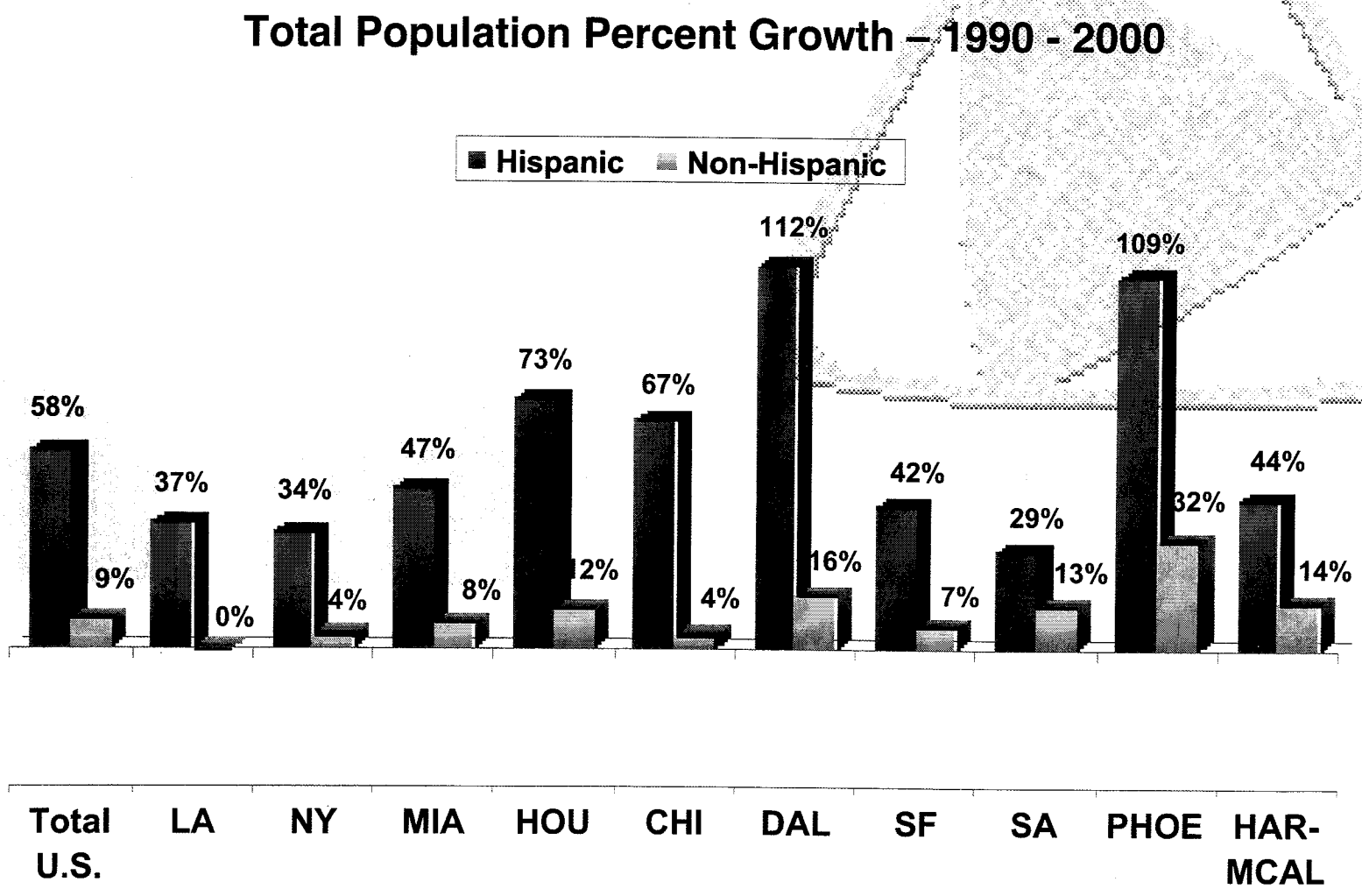
Hispanic Population Has Grown at a Rate Much Faster than the Non-Hispanic Population



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Source: 2000 U.S. Census, March 2001 Release

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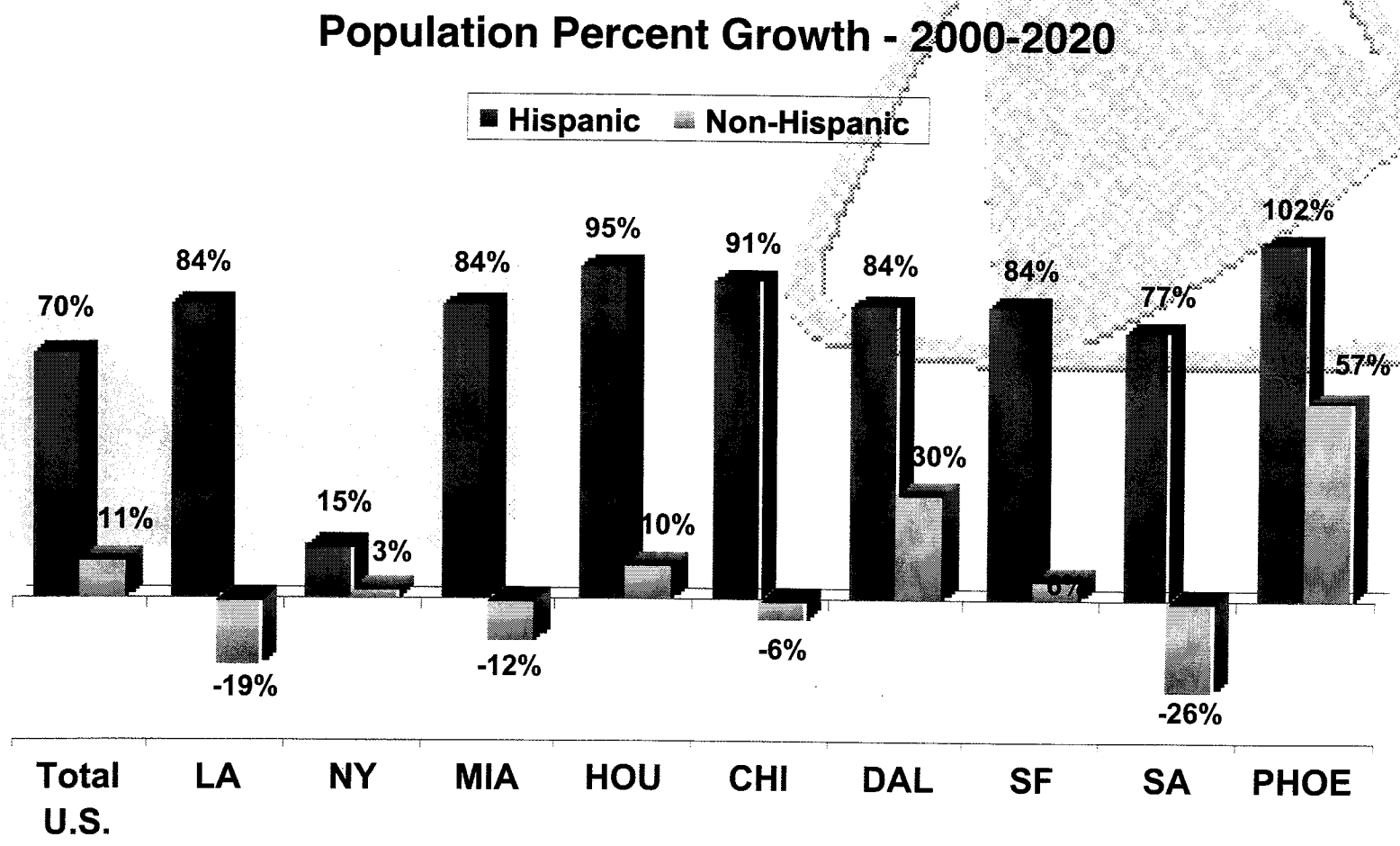
The Hispanic Population Growth from 2000 to 2001 Accounted for 50% of the Total Population Growth in the Country!

Census Bureau Update				
	April 1, 2000	July 1, 2001	Increase/ Decrease	% Change
Hispanic	35.3	37.0	1.7	+4.8%
Non-Hispanic	246.1	247.8	1.7	+0.7%
Total Population	281.4	284.8	3.4	+1.2%

Source: U.S. Census 2001 – January 2003 Release

Hispanic Population Will Continue to Grow at a Dramatic Rate



Source: The Hispanic Consumer Market in 1999 and Forecasts to 2020, Standard & Poor's DRI, October 2000 - All markets available are shown

U.S. Hispanic Households are Younger and Larger

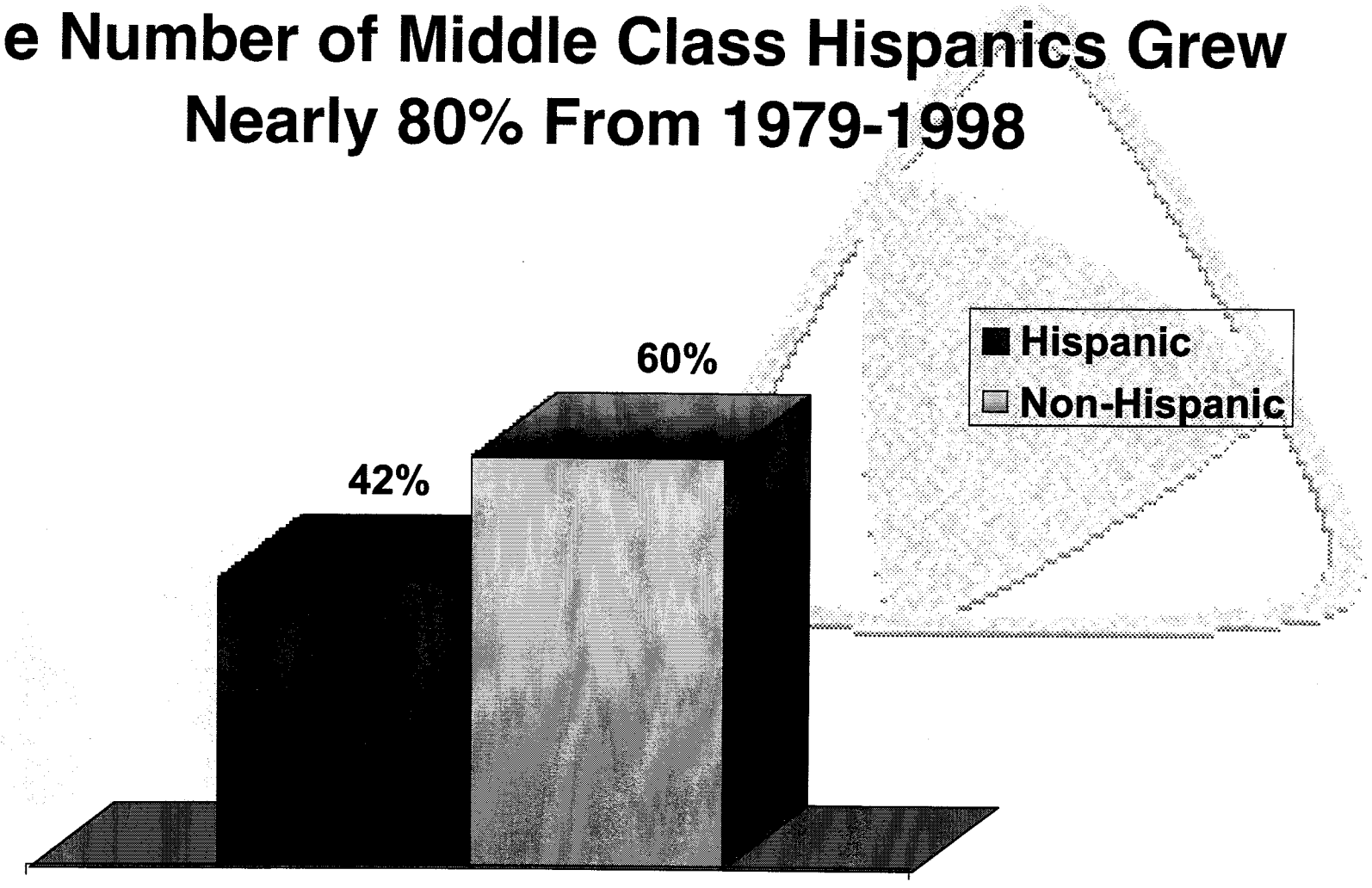
Larger and Younger Households are in the Acquisition Phase of Life!

Median Age	
U.S. Hispanic HH	24.4
Non-Hispanic U.S. HH	37.5

HH Size	
U.S. Hispanic HH	3.6
Non-Hispanic U.S. HH	2.4

Source: Nielsen 2003 Universe Estimates

The Number of Middle Class Hispanics Grew Nearly 80% From 1979-1998



% of HH's Considered Middle Class - Income Above $40,000

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Source: Standard & Poor's DRI, The Latino Middle Class - 2/2000

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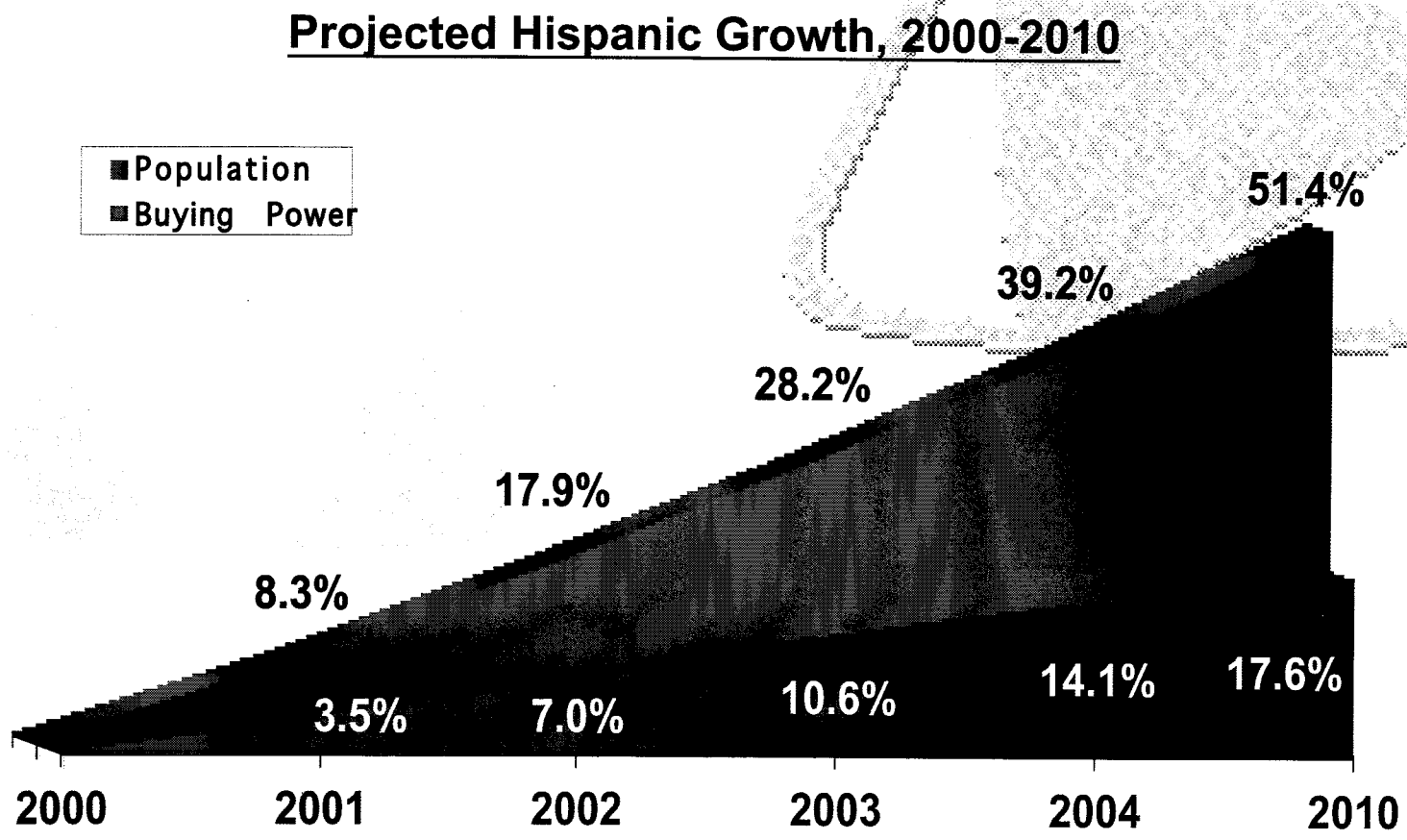
Hispanic Purchasing Power is Projected to Grow Three Times as Fast as the Population



Source: The Hispanic Consumer Market in 1999 and Forecasts to 2005, Standard & Poor's DRI, January 2001

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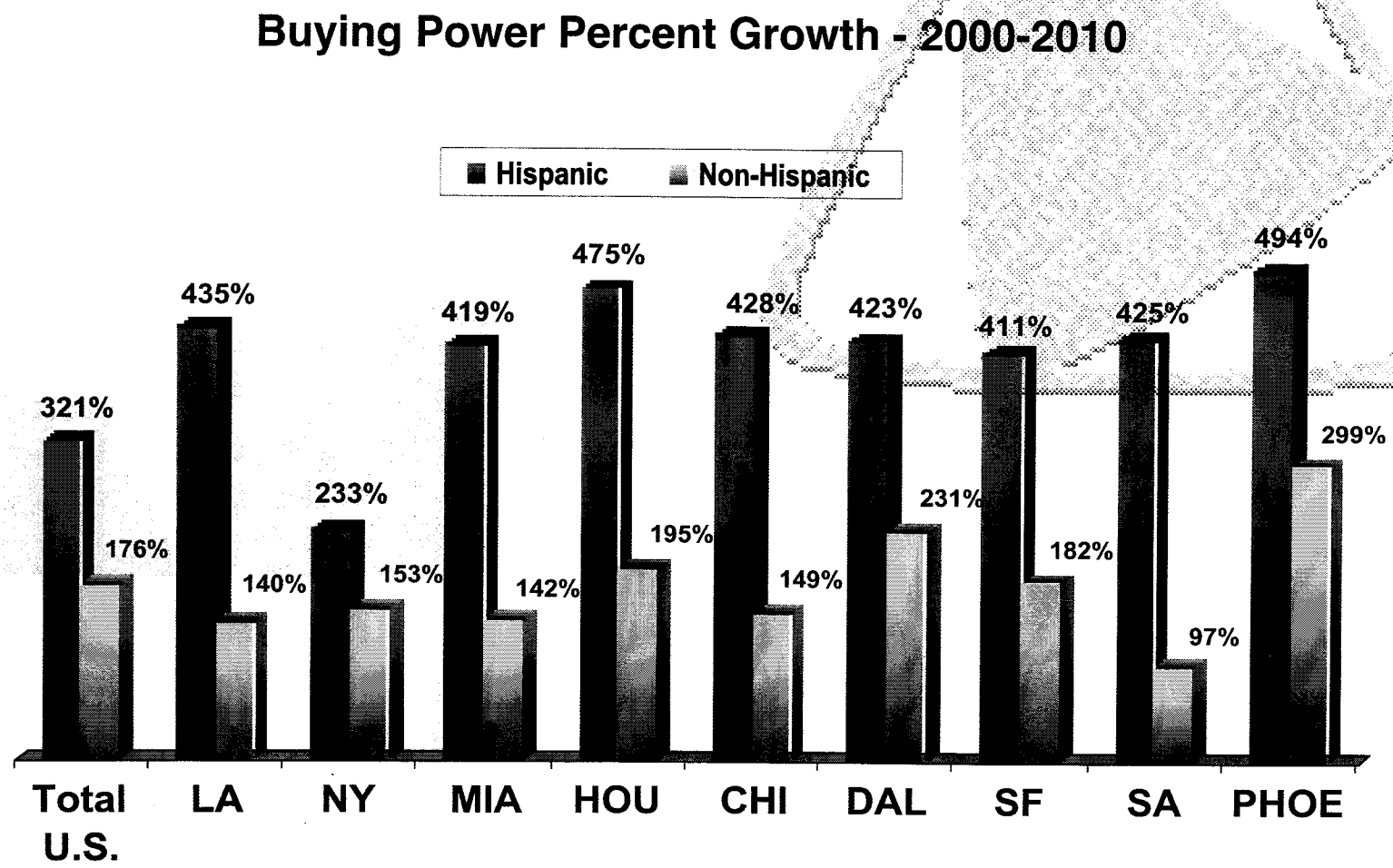
Growth of Hispanic Buying Power Will be Even More Dramatic in Many Top Markets



Source: The Hispanic Consumer Market in 1999 and Forecasts to 2020, Standard & Poor's DRI, October 2000

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In Fact, Hispanics Are More Likely Than Non-Hispanics to Own or Buy Products in Many Major Categories

Product	Hispanic	Non-Hispanic	Hispanic Index
Imported Beer	31%	19%	163
After Shave/Cologne	57%	37%	154
Electric & Battery Shavers	35%	25%	141
Perfume/Cologne	80%	57%	141
Games & Toys	73%	54%	136
Plan to Buy Computer	20%	15%	133
See Movie 1st 2 Weeks of Opening	22%	17%	129
Records/Discs/Tapes	74%	62%	118
Moisturizers/Creams/Lotions	73%	63%	116
Regular Cola (Not Diet)	78%	69%	114
Sneakers/Athletic Shoes	73%	65%	113
Automotive growth in new vehicle sales (1Q '00 – 1Q '02)	33%	13%	154

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Sources: Simmons National Consumer Survey 2001, Hispanic Survey 2001; R.L. Polk
Scarborough Multimarket Survey 2001 – 75 market aggregate

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Language *and* Advertising Impact

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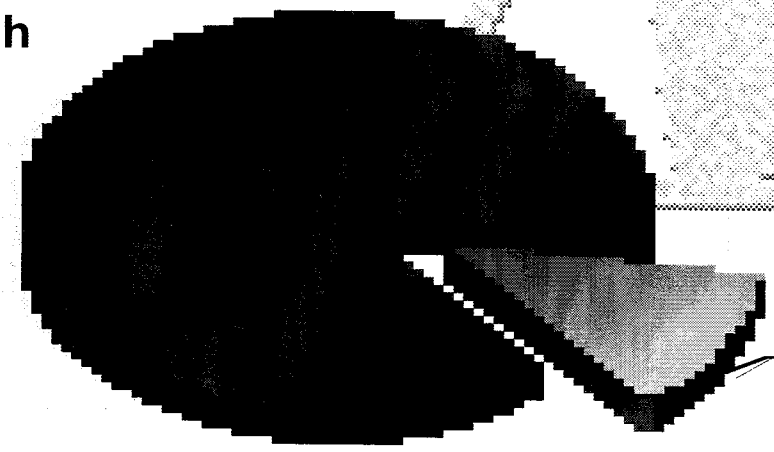
The Majority of U.S. Hispanic Households Speak Spanish



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Source: Nielsen 2003 Universe Estimates. 2003 Hispanic TV Households by Language Strata.

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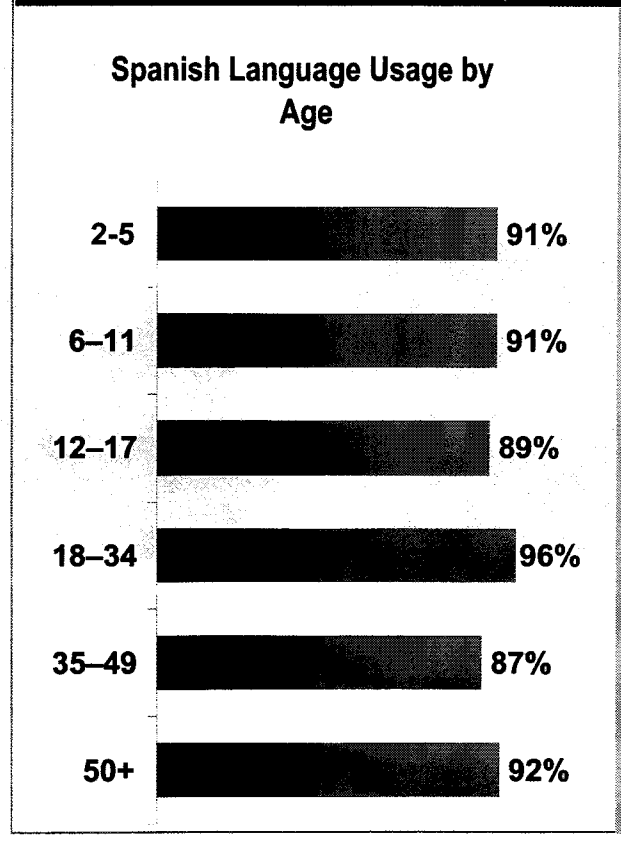
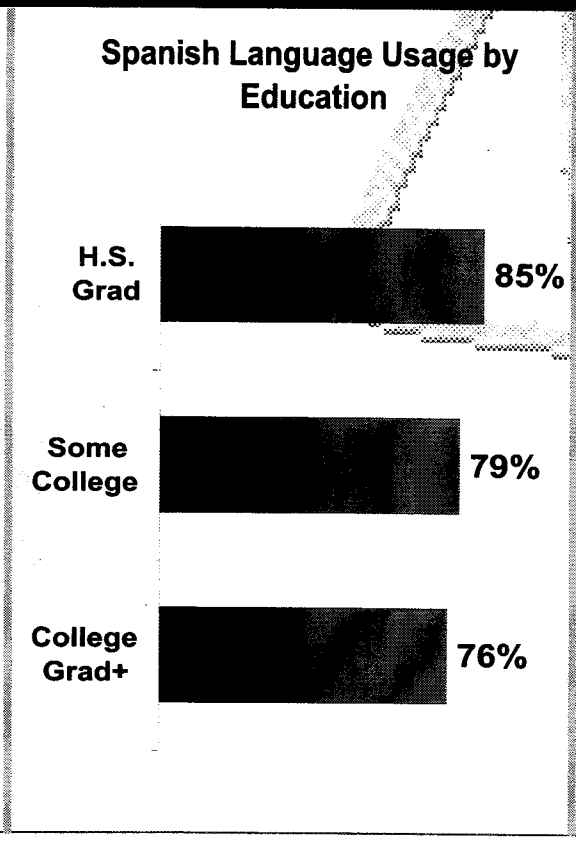
U.S. Hispanics Speak Spanish at Home…

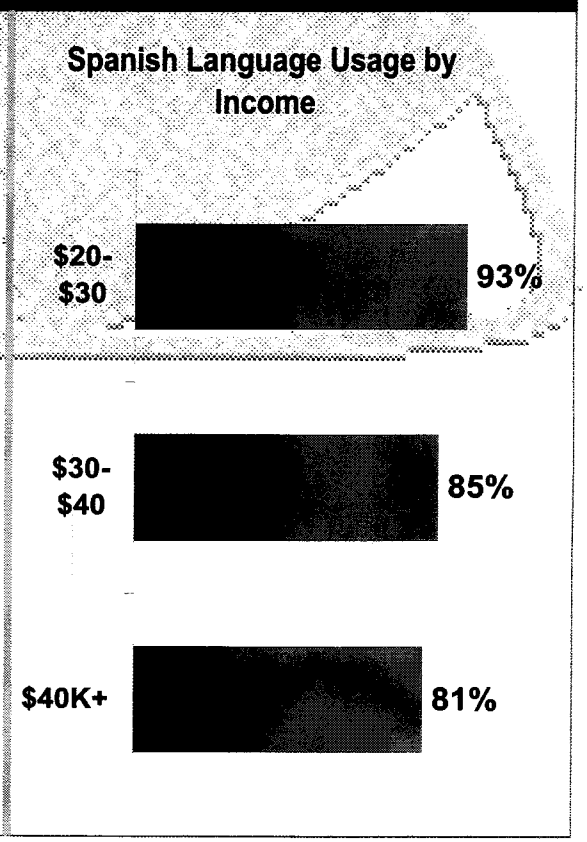
…Regardless of Age



…Regardless of Education of Head of HH



…Regardless of HH Income



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Source: NHTI Installed Metered Sample, Feb 2002; Excludes English Only Homes; Based on % of Persons Living in HH's that Speak Some Spanish

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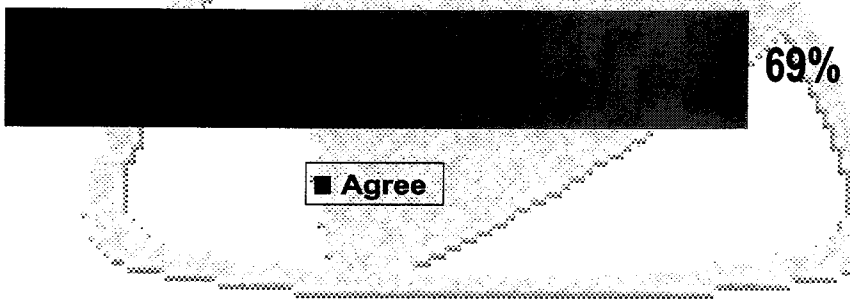
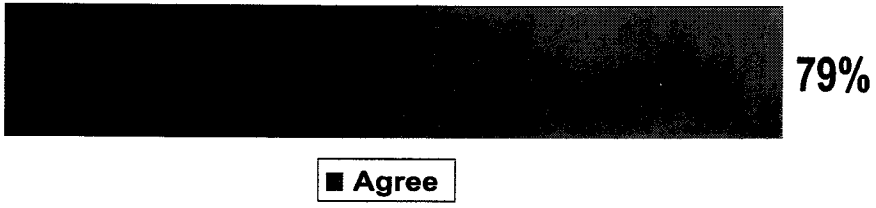
The Majority of Hispanics Prefer to Get Information in Spanish...

"I get more information about a product when it's advertised in Spanish than when it's advertised in English only."



...and They Want to be Marketed to *as Hispanics*

"There should be TV or other commercials directed specifically to Hispanic concerns."



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Source: Yankelovich, 2002 Hispanic Monitor

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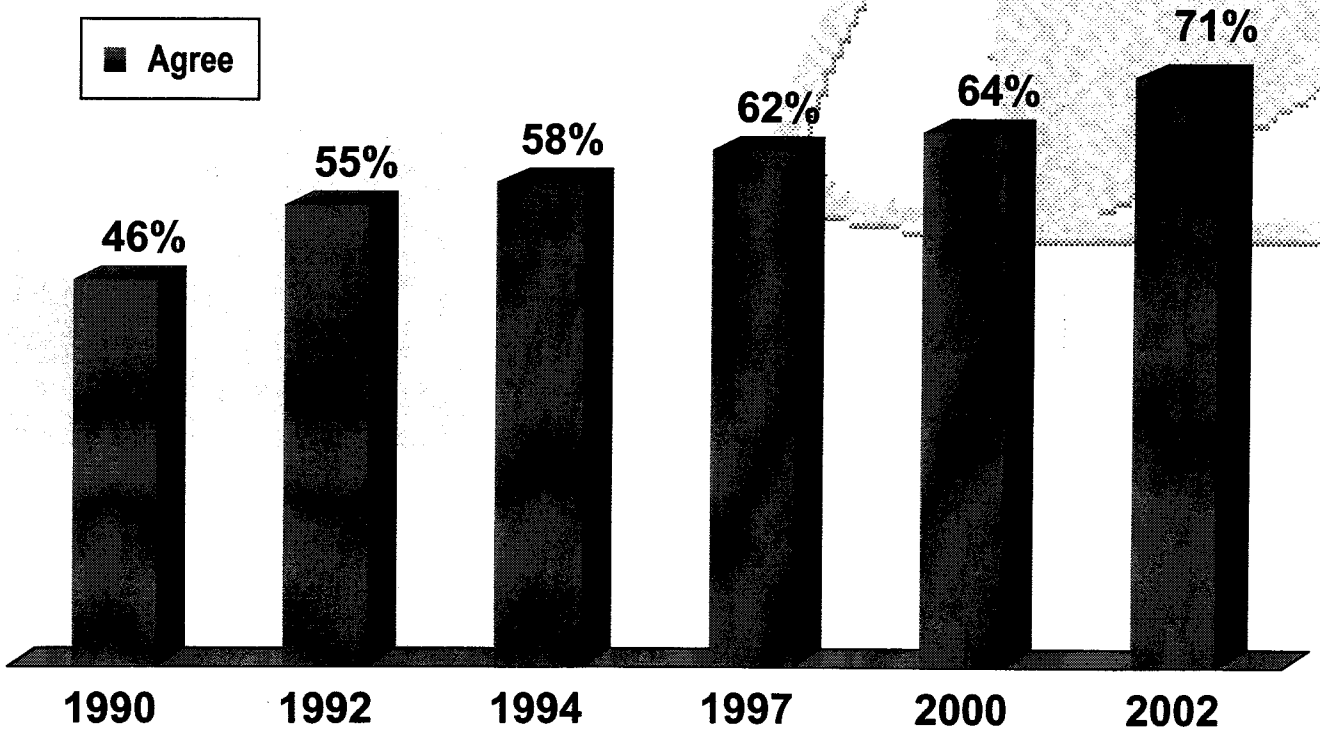
Hispanics are More Likely to Purchase Brands Which Advertise in Spanish

"I would be more inclined to purchase brands which are advertised in Spanish."



Source: Yankelovich, 2002 Hispanic Monitor

NATIONAL SALES

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Advertising to Hispanics in Spanish is Far More Effective

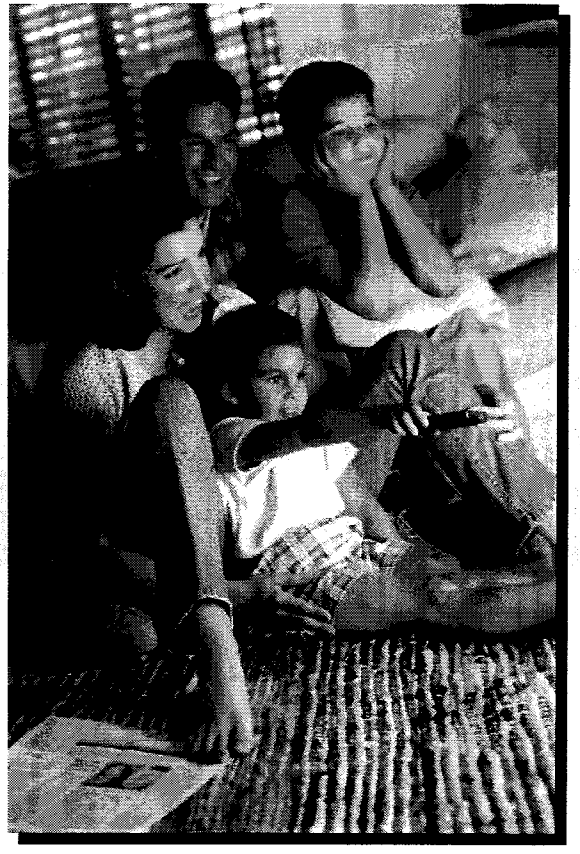
Among Hispanics, Spanish-language commercials (as compared to English Language commercials) are...

- **61% more effective at increasing awareness!**
- **57% more effective in message comprehension!**
- **Nearly 4.5 times more persuasive!**

<u>Even Among Bilingual</u> Hispanics...Spanish-language commercials are *3.4 times more persuasive*!

Source: Roslow Research Group, 2000
"Advertising Effectiveness Among Hispanics"

Television — The Most Widely Used Ad Medium — Is Even More Important in the Hispanic Market

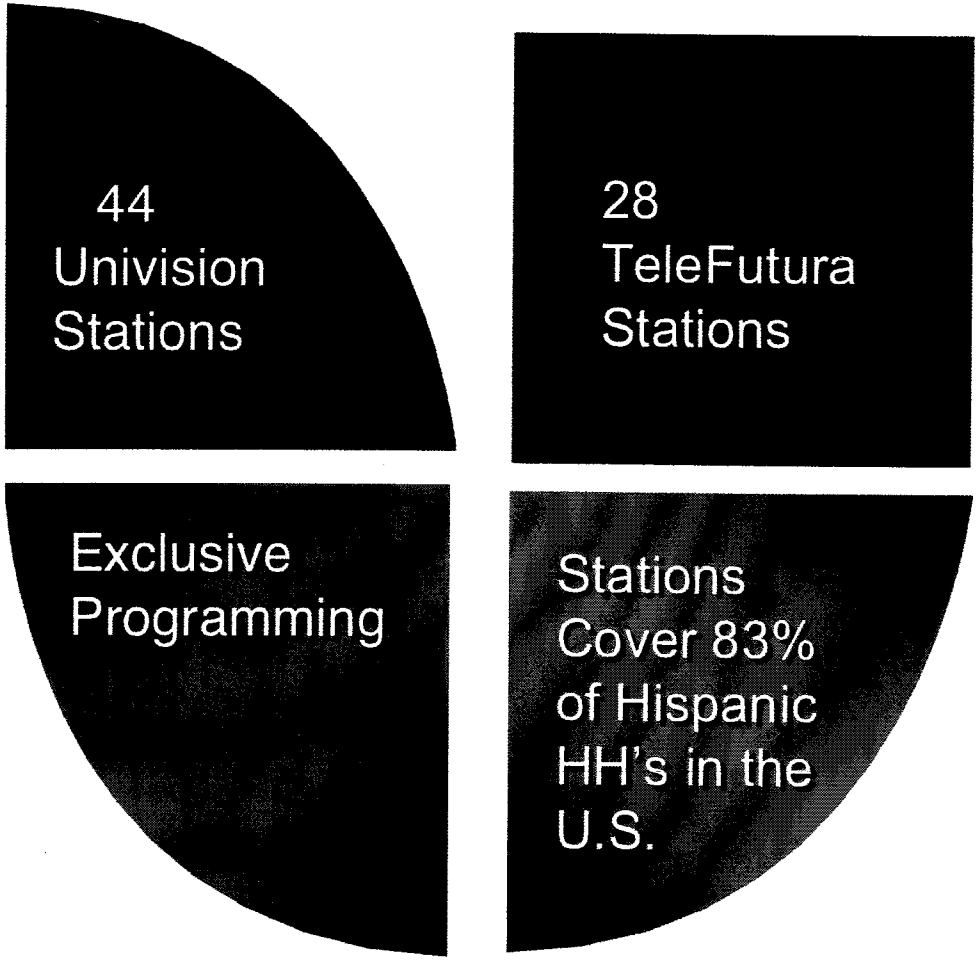


Avg. # Hours Per Week Spent with Each Medium

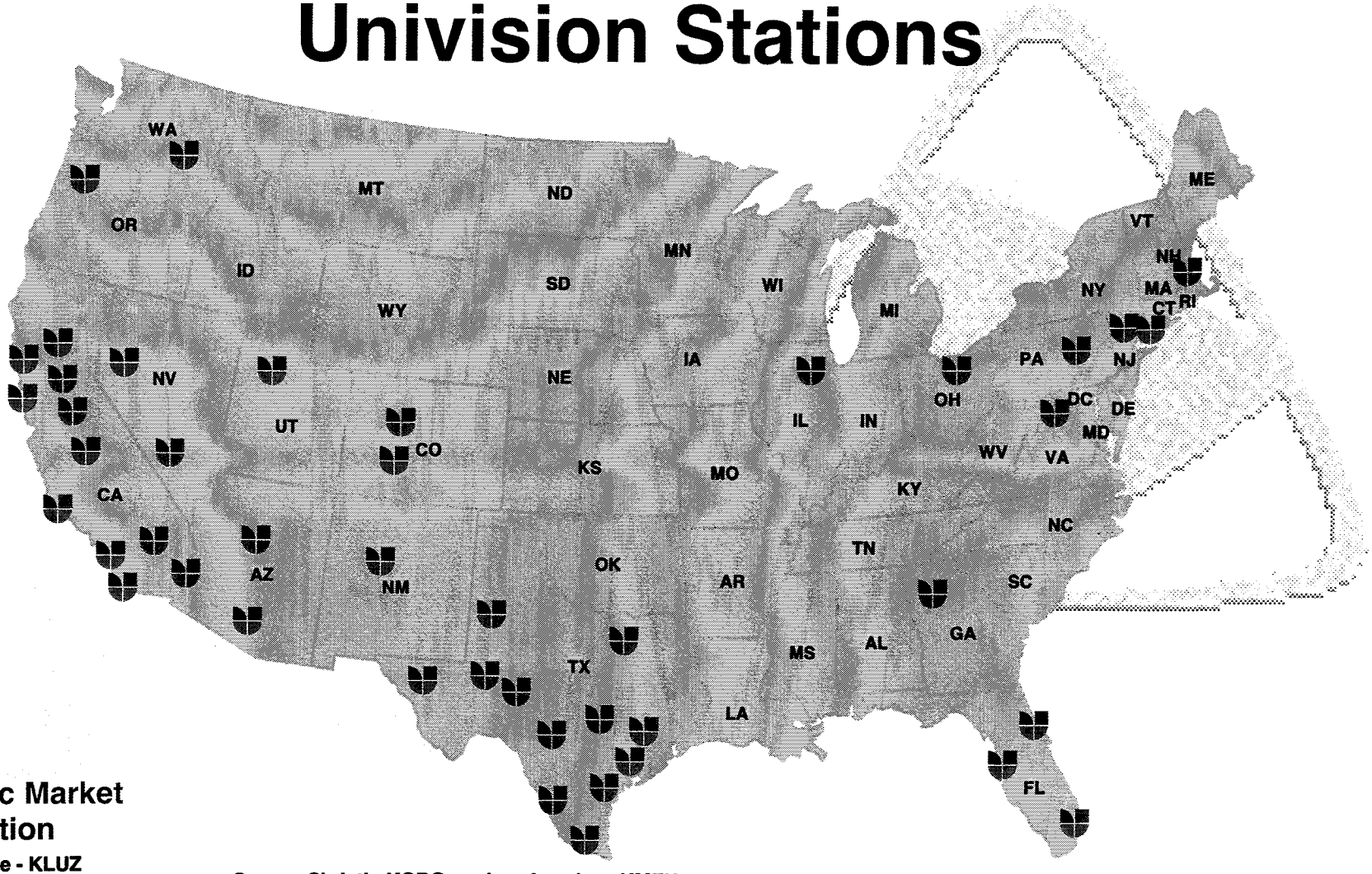
	Hispanic	Non-Hispanic	Hispanic Index
TV	25.40	17.81	143
Radio	16.57	14.75	112
Magazine	3.35	3.74	90
Newspaper	4.29	5.04	85

Source: Market Segment Research & Consulting, Inc. "The MSR&C Ethnic Market Report" - 1996

NATIONAL SALES



Univision Stations



Hispanic Market and Station

Albuquerque - KLUZ
Atlanta - WUVG
Austin - KAKW
Bakersfield - KABE-CA
Boston - WUNI
Chicago - WGBO
Chico - K20FZ
Cleveland - WQHS
Colorado Springs - KGHB-CA
Corpus Christi - KORO
Dallas - KUVN
Denver - KCEC
El Paso - KINT
Fresno - KFTV
Hartford - WUVN
Houston - KXLN
Laredo - KLDO
Las Vegas - KINC
Los Angeles - KMEX
Lubbock - KBZO
McAllen-Harlingen - KNVO
Miami - WLTV
Monterey - Salinas-KSMS
New York - WXTV
Odessa-Midland - KUPB
Orlando - WVEN
Palm Springs - KVER-CA
Philadelphia - WUVP
Phoenix - KTVW
Portland - KPOU
Reno - KNVV
Sacramento - KUVS
Salt Lake City - KUTH
San Angelo - KEUS
San Antonio - KWEX
San Diego - KBNT-CA
San Francisco - KDTV
Santa Barbara - KPMR
Tampa - WVEA
Tucson - KUVE
Victoria - KUNU
Washington, D.C. - WMDO-CA
Yakima – KKFQ/CA
Yuma-El Centro - KVYE

NATIONAL
SALES

Source: Claritas Compass 1990 U.S. Census, 2000 Estimates;
Nielsen Universe Estimates 2001, as of 3/1/01

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Univision's Programming is Similar to English-Language Network Formats, But is More Culturally Relevant to Hispanic Audiences

What They've Got		What We've Got
Early Morning News	EARLY MORNING	Early Morning News
Talk/Game Shows/Soaps	DAYTIME	Talk/Variety/Novelas
Talk/Oprah/Rosie O'Donnell	EARLY FRINGE	Talk/Cristina/Game Shows/ Primer Impacto
Local News/Network News	EARLY NEWS	Local News/Network News
Various	PRIME	Novelas/Variety
Local News	LATE NEWS	Local News/Network News
Baseball/Football/Basketball	SPORTS	Soccer/Boxing
Kids	WEEKEND	Kids/Movies/Variety

Even the Highest Rated English Language Television Shows Underdeliver Hispanic Adults 18-49

Rank	Program	Network	NTI	NHTI
1	FRIENDS	NBC	10.1	3.4
2	FRIENDS 8:30PM	NBC	9.0	3.5
3	E.R.	NBC	8.9	3.3
4	SURVIVOR: AFRICA	CBS	8.4	2.6
5	SURVIVOR: MARQUESAS	CBS	8.3	2.8
6	LEAP OF FAITH	NBC	7.9	2.8
7	CSI	CBS	7.8	2.6
8	WILL & GRACE	NBC	7.8	2.9
9	FOX NFL SUNDAY-NATIONAL	FOX	7.6	3.0
10	CBS NFL NATIONAL	CBS	7.1	3.4
11	INSIDE SCHWARTZ	NBC	6.9	2.3
12	NFL MONDAY NIGHT FOOTBALL	ABC	6.9	3.4
13	JUST SHOOT ME	NBC	6.7	2.3
14	EVERYBODY LOVES RAYMOND	CBS	6.6	2.0
15	FOX NFL SUNDAY-SINGLE	FOX	6.5	3.0
16	LAW AND ORDER	NBC	6.4	2.3
17	FRASIER	NBC	5.6	1.9
18	MALCOLM IN THE MIDDLE	FOX	5.6	2.4
19	WEST WING	NBC	5.6	1.7
20	SIMPSONS	FOX	5.4	2.5
21	FEAR FACTOR	NBC	5.3	3.0
22	AMERICAN IDOL-TUESDAY	FOX	5.1	3.1
23	BECKER	CBS	4.9	1.4
24	CBS NFL SINGLE	CBS	4.9	2.5
25	FOX NFL SUNDAY-REGIONAL	FOX	4.8	1.8
26	LAW AND ORDER:SVU	NBC	4.8	2.0

Source: NTI; Nielsen Hispanic Television Index October 2001 – July 2002

The Top 78 Shows Among Hispanic A18-49 Are on Univision

Rank	Program	Network	NHTI
1	AMIGAS Y RIVALES-TUE	UNI	14.2
2	POR UN BESO WED	UNI	14.0
3	AMIGAS Y RIVALES-MON	UNI	13.9
4	POR UN BESO TUE	UNI	13.7
5	POR UN BESO THU	UNI	13.6
6	AMIGAS Y RIVALES-WED	UNI	13.5
7	AMIGAS Y RIVALES-THU	UNI	13.4
8	POR UN BESO MON	UNI	13.1
9	DERECHO DE NACER-MON	UNI	13.0
10	POR UN BESO FRI	UNI	12.8
11	DERECHO DE NACER-TUE	UNI	12.7
12	AMIGAS Y RIVALES-FRI	UNI	12.4
13	DERECHO DE NACER-WED	UNI	12.4
14	CARITA DE ANGEL-MON	UNI	12.1
15	CARITA DE ANGEL-TUE	UNI	12.0
79	*CLON F*	*TEL*	*4.3*

NATIONAL SALES

Source: Nielsen Hispanic Television Index October 2001 – July 2002

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Among Bilingual Households, the Top 73 Shows Are On Univision

Rank	Program	Network	NHTI
1	POR UN BESO THU	UNI	33.2
2	AMIGAS Y RIVALES-MON	UNI	33.1
3	POR UN BESO MON	UNI	33.1
4	AMIGAS Y RIVALES-WED	UNI	32.9
5	POR UN BESO WED	UNI	32.9
6	AMIGAS Y RIVALES-TUE	UNI	32.7
7	AMIGAS Y RIVALES-THU	UNI	32.4
8	POR UN BESO FRI	UNI	31.3
9	POR UN BESO TUE	UNI	31.2
10	DERECHO DE NACER-MON	UNI	30.7
11	DERECHO DE NACER-TUE	UNI	30.5
12	DERECHO DE NACER-WED	UNI	30.5
13	AMIGAS Y RIVALES-FRI	UNI	30.3
14	PRIVILEGIO DE AMAR-TUE	UNI	29.8
15	DERECHO DE NACER-THU	UNI	29.7
16	PRIVILEGIO DE AMAR-TUE	UNI	28.8
17	DERECHO DE NACER-FRI	UNI	28.6
18	CARITA DE ANGEL-THU	UNI	28.3
19	CARITA DE ANGEL-TUE	UNI	28.1
20	PRIVILEGIO DE AMAR-WED	UNI	28.0
74	WWF SMACKDOWN!	UPN	11.8

Source: NHTI, Oct01-July02, Based on regular network programming.
Bilingual Households where Spanish and English are spoken equally

Regardless of Language, Univision is the #1 Ranked Station in Many Markets

TOTAL DAY

KMEX Los Angeles	A1834, A1849, A2549 (Tie), W1834, W1849, W2549 (Tie)
WLTV Miami	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834 W1849, W2549, W2554, M1834, M1849, M2549, M2554 (Tie)
KXLN Houston	A1834, W1834
KUVN Dallas	A1834 (Tie), W1834
KTVW Phoenix	A1834, W1834, M1834
KNVO McAllen-Harlingen	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554, M1834, M1849, M2549, M2554
KINT El Paso	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554
KFTV Fresno	V2+, A1834, A1849, A2549, A2554, W1834, W1849, W2549 W2554, M1834, M1849, M2549, M2554
KINC Las Vegas	A1834, W1834, M1834 (Tie)
KSMS Monterey-Salinas	A1834, W1834 (Tie), M1834
KABE Bakersfield	A1834, A1849 (Tie), W1834, M1834, M1849, M2549
KLDO Laredo	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554, M1834, M1849, M2549, M2554
KVYE Yuma-El Centro	A1849 (Tie), A2549,W1834, W1849, W2549, W2554
KVER Palm Springs	V2+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554, M1834, M1849, M2549, M2554

PRIME

KMEX Los Angeles	W1834
WLTV Miami	HH's (Tie), V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554, M1834, M1849, M2549, M2554
KXLN Houston	A1834, W1834
KTVW Phoenix	A1834, W1834, M1834
KNVO McAllen-Harlingen	HH's, V2+, A18+, A1849, A2549, A2554, W1849, W2549, W2554, M2549, M2554
KINT El Paso	HH's (Tie), V2+, W1849,W2549, W2554
KFTV Fresno	V2+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554, M1834, M1849, M2549, M2554
KINC Las Vegas	A1834, W1834 (Tie)
KSMS Monterey-Salinas	A1834, M1834
KABE Bakersfield	A1834, W1834, M1834, M1849
KLDO Laredo	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554, M1834, M1849, M2549, M2554
KVYE Yuma-El Centro	W2549, W2554 (Tie)
KUPB Odessa	A1834, W1834, M1834
KVER Palm Springs	V2+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554, M1834, M1849, M2549, M2554

Source: NSI Nov02 Total Day TP (Mon–Sun 6am–2am Est/Cntrl/Pac); Prime TP (Mon–Sun 7–11pm Est/Pac [Univision, Telemundo, Spanish Language Stations], Mon–Sat 8–11pm / Sun 7–11pm Est/Pac [ABC, CBS, NBC, PAX, IND] & Mon-Sat/8-10pm, Sun 7-10pm [FOX, WB,UPN]; Cent/Mtn Time Zones are one hour behind Est/Pac times listed. Demos include Households, Viewers 2+, Adults 18+, Adult, Women, Men 1834, 1849, 2549, 2554.

Regardless of Language, Univision is the #1 Ranked Station in Many Markets

EARLY NEWS

KMEX Los Angeles	A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554 (Tie), M1834, M1849, M2549, M2554
WXTV New York	A1834, W1834, M1834, M1849 (Tie)
WLTV Miami	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554, M1834, M1849 M2549, M2554
KXLN Houston	A1834, W1834
WGBO Chicago	A1834, W1834, M1834, M1849, M2549
KDTV San Francisco	A1834, W1834, M1834
KTVW Phoenix	A1834, A1849, A2549, W1834, W1849, W2549, M1834
KNVO McAllen-Harlingen	V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554, M1834, M1849, M2549, M2554
KLUZ Albuquerque	A1834, W1834
KBNT San Diego	A1834 (Tie), W1834
KINT El Paso	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554, M1834, M1849, M2549, M2554
KFTV Fresno	V2+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554, M1834, M1849, M2549, M2554
WVEA Tampa	W1834
KINC Las Vegas	A1834, A1849, A2549, W1834, W1849, W2549, W2554 (Tie), M1834, M1849, M2549 (Tie)
KSMS Monterey-Salinas	A1834, W1834, M1834
KABE Bakersfield	A1834, A1849, A2549, W1834, M1834, M1849, M2549, M2554
KLDO Laredo	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554, M1834, M1849, M2549, M2554

EARLY NEWS

KVYE Yuma- El Centro	A1834, A1849, A2549, W1834, W1849, W2549, W2554, M1849, M2549
KVER Palm Springs	A1834, A1849, A2549, A2554, W1834, W1849, W2549 W2554, M1834, M1849, M2549, M2554

LATE NEWS

KMEX Los Angeles	A1834, W1834, M1834
WLTV Miami	HH's (Tie), V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554, M1834, M1849, M2549, M2554
KXLN Houston	A1834, W1834, M1834
KTVW Phoenix	A1834, M1834
KNVO McAllen-Harlingen	V2+, A18+, A1834, A1849, A2549, A2554, W1834 W1849, W2549, W2554, M1834, M1849, M2549, M2554
KINT El Paso	A1834, A2549, A2554, W1834, W1849, W2549, W2554
KLDO Laredo	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834 W1849, W2549, W2554, M1849, M2549, M2554 (Tie)
KVYE Yuma	A1834, A1849, A2549. A2554 (Tie), W1834, W1849, W2549, W2554

NATIONAL SALES

Source: NSI Nov02 Early News PAV (Mon-Fri 6–630pm Est/Pac). Late News PAV (Mon–Fri 10-11pm, 11–1130pm Est/Pac). Cent/Mtn Time Zones are one hour behind Est/Pac times listed. Demos include Households, Viewers 2+, Adults 18+, Adult, Women, Men 1834, 1849, 2549, 2554. Please Note: ABC News ran T-F 11-1130p ET / T-F 10-1030p CT/MT / T-F 6-630p PT due to Monday Night Football

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DAYTIME*

KMEX Los Angeles	A1834, A1849, A2549, W1834,
WLTV Miami	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554
KXLN Houston	A1834, W1834
WGBO Chicago	A1834 (Tie), W1834
KUVN Dallas	W1834
KDTV San Francisco	A1834, W1834 (Tie)
KTVW Phoenix	A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554
KNVO McAllen-Harlingen	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554
KLUZ Albuquerque	A1834, W1834
KINT El Paso	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849,W2549, W2554
KFTV Fresno	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554
KINC Las Vegas	A1834, A1849, A2549, W1834, W1849, W2549,
KSMS Monterey- Salinas	A1834 (Tie), A1849, A2549, A2554, W1834 (Tie), W1849, W2549, W2554
KABE Bakersfield	A1834, A1849, A2549, A2554 (Tie), W1834, W1849
KLDO Laredo	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554
KVYE Yuma-El Centro	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554
KPMR Santa Barbara	A1834, A1849 (Tie), W1834
KVER Palm Springs	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554

EARLY FRINGE*

KMEX Los Angeles	A1834, A1849, A2549, A2554, W1834, W1849, W2549
WLTV Miami	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554
KXLN Houston	A1834, W1834, W1849
WGBO Chicago	A1834, W1834
KUVN Dallas	A1834, A1849 (Tie), W1834, W1849 (Tie)
KDTV San Francisco	A1834, A1849 (Tie), W1834
KTVW Phoenix	A1834, A1849, A2549, W1834
KNVO McAllen-Harlingen	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554
KLUZ Albuquerque	A1834, A1849, W1834 (Tie)
KBNT San Diego	A1834, W1834
KINT El Paso	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554
KFTV Fresno	V2+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554
WVEA Tampa	A1834 (Tie)
KINC Las Vegas	A1834, A1849, A2549 , W1834, W1849, W2549
KSMS Monterey- Salinas	A1834, A1849, A2549 (Tie), W1834
KABE Bakersfield	A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554
KLDO Laredo	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554
KVYE Yuma-El Centro	A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554
KUPB Odessa	A1834 (Tie), A2554 (Tie), W1834, W2554
KMPR Santa Barbara	A1834
KVER Palm Springs	V2+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554

Source: NSI Nov02 Daytime TP (Mon-Fri 10am - 3 pm Est/Pac); Early Fringe TP (Mon--Fri 3pm - 6pm Est/Pac).
Cent/Mtn Time Zones are one hour behind Est/Pac times listed.
Among Households, Viewers 2+, Adults 18+, Adult and Women 1834, 1849, 2549, 2554.

NATIONAL SALES

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Regardless of Language, Univision is the #1 Ranked Station in Many Markets

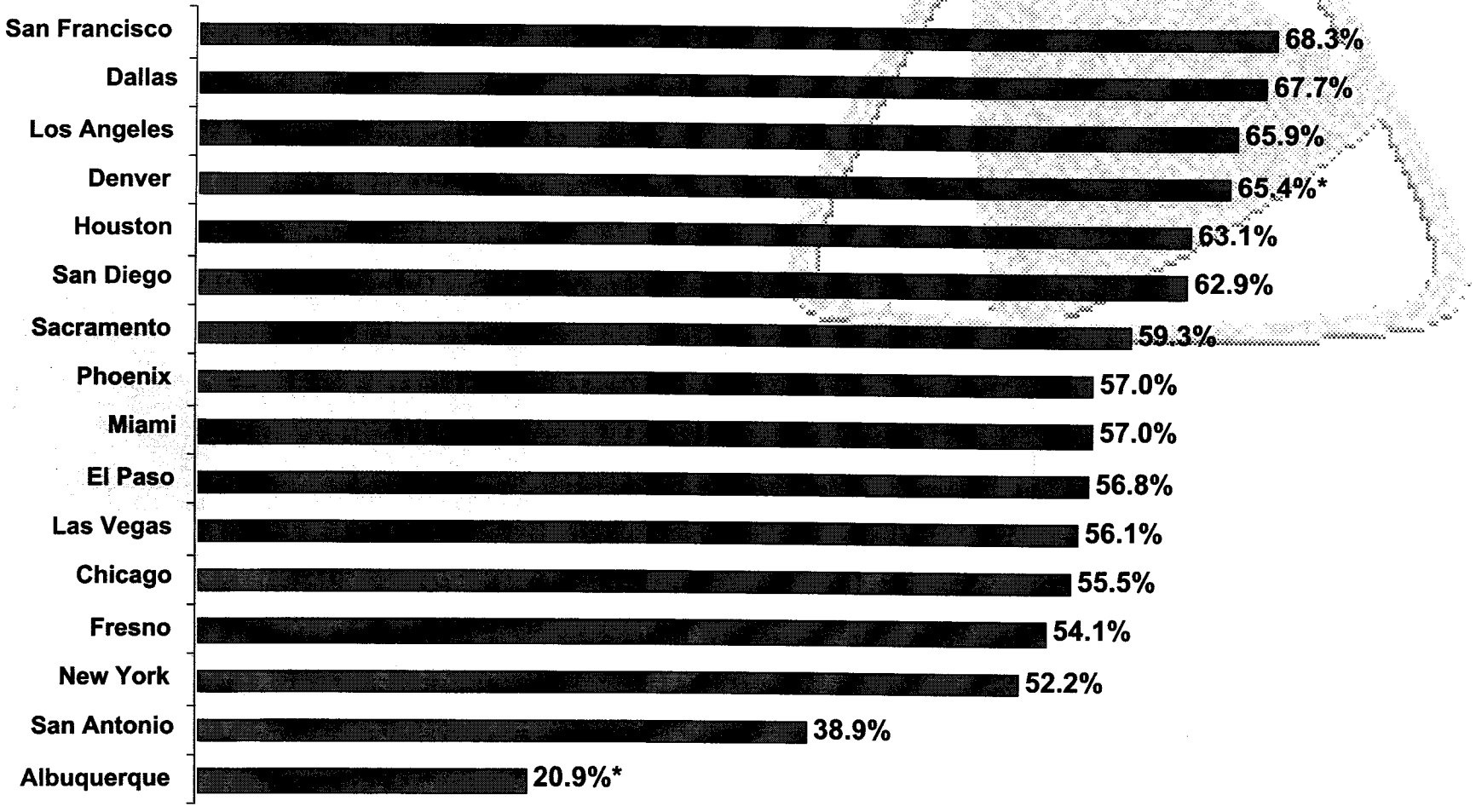
EARLY MORNING

WLTV Miami	W1834 (Tie)
KTVW Phoenix	A1834, M1834 (Tie)
KNVO McAllen-Harlingen	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554, M1834, M1849, M2549, M2554 (Tie)
KINT El Paso	A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554, M1834
KFTV Fresno	A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554, M1834, M1849
KORO Corpus Christi	W1834 (Tie)
KINC Las Vegas	A1834, W1834, M1834
KABE Bakersfield	A1834, W1834, M1834
KLDO Laredo	HH's, V2+, A18+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554, M1834, M1849, M2549, M2554
KUPB Odessa	W1834
KGHB Colorado Springs	M1834
KPMR Santa Barbara	A1834, W1834, M1834
KVER Palm Springs	V2+, A1834, A1849, A2549, A2554, W1834, W1849, W2549, W2554, M1834, M1849, M2549, M2554

Source: NSI Nov02 Early Morning TP (Mon-Fri 7am - 10am Est/Pac); Cent/Mtn Time Zones are one hour behind Est/Pac times listed.
Demos include Households, Viewers 2+, Adults 18+, Adult, Women, Men 1834, 1849, 2549, 2554.

Only Univision Delivers a Significant Exclusive Audience!

*Percent of Univision's cume **A18+** audience that did not watch any English-language stations; Mon-Sun, 6A-2A*



NATIONAL SALES

Source: Scarborough, 2002 Release 1: LA, Miami, Denver, San Diego, El Paso, Las Vegas, Albuquerque; Hispanic Custom: Dallas (2001 Release 2), San Francisco, Houston, Sacramento, Phoenix, Chicago, Fresno, New York, San Antonio
* Limited sample; shown for directional purposes only.

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Univision Increases Your Reach at *No* Additional Cost

NATIONAL
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Univision Increases Your Reach of Hispanics At NO Additional Cost

	General Market Schedule w/o WLTV	Schedule Including WLTV	% Reach Incr. w/ WLTV
NSI	55.8	65.8	+ 18%

Generic 200 Weekly GRP Miami Schedule - Adults 25-54

NATIONAL SALES

Source: November 2000 NSI, Miami DMA.

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Local Programming/ Events *and* Sponsorship Opportunities

NATIONAL
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Local Programming Provides A Connection to the Community

Los Angeles	KMEX	Noticias 34 (M-F 5a, 6a, M-Su 6p, 11p) Voz y Voto (Sat 10:30a) Deportes 34 (Sun 3p)
New York	WXTV	Noticias 41 (M-F 5a, 6a, M-Su 6p, 11p)
Miami	WLTV	Noticias 23 (M-F 6a, M-Su 6p, 11p) Miami Ahora (Sat 6:30a, 10a)
Houston	KXLN	Noticias 45 (M-Su 5p, 10p) Nuestra Vida (Sat 9:30a)
Chicago	WGBO	Noticias Univision Chicago (M-Su 5p, 10p) Primera Plana (Su 9:30a)
Dallas	KUVN	Noticias 23 (M-F 5p, 10p) Dale Ganas (Second Sat 9a) Noticias 23 Edicion Fin de Semana (Sat-Sun 5p, 10p)
San Francisco	KDTV	Noticias 14 (M-Su 6p, 11p) Voz y Voto (Sat 10a) Encuentro en la Bahia (Sat 10:30a)
San Antonio	KWEX	Noticias 41 Univision (M-Su 5p, 10p) Desde San Antonio (Sat 9a) Club Deportivo 41 (Sat 9:30a)
Phoenix	KTVW	Noticias 33 (M-F 5p, 10p) Teledía Sábado (Sat 9a) Agenda Deportiva (Sat 9:30a)
Fresno	KFTV	Noticias 21 (M-F 6p, 11p) Arriba Valle Central (M-F 6a)
Sacramento	KUVS	Noticias 19 (M-F 6a, M-Su 6p, 11p) Voz y Voto (Sat 10a) Sabor Latino (Sat 10:30a)
Philly	WUVP	Voces del Valle (Sat 10a) Noti Breves (M-F 7a)
Atlanta	WUVG	Nuestra Georgia (Sat 10a)
Tucson	KUVE	Noticias 33 (M-F 5p, 10p) Teledía Sábado (Sat 9a) Agenda Deportiva (Sat 9:30a)
Bakersfield	KABE	Noticias 21 (M-F 6p, 11p) Bakersfield Al Día (Sat 6a, 6:30a, 10a, 10:30a, Sun 6a, 6:30a) Arriba Valle Central (M-F 6a)
McAllen	KNVO	Noticias 48 (M-Sun 5p, 10p) Amaneciendo con Univision (M-F 5a)

NATIONAL SALES

As of 5/1/02

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Local Programming Provides A Connection to the Community

Albuquerque	KLUZ	Noticias 41 (M-F 5p, 10p)
Denver	KCEC	Noticias 50 (M-F 5p, 10p, Sun 5p)
San Diego	KBNT	Noticias 17 (M-F 6p, 11p) Despierta San Diego (M-F 7:30a, 8:30a, 9:30a)
El Paso	KINT	Noticias 26 (M-Sun 5p, 10p) Despierta El Paso (M-F 6:30a, 7:30a, 9:30a)
Washington, D.C.	WMDO	Noticias 30 (M-F 6p & 11p)
Tampa	WVEA	Noticias 62 (M-F 6p) Nuestra Tampa (Sat 1x mo 7a)
Orlando	WVEN	Noticias 26 (M-F 6p, 11p)

Boston	WUNI	Enfoque Latino (Sun 6:30a) Pachanga Latina (Sat 10a)
Las Vegas	KINC	Noticias 15 (M-F 6p, 11p)
Corpus Christi	KORO	Noticias 28 (M-F 5p, 10p)
Monterey	KSMS	Noticias 67 (M-F 6p, 11p)
Hanford	WUVN	Enfoque Latino (Sun 6:30a) Pachanga Latina (Sat 10a)
Laredo	KLDO	Noticias 27 (M-F 5p, 10p)
CO Springs	KGHB	Noticias 50 (M-F 5p, 10p)
Santa Barbara	KPMR	Noti Breves (M-F 7p-12a)
Yuma-El Centro	KVYE	Notivalle (M-F 6p, 11p)
Palm Springs	KVER	Notivalle (M-F 6p,11p)

NATIONAL SALES

As of 5/1/02

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Univision Stations Have Strong Ties to the Community

LOS ANGELES-KMEX
- Tournament of Roses Parade
- El Grito
- Fiestas Patrias
- Latino Action Day

NEW YORK-WXTV
- Dominican Heritage Month
- Puerto Rican Day Parade
- Hispanic Day Parade

MIAMI-WLTV
- Calle Ocho
- Expo Nica
- Viva Broward
- Cuba Nostalgia

SAN FRANCISCO-KDTV
- Cinco de Mayo
- Mariachi Festival
- Viva las Americas

CHICAGO-WGBO
- Chicago Latino Film Festival
- Elgin Puerto Rican Parade and Festival
- Fiesta Del Sol

HOUSTON-KXLN
- Livestock Show and Rodeo
- International Festival
- Cinco de Mayo

SAN ANTONIO-KWEX
- Spanish Spelling Bee
- Sembrando la Esperanza del Futuro
- Feria de Salud

DALLAS-KUVN
- Feria de Salud
- Gran Fiesta de Fort Worth
- City of Dallas Back to School Fair

McALLEN-KNVO
- Charro Days Fiesta
- Fiesta Edinburg
- Border Fest
- 16 De Septiembre Concerts in the Park

PHOENIX-KTVW
- Cinco de Mayo
- 16 de Septiembre
- Sol de Nuestra Comunidad

SAN DIEGO-KBNT
- Cinco de Mayo
- Hispanic Health Fair
- Fiestas Patrias
- Hispanic Heritage Month

ALBUQUERQUE-KLUZ
- Cinco de Mayo
- Hispanic Heritage Weekend
- Balloon Fiesta

EL PASO-KINT
- Rio Grande Cancer Foundation's "Ponte Al Dia"
- Carrasco Job Corps Ctr "Student of the Month"
- Susan B. Koman Race for the Cure
- Abrigos para los Niños

FRESNO-KFTV
- Cinco de Mayo
- Hispanic Family Day at the Chaffee Zoo
- 16 de Septiembre
- Fresno Fair's Hispanic Day

SACRAMENTO-KUVS
- Festival de la Familia
- International Festival
- Cinco de Mayo
- 16 de Septiembre

DENVER-KCEC
- Student of the Year
- Wells Fargo Culture Festival
- Cherry Creek Culture Festival
- Fiestas Patrias

WASHINGTON, D.C.-WMDO
- Beca Skirble
- Health Fair – La Clinica del Pueblo
- Latin American Day – Six Flags

Univision Stations Have Strong Ties to the Community

TAMPA - WVEA
- Fiesta Day
- Sant'Yago Illuminated Night Parade
- International Folk Festival
- Hispanic Heritage Month

CORPUS CHRISTI - KORO
- Cinco de Mayo
- Fiesta Lo Nuestro
- Bay Fest
- Buccaneer Day's Parade

TUCSON - KUVE
- Festival Norteño
- LULAC Youth Leadership
- Fiesta Para la Familia

BOSTON-WUNI
- Lawrence Hispanic Festival
- Boston Puerto Rican Festival
- Providence Dominican Festival
- Worcester Latin Festival

ORLANDO - WVEN
- Hispanic Academic All-Stars
- Fiesta Gigante
- Puerto Rican Day Parade

LAS VEGAS - KINC
- National Western Stock Show
- Cinco de Mayo

MONTEREY - KSMS
- Cinco de Mayo
- California Rodeo Salinas
- California International Air show
- Gilroy Hispanic Cultural Festival

BAKERSFIELD - KABE
- Cinco de Mayo
- Fiestas Patrias
- Downtown Street Fairs
- Kern County Fair

LAREDO - KLDO
- Washington's Birthday Celebration
- 16 de Septiembre Celebration

SANTA BARBARA/SANTA MARIA - KPMR
- Cinco de Mayo
- Mother's Day and Father's Day Greetings
- Las Fiestas Patrias

YUMA/EL CENTRO - KVYE
- Mariachi Festival-Fund Raiser
- Making Strides Against Cancer
- Hidalgo Society

LUBBOCK - KBZO
- 4th on Broadway
- Southplanes Fair

PALM SPRINGS - KVER
- Cinco de Mayo
- 16 de Septiembre 2000
- Christmas Greetings
- Nuestra Comunidad al Dia

RENO - KNVV
- Cinco de Mayo
- Children's Cabinet Golf Tournament
- Nevada State Fair
- Hispanic Heritage

VICTORIA - KUNU
- Cinco de Mayo
- Calhoun County Fair Tejano Night
- 16 de Septiembre Celebration
- Christmas Toy Drive

CHICO - KOFZ
- Cinco de Mayo
- 16 de Septiembre Celebration
- Toys 4 Tots

Gracias!

NATIONAL
SALES

univision

ATTACHMENT 3

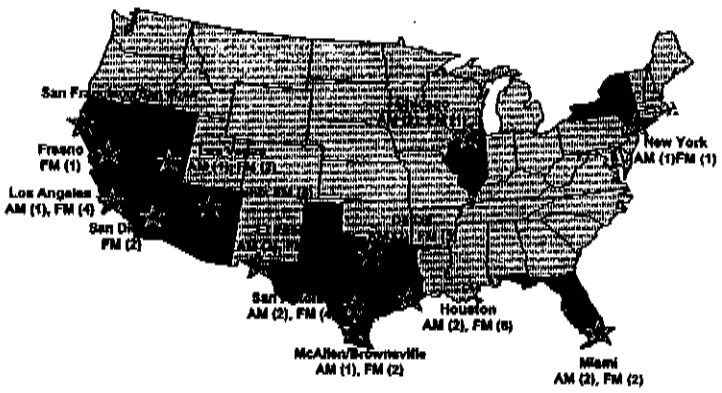
HBC

"Si"

Presentation

Hispanic Broadcasting Corporation Delivery

55 Stations in the Top 13 Hispanic Markets, and Las Vegas



3

America's Changed Landscape

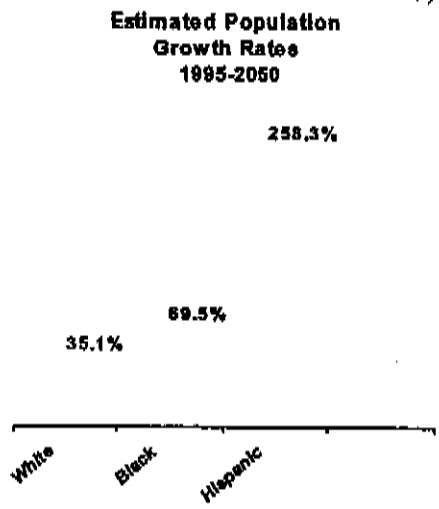
Hispanics Are Driving That Change

- **Hispanics accounted for 40% of the US population growth between 1990-2000 and will represent over 60% of total population growth in the next decade!**
- **Hispanics now total over 38 million people and represent 13.4% of the US Population**
- **More than 1 out of 5 Americans born today is of Hispanic descent**

Source: U.S. Census

4

America Isn't Changing It Has Changed!



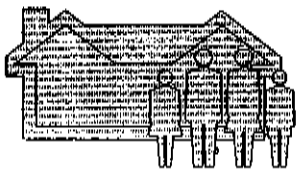
Source: U.S. Census

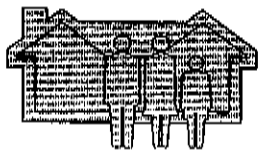
6

Hispanics are younger and have larger families

Hispanic households are in their acquisition phase of life

Hispanic	Total US
HH size: 3.6	HH size: 2.6
Median age: 27.45	Median age: 35.13



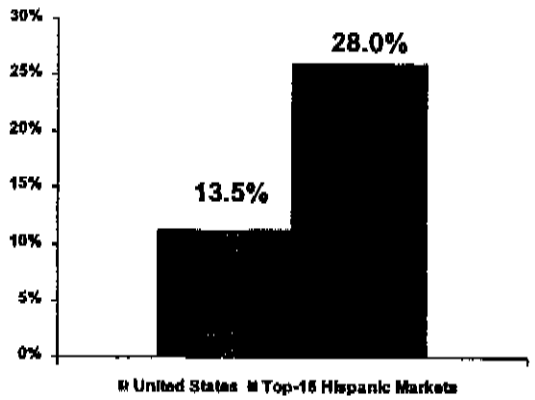


Source: US Bureau of the Census

6

1 in 4 Persons are Hispanic in Top 15 Markets

Hispanic Population as % of U.S. Population and Top 15 Hispanic Markets



Source: U.S. Bureau of the Census

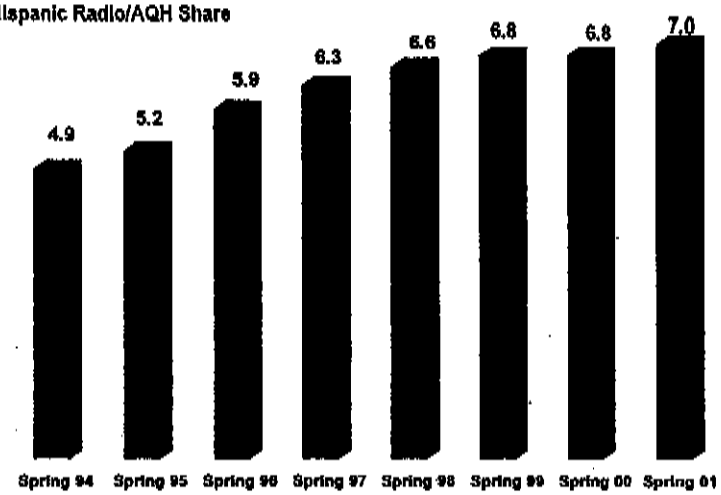
7

Radio Plays a More Important Role in the Hispanic Marketplace

- The Number of Spanish language radio stations has almost tripled in the last decade.
- Spanish radio stations show up routinely at the top of a general market radio ranker in key markets
- Hispanics listen to the radio 20%-30% more than Non-Hispanics
- On average Spanish radio stations duplicates less than 10% with English language stations

Source: Arbitron

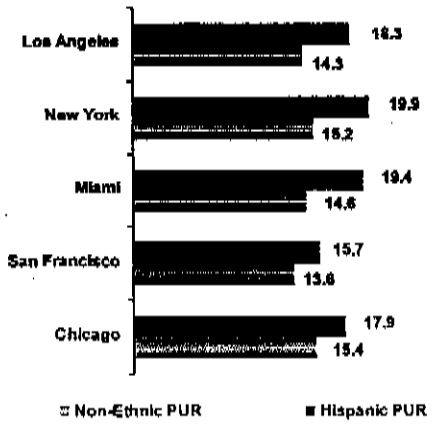
Hispanic Radio Gets Stronger Every Year



Source: Arbitron National Database

9

PUR Levels for Hispanics in the Top 5 Hispanic Markets Tell a Powerful Story!



Source: Spring 2001 Arbitron/PUR/P12+/Total Week

10

Spanish Language Radio Out delivers Spanish TV Across all HBC Markets!

[illegible]	[illegible]	[illegible]	[illegible]
Los Angeles	1,893,055	1,661,285	1,320,835
New York	1,339,435	N/A	N/A
Miami	548,520	428,530	318,675
Chicago	488,245	344,675	252,615
Houston	488,705	376,655	183,320
San Francisco	345,725	259,820	203,640
Dallas	327,405	284,610	28,015
San Antonio	250,040	104,025	31,550
Phoenix	240,655	197,525	N/A
San Diego	237,975	140,555	81,825
El Paso	136,850	103,235	23,380
Las Vegas	92,700	98,240	58,680

Source: Scarborough MSA Aug 2000-July 2002/Total Week Cume/Adults 18-49

11

Radio Plays a More Important Role in the Hispanic Media Mix

U.S. Hispanics spend 9.7 hours per day with different media

- **30 minutes per day reading magazines (2.9%)**
- **45 minutes per day reading newspapers (7.1%)**
- **45 minutes per day on the Internet (7.6%)**
- **3.6 hours per day listening to radio (37%)**
- **4.4 hours per day watching TV (45.4%)**

Source: 2002 Strategy Research U.S. Hispanic Survey

12

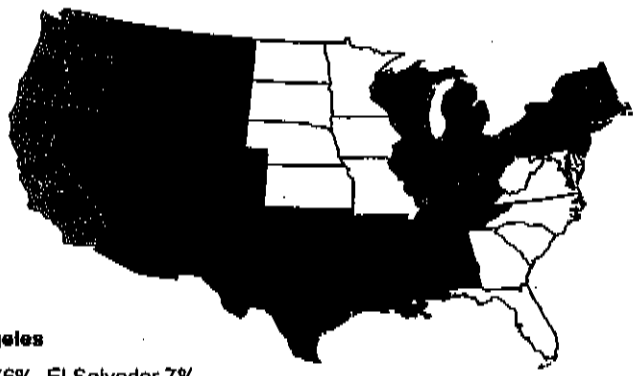
Hispanic Radio Market

- Hispanics are not a single homogeneous group
  - Music, customs, food, culture and Spanish dialects vary both by market and within individual markets
- Hispanic Radio is not a format
  - Individual stations are programmed with a wide range of music and information formats designed to appeal to the local market
- Radio provides an important cultural touchstone, especially to a market that has a large segment of the audience driven by dependence and not just preference
  - Community
  - Education
  - Political Forum

-Language
-Product Information
-General Information

13

The U.S. Hispanic Population Is Diverse!



New York

Puerto Rico 36%
Dom. Rep. 19%
Mexico 11%
Colombia 8%
Ecuador 5%
El Salvador 5%
Other 16%

Los Angeles

Mexico 76% El Salvador 7%
Guatemala 3% Other 14%

Miami

Cuba 59%, Nicaragua 9%, Columbia 5%
Puerto Rico 5%, Other 22%

Source: 2002 U.S. Strategy Research

14

Why HBC*si*?

No Radio Company is Better Positioned than HBC

15

The Largest and Most Successful Spanish Radio Broadcaster

Leadership:	**#1 Spanish station in 10 of 13 markets[2]**
	55 Stations in the top 13 Hispanic Markets, plus Las Vegas[3]
	Only Spanish radio broadcaster to deliver FM stations in the top 10 Hispanic markets
Size:	**HBC is larger than the next 4 Spanish radio broadcasters combined, and reaches over 8 million Hispanics in the major markets.[1]**

1. Source: BT Alex Brown
2. Source: Arbitron Fall '01

16

HBC Addresses Hispanic Diversity Both Locally & Nationally

Los Angeles

New York

Miami

17

Consider This:

- Advertisers can reach 70% of the Continental U.S. Hispanic Population using HBC stations in 13 markets.
- To reach 70% of the Continental U.S. General Market Population an advertiser must buy over 100 markets!
- It is much easier to coordinate cross platform selling in 13 markets versus 100!

Source: Arbitron Persons 12+ Metro Population estimates Total United States

18

Consider This:

- HBC Outdelivers Big GM Groups - In the Hispanic arena HBC is larger than Clear Channel, Infinity or ABC in the general market!
- HBC has Strong Network Delivery - The HBC Radio Network is larger in the Hispanic arena than any radio network is in the general market and includes exciting specialty programs like Latin Grammy's
- HBC/ has the only local city guide for Hispanics – HBC's Internet portal Netmio and 39 individual station web-sites offer a unique service on the net for U.S. Hispanics

19

Consider This:

- Event Marketing - Event Marketing is already a turnkey part of HBC's local delivery. Executing national programs will be easier due to the high concentration of the Hispanic population in HBC markets.
- Powerful Delivery - HBC stations are dominant players in the majority of their markets so they have the ability to deliver marketing/media objectives to advertisers beyond what the general market can accomplish
- Limited Competition - HBC delivers marketing capabilities to agencies and advertisers that have not been available before

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Arbitron Cume Fall 2001

Company	Format	Listeners 12+	Listeners A18-49	Listeners M18-49	Listeners A 25-49
HBC	Contemporary	3,201,800	2,062,200	1,007,000	1,637,500
SBS	Contemporary	2,037,400	1,349,900	630,300	1,089,400
SBS Puerto Rico	Contemporary	1,343,400	911,400	414,600	683,300
Entravision	Contemporary	1,422,900	993,300	456,600	705,600
HBC	News/Talk	1,050,400	498,400	273,600	440,100
Radio Unica	News/Talk	668,800	606,700	377,100	541,600
Lotus	News/Talk	123,900	80,000	44,400	66,300
Caracol	News/Talk	87,600	41,000	23,600	37,800
HBC	Regional	2,856,300	2,252,200	1,277,200	1,720,400
Liberman	Regional	1,231,600	923,600	550,700	653,700
SBS	Regional	1,221,700	932,600	511,800	676,100
Entravision	Regional	960,700	752,500	449,200	542,800

Source: Arbitron Fall '01 Total Cume

21

Arbitron Cume Fall 2001 (continued)

Company	Format	Listeners 12+	Listeners A18-49	Listeners M18-49	Listeners A 25-49
HBC	Tejano	402,700	243,400	121,200	193,900
Entravision	Tejano	195,000	123,600	54,400	84,200
El Dorado	Tejano	130,400	89,400	43,200	63,900
Clear Channel	Tejano	45,600	27,600	13,600	24,500
Guerra	Tejano	47,000	27,600	13,700	20,300
SBS	Tropical	1,583,900	1,137,400	556,400	917,100
HBC	Tropical	1,122,900	803,300	389,600	645,300
Arso Group	Tropical	1,083,800	720,000	339,800	615,500
SBS Puerto Rico	Tropical	373,800	225,300	136,700	223,900
Mega	Tropical	490,500	428,900	203,600	333,400

Source: Arbitron Fall '01 Total Cume

22

Hispanic Broadcasting Corporation Rankings Fall 2001

Market	Station	Hispanic Market				General Market			
		P 12+	A 18-34	A 18-49	A 25-54	P 12+	A 18-34	A 18-49	A 25-54
Los Angeles	KSCA-FM	1	1	1	1	6	6	2	1
Los Angeles	KLVE-FM	2	2	2	2	8	5	5	4
Los Angeles	KRCD/V-F	4	7	4	4	26	23	21	18
New York	WCAA-FM	3	3	3	3	21	11	18	19
New York	WADO-AM	4	5	4	4	22	27	24	23
Miami	WAMR-FM	1	2	1	1	5	11	5	3
Miami	WAQI-AM	2	6	7	7	6	24t	27t	24
Miami	WRTO-FM	5	3	4	4	20	12	14	16
Miami	WQBA-AM	6	5	9	8	22	24t	27t	27
San Francisco	KSOL/KZOL	1	1	1	1	10	7	16	16
Chicago	WOJO-FM	2	2	2	2	16	7	13	16
Chicago	WLXX-AM	3	3	3	3	33	31	32t	30
Chicago	WIND-AM	5	6	5	6	37t	30t	34	36
Houston	KLTN-FM	1	1	1	1	4	2	3	3
Houston	KQBU-FM	8	6	6	7	30	21	30t	27
Houston	KOVE/KOVA	3	3	3	3	21	16	19	19
Houston	KLAT-AM	5	5	4	5	34	19	23	22

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Arbitron/AQH Rank Fall 2001

Hispanic Broadcasting Corporation Rankings Fall 2001 (continued)

Market	Station	Hispanic Market				General Market			
		P 12+	A 18-34	A 18-49	A 25-54	P 12+	A 18-34	A 18-49	A 25-54
San Antonio	KXTN-FM	2	3	2	1	7	12	11	9
San Antonio	KBBT-FM	1	1	1	2	2	2	3t	10t
San Antonio	KROM-FM	3	2	1	3	14	8t	10	11
San Antonio	KCOR-FM	4	4	4	4	19	15t	19	19
San Antonio	KCOR-AM	7	6	4	7	21t	21t	19	26t
McAllen	KGBT-FM	1	2	1	1	2	4	4	1
McAllen	KIWW-FM	4	3	3	3	8	7	7	6
McAllen	KGBT-AM	3	4	4	4	6	5	6	7
Dallas	KLNO-FM	1	1	1	1	7	4	4	10
Dallas	KHCK-FM	3	4	4	4	28	32t	32	29
Dallas	KDXX/T-A/F	2	1	2	3	27	17	24	28
Dallas	KESS-AM	5	8	5	5	35	28	35	31
San Diego	KLNV-FM	1	1	1	1	12	6	12	11
San Diego	KLQV-FM	3	2	3	3	22	14	19t	20
El Paso	KBNA A/F	1	1	1	1	2	3	3	1
El Paso	KAMA-AM	8	13	8	7	17t	20t	22t	16t
Phoenix	KHOT-FM	3	3	3	3	17	12t	17t	16t
Phoenix	KMRR/KOMR	5	4	4	4	26t	17t	23t	22t
Las Vegas	KISF-FM	1	1	1	1	7	5	6	7
Las Vegas	KLSQ-AM	3	3	3	2	21	18t	22	17

24

Arbitron/AQH Rank Fall 2001

Noches Intimas and HBC*si*

Noches Intimas

Noches Intimas

HBC and TMP are proud to present a monthly "unplugged" concert series designed to showcase today's hottest Hispanic recording stars in a close "*intimate*" environment.

Starring

Thalia
Alejandro Fernandez
Chayanne
Juan Gabriel
Vicente Fernandez

26

Station Delivery - Noches Intimas

Radio:

Daypart	Station	# Spots	# Promo Spots	A18-49 GRPs Spots	A18-49 GRPs Promo Spots
Los Angeles	KLVE-FM	30	130	47.0	182.0
New York	WCAA-FM	30	130	47.7	190.7
Miami	WRTO-FM	30	130	40.2	151.7
Chicago	WOJO-FM	30	130	76.7	288.0
San Diego	KLQV-FM	30	130	28.1	99.7
San Francisco	KEMR-FM	30	130	54.5	199.3
Houston	KOVE-FM	30	130	45.7	186.3
Dallas	KDXX-FM	30	130	16.3	65.0
Phoenix	KHOT-FM	30	130	N/A	N/A
Total		270	1,170	1,440.0	2,580.0

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Netmio.com
Noches Intimas

Netmio.com (Internet)

•Banner placement on all Netmio.com categories and station pages across the network for one month

•Tile ads on all Netmio.com category and station pages across the network

•2 Geo-targeted or demo-targeted e-mail blasts per market (220,000+) up to 200 words of text per blast

•Static text link placement on all Netmio.com and station sites

•Photos, bios and schedules

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Venues
Noches Intimas

Event:

Market	Venue	Capacity
Los Angeles	House of Blues	500
New York	BB King's Blues Club	500
Miami	TBD	0
Chicago	Aragon Ballroom	4,500
San Diego	Humphrey's Concerts By The Bay	1,295
San Francisco	Bimbo's 365 Club	685
Houston	TBD	0
Dallas	Gypsy Tea Room	1,100
Phoenix	Celebrity Theater	2,650

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Noches Intimas

Event (continued):

Signage

•Sponsor will receive prominent brand presence at the event through a combination of vehicles including:

- •Event Tickets
- •Video Monitors
- •Stage Backdrop
- •Table Tents
- •Club Matches/coasters
- •On-stage mentions
- •Step & Repeat Walls for celebrities/press interviews
- •Merchandise giveaways
- •Product Display and sampling

30

Hispanic Broadcasting Corporation and
3rd Annual Latin GRAMMY® Awards

3rd Annual Latin GRAMMY Awards
SEPTEMBER 18, 2002 • 9PM ET/PT • CBS

3rd Annual Latin GRAMMY Awards

During 2000, the Latin Music world experienced growth and phenomenal buzz with crossover talent. The Recording Academy in conjunction with L.A.R.A.S. presents the Latin GRAMMY Awards.

Goals of L.A.R.A.S.

- Promote Latin Music emergence
- Promote great crossover talent
  - Jennifer Lopez
  - Shakira
  - Christina Aguilera
  - Marc Anthony
  - Enrique Iglesias
- Help to create a diverse membership of Latin Music professionals

Hispanic Broadcasting Corporation

Hispanic Broadcasting Corporation is the largest Spanish-language radio broadcasting company in the United States. We own and program 55 radio stations, serving 13 of the largest Hispanic markets in the United States, including Los Angeles, New York, Miami, San Francisco/San Jose, Chicago, Houston, San Antonio, Dallas, McAllen/Brownsville/Harlingen, San Diego, El Paso, Phoenix, Las Vegas and soon Fresno. Approximately 7.3 million Hispanics listen to the company's radio stations every week.

Hispanic Broadcasting Corporation's strategy is to own and program top performing radio stations, principally in the largest Spanish language radio markets in the United States. The top 15 Hispanic markets account for approximately 21.6 million Hispanics, representing approximately 71% of the total Hispanic population in the United States. The Company intends to acquire or develop additional Spanish language stations in the leading Hispanic markets.

3rd Annual Latin GRAMMY Awards
September 18, 2002
Los Angeles, CA – Kodak Theater

Media Partners

CBS Television Network
- Live Primetime 9p-11p EST

HBC Radio Network
- Broadcast on HBC's Entertainment Network
- Live on-air reports
- Behind the scenes information
- Market list of entertainment network stations

Latin GRAMMY ELEMENTS

- Teaser campaign - August 30th-September 18th - News/Talk/FM stations
- Vignettes -- September 5th-September 18th- News/Talk/FM stations
- Nominees Music Special - September 15th - FM stations
- Live "on-site" interviews - September 16th-18th - News/Talk/FM stations
- Live "night of" event - September 18th - News/Talk stations
- Recap, Best of the Awards - September 19th - FM stations

May 2002 3rd Annual Latin GRAMMY Awards SEPTEMBER 18, 2002 • 9PM ET/PT • CBS

35

Teaser Campaign

HBC will broadcast the following (:20) "teaser" campaign on all stations. These capsules will inform the listener of the upcoming event on their favorite stations. Teaser is tagged with advertisers, 2 advertisers per tag (:07).

Date	Promo	Time	# Units/ Week
Week 1 August 30th – September 1st	*"Coming Soon..."*	6a-12 mid	6
Week 2 September 2nd – September 8th	*"Listen to this station for..."*	6a-12 mid	12
Week 3 September 9th – September 15th	*"Next week..."*	6a-12 mid	12
Week 4 September 16th- September 18th	*"This Wednesday..." "Tonight..."*	6a-12 mid (Monday) 6a-6p (Wednesday)	6
		Total	36 promos

Day	Time	A18-49 AQH	Total Units
Monday-Sunday	6a-12m	429.8/2.2	36

August 2002

Mon	Tue	Wed	Thur	Fri	Sat	Sun
26	27	28	29			

September 2002

Mon	Tue	Wed	Thur	Fri	Sat	Sun
			19	20	21	22

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Arbitron Fall '01

3rd Annual Latin GRAMMY Awards SEPTEMBER 18, 2002 • 9PM ET/PT • CBS

GRAMMY Vignettes

HBC talks to the nominees and past GRAMMY winners leading up to the big show.

Media Elements
September 5th-September 18th :
Interview vignettes with Stars
:25 second content
:05 second billboard
:30 second spot
Sponsor will receive 2 units per day
Media to air Monday-Sunday 5a-7p
Total units - 28

September 2002

Mon	Tue	Wed	Thur	Fri	Sat	Sun
2	3	4				
			19	20	21	22
23	24	25	26	27	28	29
30						

Day	Time	# Units/ Day	A18-49 AQH	# Days	Total Units
Monday-Sunday	5a-7p	2	515.9/2.7	14	28

Arbitron Fall '01

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Nominees Music Special

HBC presents a look at all the top nominees and their work that got them to the "big party." A two hour special airing the Sunday prior to the event.

Sunday, September 15, 2002 7p-9p
- FM stations
- 2 hour special with interviews, music and "behind the scenes" with today's Latin GRAMMY Nominees

Media Elements
- Open, interior and close billboards
- 3 units

September 2002

Mon	Tue	Wed	Thur	Fri	Sat	Sun
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Day	Time	# Units/ Day	A18-49 AQH
Sunday	7p-9p	3	157.7/0.8

Arbitron Fall '01

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Live Interviews

HBC will grab your favorite artist to get an upfront and personal look at what's happening at the GRAMMYs.

September 16-18th, 2002

- Interviews from the Event Site
- "Live" Monday & Tuesday only
- Interviews with your favorite artist
- Minimum of two per day

Media Elements
- Open billboard
- :30 second unit
- Monday-Wednesday 5a-8p
- Total 6 units

September 2002

Mon	Tue	Wed	Thur	Fri	Sat	Sun
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
			19	20	21	22
23	24	25	26	27	28	29
30						

Day	Time	# Units/ Day	A18-49 AQH	Total Units
Monday-Friday	5a-8p	2	548.9/2.8	6

Arbitron Fall '01

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Live Night of Event

September 18, 2002 9p-11 (EST):
- Two hour simulcast on entertainment station
- Station "break-in" (FM) to format specific artist
- Behind the scenes reporting and direct from stage interviews

Media Elements
Simulcast
- 4 units
- Open, interior and close billboards

September 2002

Mon	Tue	Wed	Thur	Fri	Sat	Sun
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17		19	20	21	22
23	24	25	26	27	28	29
30						

Day	Time	# Units/ Day	A18-49 AQH	Total Units
Monday-Friday	9p-11p	4	31.2/0.2	4

Arbitron Fall '01

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Day After

After the glamour and glitz, HBC will recap who won, what was said and the important issue, what they were wearing.

September 19th, 2002 6a-7p:

- FM stations only
- Units will be centered around GRAMMY news during the day

September 2002

Mon	Tue	Wed	Thur	Fri	Sat	Sun
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	[redacted]	20	21	22
23	24	25	26	27	28	29
30						

Day	Time	A18-49 AQH	# Units
Monday-Friday	6a-7p	503.2/2.6	3

Arbitron Fall '01

41

Recap

Totals

Teaser campaign:

- 6/:30(with sponsor tag) units week 1, Friday-Sunday 5a-12 mid
- 12/:30(with sponsor tag) units week 2, Monday-Sunday 5a-12 mid
- 12/:30(with sponsor tag) units week 3, Monday-Sunday 5a-12 mid
- 6/:30(with sponsor tag) units week 4, Monday 5a-12 mid, Tuesday 5a-12m, Wednesday 6a-6p

Vignettes:

- 2 units per day- Monday-Sunday 6a-7p
- 28 units per campaign

Live Interviews:

- 2 units per day – Monday and Tuesday Only
- 6 total units

Nominees Program:

- 3 units
- Open, interior and close billboard

Live Program

- 4 units - HBC Entertainment
- Open, interior and close billboard

Recap

- 3 units-FM Stations

Total Investment: $300,000

42

Billboard® Latin Music Awards
Miami, Florida

Media Partners

Telemundo Television Network
Billboard® Magazine

HBC Radio Network
- Event Date: May 2003
- Broadcast Date: TBD
- Radio Broadcast will be scheduled in conjunction with Telemundo telecast.
- Broadcast on HBC's Entertainment Network
- Backstage Reports
- Behind the scenes information
- Market list of entertainment network stations

55

Billboard® Latin Music Awards
Miami, Florida

- Teaser campaign – April 17-May 11th - News/Talk/FM stations
- Vignettes – April 24-May 11th - News/Talk/FM stations
- Finalists' Music Special – May 4th - FM stations Only
- Backstage Interviews – May 8th, 9th & 10th - News/Talk/FM stations
- Red Carpet Pre-Show – May 11th – News/Talk/FM Stations
- Radio Broadcast – May 11th – News/Talk Stations Only

56

All Dates are Tentative based on 2002 Schedule

Teaser Campaign

HBC will broadcast the following (:23) "teaser" campaign on all stations. These capsules will inform the listener of the upcoming event on their favorite stations. Teaser is tagged (:07) with advertisers, 2 advertisers per tag.

April/May 2003

Mon	Tue	Wed	Thur	Fri	Sat	Sun

Date	Promo	Time	# Units/ Week
Week 1 April 17 – April 20th	*"Coming Soon on Telemundo..."*	6a-12 mid	10
Week 2 April 21st – April 27th	*"Listen to this station for ..."*	6a-12 mid	8
Week 3 April 28th – May 4th	*"Next week on Telemundo..."*	6a-12 mid	12
Week 4 May 5th - May 11th	*"This Week on Telemundo..."*	6a-12 mid	3
		Total	33 promos

Day	Time	A18-49 AQH	# Days	Total Units	Stations
Monday-Sunday	6a-12m	429.8/2.2	25	33	All

57

Arbitron Fall 2001

All Dates are Tentative based on 2002 Schedule

Vignettes

HBC talks to the Finalists and past Billboard Latin Music Award winners leading up to the big show.

April/May 2003

Mon	Tue	Wed	Thur	Fri	Sat	Sun
21	22	23				

Media Elements
April 24th – May 11th , 2003:
Interview vignettes with Stars
:30 second content
:30 second spot
Sponsor will receive:
1 unit per day – Week of April 28th
2 units per day – Week of April 21st and May 5th
Media to air Monday-Sunday 5a-7p
Total units - 29

Day	Time	A18-49 AQH	# Days	Total Units	Stations
Monday-Sunday	5a-7p	816.9/2.7	18	29	All

56

Arbitron Fall 2001

All Dates are Tentative based on 2002 Schedule

Finalists' Music Special

HBC presents a look at all the top finalists and their work that got them to the "big party." A two hour special airing the Sunday prior to the event.

May 2003

Mon	Tue	Wed	Thur	Fri	Sat	Sun
			1	2	3	
5	6	7	8	9	10	11

Sunday, May 4, 2003 7p-9p

- FM stations
- 2 hour special with interviews, music and "behind the scenes" with today's Billboard Latin Music Finalists

Media Elements

- 2 units

Day	Time	# Units/ Day	A18-49 AQH	Stations
Sunday	7p-9p	2	157.7/0.8	FM Only

59

Arbitron Fall 2001

All Dates are Tentative based on 2002 Schedule

Backstage Interviews

HBC will grab your favorite artist to get an upfront and personal look at what's happening at the Billboard Latin Music Awards.

May 2003

Mon	Tue	Wed	Thur	Fri	Sat	Sun
			1	2	3	4
5	6	7				11

May 8th, 9th & 10th, 2003:

- Interviews from on-site
- Interviews with your favorite artist
- Minimum of two per day

Media Elements

- :30 second unit
- Thursday-Saturday 5a-8p
- Total 6 units

Day	Time	# Units/ Day	A18-49 AQH	Total Units	Stations
Thursday-Saturday	5a-8p	2	513.3/2.7	6	All

60

Arbitron Fall 2001

All Dates are Tentative based on 2002 Schedule

Red Carpet Pre-Show

The glamour and glitz of the Red Carpet.

May 11th 7p-8p EST/PST:
- News/Talk Stations Only
- Units will be centered around Billboard news during the day

Media Elements
- 2 units

May 2003

Mon	Tue	Wed	Thur	Fri	Sat	Sun
			1	2	3	4
5	6	7	8	9	10	

Day	Time	# Units/ Day	A18-49 AQH	Total Units	Stations
Sunday	7p-8p	2		2	New/Talk Only

61

Arbitron Fall 2001

All Dates are Tentative based on 2002 Schedule

Radio Broadcast

May 11th, 2003 8p-11 (EST/PST):
- News/Talk Stations
- Three hour simulcast on entertainment station
- Behind the scenes reporting and direct from stage interviews

Media Elements
Simulcast
- 4 units

May 2003

Mon	Tue	Wed	Thur	Fri	Sat	Sun
			1	2	3	4
5	6	7	8	9	10	

62

All Dates are Tentative based on 2002 Schedule

Recap

Totals

Teaser campaign:
- 10/:15 units week 1, Monday-Sunday 6a-12 mid
- 8/:15 units week 2, Monday-Sunday 6a-12 mid
- 12/:15 units week 3, Monday-Sunday 6a-12 mid
- 3/:15 units week 4, Monday 6a-12 mid, Tuesday 6a-6p
- 33 units per campaign

Vignettes:
- 1 unit per day – Week of April 28th
- 2 units per day – Weeks of April 21st & May 5th
- 29 units per campaign

Interviews:
- 2 units per day
- 6 total units

Finalists' Program:
- 2 units

Red Carpet Coverage:
- 2 units

Broadcast:
- 4 units

Total Investment: $250,000

63

All Dates are Tentative based on 2002 Schedule

HBC Events and Promotions

Cinco de Mayo

Celebrate Cinco de Mayo with HBC's top Spanish language stations in the top 13 Hispanic markets. Cinco de Mayo, marked as the day of Mexican victory at the "Batalla de Puebla," represents a symbol of Mexican unity and patriotism. This famous 1800s battle was between the powerful French Army and the citizens of the small city of Puebla in which the Mexicans victoriously defended their land against the French invaders. This is a celebration of Hispanic culture and heritage. This "historic and heroic" holiday is celebrated around the country..

This will be a great opportunity for your business to showcase your company and increase awareness of your products and services to a large number of Hispanics that will be gathered to celebrate with the best Mexican Regional, International and Tejano artists that will highlight this outdoor festival. The festive music, carnival rides and the smell of succulent international foods make Cinco de Mayo an all-together family event. YOU will capitalize on this event by creating consumer interaction through display, selling, sampling and coupons. You can take full advantage of this unique and exclusive marketing opportunity with sponsorship packages.

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Fiestas Patrias/Diez y Seis

The Mexican Independence Holiday is probably the most significant and universally celebrated holiday of the Mexican people. El Diez y Seis de Septiembre or September 16th is the date in 1810 when the Mexican people, led by Miguel Hidalgo, declared independence from Spain's control of the country for generations.

Over 1.5 million consumers will be invited to the festivals. It's an opportunity for you to showcase your product and increase awareness at one of the biggest Hispanic events. Fiestas Patrias is a celebration of Mexico, its culture and its people featuring non-stop entertainment, authentic food and exhibits targeting the Hispanic community. You will capitalize on this event by creating consumer interaction through display and product promotion.

66

Events not scheduled:

Las Vegas – Dia de los Reyes Toy Drive

Houston – Rosca de Rayes / Super Bowl

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Events not scheduled:

Las Vegas – Valentine's Day Promotion / Kinder Vision / Baby Fair Houston/

Houston – HLSAR Championship BBQ Cookoff / Parade Welcome Trailide / Championship Martachi

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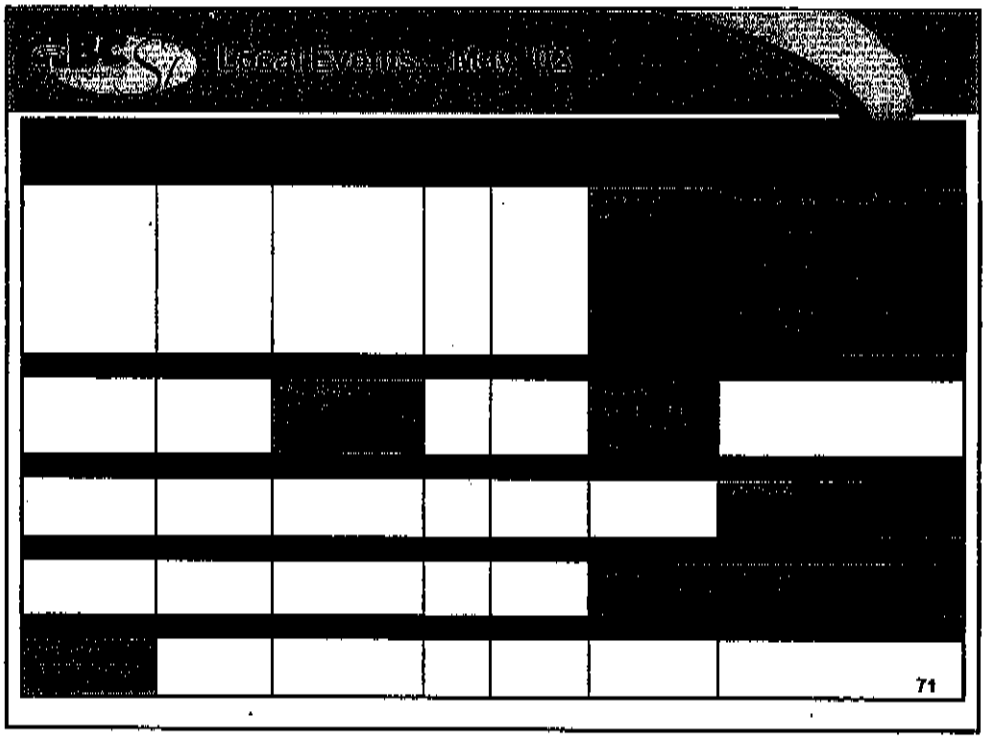
Local Events – March

Events not scheduled:
Las Vegas – Sea World Promotion / Bridal Women's Wear
McAllen – Borderfest
Phoenix – Saint Jude's Radiothon
Houston – Diabetes Awareness / Breakdance Contest / One Hot Night
San Antonio – St. Jude Children's Research

Local Events – April

Events not scheduled:
Las Vegas – Día de los Ninos
San Diego – St. Jude's Radiothon / Día de los Ninos
Phoenix – HSC Signature Event / Gran Baile & Concert

70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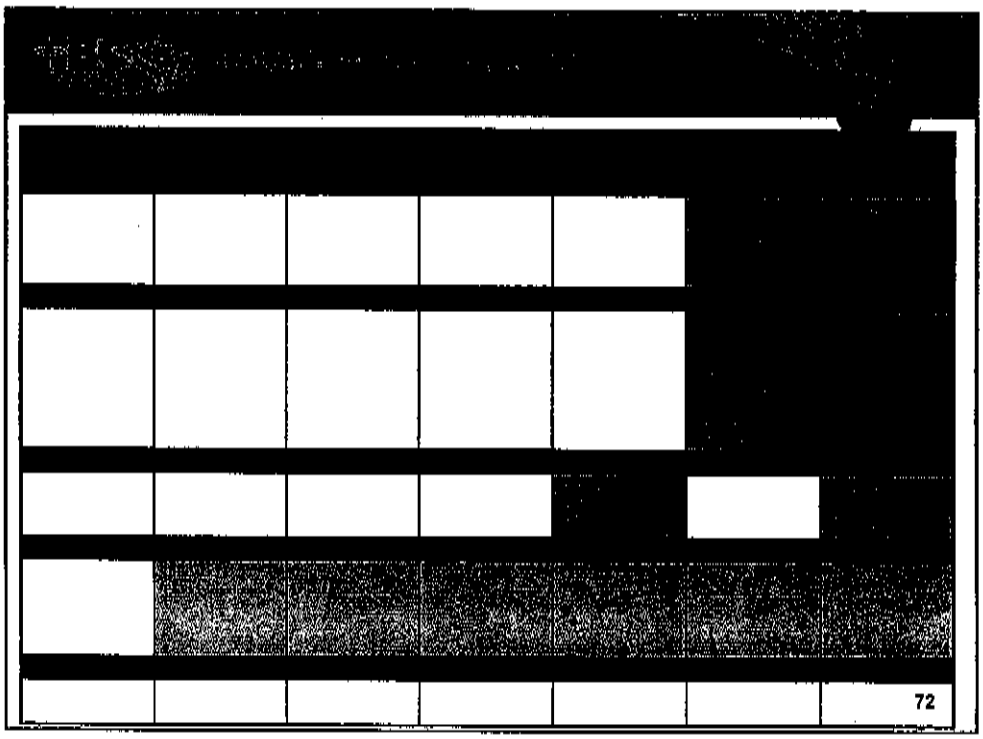
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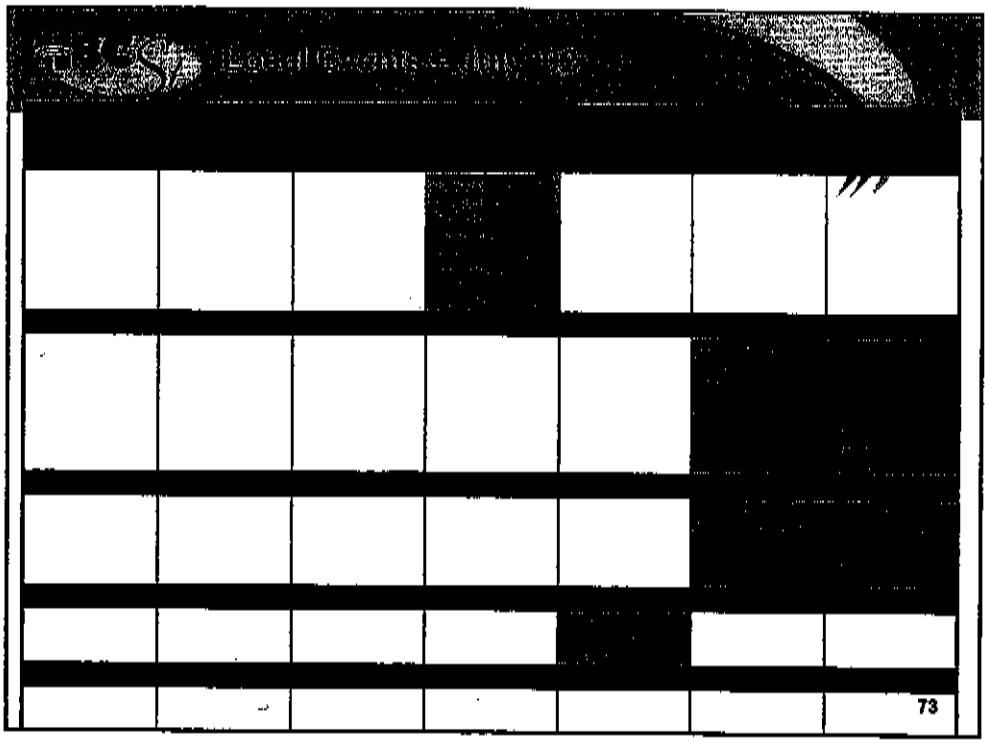
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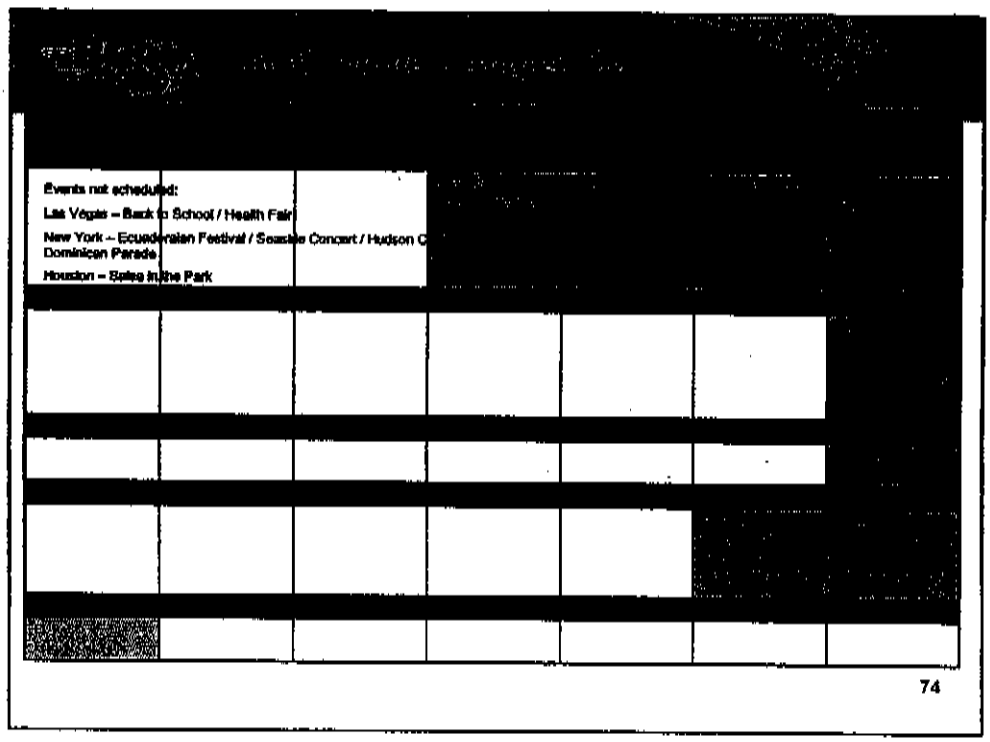
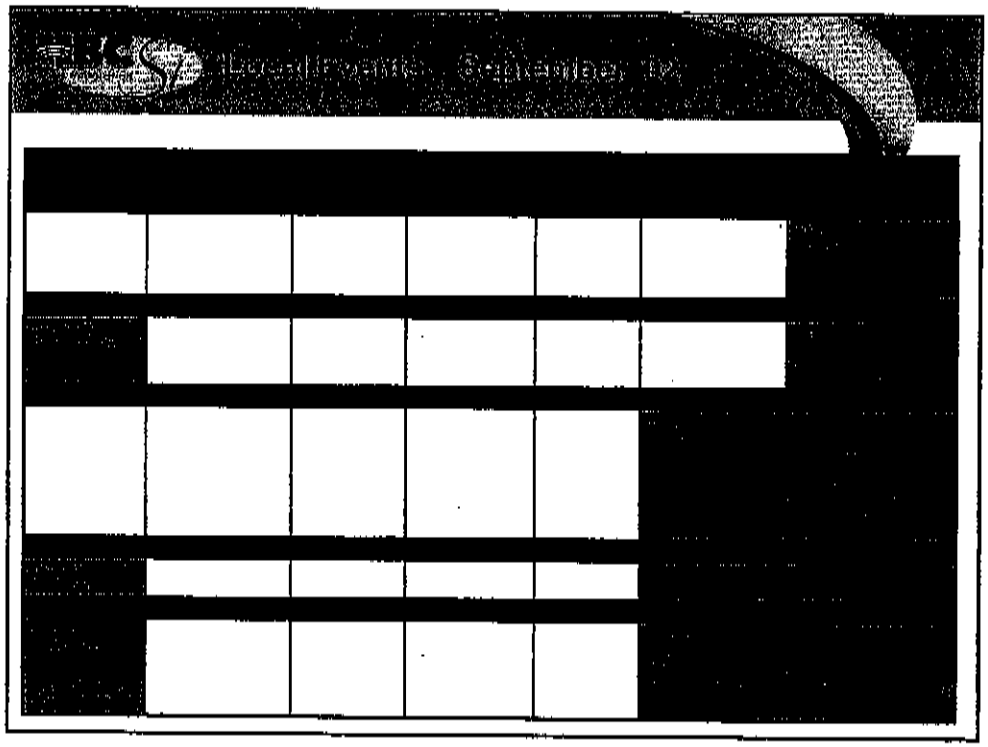
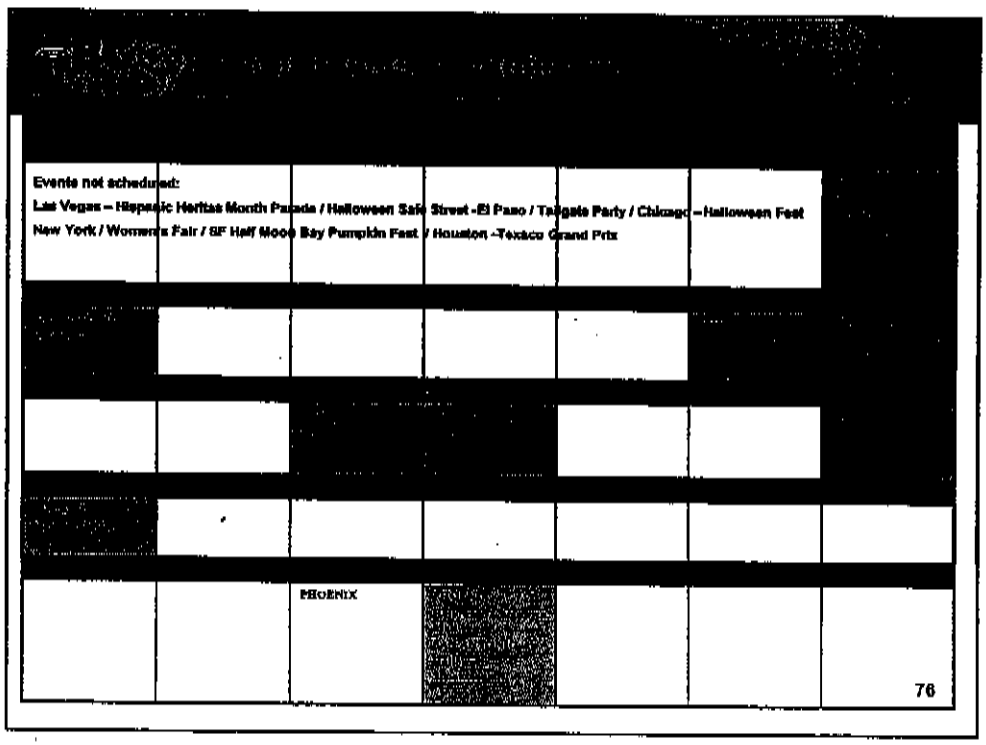

Events not scheduled:
Las Vegas – Back to School / Health Fair
New York – Ecuadorian Festival / Seaside Concert / Hudson C
Dominican Parade
Houston – Spring in the Park
74




Events not scheduled:
Las Vegas – Hispanic Heritas Month Parade / Halloween Safe Street -El Paso / Tailgate Party / Chicago – Halloween Fest
New York / Women's Fair / SF Half Moon Bay Pumpkin Fest / Houston -Texaco Grand Prix
PHOENIX
76

Local Events – November 02

Events not scheduled:
Las Vegas – Turkey Give-a-way and Food Drive
El Paso – Keep El Paso Warm
Phoenix – Grand Balle
Houston – ADA Walk for Diabetes / Thanksgiving Day Parade / Autorama

PHOENIX

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Programs on HBC Radio Network

HBC Interactive/Netmio.com

NETMIO.COM

Netmio.com is a local city guide which contains news and information that is culturally relevant to the Hispanic community. Visitors are drawn to the sites to interact with the radio station personalities, enter contest promotions, listen to streaming audio, interact with other visitors in their local market, find out about local event and advertiser information, and much much more.

Some of the features of Netmio.com are:

- Network of 40 bilingual radio station web sites, plus 13 local city guides featuring specialized content channels such as : Finance, Automotive, Gaming, Sports, Music, etc.
- Daily updated information related to the stations' programming, advertising, and promotions

Netmio.com is the exclusive Internet network of HBC's radio station properties and is dedicated to serving Hispanics by building interactive online communities to enrich the quality of life of its users.

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HBC Interactive/Netmio.com

NETMIO.COM

Sponsorship includes:

- *468 x 60 Banner Placement*
  - Multi-City and Multi-Channel Banner Campaign on the Netmio City Family
  - Placement in 468 x 60 Banner avail on all Netmio Category pages In and on all station pages
  - Placement in Text Promo on all pages Netmio and station pages
- *Geo-Targeted or Demo-Targeted E-Mail blasts every 2 weeks....*
  - 185,000 Registered Opt-In Email Users as of 2/2/02
- *Static Text Link Placement*
  - Static Placement on All Netmio.com and Station Sites

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SATELLITE RADIO

HBC is the exclusive provider of Spanish-language programming for the XM Radio line-up. HBC provides five distinct channels to satisfy a range of musical tastes and demographic targets within the Latin market. HBC will offer 3 commercial free channels and two advertiser supported channels. So whether you want to reach the Hispanic market as a whole, or a more specific audience within this fast-growing consumer group, HBC is the only way to make your mark with the market through XM satellite broadcasting.

On December 12, 2001, *Fortune Magazine* named XM Satellite Radio, its "Product of the Year", calling XM "way, way way above the rest" of 2001 new technologies. It's the first major advance in radio since FM emerged in the 1960s, and the best thing to happen to mobile music since the dashboard CD player..." *Fortune* wrote.

On November 13, 2001, *Time* named XM a "2001 Invention of the Year" in its annual invention issue. "XM will transform radio the way cable and DIRECTV transformed television," said XM President and CEO, Hugh Panero.

Media Elements:
•Monday-Friday 6a-7p
•Across 2 channels

82

3rd Annual Latin GRAMMY® Awards

During 2000, the Latin Music world experienced growth and phenomenal buzz with crossover talent. The Recording Academy in conjunction with L.A.R.A.S. presents the Latin GRAMMY Awards.

Goals of L.A.R.A.S.

- Promote Latin Music emergence
- Promote great crossover talent
  - Marc Anthony
  - Enrique Iglesias
- Help to create a diverse membership of Latin Music professionals

Media Partners

CBS Television Network
- Live Primetime 9p-11p EST

HBC Radio Network
- Broadcast on HBC's Entertainment Network, September 18, 2002
- Live on-air reports
- Behind the scenes information
- Market list of entertainment network stations
- See enclosed program package

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Billboard® Latin Music Awards

Media Partners

Telemundo Television Network
Billboard® Magazine

HBC Radio Network
- Broadcast on HBC's Entertainment Network, May 2003 EST (time to be determined)
- Live on-air reports
- Behind the scenes information
- Market list of entertainment network stations

Promotional Campaign Includes:
- Teaser campaign
- Vignettes
- Finalists' Music Special
- Live "on-site" interviews
- Radio Broadcast of the Billboard® Latin Music Awards
- Red Carpet Coverage

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HBC Radio Network
Market/Station Lists

Hispanic Broadcasting Corporation

STATION	FREQ.	AM/FM	MARKET	STATE	FORMAT
KTNQ	1020	AM	LOS ANGELES	CA	SPANISH OLDIES/SPORTS/TALK
KLVE	107.5	FM	LOS ANGELES	CA	MUSIC/ADULT CONTEMPORARY
KSCA	101.9	FM	LOS ANGELES	CA	MUSIC/REGIONAL MEXICAN
KRCD	103.9	FM	LOS ANGELES	CA	SPANISH OLDIES
KRCV	98.3	FM	LOS ANGELES	CA	SPANISH OLDIES
WADO	1280	AM	NEW YORK	NY	NEWS/TALK/SPORTS
WCAA	105.9	FM	NEW YORK	NY	HOT MIX
WAQI	710	AM	MIAMI	FL	NEWS/TALK/COMMENTARY
WQBA	1140	AM	MIAMI	FL	NEWS/TALK/SPORTS
WRTO	98.3	FM	MIAMI	FL	MUSIC/TROPICAL
WAMR	107.5	FM	MIAMI	FL	MUSIC/ADULT CONTEMPORARY
KEMR	98.9	FM	SAN FRANCISCO	CA	MUSIC/REGIONAL MEXICAN
KZMR	99.1	FM	SAN FRANCISCO	CA	MUSIC/REGIONAL MEXICAN
KSOL	105.7	FM	SAN JOSE	CA	TBD
WIND	560	AM	CHICAGO	IL	NEWS/TALK/SPORTS
WLXX	1200	AM	CHICAGO	IL	MUSIC/TROPICAL
WOJO	105.1	FM	CHICAGO	IL	MUSIC/REGIONAL MEXICAN
KLAT	1010	AM	HOUSTON	TX	MUSIC/REGIONAL MEXICAN
KLTN	102.9	FM	HOUSTON	TX	MUSIC/REGIONAL MEXICAN
KOVE	106.5	FM	HOUSTON	TX	MUSIC/ADULT CONTEMPORARY
KPTY	104.9	FM	HOUSTON	TX	HIP-HOP (ENGLISH)
KLAT	100.7	FM	HOUSTON	TX	MUSIC/REGIONAL MEXICAN
KRTX	980	AM	HOUSTON	TX	NEWS/TALK
KLTO	105.3	FM	HOUSTON	TX	SIMULCAST WITH KPTY(ENGLISH)
KOBU	93.3	FM	HOUSTON	TX	REGIONAL MEXICAN

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Hispanic Broadcasting Corporation (continued)

STATION	FREQ.	AM/FM	MARKET	STATE	FORMAT
KXTN	107.5	FM	SAN ANTONIO	TX	MUSIC/TEJANO
KXTN	1310	AM	SAN ANTONIO	TX	MUSIC/TEJANO
KCOR	1350	AM	SAN ANTONIO	TX	MUSIC/REGIONAL MEXICAN
KROM	92.9	FM	SAN ANTONIO	TX	MUSIC/REGIONAL MEXICAN
KCOR	95.1	FM	SAN ANTONIO	TX	MUSIC/ADULT CONTEMPORARY
KBBT	96.5	FM	SAN ANTONIO	TX	HIP-HOP (ENGLISH)
KGBT	96.5	FM	MCALLEN	TX	MUSIC/REGIONAL MEXICAN
KGBT	1530	AM	MCALLEN	TX	NEWS/TALK/SPORTS
KWW	98.1	FM	MCALLEN	TX	MUSIC/TEJANO
KESS	1270	AM	DALLAS	TX	SPANISH OLDIES/SPORTS
KHCK	99.1	FM	DALLAS	TX	MUSIC/TEJANO
KHCK	1460	AM	DALLAS	TX	MUSIC/TEJANO
KDXX	107.9	FM	DALLAS	TX	MUSIC/ADULT CONTEMPORARY
KDOS	107.9	FM	DALLAS	TX	REGIONAL MEXICAN
KDXT	106.7	FM	DALLAS	TX	MUSIC/ADULT CONTEMPORARY
KLNQ	94.1	FM	DALLAS	TX	MUSIC/REGIONAL MEXICAN
KBNA	97.5	FM	EL PASO	TX	MUSIC/ADULT CONTEMPORARY
KAJZ	920	AM	EL PASO	TX	MUSIC/ADULT CONTEMPORARY
KAMA	750	AM	EL PASO	TX	NEWS/TALK/SPORTS
KLSQ	870	AM	LAS VEGAS	NV	SPANISH OLDIES/SPORTS
KBIF	103.5	FM	LAS VEGAS	NV	MUSIC/REGIONAL MEXICAN
KQMR	98.3	FM	LAS VEGAS	NV	TBD
KLQV	102.9	FM	SAN DIEGO	CA	MUSIC/REGIONAL MEXICAN
KLNV	106.5	FM	SAN DIEGO	CA	MUSIC/ADULT CONTEMPORARY
KQMR	106.3	FM	PHOENIX	AZ	MUSIC/ADULT CONTEMPORARY
KMRR	100.3	FM	PHOENIX	AZ	MUSIC/ADULT CONTEMPORARY
KKMR	106.5	FM	PHOENIX	AZ	MUSIC/ADULT CONTEMPORARY
KHOV	105.3	FM	PHOENIX	AZ	SIMULCAST with KHOT
KHOT	105.9	FM	PHOENIX	AZ	MUSIC/REGIONAL MEXICAN
KZDL	107.7	FM	FRESNO	CA	TBD

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ATTACHMENT 4

HBC

"Hispanic Radio"

Presentation

Hispanic Radio Presentation Fall 2002

Hispanic Radio Presentation Overview:

- Hispanic Population Overview
- Hispanic Radio Overview
- Why HBC?

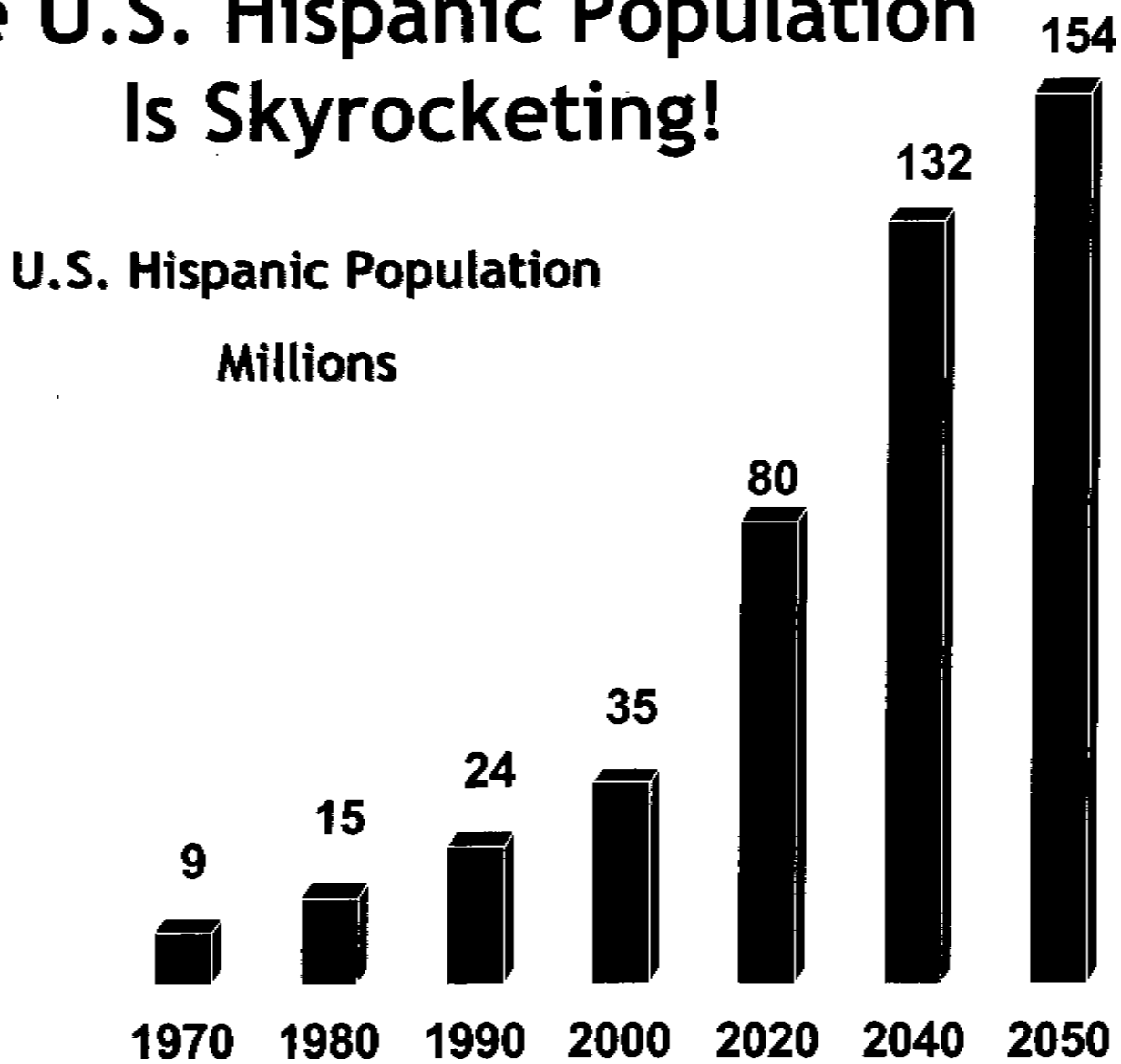
BCS National Sales

Hispanics:
The Market of the New Millennium

- The Hispanic population has grown at a rate 7 times faster than the non-Ethnic population. Currently there are almost 38 million U.S. Hispanics living in almost 11 million HouseHolds.

- The Census projects that Hispanics have accounted for over 44% of total population growth in the last decade and will account for almost 2/3's of the total growth from 2020-2050.

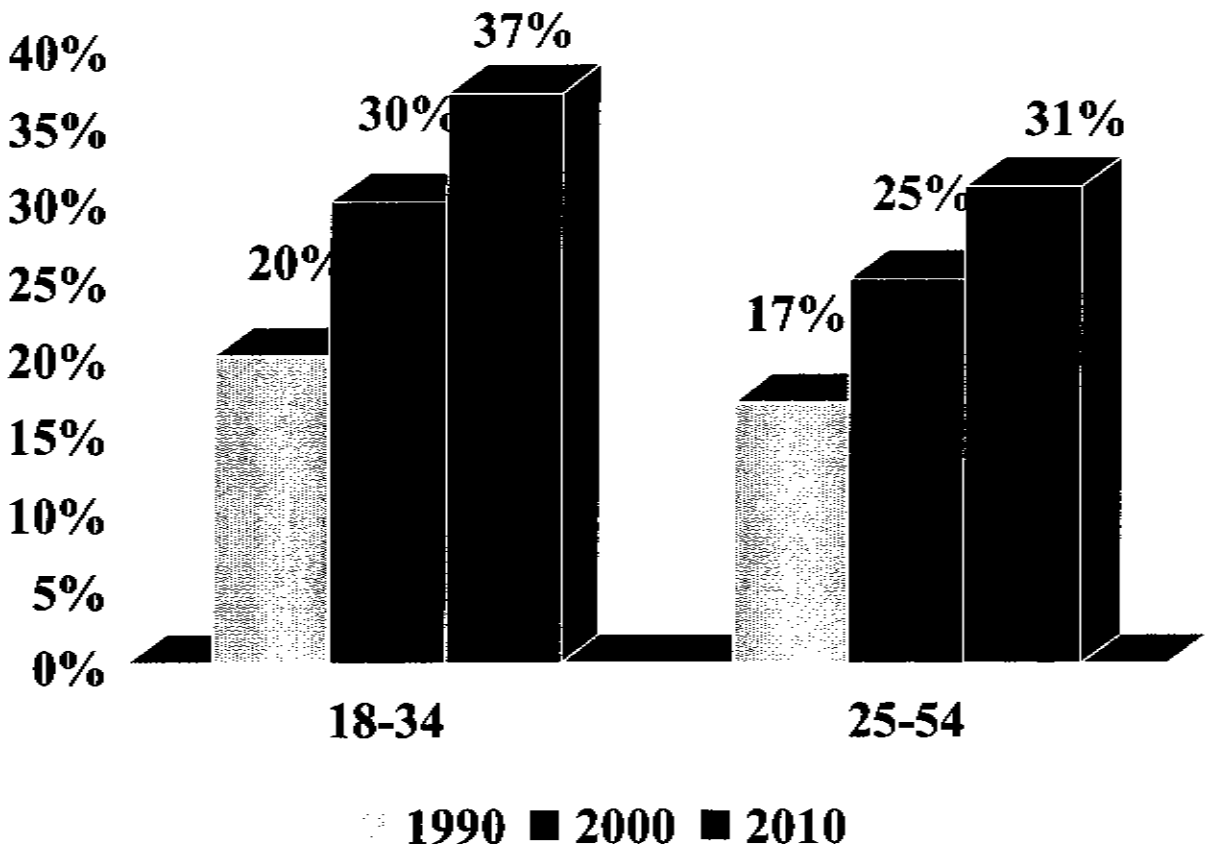
The U.S. Hispanic Population Is Skyrocketing!



Source: Strategy Research Corporation 2002 Based on Current U.S. /Census Projections

Demographics of Top 15 Markets

Hispanic Population as a % Total Population in Key Radio Demos



Source: Us Census Figures 1990- 2010 Projections

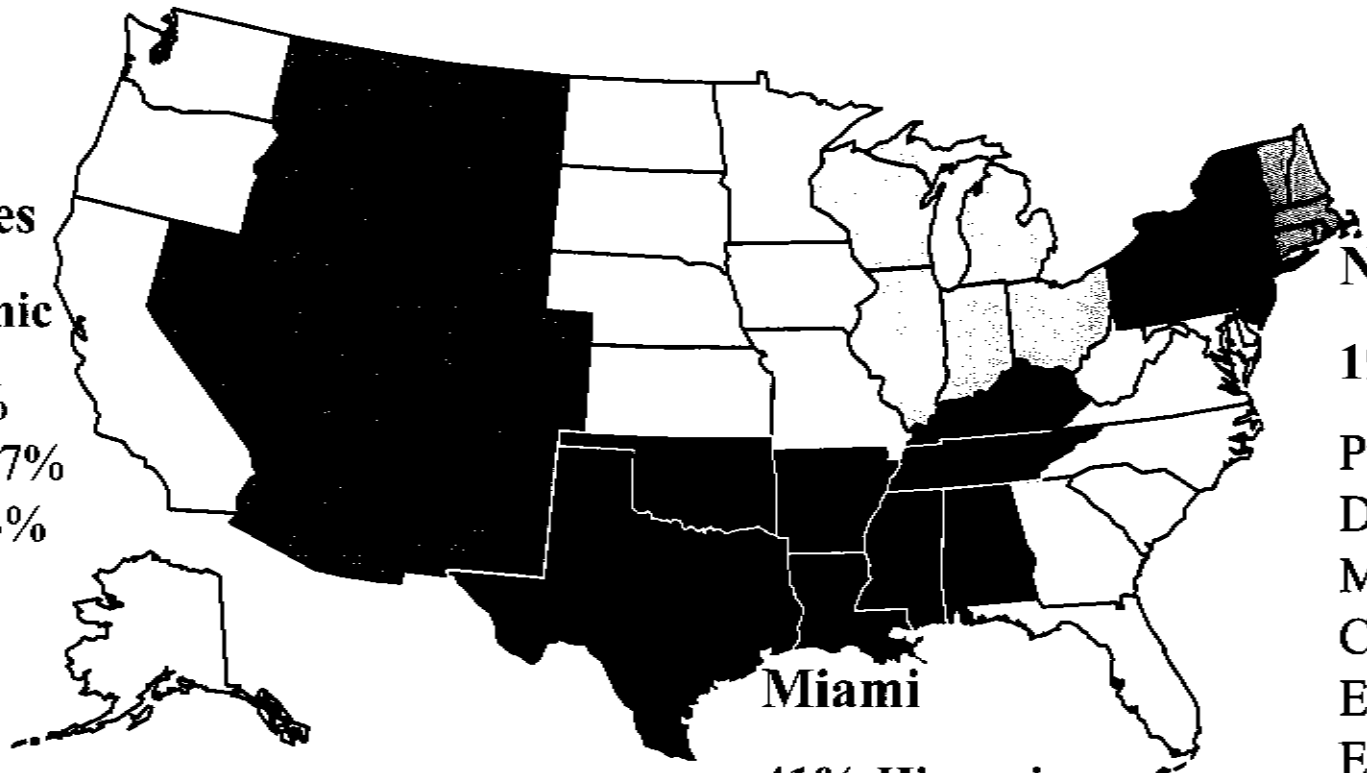
The U.S. Hispanic Population Is Highly Concentrated

Over 70% of all Hispanics in the U.S. live in the top 15 Hispanic markets!

Market	Hispanic Pop	% of Total U.S. Hisp. Pop
1) Los Angeles	7,000,818	18.1
2) New York	3,971,345	10.3
3) Miami	1,719,474	4.5
4) Chicago	1,603,761	4.2
5) Houston	1,584,098	4.1
6) San Francisco	1,356,629	3.5
7) Dallas	1,324,916	3.4
8) San Antonio	1,150,592	3.0
9) Phoenix	1,035,092	2.7
10) McAllen	982,750	2.5
11) San Diego	829,900	2.1
12) Fresno	811,750	2.1
13) Sacramento	794,812	2.1
14) El Paso	707,507	1.8
15) Albuquerque	685,756	1.8

Source: Hispanic DMA 2003 Population

The U.S. Hispanic Population Is Diverse!



Los Angeles

41% Hispanic

Mexico 76%
El Salvador 7%
Guatemala 3%
Other 14%

New York

19% Hispanic

Puerto Rico 36%
Dom. Rep. 19%
Mexico 11%
Colombia 8%
Ecuador 5%
El Salvador 5%
Other 16%

Miami

41% Hispanic

Cuba 59% Nicaragua 9%
Columbia 5%
Puerto Rico 5%
Other 22%

Source: 2002 U.S. Strategy Research

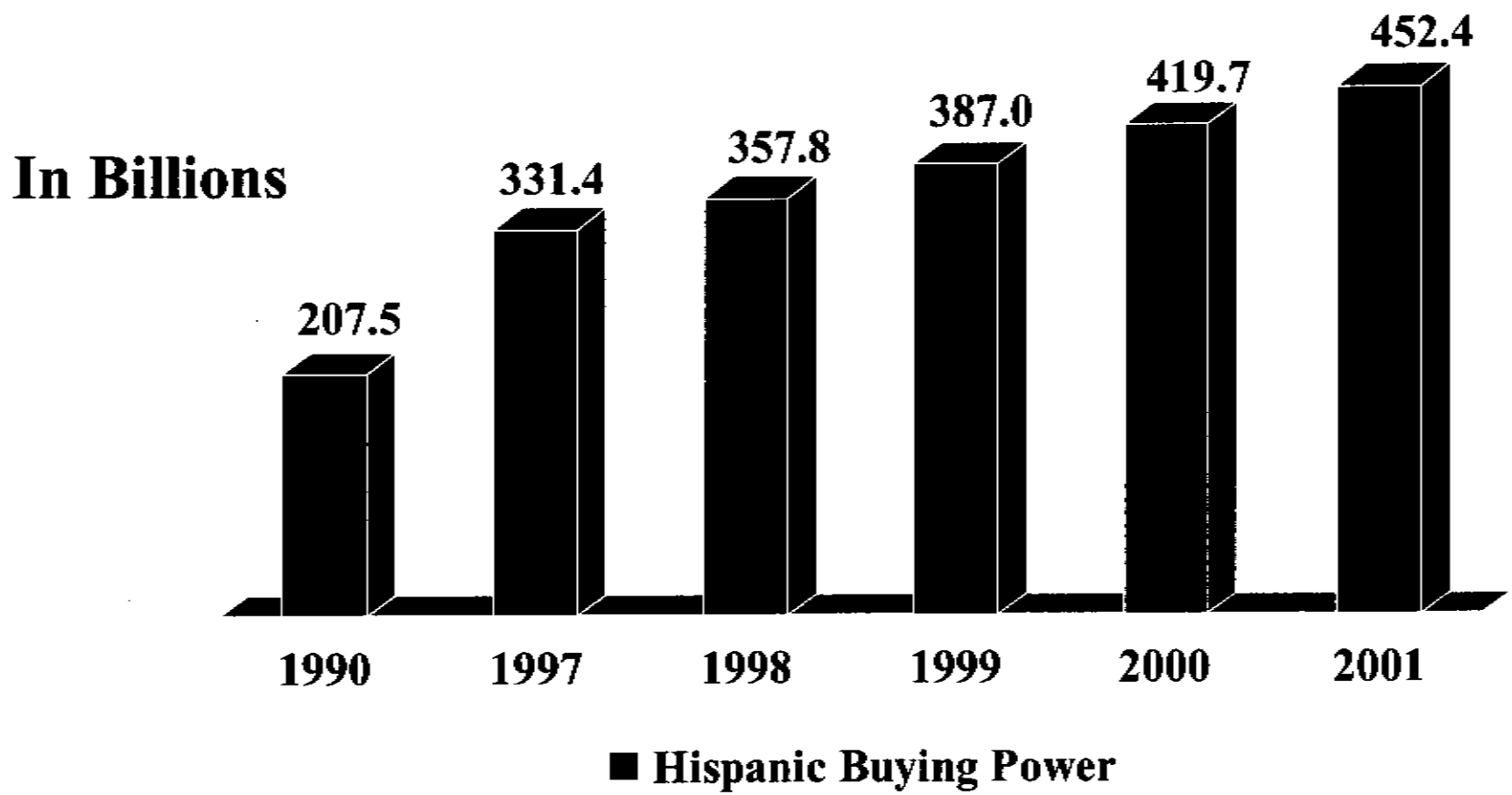
Hispanic Buying Power is Exploding!

Buying Power ($Billions)			
	1990	2002	% Increase
Hispanic	223.0	580.5	160%
African American	316.5	645.5	104%
Asian American	117.6	296.4	152%
Native American	19.3	40.8	111%
Non-Hispanic White	3,738.6	6,252.5	67%

- Hispanic Buying Power is Increasing at a rate faster than any other ethnic group!
- Hispanic buying power is growing twice as fast as the Hispanic population!

Source: Selig Center for Economic Growth – 2002 Study

Hispanic Buying Power has more than doubled in the past decade



Source: Selig Center for Economic Growth

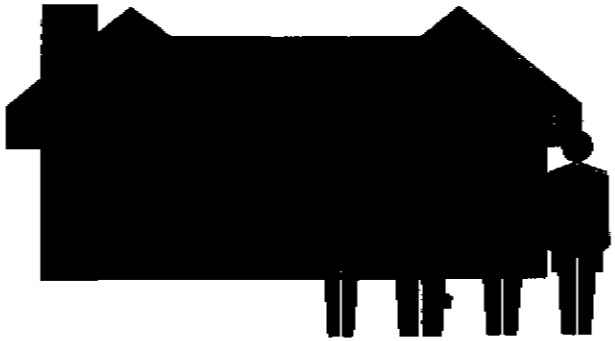
Hispanics are Younger and have Larger Families

Hispanic households are in their acquisition phase of life

Hispanic

HH size: 3.6

Median age: 27.45



Total US

HH size: 2.6

Median age: 35.13

Hispanic Families Have More Children

One or More Child in Household	Hispanic Population	Total Population	Index
Los Angeles	68.1%	47.0%	145
New York	57.3%	40.1%	143
Miami	41.7%	37.8%	110
Chicago	67.1%	42.7%	157
San Francisco	60.1%	40.4%	149
Houston	65.5%	47.9%	137
Dallas	64.5%	45.1%	143
San Antonio	52.9%	44.5%	119
San Diego	65.0%	43.1%	151
Phoenix	65.5%	41.7%	157
Las Vegas	67.4%	42.4%	159

Source: Instant Scarborough Qualitative Profile/ A18+/Fall 2002

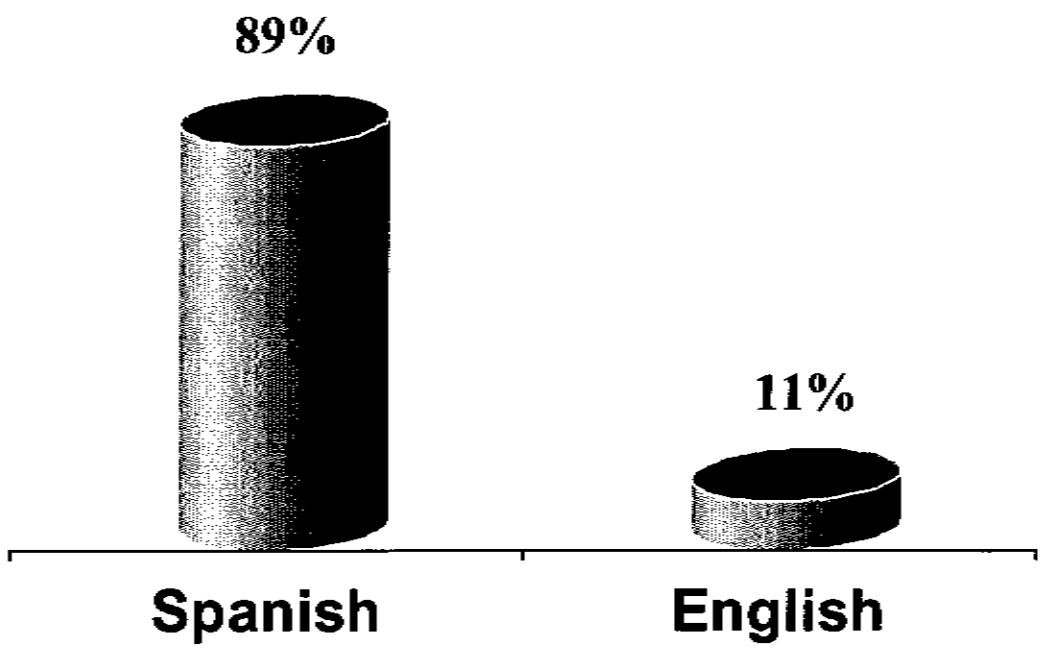
The Age Gap Gets Even Wider in the Next Decade!

	2002 Median Age	2012 Median Age
Hispanic	25.9	26.7
Black/Non-His	30.0	32.5
Asian/Non-His	31.6	34.1
White/Non-His	38.4	41.1

Source: Current U.S. Census

Almost 90 % of U.S Hispanics spoke Spanish as their first language

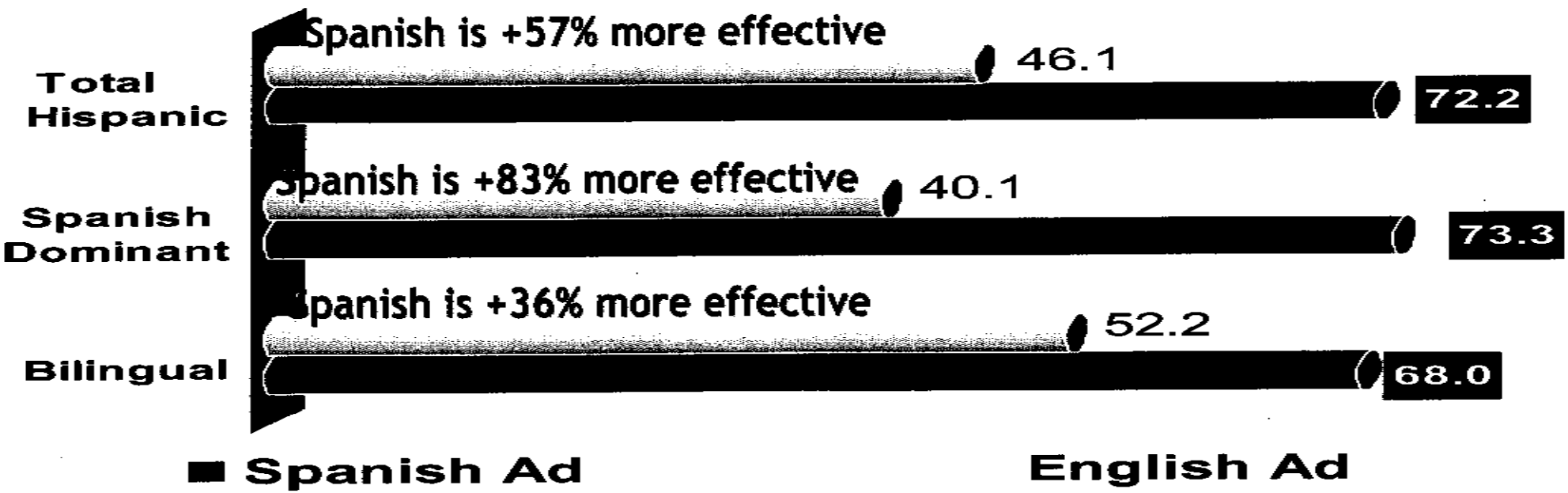
First Language Spoken



Source: Strategy Research Corporation, 2002

U.S. Hispanics Prefer Ads in Spanish

Commercials in Spanish are 57% more effective than commercials in English



Source: Roslow Research 2000

U.S. Hispanics Prefer to Speak Spanish but Most Are Bilingual!

Language preference doesn't mean lack of ability!

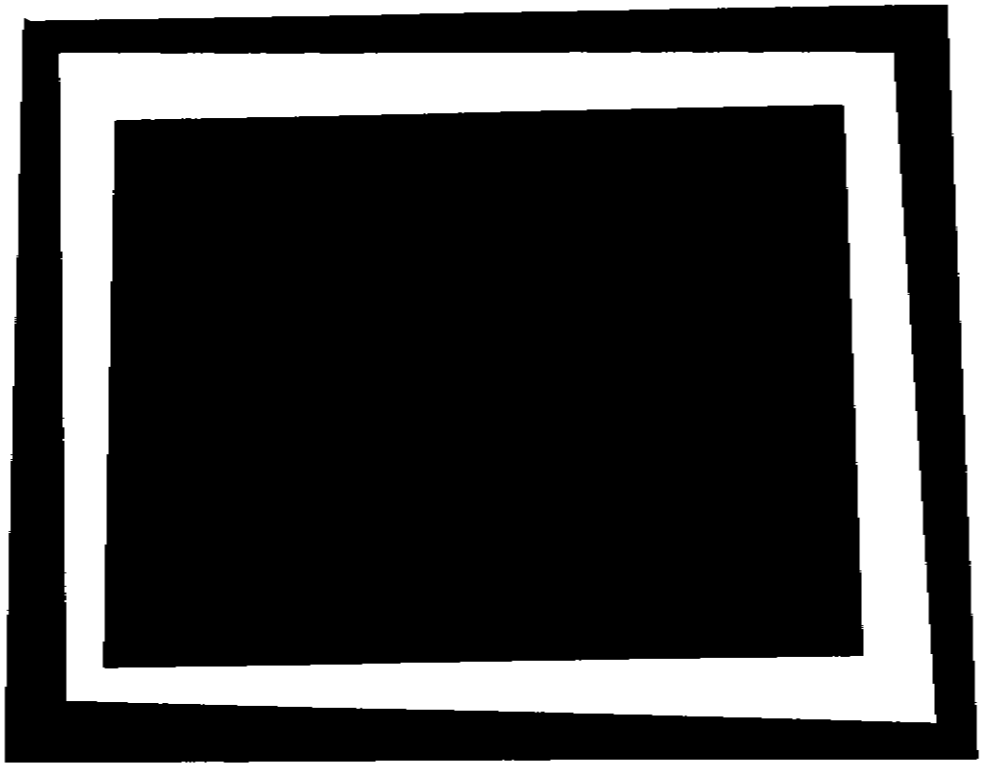
- Over 70% of U.S. Hispanics prefer to speak Spanish at home
- Over 50% of U.S. Hispanics prefer to speak Spanish on social occasions
- Over 30% of U.S. Hispanics speak Spanish at work, almost 40% speak English and over 20% use both equally!

Source: Strategy Research Corporation, 2002

The Hispanic Population

- Exploding - responsible for much of the total population growth in major cities!
- Concentrated - Almost 2/3's can be reached in the top 15 markets
- Young - median age a decade younger
- Family Oriented - larger households
- Speaks Spanish - almost 90% of U.S. Hispanics speak some Spanish

Hispanic Radio

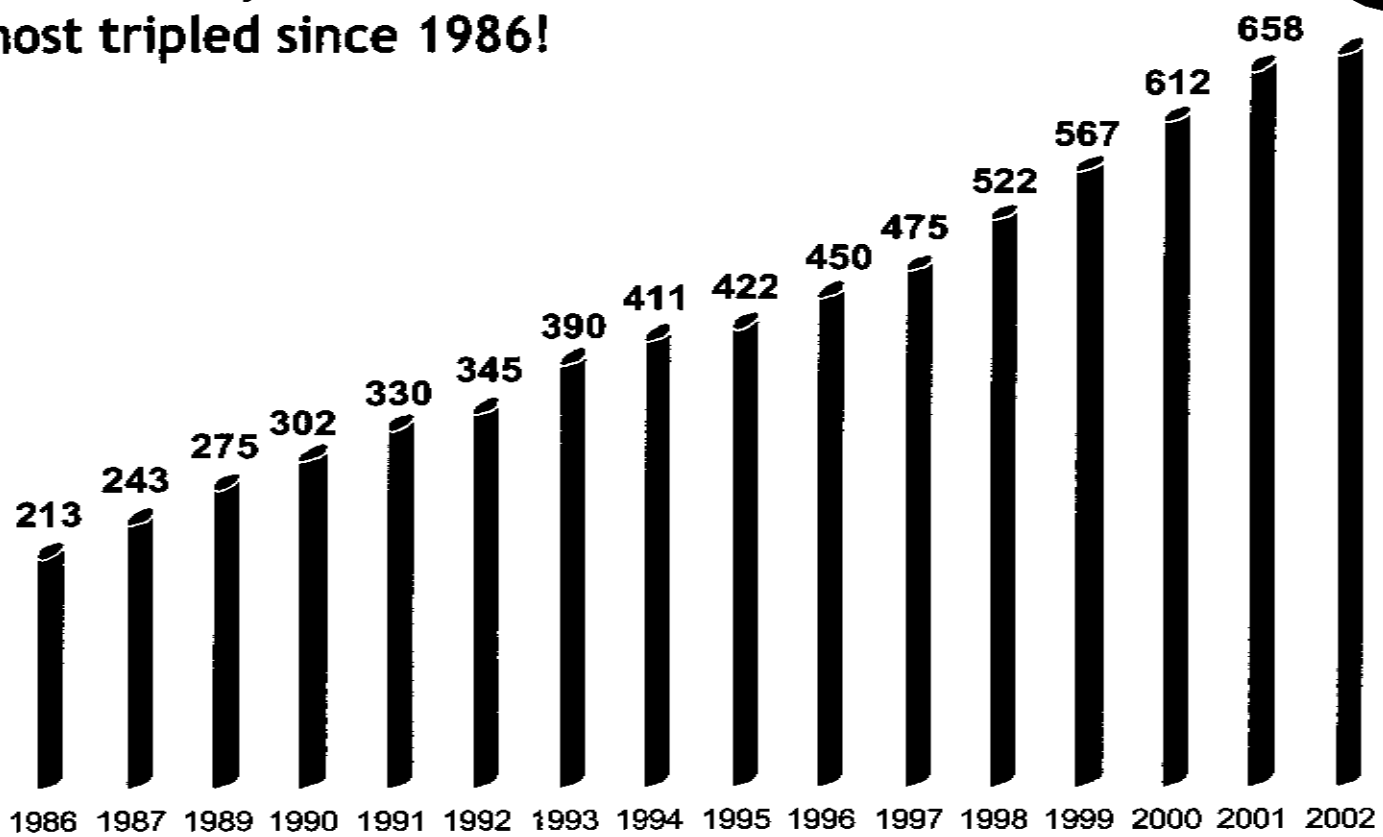


HBCS National Sales

Radio has a much stronger story to tell in the Hispanic market than it does in the general market

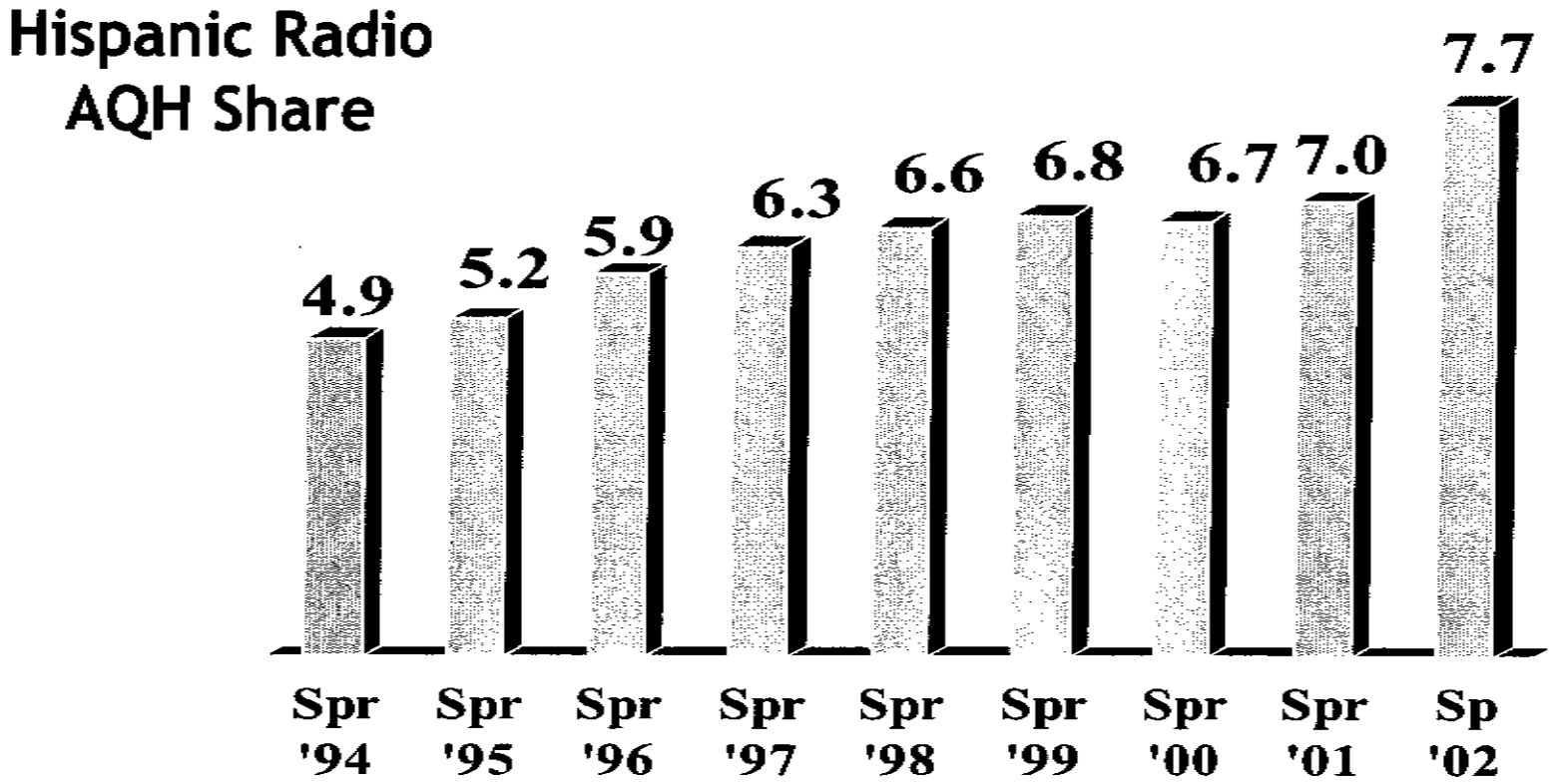
Hispanic Radio Is Exploding in the United States!

The number of Hispanic radio stations in the U.S. have almost tripled since 1986!



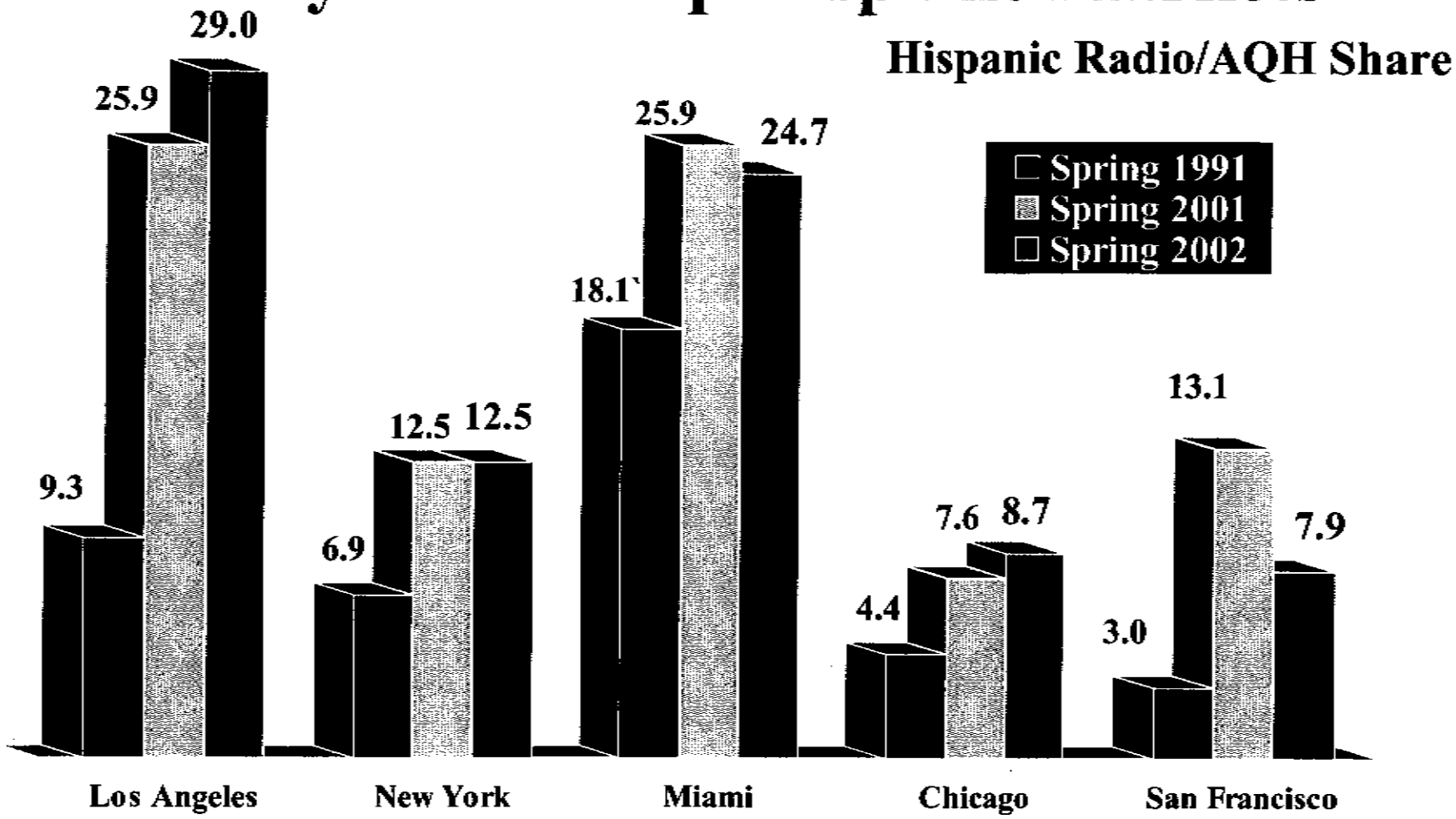
Source: M Street Journal

SPANISH Radio Share Grows Stronger Every Year!



Source: Arbitron National Database

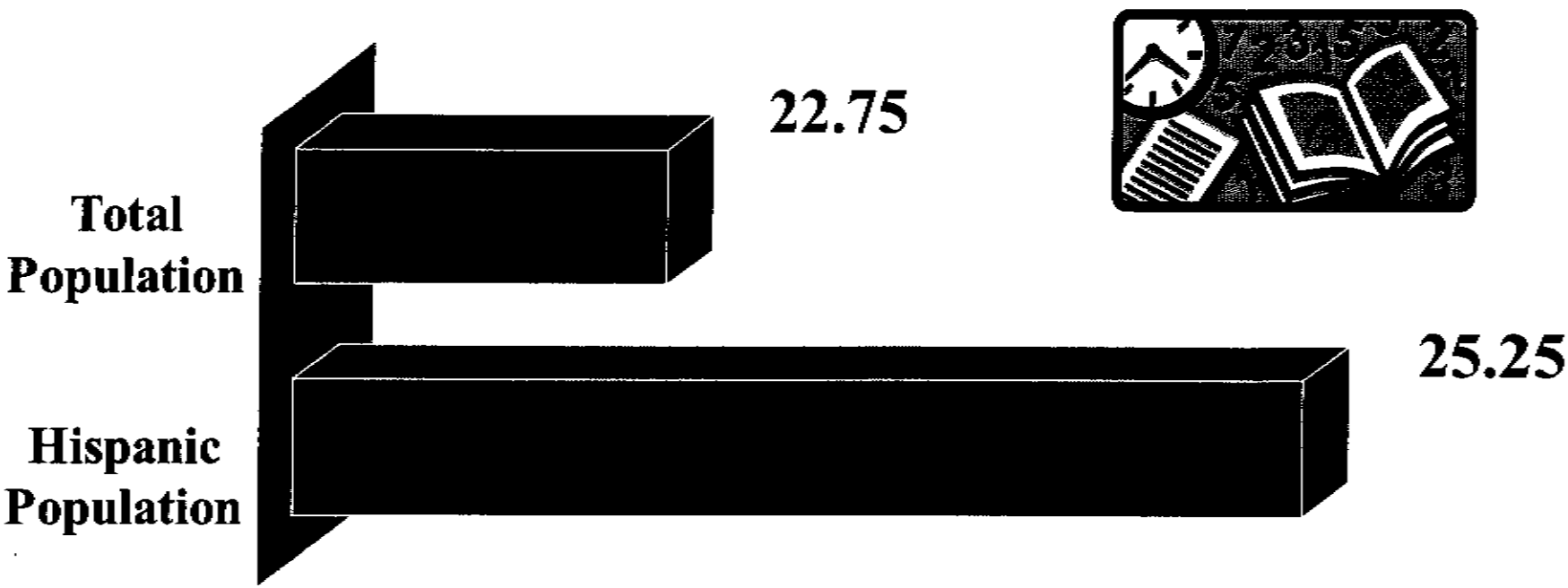
AQH Share has Increased More Dramatically Across Top Hispanic Markets



Source: Arbitron Persons 25-54/AQH
Share of Hispanic Stations/Total Week

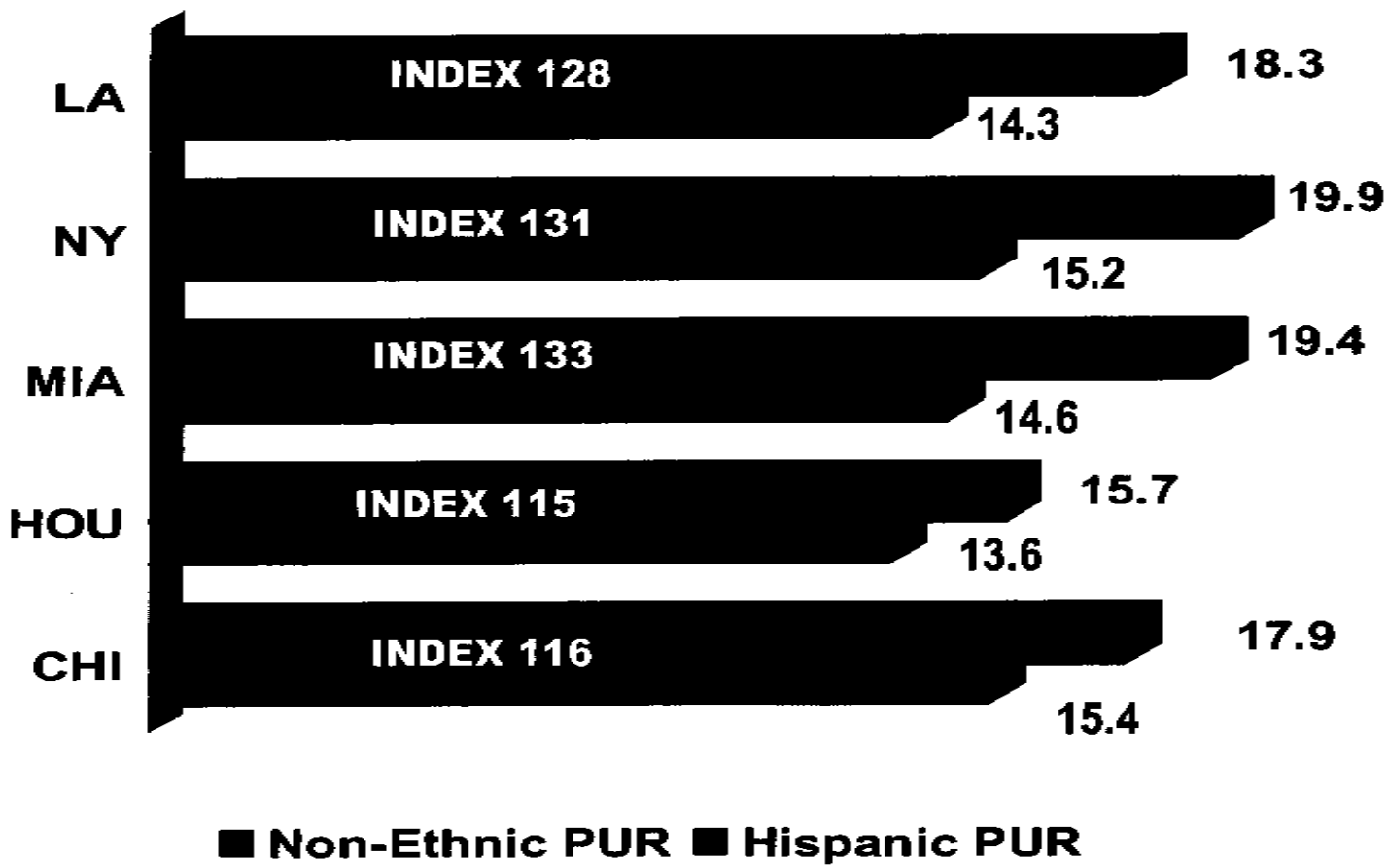
Hispanics Listen to the Radio 3 Hours Longer Per Week

Time Spent Listening/hours Per Week



Source: Current Arbitron National Database

These PUR levels for Hispanics in the top 5 Hispanic Markets tell a powerful story!



Source: Spring 2002 Arbitron/PUR/P12+/Total Week

HBC National Sales

HBC Ranks at the top of the Current "General Market" Ranker in Major Markets!

Market	Station	General Market Rank: A 18-49	General Market Rank: A 25-54
Los Angeles	KSCA-FM	3	**1**
Los Angeles	KLVE-FM	6	3
San Diego	KLNV-FM	**1**	4
Houston	KLTN-FM	**1**	**1**
Dallas	KLNO-FM	3	3
San Antonio	KBBT-FM	2	3
San Antonio	KXTN-FM	13	12
McAllen	KGBT A/F	**1**	**1**
El Paso	KBNA-FM	**1**	**1**

Source: AQH Rank Total Week Fall 2002 Arbitron

HBC National Sales

You Can't Reach HBC Listeners On General Market Stations!

Los Angeles: Top 5 English Stations

	% of HBC'S Aud. Reached	% of HBC'S Aud. Missed	# of HBC'S Listeners Missed
KOST-FM	10%	90%	1,036,620
KTWV-FM	4%	96%	1,105,728
KPWR-FM	9%	91%	1,048,138
KROQ-FM	4%	96%	1,105,728
KLSX-FM	2%	98%	1,128,764

Houston: Top 5 English Stations

	% of HBC'S Aud. Reached	% of HBC'S Aud. Missed	# of HBC'S Listeners Missed
KODA-FM	12%	88%	465,696
KMJQ-FM	10%	90%	476,280
KKRW-FM	6%	94%	497,448
KBXX-FM	18%	82%	508,032
KRBE-FM	15%	85%	497,448

Source: Arbitron Cume Duplication Total Week A25-54/Fall 2002

BCS National Sales

Unlike Other Types of Media, Radio Can Address Hispanic Diversity Both Locally and Nationally

HISPANIC

- Regional Mexican
- Tropical
- Spanish A/C
- News / Talk
- Tejano
- Spanish Contemporary

Los Angeles

LA NUEVA 101.9 FM

KLVE 107.5 FM

RECUERDO

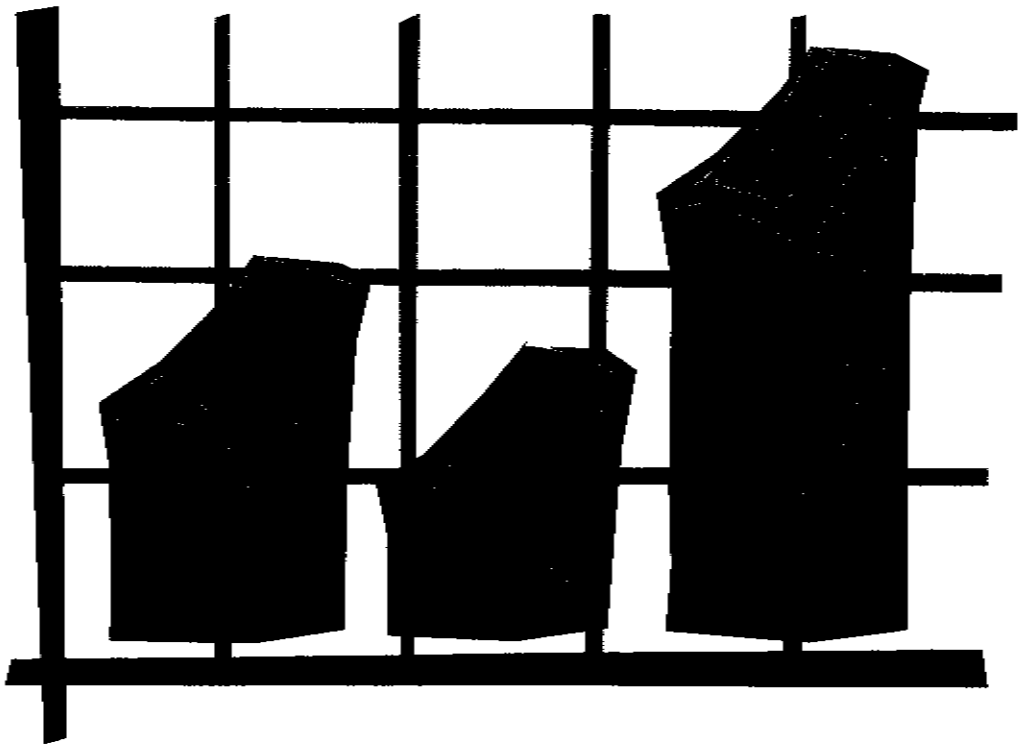
New York

Latino Mix 103.9 FM

Miami

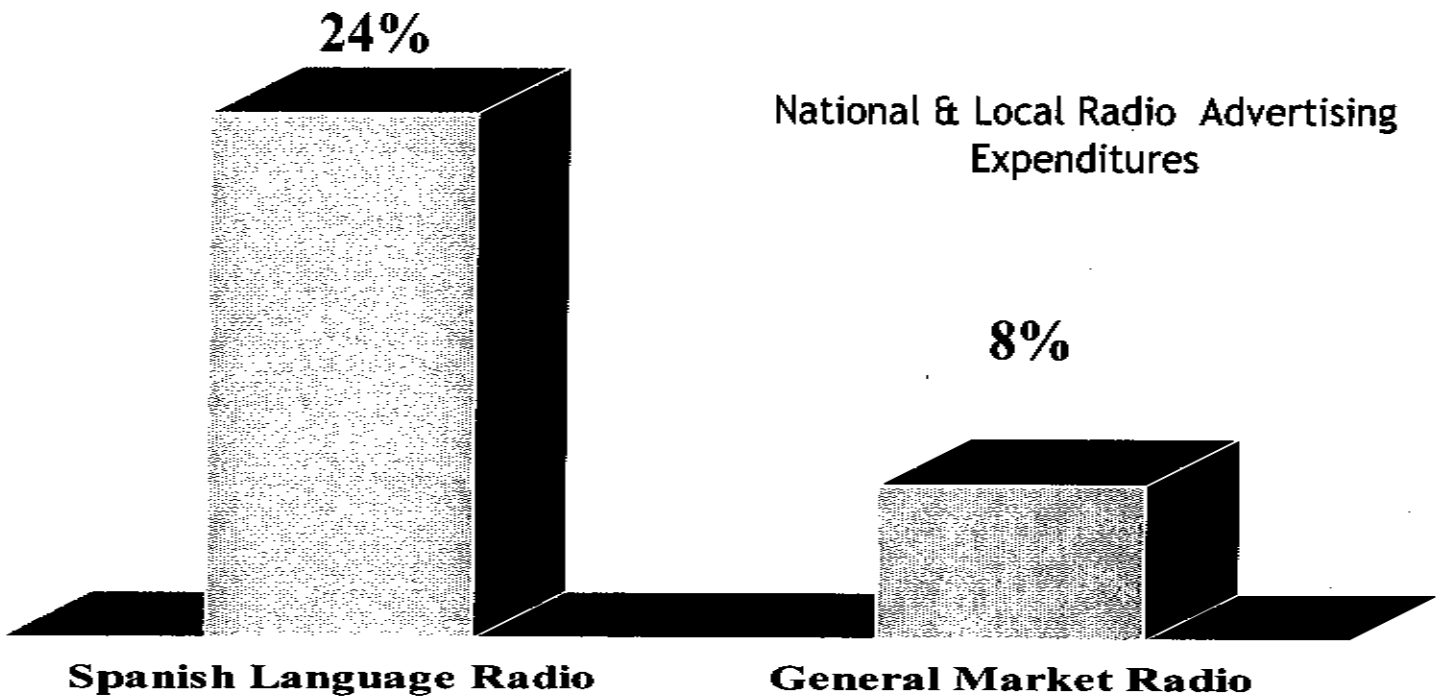
WQBA 1140 AM

Hispanic Radio Is Big Business!



Hispanic Radio Ad Spending Is At 24%

National and Local Ad Spending Combined Bring the Hispanic Radio Share up to 24%. That's an Impressive Figure, Especially When Compared to the Total Expenditures on General Market Radio Which Account for 8% of Ad Dollars.



Source: Hispanic Business Dec/2002

Radio is more Important in the Hispanic Media Mix: Hispanic Radio Out-Delivers Spanish TV Networks

Cume Reach Adults 18-49	Spanish Radio Listening	Univision
Los Angeles	1,893,055	1,661,265
San Francisco	343,725	259,620
San Diego	237,975	140,555
Fresno	113665	124045
Houston	488,705	376,655
El Paso	215280	154785
Dallas	327,405	284,510
San Antonio	250,040	104,025

Source: Scarborough MSA Aug 2000-July 2002/Total Week Cume/Adults 18-49

HBC National Sales

KLOVE 107.5 FM

102.9 FM Estereo Latino

LA NUEVA 101.9 FM

K-LOVE 106.5 FM

Why HBC?

La Mas BUENA 107.5 FM

LA QUE 105.1 FM

Estéreo Latino 94.1 FM

103.1

HBC National Sales

HBC is One of the Nation's Largest Radio Groups

Rank	Hispanic Group Owner	Estimated '01 Revenues	# of Station
1	Clear Channel	$3.46 Billion	1240
2	Infinity Broadcaster	$2.16 Billion	184
3	Cox Radio	$433.1 Million	77
4	ABC Radio	$385.0 Million	50
5	Entercom	$357.5 Million	100
6	Citadel Comm.	$324.2 Million	193
7	Radio One	$294.4 Million	63
8	Emmis	$263.2 Million	21
9	**HBC**	**$262.8 Million**	**52**
10	Susquehanna	$221.8 Million	26

Source: M Street Journal 2001 Year End

HBC National Sales

HBC Is the Largest Hispanic Radio Broadcaster in the US?

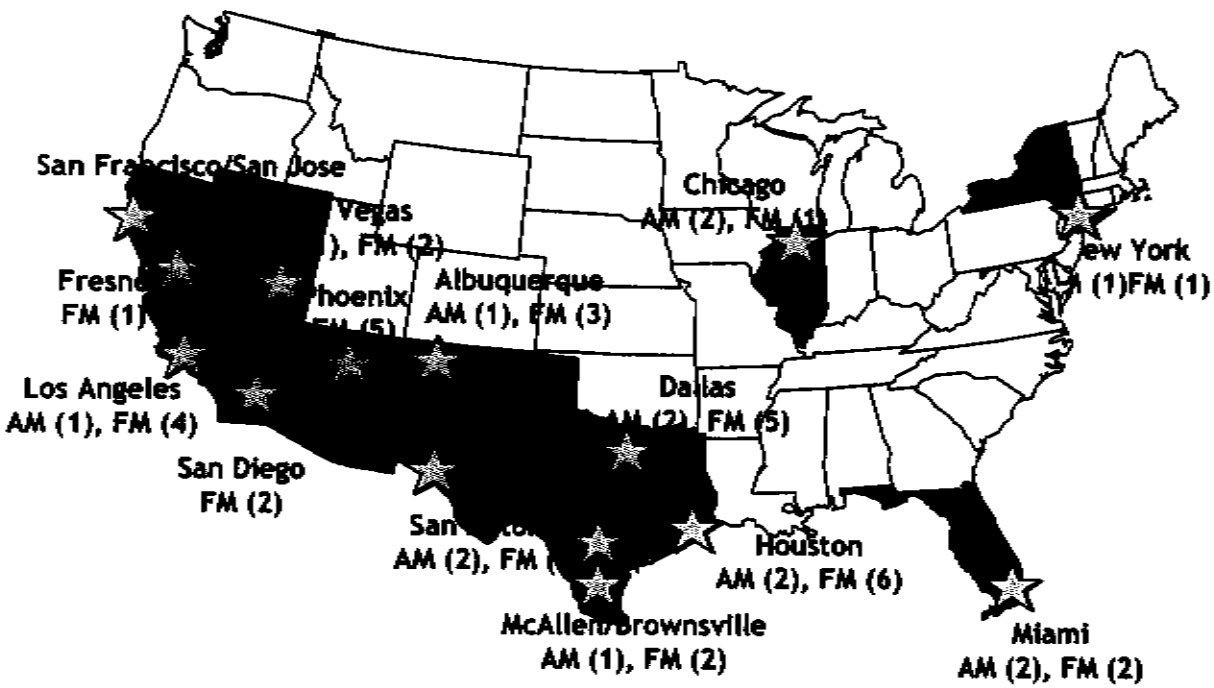
Rank	Hispanic Group Owner	Estimated '01 Revenues	# of Station
1	**HBC**	**$262.8 Million**	**52**
2	SBS	$115.3 Million	25
3	Entravision	$56.8 Million	54
4	Lotus	$38.1 Million	24
5	Mega	$23.8 Million	18
6	Liberman	$22.0 Million	10
7	Radio Unica	>$10 Million	15
8	Big City	>$10 Million	9

Source: M Street Journal 2001 Year End

HBC*Si* National Sales

- HBC*Si* National Sales is the #1 billing rep firm in the Hispanic market
- HBC*Si* *is* the oldest and most well respected media rep company in the industry
- A full service rep firm with 8 offices exclusively representing Hispanic radio stations nationally since 1987

HBC is the Nation's largest and most successful Spanish Radio Broadcaster



Leadership:

62 Stations in 14 of the Top 15 Hispanic Markets including Las Vegas

Only Spanish radio broadcaster to deliver FM stations in the top 11 Hispanic markets

HBC National Sales

HBC LINE-UP

STATION	FREQ.	AM/FM	MARKET	STATE	FORMAT
KTNQ	1020	AM	LOS ANGELES	CA	TRIMULCAST WITH KRCD
KLVE	107.5	FM	LOS ANGELES	CA	MUSIC/ADULT CONTEMPORARY
KSCA	101.9	FM	LOS ANGELES	CA	MUSIC/REGIONAL MEXICAN
KRCD	103.9	FM	LOS ANGELES	CA	MUSIC/SPANISH OLDIES
KRCV	98.3	FM	LOS ANGELES	CA	TRIMULCAST WITH KRCD
WADO	1280	AM	NEW YORK	NY	NEWS/TALK/SPORTS
WCAA	105.9	FM	NEW YORK	NY	MUSIC/HOT MIX
WAQI	710	AM	MIAMI	FL	NEWS/TALK/COMMENTARY
WQBA	1140	AM	MIAMI	FL	NEWS/TALK/SPORTS
WRTO	98.3	FM	MIAMI	FL	MUSIC/TROPICAL - TOP 40
WAMR	107.5	FM	MIAMI	FL	MUSIC/ADULT CONTEMPORARY
KSOL	98.9	FM	SAN FRANCISCO	CA	MUSIC/REGIONAL MEXICAN
KSQL	99.1	FM	SAN FRANCISCO	CA	MUSIC/REGIONAL MEXICAN
KEMR	105.7	FM	SAN JOSE	CA	MUSIC/ADULT CONTEMPORARY
WIND	560	AM	CHICAGO	IL	MUSIC/SPANISH OLDIES/TALK
WLXX	1200	AM	CHICAGO	IL	SIMULCAST WITH WXXY-FM
WOJO	105.1	FM	CHICAGO	IL	MUSIC/REGIONAL MEXICAN
WXXY	103.1	FM	CHICAGO	IL	MUSIC/TROPICAL
KLAT	1010	AM	HOUSTON	TX	SIMULCAST WITH KLAT-FM
KLTN	102.9	FM	HOUSTON	TX	MUSIC/REGIONAL MEXICAN
KOVE	106.5	FM	HOUSTON	TX	MUSIC/ADULT CONTEMPORARY
KPTY	104.9	FM	HOUSTON	TX	**MUSIC/HIP-HOP (ENGLISH)**
KOBT	100.7	FM	HOUSTON	TX	MUSIC/SALSA/MERENGUE/SPANISH ROCK
KRTX	980	AM	HOUSTON	TX	MUSIC/TEJANO
KLTO	105.3	FM	HOUSTON	TX	**SIMULCAST WITH KPTY(ENGLISH)**
KQBU	93.3	FM	HOUSTON	TX	MUSIC/REGIONAL MEXICAN
KXTN	107.5	FM	SAN ANTONIO	TX	MUSIC/TEJANO
KXTN	1310	AM	SAN ANTONIO	TX	SIMULCAST WITH KXTN-FM
KCOR	1350	AM	SAN ANTONIO	TX	MUSIC/SPANISH OLDIES/TALK
KROM	92.9	FM	SAN ANTONIO	TX	MUSIC/REGIONAL MEXICAN
KCOR	95.1	FM	SAN ANTONIO	TX	MUSIC/ADULT CONTEMPORARY
KBBT	98.5	FM	SAN ANTONIO	TX	**MUSIC/HIP-HOP (ENGLISH)**

HBC LINE-UP (cont-d)

STATION	FREQ.	AM/FM	MARKET	STATE	FORMAT
KGBT	98.5	FM	MCALLEN	TX	MUSIC/REGIONAL MEXICAN
KGBT	1530	AM	MCALLEN	TX	NEWS/TALK/SPORTS
KIWW	96.1	FM	MCALLEN	TX	**MUSIC/HIP-HOP (ENGLISH)**
KESS	1270	AM	DALLAS	TX	SIMULCAST WITH KDXX-FM
KHCK	99.1	FM	DALLAS	TX	MUSIC/TEJANO
KHCK	1480	AM	DALLAS	TX	SIMULCAST WITH KHCK-FM
KDXX	107.9	FM	DALLAS	TX	MUSIC/REGIONAL MEXICAN
KDOS	107.9	FM	WACO	TX	MUSIC/REGIONAL MEXICAN
KDXT	107.1	FM	DALLAS	TX	MUSIC/ADULT CONTEMPORARY
KLNO	94.1	FM	DALLAS	TX	MUSIC/REGIONAL MEXICAN
KBNA	97.5	FM	EL PASO	TX	MUSIC/ADULT CONTEMPORARY
KBNA	920	AM	EL PASO	TX	MUSIC/ADULT CONTEMPORARY
KAMA	750	AM	EL PASO	TX	NEWS/TALK/SPORTS
KIOT	102.5	FM	ALBUQUERQUE	NM	**MUSIC/CLASSIC HITS/ROCK(ENGLISH)**
KJFA	101.3	FM	ALBUQUERQUE	NM	MUSIC/REGIONAL MEXICAN
KKSS	97.3	FM	ALBUQUERQUE	NM	**MUSIC/CONTEMPORARY HITS (ENGLISH)**
KVVF	101.7	FM	ALBUQUERQUE	NM	MUSIC/SPANISH POP/ROCK
KAJZ	105.1	FM	ALBUQUERQUE	NM	**MUSIC/SMOOTH JAZZ(ENGLISH)**
KLSQ	870	AM	LAS VEGAS	NV	MUSIC/SPANISH OLDIES/SPORTS
KISF	103.5	FM	LAS VEGAS	NV	MUSIC/REGIONAL MEXICAN
KQMR	99.3	FM	LAS VEGAS	NV	MUSIC/ADULT CONTEMPORARY
KLQV	102.9	FM	SAN DIEGO	CA	MUSIC/REGIONAL MEXICAN
KLNV	106.5	FM	SAN DIEGO	CA	MUSIC/ADULT CONTEMPORARY
KOMR	106.3	FM	PHOENIX	AZ	MUSIC/ADULT CONTEMPORARY
KMRR	100.3	FM	PHOENIX	AZ	SIMULCAST WITH KOMR
KKMR	106.5	FM	PHOENIX	AZ	SIMULCAST WITH KOMR
KHOV	105.3	FM	PHOENIX	AZ	SIMULCAST with KHOT
KHOT	105.9	FM	PHOENIX	AZ	MUSIC/REGIONAL MEXICAN
KZOL	107.7	FM	FRESNO	CA	MUSIC/REGIONAL MEXICAN

HBC National Sales

HBC is larger than the next Three Competitors Combined!

Group Owner	Cume Listeners
HBC	**9,963,500**
SBS (U.S. only)	5,088,600
Entravision (Spanish)	2,934,200
Radio Unica	624,600

Source:Arbitron Spring 2002 Persons 12+ Cume Total Week

HBCSi National Sales

Conclusions

- The Exploding Hispanic Population is the Market of the new Millennium
- Hispanics are not reached effectively on general market media and you cannot reach the U.S. Hispanic effectively with Spanish TV alone
- Radio delivers a broader cross section of Hispanics by targeting them with specific formats attuned to diverse culture and language preferences
- HBC*Si* is the dominant Hispanic radio broadcaster in the country

ATTACHMENT 5

Univision

"Media Usage"

Presentation

Media Usage

NATIONAL SALES

univision

The Strengths of Television & Radio

Television:

→ Television reaches more of an advertiser's prospective customers, in almost every major demographic segment than any other medium.

→ The public perceives television as the most "influential", "authoritative", "exciting, and "persuasive" advertising medium.

→ With the power of sight, sound and motion, television is the medium where consumers are most likely to learn about products.

Radio:

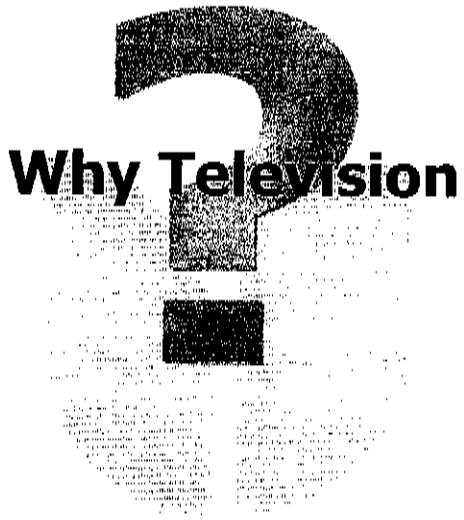
→ Radio is a highly personal medium: stations are formatted to one type of programming, and listeners tune to favorite radio stations based on personal programming preference.

→ Radio reaches mobile consumers.

→ Copy flexibility...advertisers have the ability to make last minute copy changes.

NATIONAL SALES

Source: The MEDIACENTER 2001 "Radio: The Strengths & Weaknesses"



NATIONAL SALES

univision

Television Vs. Radio: "Listening" to The Facts"

"No one can question the ability of a radio station to reach a small, limited segment of a given population in a broadcast area. However, when it comes to the complete package of reach, presentation quality, and impact that advertisers often look for, Television has no equal"

The Fact is:

→ When comparing radio and television as advertising media, regardless of the criteria in a given comparison, radio simply falls short. Nothing can compare to television's reach ability and potential impact.

→ By choosing just a single television station in a particular market, an advertiser can more effectively reach and impact its targeted audience with a message than by using multiple radio stations.

→ Television possesses the ability to reach more of an advertiser's prospective customers for longer periods.

NATIONAL SALES

Source: The MEDIACENTER 2001 "Radio: Listening to the facts"

univision

IMPACT:

→ While radio gets the impact of sound, it cannot appeal to people visually as other media do. As a result, radio tends to be a background medium; the listener doesn't always give radio full attention, instead getting involved in other activities while listening.

When getting a message out to an intended audience,

Television is truly the marketing tool necessary to build sales and increase profits.

NATIONAL SALES

Source: The MEDIACENTER 2001

univision

Television, The Most Widely Used Ad Medium, Is Even More Important in the Hispanic Market

	Hispanic	Non-Hispanic	Hispanic Index
TV	25.40	17.81	143
Radio	16.57	14.75	112
Magazine	3.35	3.74	90
Newspaper	4.29	5.04	85

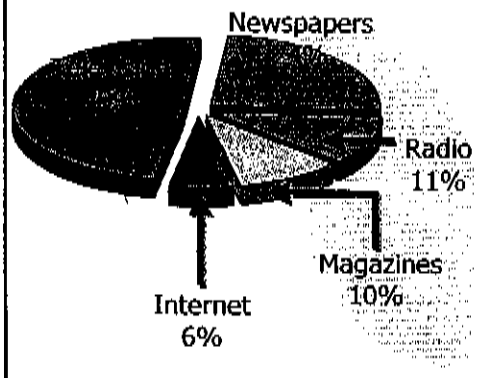
NATIONAL SALES

Source: Market Segment Research & Consulting, Inc. "The MSR&C Ethnic Market Report" - 1996

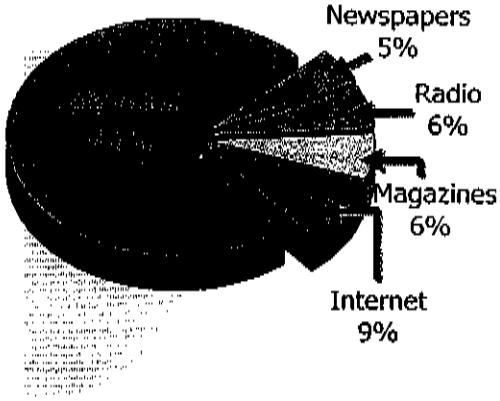
univision

Television Advertising has the Best Perception Among Adults

Most Authoritative



Most Exciting



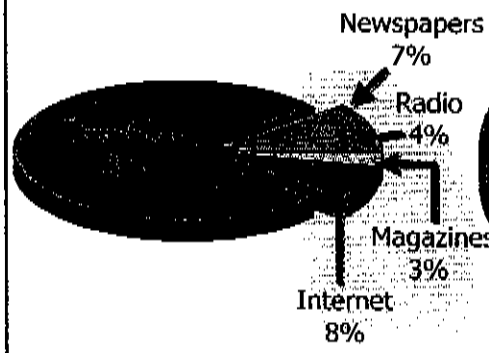
NATIONAL SALES

Source: TVB & THE MEDIACENTER 2000 Bruskin Media Research Study
(based on Total U.S. Adults)

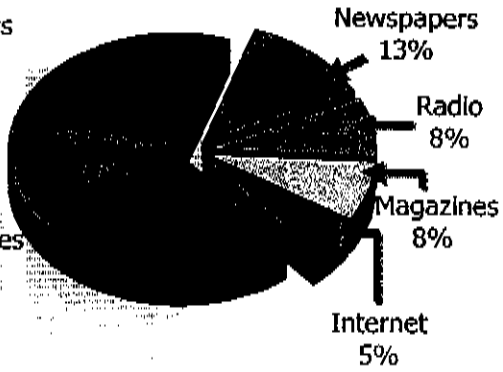
univision

Television Advertising has the Best Perception Among Adults

Most Influential



Most Persuasive



NATIONAL SALES

Source: TVB & THE MEDIACENTER 2000 Bruskin Media Research Study
(based on Total U.S. Adults)

univision

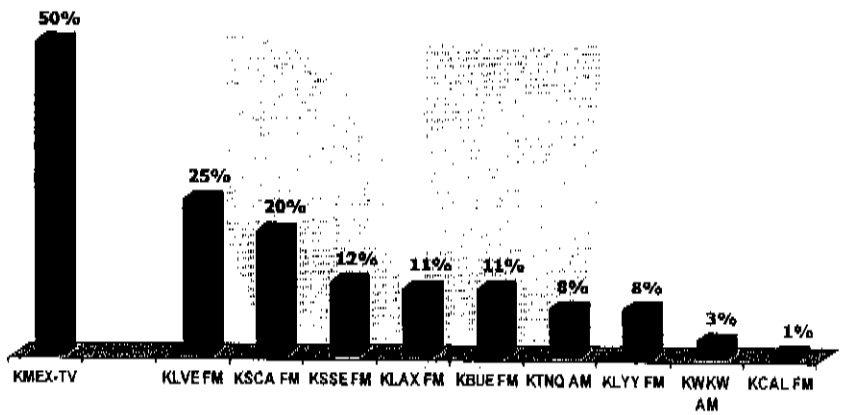
Univision Vs. Spanish Radio

NATIONAL SALES

univision

KMEX-TV Reaches More Hispanic Adults in Los Angeles than any Spanish Radio Station

Los Angeles Hispanic Adults
% Weekly Cume Audience M-S 6A-2A S/O-S/O Vs. M-S 6A-Mid Cume



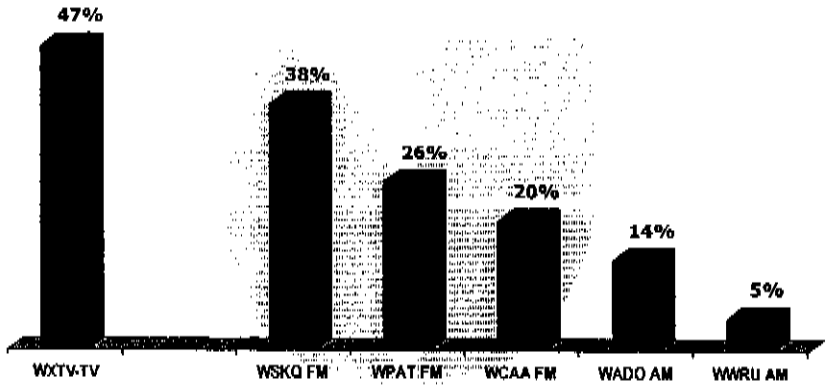
NATIONAL SALES

Source: Scarborough, Los Angeles 2001 Release 1 (Feb 00 – Jan 01)

univision

WXTV-TV Reaches More Hispanic Adults in New York than Any Spanish Radio Station

New York Hispanic Adults
% Weekly Cume Audience M-S 6A-2A S/O-S/O Vs. M-S 6A-Mid Cume



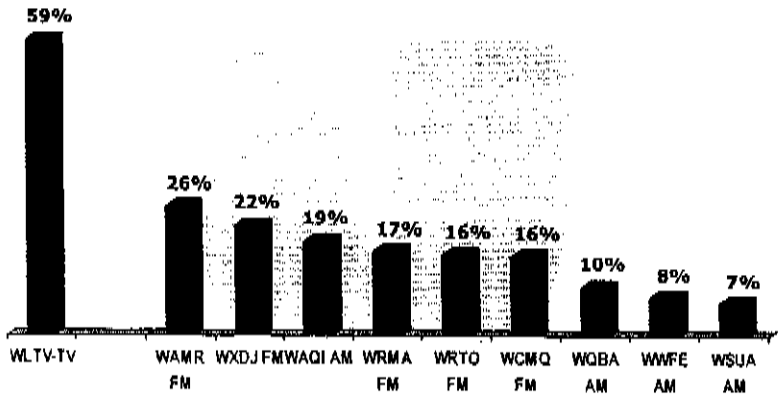
NATIONAL SALES

Source: Scarborough, New York Hispanic Custom Study 2001 Release 1 (Mar 00 – Feb 01)

univision

WLTV-TV Reaches More Hispanic Adults in Miami than Any Spanish Radio Station

Miami Hispanic Adults
% Weekly Cume Audience M-S 6A-2A S/O-S/O Vs. M-S 6A-Mid Cume



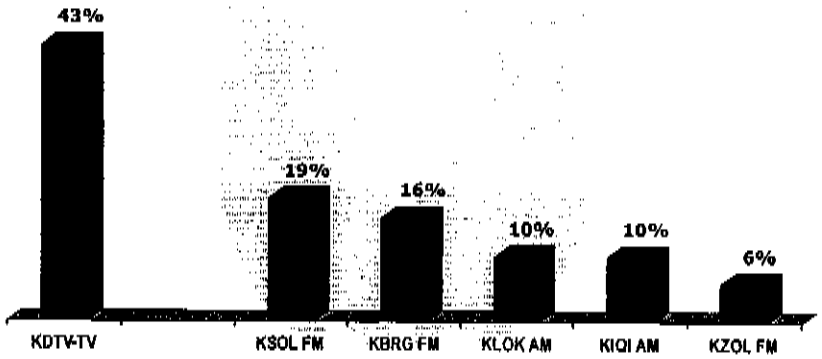
NATIONAL SALES

Source: Scarborough, Miami 2001 Release 1 (Feb 00 – Jan 01)

univision

KDTV-TV Reaches More Hispanic Adults in San Francisco than Any Spanish Radio Station

San Francisco Hispanic Adults
% Weekly Cume Audience M-S 6A-2A S/O-S/O Vs. M-S 6A-Mid Cume



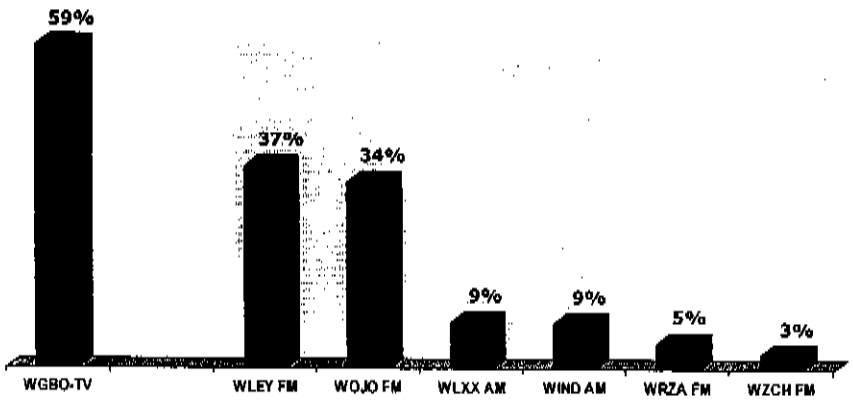
NATIONAL SALES

Source: Scarborough, San Francisco Hispanic Custom Study 2001 Release 1 (Feb 00 – Jan 01)

univision

WGBO-TV Reaches More Hispanic Adults in Chicago than Any Spanish Radio Station

Chicago Hispanic Adults
% Weekly Cume Audience M-S 6A-2A S/O-S/O Vs. M-S 6A-Mid Cume



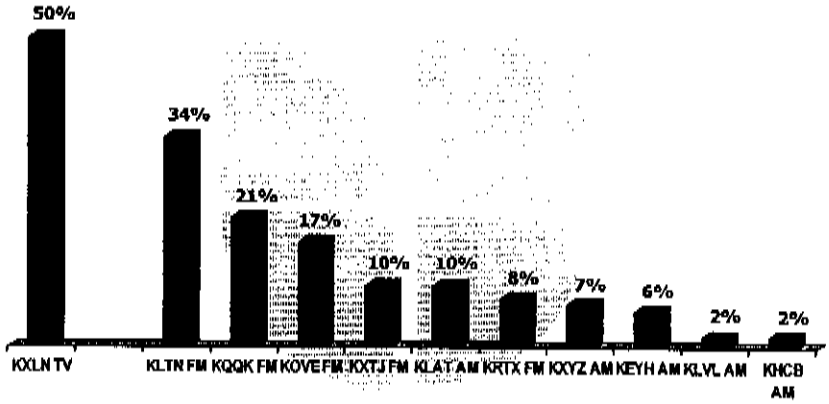
NATIONAL SALES

Source: Scarborough, Chicago Hispanic Custom Study 2001 Release 1 (Mar 00 – Feb 01)

univision

KXLN-TV Reaches More Hispanic Adults in Houston than Any Spanish Radio Station

Houston Hispanic Adults
% Weekly Cume Audience M-S 6A-2A S/O-S/O Vs. M-S 6A-Mid Cume



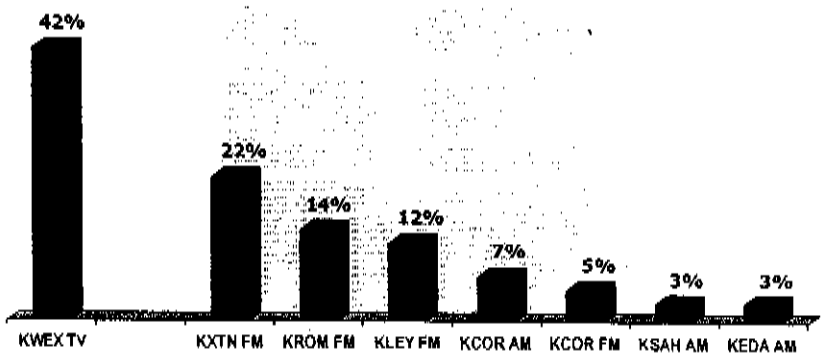
NATIONAL SALES

Source: Scarborough, Houston Hispanic Custom Study 2001 Release 1 (Mar 00 – Feb 01)

univision

KWEX-TV Reaches More Hispanic Adults in San Antonio than Any Spanish Radio Station

San Antonio Hispanic Adults
% Weekly Cume Audience M-S 6A-2A S/O-S/O Vs. M-S 6A-Mid Cume



NATIONAL SALES

Source: Scarborough, San Antonio Hispanic Custom Study 2001 Release 1 (Feb 00 – Jan 01)

univision

KUVN-TV Reaches More Hispanic Adults in Dallas than Any Spanish Radio Station

Dallas Hispanic Adults
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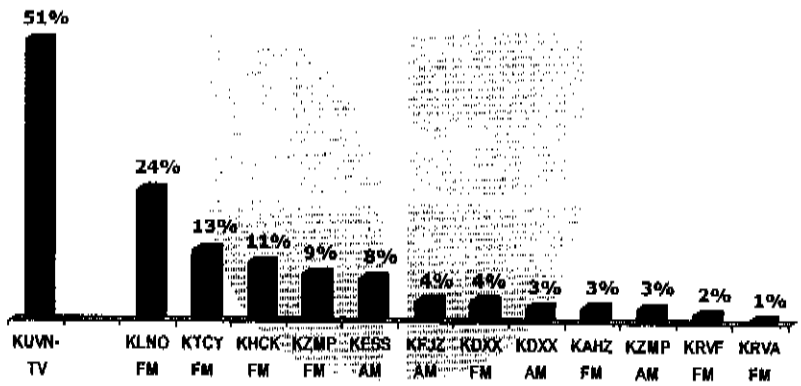

NATIONAL SALES

Source: Scarborough, Dallas Hispanic Custom Study 2001 Release 1 (Mar 00 – Feb 01)

univision

KTVW-TV Reaches More Hispanic Adults in Phoenix than Any Spanish Radio Station

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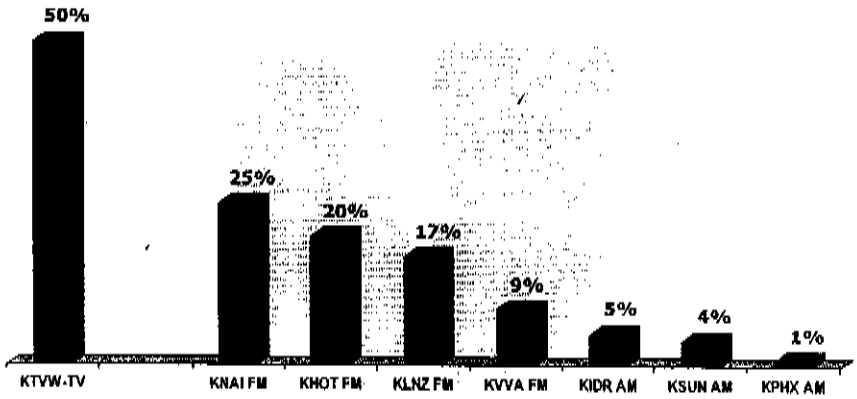

NATIONAL SALES

Source: Scarborough, Phoenix Hispanic Custom 2001 Release 1 (Feb 00 – Jan 01)

univision

KBNT-TV Reaches More Hispanic Adults in San Diego than Any Spanish Radio Station

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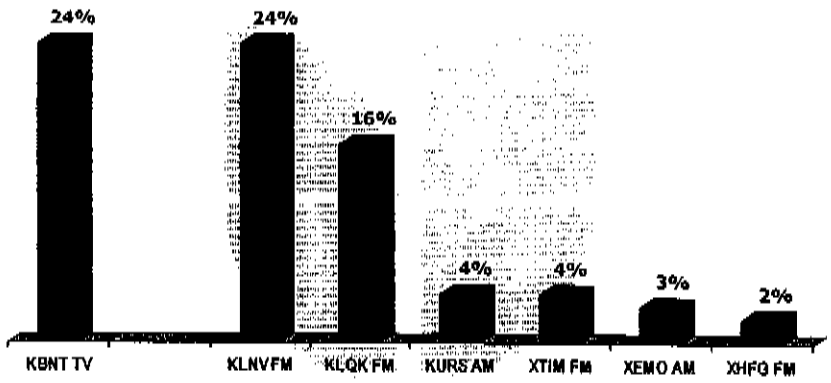


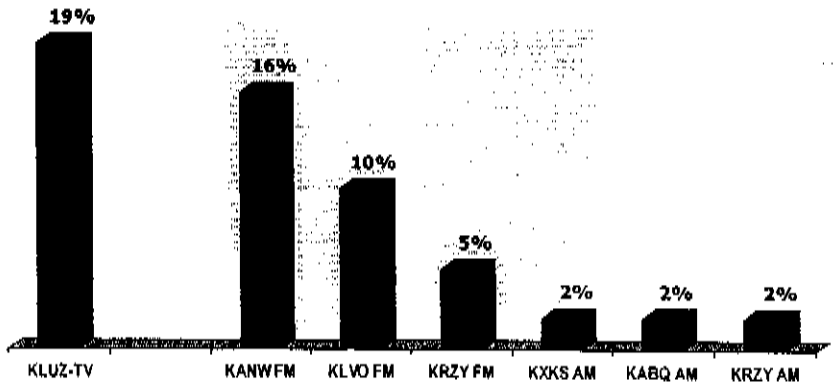
NATIONAL SALES

Source: Scarborough, San Diego Hispanic Custom Study 2001 Release 1 (Feb 00 – Jan 01)

univision

KLUZ-TV Reaches More Hispanic Adults in Albuquerque than Any Spanish Radio Station

Albuquerque Hispanic Adults
% Weekly Cume Audience M-S 6A-2A S/O-S/O Vs. M-S 6A-Mid Cume



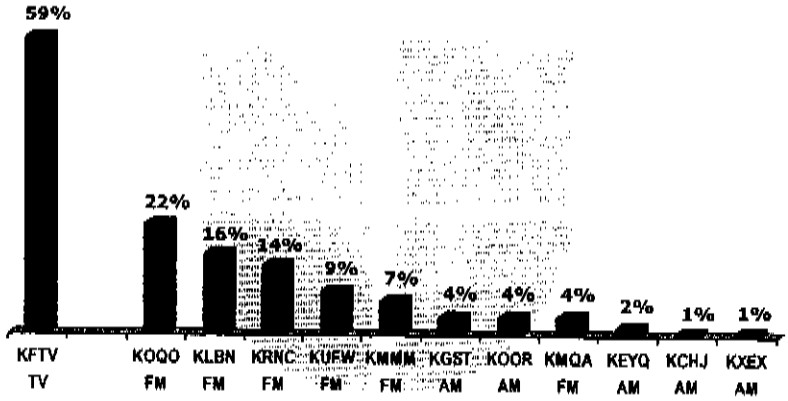
NATIONAL SALES

Source: Scarborough, Albuquerque Hispanic Custom Study 2000 Release 1 (Apr 99 – Mar 00)

univision

KFTV-TV Reaches More Hispanic Adults in Fresno than Any Spanish Radio Station

Fresno Hispanic Adults
% Weekly Cume Audience M-S 6A-2A S/O-S/O Vs. M-S 6A-Mid Cume



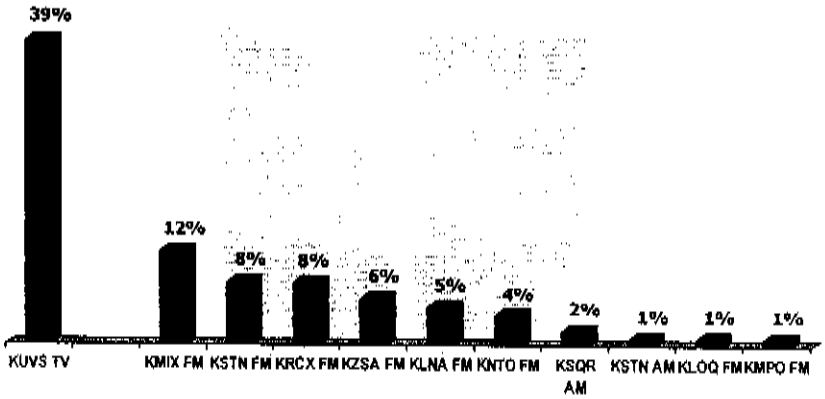
NATIONAL SALES

Source: Scarborough, Fresno Hispanic Custom Study 2001 Release 1 (Feb 00 – Jan 01)

UNIVISION

KUVS-TV Reaches More Hispanic Adults in Sacramento than Any Spanish Radio Station

Sacramento Hispanic Adults
% Weekly Cume Audience M-S 6A-2A S/O-S/O Vs. M-S 6A-Mid Cume



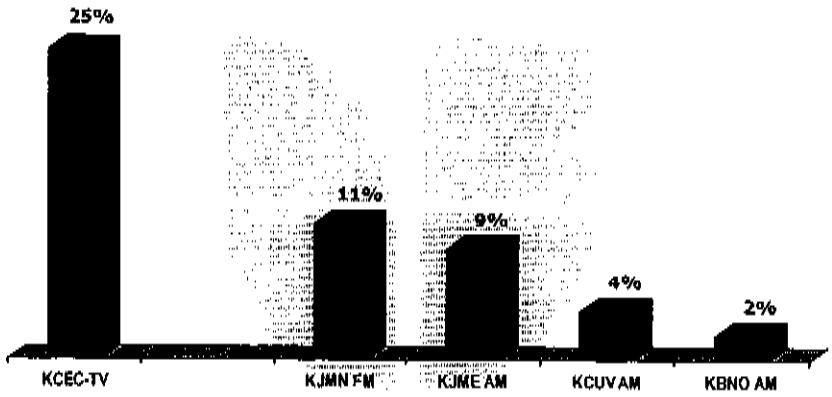
NATIONAL SALES

Source: Scarborough, Sacramento Hispanic Custom Study 2001 Release 1 (Mar 00 – Feb 01)

UNIVISION

KCEC-TV Reaches More Hispanic Adults in Denver than Any Spanish Radio Station

Denver Hispanic Adults
% Weekly Cume Audience M-S 6A-2A S/O-S/O Vs. M-S 6A-Mid Cume



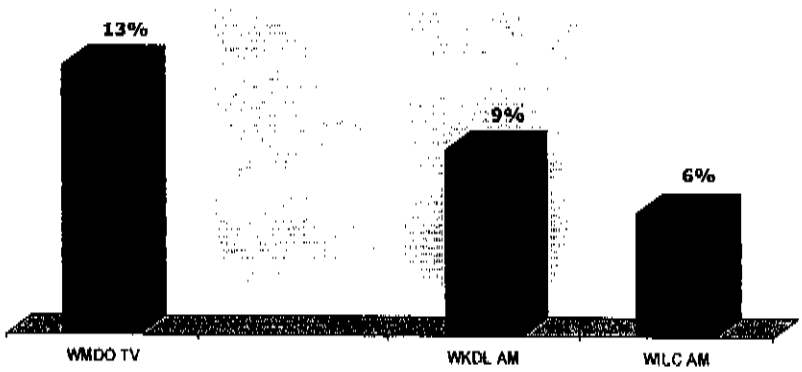
NATIONAL SALES

Source: Scarborough, Denver 2001 Release 1 (Mar 00 – Feb 01)

univision

WMDO-TV Reaches More Hispanic Adults in Washington D.C. than Any Spanish Radio Station

Washington D.C. Hispanic Adults
% Weekly Cume Audience M-S 6A-2A S/O-S/O Vs. M-S 6A-Mid Cume



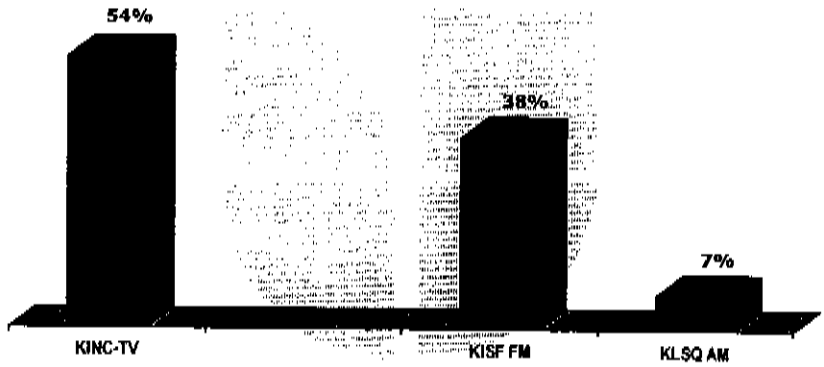
NATIONAL SALES

Source: Scarborough, Washington D.C. 2001 Release 1 (Mar 00 – Feb 01)

univision

KINC-TV Reaches More Hispanic Adults in Las Vegas than Any Spanish Radio Station

Las Vegas Hispanic Adults
% Weekly Cume Audience M-S 6A-2A S/O-S/O Vs. M-S 6A-Mid Cume



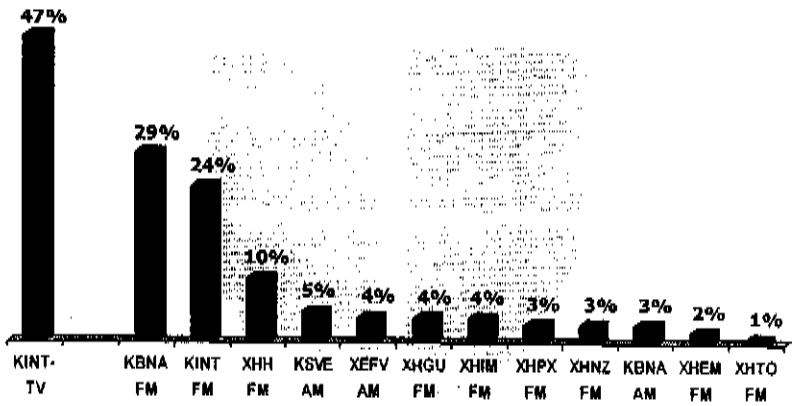
NATIONAL SALES

Source: Scarborough, Las Vegas 2001 Release 1 (Apr 00 – Mar 01)

univision

KINT-TV Reaches More Hispanic Adults in El Paso than Any Spanish Radio Station

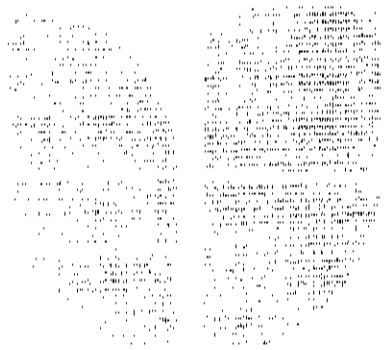
El Paso Hispanic Adults
% Weekly Cume Audience M-S 6A-2A S/O-S/O Vs. M-S 6A-Mid Cume



NATIONAL SALES

Source: Scarborough, El Paso 2001 Release 1

Univision Vs. Spanish Radio Prime Time Cume Vs. Morning Drive

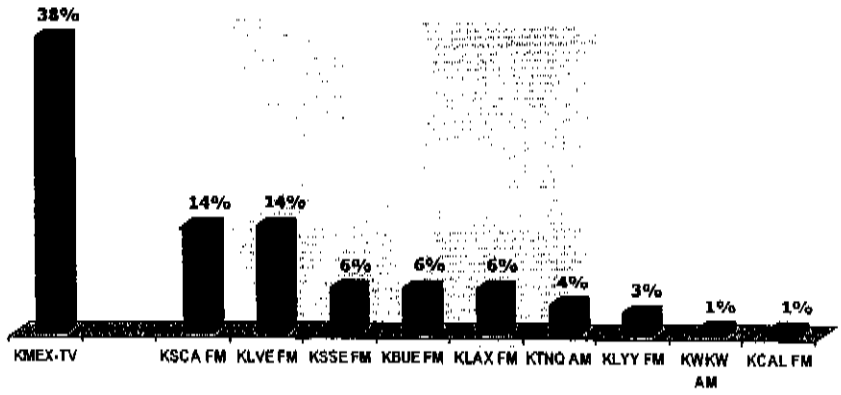


NATIONAL SALES

univision

KMEX Reaches More Hispanic Adults in Los Angeles than any Spanish Radio Station

Los Angeles Hispanic Adults
% Weekly Prime Time Cume Vs. M-F 6A-10A Morning Drive Cume



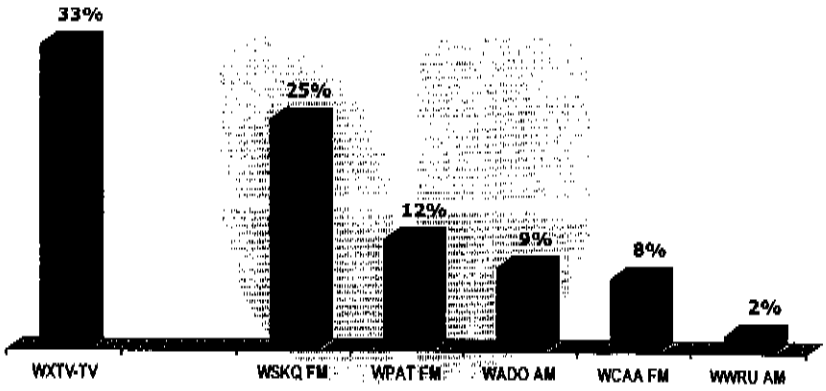
NATIONAL SALES

Source: Scarborough, Los Angeles 2001 Release 1 (Feb 00 – Jan 01)

univision

WXTV-TV Reaches More Hispanic Adults in New York than Any Spanish Radio Station

New York Hispanic Adults
% Weekly Prime Time Cume Vs. M-F 6A-10A Morning Drive Cume



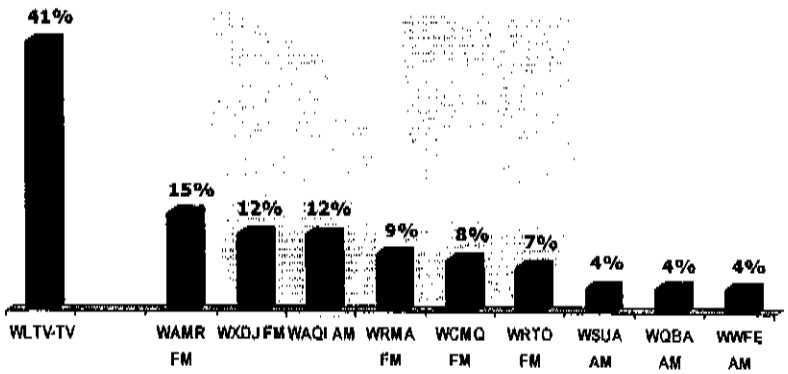
NATIONAL SALES

Source: Scarborough, New York Hispanic Custom Study 2001 Release 1 (Mar 00 – Feb 01)

univision

WLTV-TV Reaches More Hispanic Adults in Miami than Any Spanish Radio Station

Miami Hispanic Adults
% Weekly Prime Time Cume Vs. M-F 6A-10A Morning Drive Cume



NATIONAL SALES

Source: Scarborough, Miami 2001 Release 1 (Feb 00 – Jan 01)

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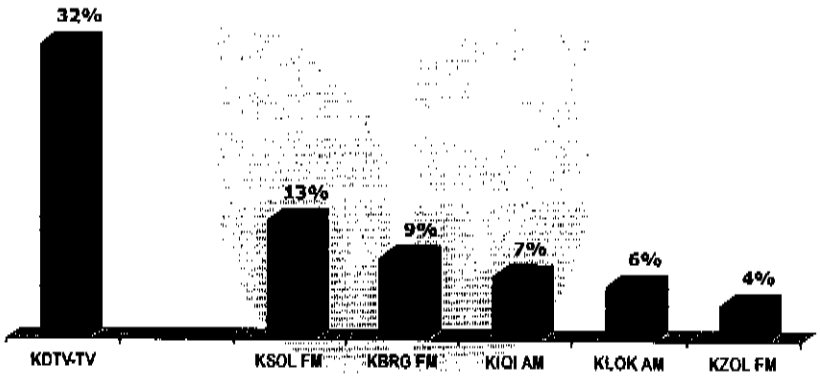
% Weekly Prime Time Cume Vs. M-F 6A-10A Morning Drive Cume



NATIONAL SALES

Source: Scarborough, San Francisco Hispanic Custom Study 2001 Release 1 (Feb 00 – Jan 01)

univision

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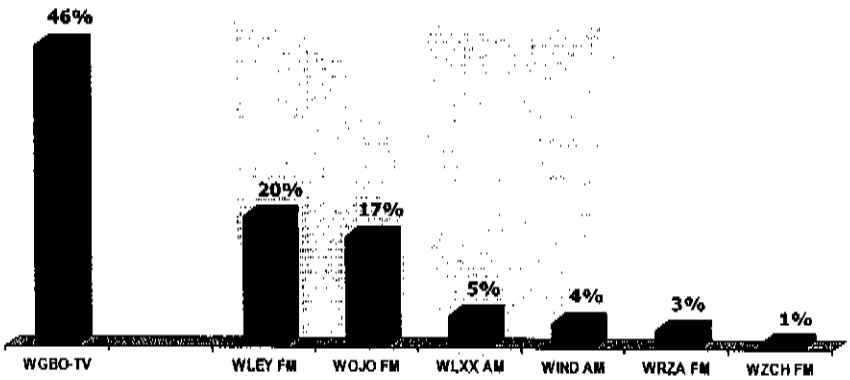
% Weekly Prime Time Cume Vs. M-F 6A-10A Morning Drive Cume



NATIONAL SALES

Source: Scarborough, Chicago Hispanic Custom Study 2001 Release 1 (Mar 00 – Feb 01)

univision

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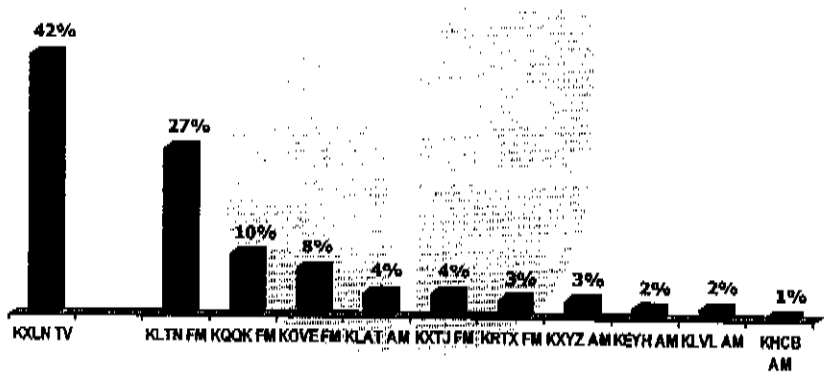
% Weekly Prime Time Cume Vs. M-F 6A-10A Morning Drive Cume



NATIONAL SALES

Source: Scarborough, Houston Hispanic Custom Study 2001 Release 1 (Mar 00 – Feb 01)

univision

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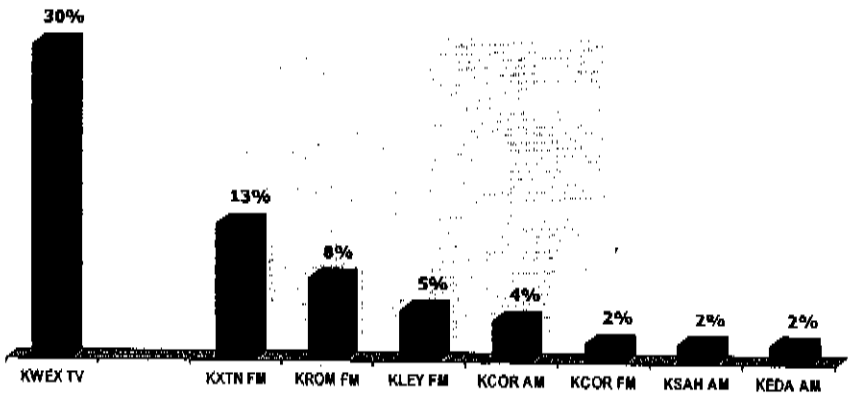
% Weekly Prime Time Cume Vs. M-F 6A-10A Morning Drive Cume



NATIONAL SALES

Source: Scarborough, San Antonio Hispanic Custom Study 2001 Release 1 (Feb 00 – Jan 01)

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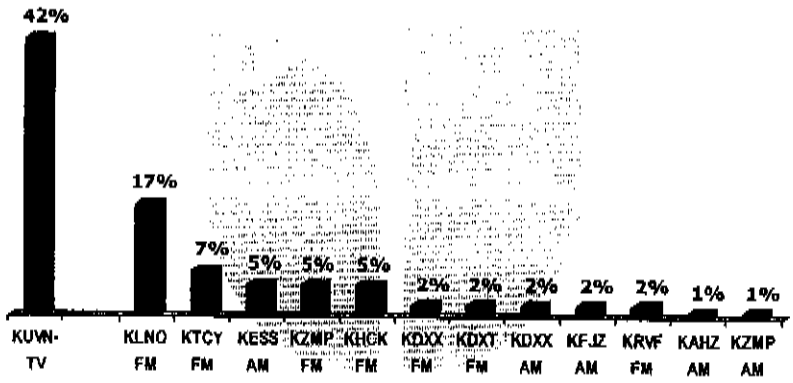

NATIONAL SALES

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univision

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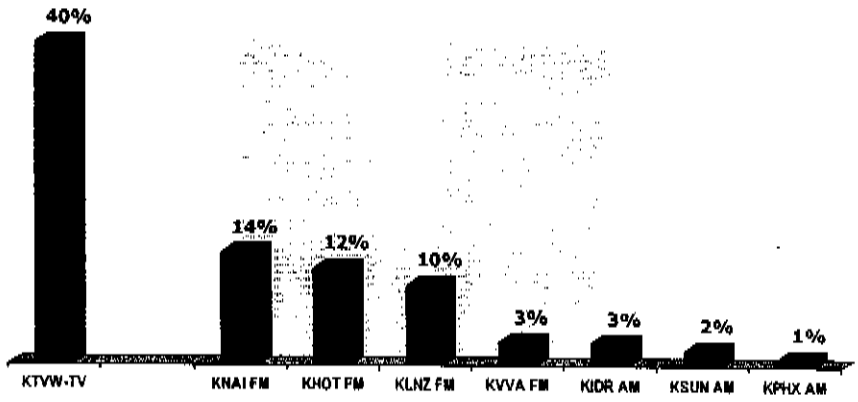

NATIONAL SALES

Source: Scarborough, Phoenix Hispanic Custom 2001 Release 1 (Feb 00 – Jan 01)

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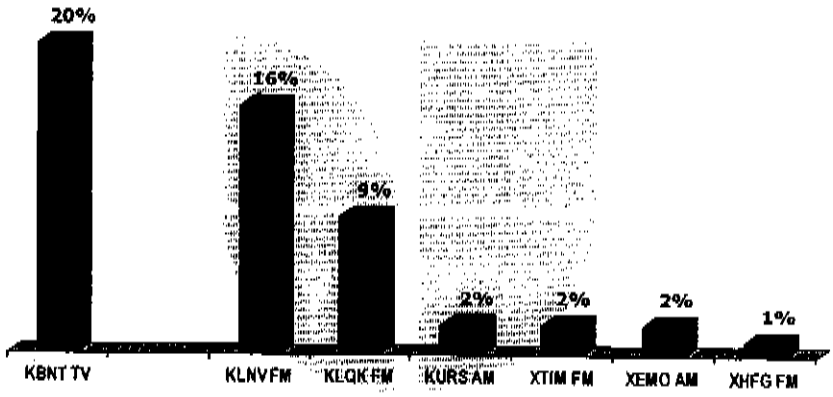

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univision

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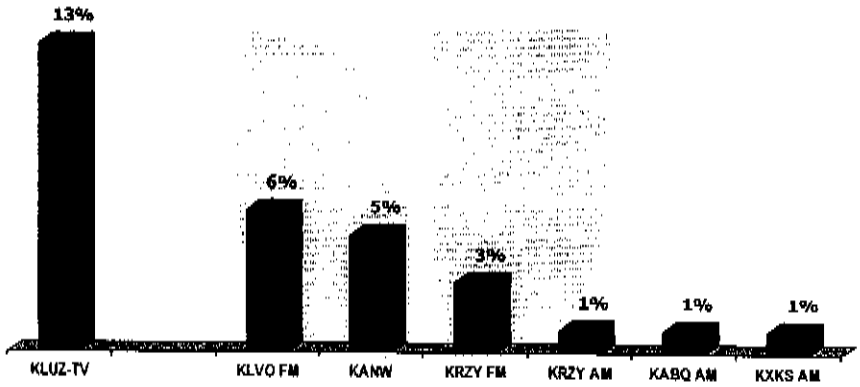

NATIONAL SALES

Source: Scarborough, Albuquerque Hispanic Custom Study 2000 Release 1 (Apr 99 – Mar 00)

univision

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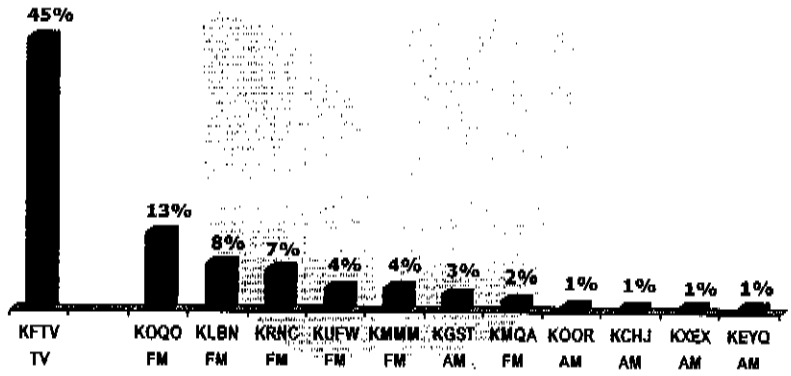

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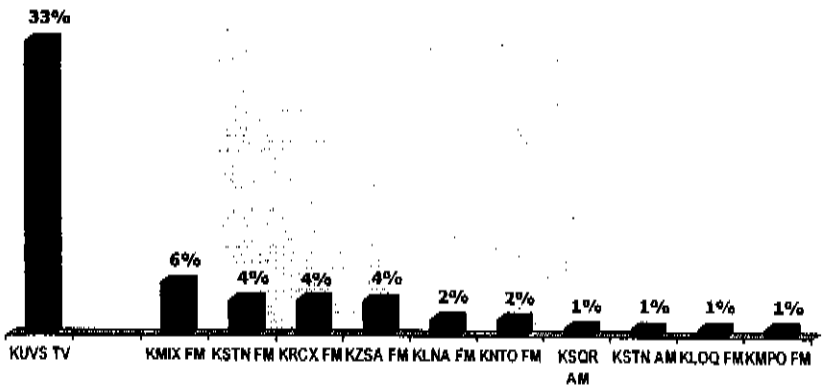

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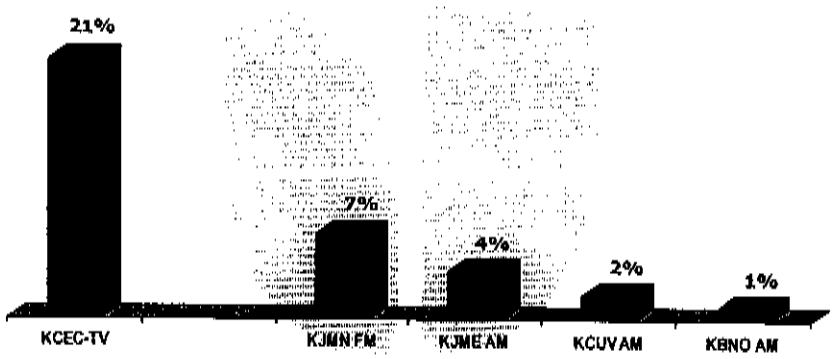

NATIONAL SALES

Source: Scarborough, Denver 2001 Release 1 (Mar 00 – Feb 01)

univision

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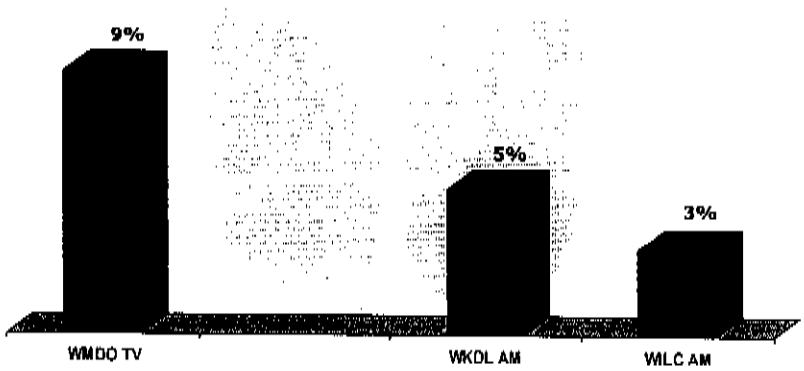

NATIONAL SALES

Source: Scarborough, Washington D.C. 2001 Release 1 (Mar 00 – Feb 01)

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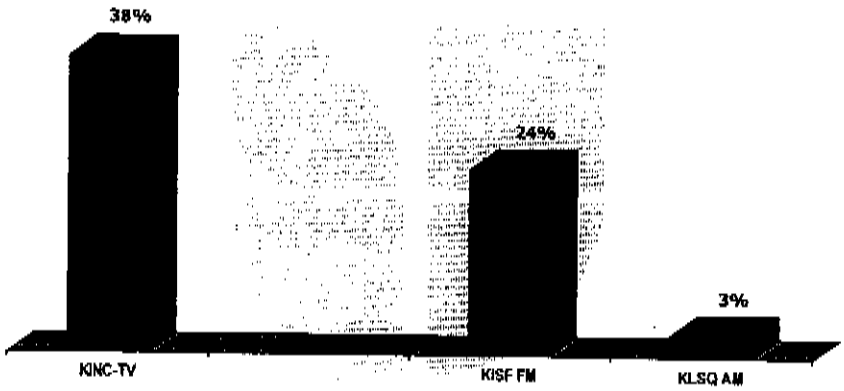


NATIONAL SALES

Source: Scarborough, Las Vegas 2001 Release 1 (Apr 00 – Mar 01)

univision

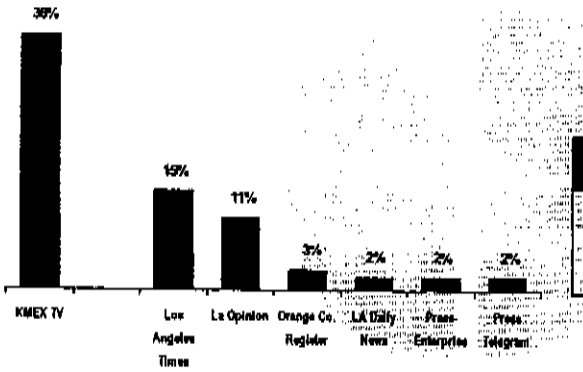
Univision Prime Time Cume Vs. Daily Newspapers

NATIONAL SALES

univision

KMEX TV in Los Angeles Delivers More Hispanics During Primetime than It's Nearest Daily Newspaper Competitor...

Los Angeles Hispanic Adults
% Weekly Cume Audience M-S Primetime Vs. Daily Newspapers Readership



...KMEX TV Gives You an Audience That Cannot be Reached by Any Newspaper

Percent of KMEX's Audience That Reads:	% of Hispanic Adults 18+
Los Angeles Times	14.5%
La Opinion	13.8%
Orange County Register	2.9%

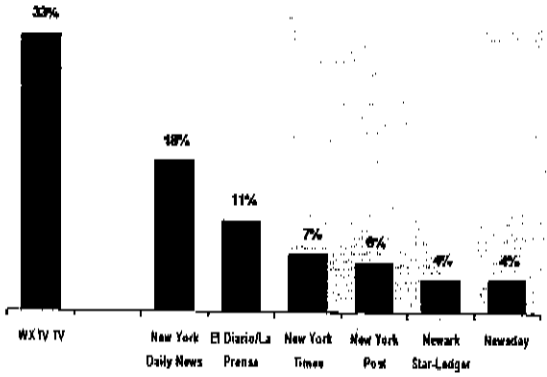
NATIONAL SALES

Source: Scarborough, Los Angeles 2001 Release 1 (Feb 00 – Jan 01)

univision

WXTV TV in New York Delivers More Hispanics During Primetime than It's Nearest Daily Newspaper Competitor...

New York Hispanic Adults
% Weekly Cume Audience M-S Primetime Vs. Daily Newspapers Readership



...WXTV TV Gives You an Audience That Cannot be Reached by Any Newspaper

Percent of WXTV's Audience That Reads:	% of Hispanic Adults 18+
New York Daily News	16.4%
El Diario/La Prensa	14.9%
New York Times	6.4%

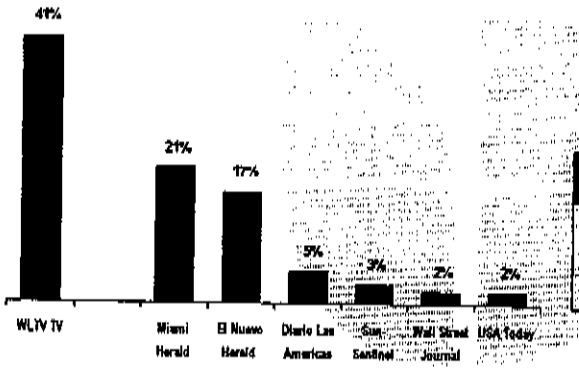
NATIONAL SALES

Source: Scarborough, New York Hispanic Custom Study 2001 Release 1 (Mar 00 – Feb 01)

univision

WLTV TV in Miami Delivers More Hispanics During Primetime than It's Nearest Daily Newspaper Competitor...

Miami Hispanic Adults
% Weekly Cume Audience M-S Primetime Vs. Daily Newspapers Readership



...WLTV TV Gives You an Audience That Cannot be Reached by Any Newspaper

Percent of WLTV's Audience That Reads:	% of Hispanic Adults 18+
Miami Herald	19.9%
El Nuevo Herald (Spanish)	18.2%
Diario Las Americas	5.9%

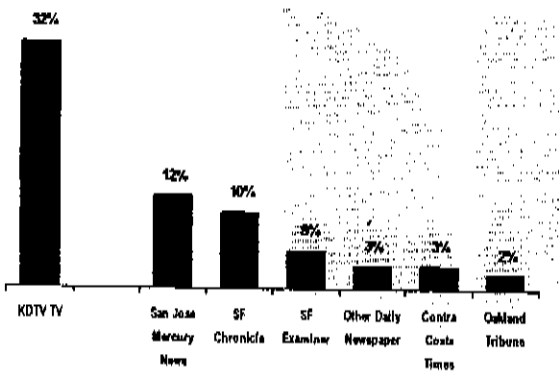
NATIONAL SALES

Source: Scarborough, Miami 2001 Release 1 (Feb 00 – Jan 01)

univision

KDTV TV in San Francisco Delivers More Hispanics During Primetime than It's Nearest Daily Newspaper Competitor...

San Francisco Hispanic Adults
% Weekly Cume Audience M-S Primetime Vs. Daily Newspapers Readership



...KDTV TV Gives You an Audience That Cannot be Reached by Any Newspaper

Percent of KDTV's Audience That Reads:	% of Hispanic Adults 18+
San Jose Mercury News	9.9%
San Francisco Chronicle	7.5%
San Francisco Examiner	3.4%

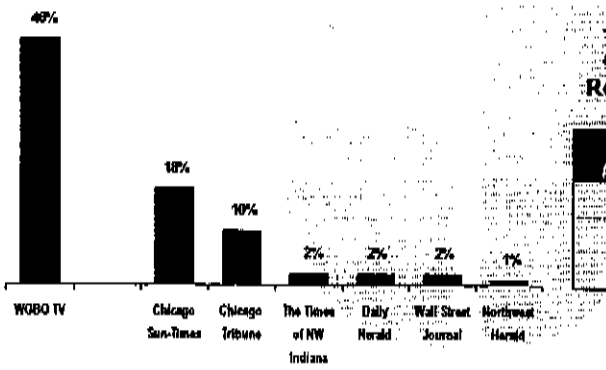
NATIONAL SALES

Source: Scarborough, San Francisco Hispanic Custom Study 2001 Release 1 (Feb 00 – Jan 01)

univision

WGBO TV in Chicago Delivers More Hispanics During Primetime than It's Nearest Daily Newspaper Competitor...

Chicago Hispanic Adults
% Weekly Cume Audience M-S Primetime Vs. Daily Newspapers Readership



...WGBO TV Gives You an Audience That Cannot be Reached by Any Newspaper

Percent of WGBO's Audience That Reads:	% of Hispanic Adults 18+
Chicago Sun-Times	17.5%
Chicago Tribune	8.7%
Daily Herald	1.3%

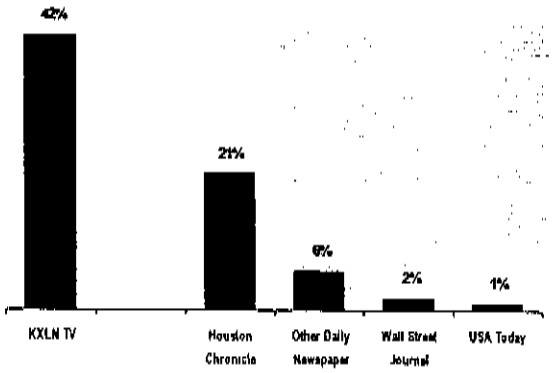
NATIONAL SALES

Source: Scarborough, Chicago Hispanic Custom Study 2001 Release 1 (Mar 00 – Feb 01)

univision

KXLN TV in Houston Delivers More Hispanics During Primetime than It's Nearest Daily Newspaper Competitor...

Houston Hispanic Adults
% Weekly Cume Audience M-S Primetime Vs. Daily Newspapers Readership



...KXLN TV Gives You an Audience That Cannot be Reached by Any Newspaper

Percent of KXLN's Audience That Reads:	% of Hispanic Adults 18+
Houston Chronicle	19.7%
Other Daily Newspaper	2.6%
Wall Street Journal	0.8%

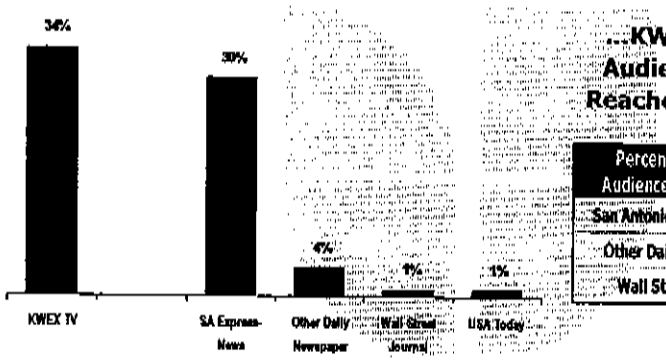
NATIONAL SALES

Source: Scarborough, Houston Hispanic Custom Study 2001 Release 1 (Mar 00 – Feb 01)

univision

KWEX TV in San Antonio Delivers More Hispanics During Primetime than It's Nearest Daily Newspaper Competitor...

San Antonio Hispanic Adults
% Weekly Cume Audience M-S Primetime Vs. Daily Newspapers Readership



...KWEX TV Gives You an Audience That Cannot be Reached by Any Newspaper

Percent of KWEX's Audience That Reads:	% of Hispanic Adults 18+
San Antonio Express-News	29.6%
Other Daily Newspaper	2.2%
Wall Street Journal	1.1%

NATIONAL SALES

Source: Scarborough, San Antonio Hispanic Custom Study 2001 Release 1 (Feb 00 – Jan 01)

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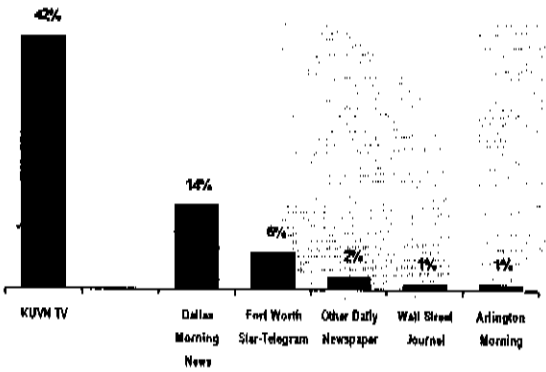
KUVN TV in Dallas Delivers More Hispanics During Primetime than It's Nearest Daily Newspaper Competitor...

Dallas Hispanic Adults
% Weekly Cume Audience M-S Primetime Vs. Daily Newspapers Readership



...KUVN TV Gives You an Audience That Cannot be Reached by Any Newspaper

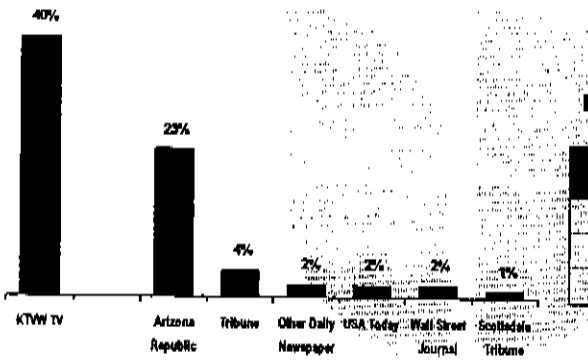
Percent of KUVN's Audience That Reads:	% of Hispanic Adults 18+
Dallas Morning News	12.6%
Fort Worth Star-Telegram	6.6%
Wall Street Journal	1.0%

NATIONAL SALES

Source: Scarborough, Dallas Hispanic Custom Study 2001 Release 1 (Mar 00 – Feb 01)

KTVW TV in Phoenix Delivers More Hispanics During Primetime than It's Nearest Daily Newspaper Competitor...

Phoenix Hispanic Adults
% Weekly Cume Audience M-S Primetime Vs. Daily Newspapers Readership



...KTVW TV Gives You an Audience That Cannot be Reached by Any Newspaper

Percent of KTVW's Audience That Reads:	% of Hispanic Adults 18+
Arizona Republic	21.7%
Tribune	3.5%
Other Daily Newspaper	1.3%

NATIONAL SALES

Source: Scarborough, Phoenix Hispanic Custom 2001 Release 1 (Feb 00 – Jan 01)

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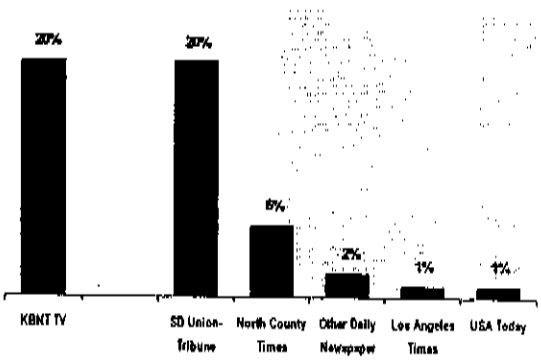
KBNT TV in San Diego Delivers More Hispanics During Primetime than It's Nearest Daily Newspaper Competitor...

San Diego Hispanic Adults
% Weekly Cume Audience M-S Primetime Vs. Daily Newspapers Readership



...KBNT TV Gives You an Audience That Cannot be Reached by Any Newspaper

Percent of KBNT's Audience That Reads:	% of Hispanic Adults 18+
San Diego Union-Tribune	12.9%
North County Times	8.3%
Other Daily Newspaper	1.9%

NATIONAL SALES

Source: Scarborough, San Diego Hispanic Custom Study 2001 Release 1 (Feb 00 – Jan 01)

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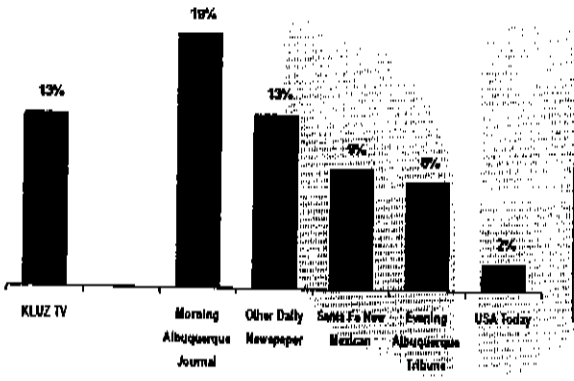
KLUZ TV in Albuquerque Delivers As Many Hispanics During Primetime as It's Nearest Daily Newspaper Competitor...

Albuquerque Hispanic Adults
% Weekly Cume Audience M-S Primetime Vs. Daily Newspapers Readership



...KLUZ TV Gives You an Audience That Cannot be Reached by Any Newspaper

Percent of KLUZ's Audience That Reads:	% of Hispanic Adults 18+
Morning Albuquerque Journal	21.3%
Evening Albuquerque Tribune	8.0%
Santa Fe New Mexican	1.0%

NATIONAL SALES

Source: Scarborough, Albuquerque Hispanic Custom Study 2000 Release 1 (Apr 99 – Mar 00)

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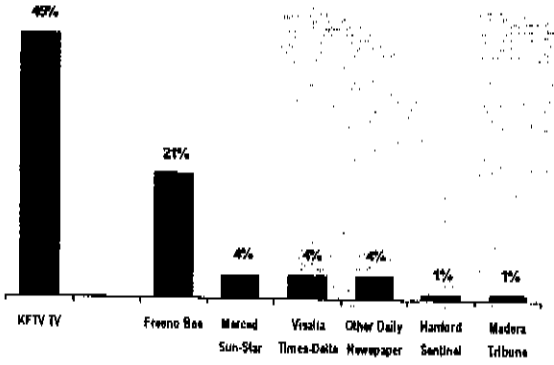
KFTV TV in Fresno Delivers More Hispanics During Primetime than It's Nearest Daily Newspaper Competitor...

Fresno Hispanic Adults
% Weekly Cume Audience M-S Primetime Vs. Daily Newspapers Readership



...KFTV TV Gives You an Audience That Cannot be Reached by Any Newspaper

Percent of KFTV's Audience That Reads:	% of Hispanic Adults 18+
Fresno Bee	19.9%
Merced Sun-Star	5.1%
Visalia Times-Delta	1.6%

NATIONAL SALES

Source: Scarborough, Fresno Hispanic Custom Study 2001 Release 1 (Feb 00 – Jan 01)

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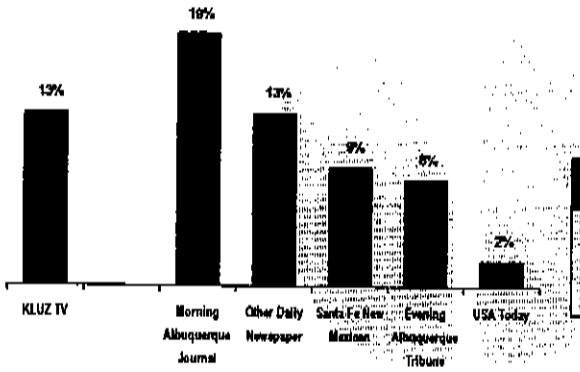
KLUZ TV in Albuquerque Delivers As Many Hispanics During Primetime as It's Nearest Daily Newspaper Competitor...

Albuquerque Hispanic Adults
% Weekly Cume Audience M-S Primetime Vs. Daily Newspapers Readership



...KLUZ TV Gives You an Audience That Cannot be Reached by Any Newspaper

Percent of KLUZ's Audience That Reads:	% of Hispanic Adults 18+
Morning Albuquerque Journal	21.3%
Evening Albuquerque Tribune	8.0%
Santa Fe New Mexican	1.0%

NATIONAL SALES

Source: Scarborough, Albuquerque Hispanic Custom Study 2000 Release 1 (Apr 99 – Mar 00)

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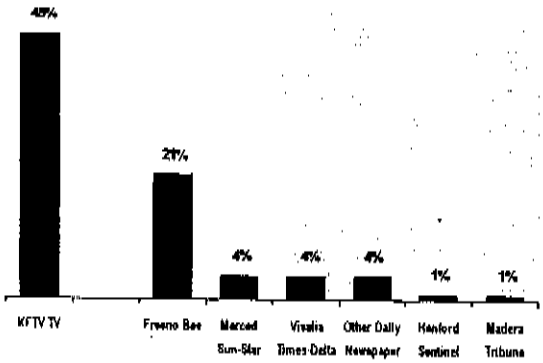
KFTV TV in Fresno Delivers More Hispanics During Primetime than It's Nearest Daily Newspaper Competitor...

Fresno Hispanic Adults
% Weekly Cume Audience M-S Primetime Vs. Daily Newspapers Readership



...KFTV TV Gives You an Audience That Cannot be Reached by Any Newspaper

Percent of KFTV's Audience That Reads:	% of Hispanic Adults 18+
Fresno Bee	19.9%
Merced Sun-Star	5.1%
Visalia Times-Delta	1.6%

NATIONAL SALES

Source: Scarborough, Fresno Hispanic Custom Study 2001 Release 1 (Feb 00 – Jan 01)

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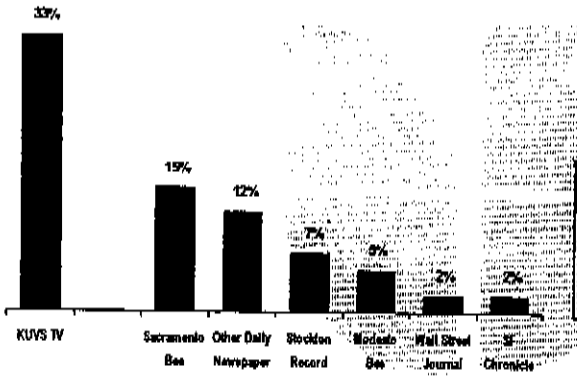
KUVS TV in Sacramento Delivers More Hispanics During Primetime than It's Nearest Daily Newspaper Competitor...

Sacramento Hispanic Adults
% Weekly Cume Audience M-S Primetime Vs. Daily Newspapers Readership



...KUVS TV Gives You an Audience That Cannot be Reached by Any Newspaper

Percent of KUVS's Audience That Reads:	% of Hispanic Adults 18+
Sacramento Bee	11.1%
Stockton Record	8.3%
Modesto Bee	8.1%

NATIONAL SALES

Source: Scarborough, Sacramento Hispanic Custom Study 2001 Release 1 (Mar 00 – Feb 01)

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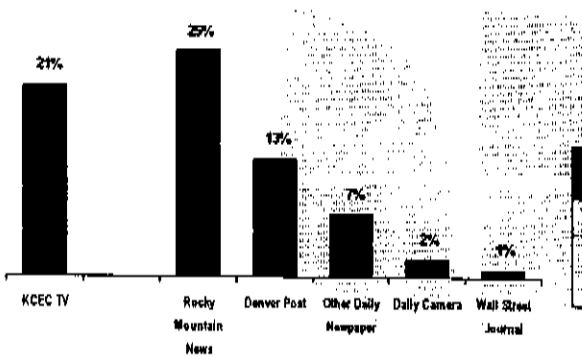
KCEC TV in Denver Delivers More Hispanics During Primetime than It's Nearest Daily Newspaper Competitor...

Denver Hispanic Adults
% Weekly Cume Audience M-S Primetime Vs. Daily Newspapers Readership



...KCEC TV Gives You an Audience That Cannot be Reached by Any Newspaper

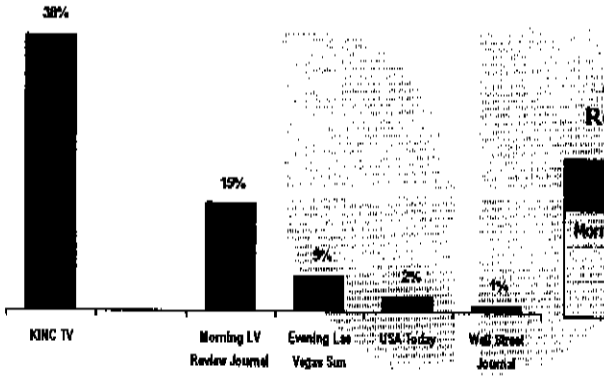
Percent of KCEC's Audience That Reads:	% of Hispanic Adults 18+
Rocky Mountain News	14.9%
Denver Post	9.3%
Daily Camera	2.2%

NATIONAL SALES

Source: Scarborough, Denver 2001 Release 1 (Mar 00 – Feb 01)

KINC TV in Las Vegas Delivers More Hispanics During Primetime than It's Nearest Daily Newspaper Competitor...

Las Vegas Hispanic Adults
% Weekly Cume Audience M-S Primetime Vs. Daily Newspapers Readership



...KINC TV Gives You an Audience That Cannot be Reached by Any Newspaper

Percent of KINC's Audience That Reads:	% of Hispanic Adults 18+
Morning Las Vegas Review Journal	10.6%
Evening Las Vegas Sun	5.5%
USA Today	2.8%

NATIONAL SALES

Source: Scarborough, Las Vegas 2001 Release 1 (Apr 00 – Mar 01)

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Gracias!

NATIONAL SALES

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