AHAA INSIGHTS SERIES
Hispanic Ad Spend Trends 2010-14
Pharmaceutical Category

May 26, 2015
Methodology

Advertising spend data including over 340K parent companies was collected by Nielsen Monitor Plus in English and Spanish/Bilingual media. This data was analyzed by Santiago Solutions Group for AHAA. SSG divided companies into 5 Tiers according to the percent allocation to Spanish Media corresponding to previous AHAA Ad Spend Allocation reports.

- Best-in-Class (more than 14.2%)
- Leaders (6.4%-14.2%)
- Followers (3.6%-6.3%)
- Laggards (1.0%-3.5%)
- On-The-Sidelines (Less than 1%)

Moreover, SSG also segmented the Top 500 Overall Spending (English + Spanish) Companies. This was done for Multiple years 2010-2014, thus permitting the analysis of trends in the marketplace.

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English Media | Spanish Media
---|---
Cable TV | Cable TV
FSI Coupon | FSI Coupon
Local Mag | Local Magazine
Local Newspaper | Local Newspaper
Local Sunday Supplement | Local Sunday Supplement
National Magazine | National Magazine
National Newspaper | National Newspaper
National Sunday | National Sunday Supplement
Network Radio | Network Radio
Network TV | Network TV
Spot Radio | Spot Radio
Spot TV | Spot TV
Syndicated TV | Syndicated TV

Excluded English Media | Excluded Spanish Media
---|---
B2B | B2B
National Internet | Display
Outdoor | Outdoor
National Cinema | Regional Cinema
Overall AdSpend Context

Hispanic Share of AdSpend Soared to 8.5% in 2014.
Top 500 Advertisers Increased Hispanic Media Spend by $3Bn or 61% vs. only 2% in English AdSpend

- While overall Ad spend among the top 500 advertisers increased by 5% from $79.0Bn to $83.1Bn from 2010 to 2014, marketers made a steep increase in Hispanic Ad Spend, jumping 61% from $4.4Bn to $7.1Bn.

- Hispanic allocation jumped to 8.5% of all US top 500 marketers ad spend from 5.5% in 2010.

- English Media Ad Spend increased by 2% from $74.6Bn in 2010 to $76.0Bn in 2014
  - The English share of ad spend among the top 500 US marketers is down to 91.5% in 2014 from 94.5% in 2010.

2010-2014 Nielsen Monitor Plus data; Santiago Solutions Group analysis & interpretation for AHAA: The Voice Of Hispanic Marketing
Pharma Category

Aggregate Hispanic AdSpend Only Increased 4%, Allocation Remained Flat, & the Average Company Hispanic Dedicated AdSpend Decreased Slightly to $6.3M

- Pharma marketers among the top US advertisers increased their aggregate Hispanic Ad Spend by 4% between 2010 and 2014 to $165M.
- The mean Hispanic Ad Spend by Pharma companies decreased 9% from $6.9M to $6.3M in 2014.
- The Pharma category allocation to Hispanic dedicated media, among the Top 500 U.S. Advertisers, remained basically unchanged at 2.5% of their.

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*Among Top 500 in 2014

2010-2014 Nielsen Monitor Plus data; Santiago Solutions Group analysis & interpretation for AHAA: The Voice Of Hispanic Marketing
Pharma Allocates 71% Less to Hispanic Dedicated Efforts Than The Top 500 U.S. Advertisers

PHARMA Allocation Index: 29 (Pharma Companies Average Top 500)

Pharma vs Advertisers Average Hispanic Dedicated Allocation

2010-2014 Nielsen Monitor Plus data; Santiago Solutions Group analysis & interpretation for AHAA: The Voice Of Hispanic Marketing
## Pharma Category Remains at a Laggard Allocation Level

### Distribution of Pharma Companies By Investment Tier in 2010 & 2014 (Among Top 500 Advertisers)

<table>
<thead>
<tr>
<th>INVESTMENT TIER</th>
<th>% Allocation Hispanic Media</th>
<th># of Companies</th>
<th>Hispanic (Span+Bilingual) Dedicated AdSpend $</th>
<th>Hisp % Allocation</th>
</tr>
</thead>
<tbody>
<tr>
<td>BIC</td>
<td>&gt; 14.2%</td>
<td>0</td>
<td>0</td>
<td>$</td>
</tr>
<tr>
<td>Leader</td>
<td>6.4% - 14.2%</td>
<td>2</td>
<td>2</td>
<td>$84,169</td>
</tr>
<tr>
<td>Follower</td>
<td>3.6% - 6.3%</td>
<td>1</td>
<td>2</td>
<td>$73,686</td>
</tr>
<tr>
<td>Laggard</td>
<td>1.0% - 3.5%</td>
<td>4</td>
<td>7</td>
<td>$37,913</td>
</tr>
<tr>
<td>On-The-Sidelines</td>
<td>&lt; 1%</td>
<td>18</td>
<td>15</td>
<td>$47,052</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td>23</td>
<td>26</td>
<td>$158,651</td>
</tr>
</tbody>
</table>

2 Pharma companies allocated more than 6.4% to Hispanic dedicated efforts in 2014 from none in 2010.

2010-2014 Nielsen Monitor Plus data; Santiago Solutions Group analysis & interpretation for AHAA: The Voice Of Hispanic Marketing
Log into AHAA.org

Members Section for the Full Dataset & Other Category Analyses Released In 2015

2010-2014 Nielsen Monitor Plus data; Santiago Solutions Group analysis & interpretation for AHAA: The Voice Of Hispanic Marketing