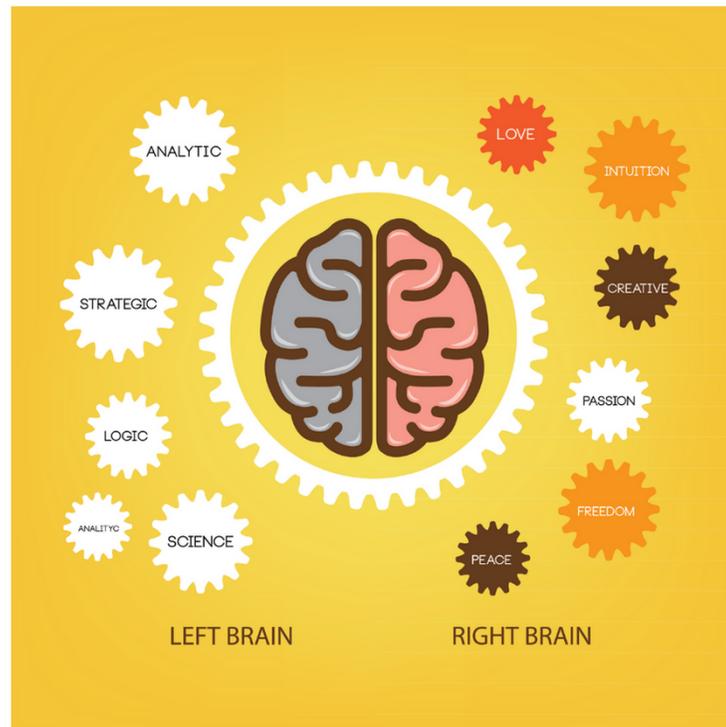


# THE 2021 HISPANIC CONTENT, DATA & SOCIAL MEDIA REPORT

independently produced by

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# UNIQUE AND MEANINGFUL ENGAGEMENT

Twenty-five years ago, **Entravision Communications** founder and CEO Walter Ulloa had a vision: to advocate for Hispanics across the U.S. He purchased a small television station in the El Centro, Calif.-Yuma, Ariz., market, and began to build a multimedia operation superserving Spanish-speaking consumers. Today, Entravision is a very different company — and has gone beyond that initial goal.

In fact, Entravision as of July 1 fully transitioned from being a Hispanic-focused multimedia broadcasting company to a digital-first enterprise with global reach. This came via a business transaction that sees Entravision, traded on the NYSE, agree to purchase a digital marketing performance and branding company with operations across seven countries in the Asia-Pacific region.

The company is Singapore-based MediaDonuts, which has been in operation since 2010. It has a team of more than 80 employees located in Singapore, Thailand, Philippines, Vietnam, Indonesia, Malaysia and India. Walter Ulloa, Entravision’s Chairman/CEO, calls the purchase “a natural fit with the overall digital and global transformation strategy of our business.”

And, Entravision believes its acquisition of MediaDonuts “is the next key step” in a plan to become a “leading marketing technology service provider in the world’s highest growth economies.”

Still, the entry into the Asia-Pacific region for a company best known for its Hispanic and Latin American efforts is a big shift. **Juan Saldívar**, Entravision’s Chief Digital, Strategy and Accountability Officer, offers a logical and succinct answer as to why the MediaDonuts deal was done.

“Data is the currency, but the process is king,” he tells *HispanicAd*. “Why did we go abroad? Why did we shift from a single culture to more than another culture, and to a performance business model? Most of our business doesn’t really care if you are Asian, or if you are short or tall or fat. It really only cares about your consumption pattern, and that’s where marketing is going.”

**“Data is the currency, but the process is king.”**

The statement speaks volumes of how data, combined with strong content and a good social media platform built for programmatic, is powering digital media revenue growth for companies around the globe. At the same time, it is not in any way diminishing the cultural appeal of niche or segmented content vehicles. Rather, it is fueling their growth and sustainability in ways perhaps previously challenged by antiquated media buying and planning objectives and execution.





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Saldivar says the idea of growing beyond the U.S. Hispanic and Latin American marketplace was first considered in 2016, as part of a plan of how to grow tenfold as a company in the next decade.

While some may see Entravision's full-throttle push into digital on a global level as a bold move, Saldivar believes, "justifying no growth based on the strength of an industry" brings many things to mind.

### IMPORTANT, BUT STAGNANT

When looking at the marketplace Ulloa set out to serve in 1996, Entravision was presented with a fundamental challenge — long-term sustainable growth. The company's quarterly financial reports, once among the rosier on Wall Street, had lost their luster. The radio division was suffering. Then, the television division began to see advertising revenue erosion. Digital seemed impenetrable.



This led to some hard discussions on its Hispanic market focus.

"Do we continue to focus on first-generation or '1.5 generation' Hispanics?" Saldivar says. "Some 18 million to 20 million people are consuming Spanish all day long. This is, today, about one-third of the U.S. Latino market. That market size is \$6 million to \$7 million in total advertising. And, it is not necessarily growing. It is stagnant, and not growing by double digits as it was 20 years ago."

Immigration shifts have led to this scenario. Add in the fact that a slow merge to the total market has been seen as Hispanics grew older, and the following result was seen: performance-driven marketing agents took on the Hispanic targeting role.

As such, Saldivar says, "our business model had to expand to where the consumers were connected for the first time and were rapidly gaining access to better digital and ecommerce service providers."

Given the speed at which the digital marketing industry grew around the world, Entravision found this was a good opportunity to expand its participation.

Above everything, "Entravision is a sophisticated sales operation," Saldivar says, with more than 180 sellers. As such, in the last five years acquisitions have added speed to this vision of tapping into emerging markets. First came the acquisition of **Headway**, a key programmatic advertising business unit that was highly profitable in 2018 but saw slowdowns in the last year due to economic challenges in markets such as Argentina, where the Peso has been severely devalued. Then came the October 2020 decision to take a majority stake in **Cisneros Interactive**, followed by the September 2021 acquisition of all of the outstanding shares in the company.

With these moves, Entravision moved into "soft pockets that are not small" serving the mobile app business, Saldivar says. Also important to the digital growth story at Entravision is the early 2019 purchase of mobile DSP **Smadex**, based in Barcelona. Smadex boasts 120 employees, with 85 devoted to the DSP.

All of the digital growth has positioned Entravision to establish relationships with "great platforms" many broadcast media owners have a love/hate relationship with — Facebook, Spotify, Twitter, LinkedIn and even TikTok. With local digital and the "GAFAN" group eating away at advertising dollars, Entravision has decided to leap into the digital space at full speed, rather than go to battle against them.

## DIGITAL AS A CORE VALUE

As reported by the *Radio + Television Business Report*, with the full ownership of Cisneros Interactive, along with Entravision's acquisition of MediaDonuts, which added digital capabilities in 7 countries in Asia, digital now comprises 73% of consolidated revenue as of the quarter ended June 30, 2021.

Digital Segment revenue improved over 1,000% year-over-year to total \$130.2 million for the second quarter 2021.

Yes, Entravision has transformed itself from being channel-centric to a performance marketing business around the globe.

As Saldivar sees it, "We are still in the middle of the mountain and I don't know if you ever reach the top, but we are a company with great ambition and a goal to create a global employer brand with digital as a core value."

This tenet has been extended across the linear media divisions of Entravision. That said, "Linear is behaving a lot better than what people expected, for one," Saldivar says. "People are still watching TV. They are still listening to the radio. And, brands understand there are 24 hours in a day. While digital has been growing a lot, there is still viewing and listening to linear media. As such, our 360-degree approach is holding on and it is a good business. Brands still trust it, and I am happy to see how those trends remain relevant."

**"While digital has been growing a lot, there is still viewing and listening to linear media."**

Still, as one focuses on all of the market targets, one needs to diversify that offering with online-only services. This speaks to how Entravision has shifted from being channel-centric to performance-centric, making the company unique among its peers.

It begs the question as to whether radio and TV superserving U.S. Hispanics remains at the core of what Entravision is as a company.

Saldivar replies, "What has shifted in the media space is that channels became irrelevant. What became important is where the data is, and what is at the center has to be how you run the business. The core has to do with how you evolve your products, and making it a client-centric vision. Rather than defining radio and TV as your pillar, when you put the client at the center, you have to solve the problems the brands have. They want to find mothers, and you have the power to do so. It is about shifting the narrative toward a product that would bring all of the mothers — all of the potential consumers. If not, we'd have to narrow our business to those service and performance pillars. Now that we have shifted, the question is how far can we go."



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## CONFUSING, AND OVERLY USED

What's the biggest takeaway or observation Saldivar has with respect to the use of data to drive Hispanic market growth in the digital space?

"Data is a confusing term and I don't want to say it is overrated, but it is overly used," Saldivar says. "What stands at the core of the business process is that you need data. It is everywhere. But let me give you just an example – how to interpret customer needs. They *know* they need it, or you can interpret that they need it. That information can come from asking the client, or doing research, and from previous importance. The processing of that information can yield to new pathways."

This establishes the importance of how performance indicators can trigger the use of new information about a company's clients.

Still, Saldivar says, "Analytics from my point of view is more important than just having the data. The goal is not to assemble large amounts of data but to interpret basic amounts of information."

HMO

### *You Are What You Have Learned*

"I come from books and selling encyclopedias," says **Juan Saldivar von Wuthenau**, who was appointed Entravision's Chief Digital, Strategy and Accountability Officer in November 2020. "Of course, you are what you have learned from good experiences and making mistakes."

Saldivar previously held several positions at **Televisa**, including serving as President of Televisa Interactive Media and as Director of Planning and Strategy of Televisa Multimedia.

Before joining Televisa, Mr. Saldivar was the founder and Country Manager of Submarino.com in Mexico. From January 2009-July 2011, Saldivar was President of IAB Mexico, a role held concurrent to his position with Televisa Interactive Media.

Saldivar began his career as a corporate consultant for Bertelsmann in 1993, following the completion of his MBA program at IESE Business School at the University of Navarra in Pamplona, Spain. He holds a Bachelor of Arts in Economics from the Instituto Tecnológico Autónomo de México.

# MAKING EXPERIENCES EXCEPTIONAL

In fall 2019, **Estrella Media** didn't even exist. By February 2020, the final top-level vestiges of its ties to founders Jose and Lenard Liberman, the LBI Media name, was phased out. Today, the only link to the Liberman family is the "Estrella" brand, created for its television division.

Now, the "Estrella" name stands for a growing multimedia company that has grown by leaps and bounds in the digital realm. Those efforts ramped up in a significant way with the October 2020 addition of a digital and streaming media executive who was previously with Sony Pictures Television Digital Networks and had a hand in the rollout of Crackle.



Celebrating his one-year anniversary at Estrella Media is EVP of Digital and Streaming Media **Rene Santaella**. His chief task: leading the transformation of Estrella Media's digital strategy, building operations, and generating new revenue initiatives.

At Sony Pictures Television, Santaella was SVP and head of ad sales and operations. This role extended beyond making "Comedians in Cars Getting Coffee" a viral hit. Santaella managed ad sales, operations and strategic initiatives and led the creation of a premium video network for advertisers targeting a large audience of "connected gamers" that included PlayStation Store, PlayStation Vue, Funimation, Pluto TV and Crackle. Before Sony, Santaella was Director of Ad Sales Marketing for Disney Interactive, leading digital and cross-platform advertising and integrated marketing solutions across the company.

How is Santaella's experience at two major multinational entertainment-focused companies fueling his decision-making at Estrella Media?

It's all tied to its ability to tap into the fast-growing Spanish-language direct to consumer marketplace.

With Estrella Media making great strides in building its digital imprint since Santaella's October 2020 arrival, how is the company expanding beyond simply serving as a content distribution platform? Are consumers and marketers responding, given the unique appeal of Estrella Media?

"There are 60 million Hispanics in the U.S., and we know they are a passionate audience, consuming content on all platforms," Santaella says. "Estrella Media is creating a connection with brands in a culturally authentic way. We have now quickly transformed into a multi-platform media company with large-scale distribution beyond TV and radio. We have Live TV FAST channels distributed with every major player, and we have direct to consumer content through AVOD platforms on Roku, iOS, Android Mobile, Android TV and Fire TV."

Then, there are the Estrella Media radio stations, with audio streaming available through the recharged Tuneln app.

Estrella Media has also grown its footprints on YouTube, Facebook, and Instagram.



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“We know it’s working very well because our partners love working with us, and we have viewers and listeners streaming nearly 800 million minutes per month,” Santaella boasts. “In addition, our original studio content and programming curation born out of Los Angeles is uniquely differentiated in the market for U.S. Hispanics.”

What sort of digital growth is Estrella Media looking forward to, and what can be said about any perceived or true gap to the total market?

“We have spent the past year standing things up,” Santaella says. “The next phase focuses on making the experiences exceptional — for our partners, our viewers, our listeners — and letting our biggest fans know they can easily access our content through our EstrellaTV App.”

Estrella Media’s goal is to have 1 billion minutes of streaming content available by year’s end, with one key objective. “We want to make it hassle-free to enjoy our content,” Santaella says.

Regarding gaps in the marketplace for the Hispanic audience, he notes, “You see many licensed movies and novelas across many of the content options out there, and you can find it on multiple apps. We are the Hispanic audience’s choice for focusing on fun entertainment — reality TV, competitions, game shows, comedy, and music content inspired by our lens of being unapologetically Latino.”

Estrella Media has also invested heavily in its news programming, with a focus on the U.S. Hispanic audience, Mexico, and Latin America. Live sporting events are also in the mix.

## THE AGENCY AWAKENING

While Estrella Media has demonstrated its prowess, quickly, in serving Hispanic consumers through digital and social media, have marketers responded?

Santaella comments, “We are seeing minority-owned and minority-focused investment initiatives from agencies and brands. It is driving a Hispanic awakening from agencies, but the fact remains that the Hispanic community is still underserved in the advertising community. During this sales season, we have seen a high demand for our content from advertisers, and we appreciate it. Our audience is key to business and brand growth in the U.S. For advertisers who have not bought into spending against Hispanics or Spanish-language content, we need to remind them that it is a business opportunity that will deliver results. The Hispanic population has the youngest median age at 30. It is an investment that will deliver results and build your brand for future growth. Hispanic buying power accounted for 11.1% of the total U.S. buying power, or nearly \$2 trillion in 2020, and yet ad spend against Hispanics is only around \$10 billion – it should be twice that.



Is there one category that stands out for Santaella as he completes his first year at Estrella Media?

“We have some great partners in Retail and Automotive — they get it,” he says. “We applaud their commitment to creating multi-cultural creative. Brands like **Target** know that 73% of Hispanics respond to ads and content that show ‘people like me.’”

Estrella Media is presently taking a greater look at categories such as Pharmaceuticals, where “the creative is only in English and nothing is in Spanish,” Santaella says. “We are making headway and having success. It is logical and important that Health – especially Pharma - should connect and communicate with the Hispanic audience in the best possible way.”

**“Hispanic buying power accounted for 11.1% of the total U.S. buying power, or nearly \$2 trillion in 2020, and yet ad spend against Hispanics is only around \$10 billion – it should be twice that.”**

What’s the biggest takeaway or observation Santaella has with respect to the dynamic of Hispanic social media and content – in English or Spanish – of particular interest to these consumers?

Santaella says “We know many of our viewers and listeners are watching English-language content on other platforms like Netflix or Disney. However, they come and watch and listen to our content because we fill a void in their lives for entertainment and news to connect with their culture, family, and friends. We know that 74% of Spanish-language Hispanics and 60% of Bilingual Hispanics wish there were more Spanish-language content options. There is a powerful desire and cultural identification to seek out Spanish-language or even bi-lingual content. We create this connection.”

**HMO**

### *Hey, Ref!*

When **René Santaella** isn’t at the office, he can be found as an AYSO coach, referee and board member in Region 76. He’s a big supporter of youth soccer and AYSO philosophies — Everyone Plays, Balanced Teams, Open Registration, Positive Coaching, Good Sportsmanship and Player Development.

# CONNECTING AT EVERY TOUCHPOINT

With more attention to digital platforms than ever before, how is **CNN en Español** serving audiences across online content distribution platforms? Are consumers and marketers responding?



“I would say absolutely,” says **Cynthia Hudson**, the SVP and Managing Director of **CNN en Español** and Hispanic Strategy at CNN. “If you look at the larger percentage of our current ad revenue, it is coming from the digital world and people who are looking at multiplatform as well. They are not just looking at one data point to make their decision but rather how we integrate the content across various platforms.”

For Hudson, that is today — and the future. “We have a highly mobile audience,” she notes. “Almost 80% of the people that come in to our digital sites come in through their mobile devices. They are engaging with us in different ways. If you at how our monthly unique visitors play out as well on our social media accounts, then you start seeing this pattern of people who are basically following the brand wherever they are at the moment.”

That’s where things are going, Hudson believes, and why “it made a lot of sense” two years ago when a restructuring of CNN put a focus on the forthcoming CNN+ platform, and what it would bring to consumers come 2022.

“When I work with my teams, I tell them, ‘You are not a TV producer. You are a content generator for a series of screens, and we need to be thinking about how we do that,’” Hudson says. “That’s been a very big change in workflow, but I’ve been doing it for the last five years at CNN en Español because we are such a small group that my same folks that produce TV are in many cases producing digital content, working with specifically digital producers to elevate that content in digital as well as in social, and that’s where we are seeing our success.”

This sees content re-edited, and not simply taken from linear to digital vehicles. “You can’t just say, ‘I’m going to create this and it is going to matter in the exact same way everywhere,’” Hudson believes. “There’s different modalities that you want to look at in terms of how you select something that might go on a TV screen versus how that might play out on a mobile phone, and how that might play out on a social media platform. That’s where those things then get customized.”

How people engage with content across all of these different platforms is perhaps paramount to digital prowess for a media brand.

“If they wanted it all the same, perhaps they wouldn’t need so many platforms,” she says.

## **BIG DATA, GRANULAR ANSWERS**

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With consumers connecting with CNN en Español across multiple touchpoints, one wonders if “Big Data” is aiding CNN en Español in reaching its digital ad sales targets while also building its non-linear audience.

Hudson comments, “What we are all looking for is very specific targeted users. What happens with the ‘Big Data’ is that an advertiser may say, ‘Well, I’m really very interested in finding young women or young men who are highly educated and who are affluent and well-traveled and who are going to be gravitating toward business content.’ We need to pull together all of sources to say this is why we think your best rotation buy is ‘this,’ because this is how we believe *our* audience, which fulfills *your* category, is using that content and is going to deliver that audience.”

That, to Hudson, is just a reality of having more data, and being able to be much-more fine-tuned with regard to projecting how to create content. The data also helps in understanding how advertisers are choosing to spend their money and where they want to be with the audiences they are looking for.

When one looks at the distribution of content, and in particular at CNN en Español, is there a delineation point between using social media as a content distribution platform, or as a promotional stage, designed to drive traffic from social media to CNN’s linear and digital channels?

Hudson says it’s a combination of both.

“We do use it, definitely, to promote,” she says. “But I also think that if you start digging in deeper you’ll see that we do create content specifically for Facebook and specifically for our Instagram viewers. There is content specifically created for YouTube, and we are about to launch a couple of TikTok products. We recognize that it is a very interesting platform that drives a lot of younger users.”

Indeed, if one looks at the average age of who watches CNN en Español, TikTok doesn’t seem too odd for a brand squarely focused on news, insight and observation.

That said, CNN en Español’s content is very different than the CNN seen in the U.S., just as CNN International is different for English-language viewers around the globe. “In the U.S. we have become known for being non-political and for being neutral in our coverage,” Hudson says.

At the same time, on the day famed Rolling Stones drummer Charlie Watts died, CNN en Español — in the 6pm Eastern hour — devoted a lengthy segment to the rock ‘n’ roll star. To the non-Hispanic buyer on Madison Avenue, that may be surprising. Yet, “Los Rolling” are just as culturally relevant to generations of viewers across Iberoamérica as the Stones are to those in Indianapolis.



That's another *aha* moment that is only solidified by how Hudson oversees CNN en Español. "If you're a Spanish-speaking person, and we turn 25 years old in 2022, and how we rate against brands in Mexico, when you think about what people see in CNN en Español they see a brand that does not look at news from a very narrow-focused lens. To say we are going to cover Vicente Fernandez getting sick or the death of Jenni Rivera is too narrow. We cover pop culture and general entertainment."

That's an approach the biggest news brand in the Spanish-speaking world, *El País*, has maintained for decades. In Argentina, *Clarín* and *La Nación* take the same approach. For Mexico, with more than a half-dozen daily newspapers available, cutting through the clutter has worked for CNN en Español by taking a page, if you will, out of the global press philosophy of bring the world to its viewers.

Today, that includes digital and social platforms, with intelligence fueled by data.

**HMO**

### *FAST Love*

With "FAST" channels changing the perception of what "live TV" is for some consumers, how is **CNN en Español** staying top of mind with Latino consumers?

**Cynthia Hudson** says the network will soon be launching on one of those "FAST" services. "We will be there," she promises. CNN en Español is also continuing its direct-to-consumer product development.

"We have been doing a lot of testing of live TV on digital," Hudson adds, noting that consumers will have access to this by the end of 2021.

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# SEEKING GENUINE COMMITMENT

Given the current social environment and the renewed awareness of how priorities for Hispanic audiences are evolving, brands have started to dip their toes into the uncertain by reaching out to ask questions and have open discussions about how to better leverage the “New Hispanic” audience.

That’s the vantage point of **Gisella Fu-Ripp**, the Director of Sales and Marketing at **LATV**, today a digital-first content platform focused on bilingual, bicultural Latinos. She’s held the post for nearly a decade, following positions in both broadcast TV and radio. From 2001-2003, Fu-Ripp was a local sales executive for WADO-AM in New York, the market’s spoken word station serving Spanish-language audiences.



With 2022 fast approaching, Fu-Ripp believes some brands have gone full force with commitments and openness to start the Hispanic outreach process through marketing and advertising on LATV. In contrast, others have stepped back, retreating to a mindset of what feels more comfortable, and safe, for them.

That said, as LATV revamped and reintroduced a complete digital offering at the beginning of 2020, it has seen rapid growth when compared to its historical digital engagements. It’s not good enough for Fu-Ripp. “In comparison to the total market, there is still a huge gap, and that has to do with marketers’ adaptation to new audiences and niche media partners being ready to supply that demand,” she says. “As we gear up for the next phase of digital growth, we are hoping we can close those gaps as we introduce new and exciting capabilities.”

LATV has seen increased investments and commitments from many new advertisers. But, Fu-Ripp laments, “genuine commitment” is the pressing issue when it comes to the level of investments “in the niche Hispanic media space.” She says, “We are hoping this is not just a wave but a true commitment of continued support and investment growth over time to help media partners grow and bring new data to the market. The hope is that with a shift in investments it will help jump start and reshape the current audience pools of Hispanic data that everyone buys into today.”

Meanwhile, brand categories including Telecommunications, Automotive and Retail have created the most traction. In a time of “content saturation,” audiences are increasingly looking for an authentic connection and representation.

“As we know, the U.S. Hispanic audience is rapidly changing,” Fu-Ripp notes. “It is more and more fully bilingual. English represents their day-to-day living, while the use of Spanish is a connection to their roots. Mindfulness of the actual lifestyle that surrounds these consumers is vital, beyond stereotypical personas.”

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## DATA: THE FOUNDATION OF TODAY'S MARKETING AND MEDIA PLANS

In 2020, the *Hispanic Content, Data & Social Media Report* offered coverage of how the New York-headquartered integrated, multi-service, minority-and-woman-owned independent agency **d expósito & Partners** has long incorporated data into its marketing and media buying and planning initiatives.

How has this aided the agency across the pandemic and today, as plans for 2022 are coming to fruition for its clients in the U.S. Hispanic market? **Louis Maldonado**, Partner and Managing Director, shares his thoughts in a Q&A session conducted in early September.



*LOUIS MALDONADO:* The widespread shift to digital channels and platforms during the pandemic included Hispanics, so utilizing data is even more essential to everything we do since it's the foundation of marketing and media plan. Over the last year, our agency invested in new tools and data platforms to help with advanced targeting, like **Resonate**, not just to reach them more precisely but to mine for insights we leverage in our content strategies and creative messages. We can now utilize data to drive efficiencies through programmatic buys while also serving more impactful messages throughout the customer journey. This has been pivotal for driving leads and client sales on e-commerce platforms at a time when more people are opting to shop from home.

One caveat we still keep in mind is that not all data sources are inclusive of all segments of the Hispanic population, particularly third-party sources. So, we do have to tap multiple data sources, both traditional and big data, to conduct a full analysis that ensures the outputs more precisely reflect the full Hispanic target that our clients seek to engage.

*What sort of digital growth has been seen for the U.S. Hispanic market of late, compared to that seen in the total market? Is there any improvement from 2018, when a gap was seen?*

*LOUIS:* The Ad Age 2019 Hispanic Fact Pack showed Hispanic digital investment was flat versus what was reported in the 2018 edition, at \$2.2 billion versus \$2.1 billion dollars the prior year. The 2020 industry-wide outlook is still a bit nebulous, particularly since reporting on Hispanic digital investment still significantly lags total digital investment and those numbers are still to be released. However, I think it's safe to assume that a large gap still exists today, since the 2019 report showed a 16.9 percentage point gap when comparing the share that digital channels comprise of total Hispanic media spend to the same share for diverse, mainstream media. Even if the share of total spend improved due to the increased importance of digital channels during the pandemic, it's likely due to decreased investments in Hispanic above-the line media as a percent of total spend. As has been well reported, the pandemic has negatively impacted the Hispanic market, and, unfortunately, we saw that hold true for investments in Hispanic advertising and media.

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As I said last year, Hispanic digital and social media behavior is increasingly language-fluid and reflects our increasingly bilingual and bicultural nature as a collective. There are still widespread assumptions that Millennial and Gen-Z Hispanics are not as connected to our culture as prior generations and are less likely to consume content from Hispanic digital channels. Thankfully, a [customized study](#) by the Hispanic Marketing Council (HMC) found that these younger generations still spend about half of their time online consuming in-culture and in-language content (43% for Hispanics ages 13 to 17 and spent 53% for Hispanics ages 18 to 49). These are learnings that we need to socialize as an industry, particularly since these misguided perceptions can take time to correct.

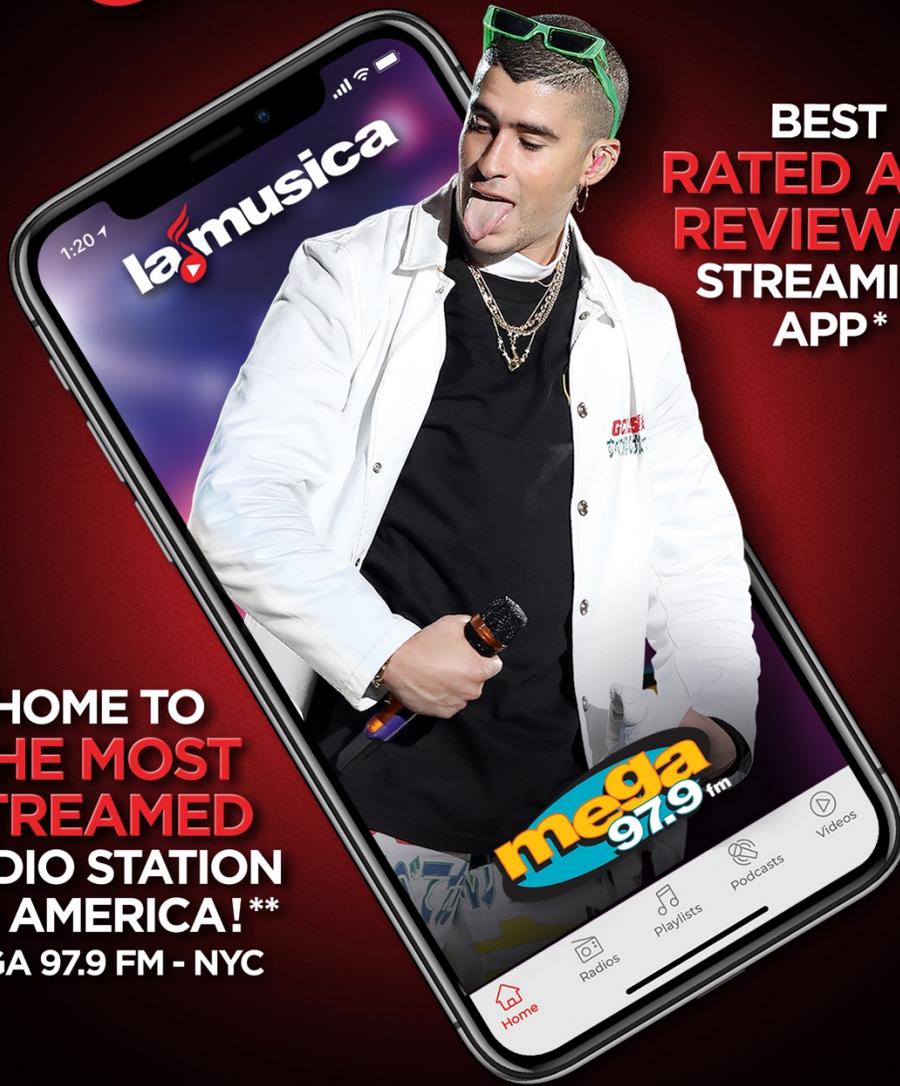
*Are investors investing more in Hispanic media, as African American commitments – deservedly so – have increased from marketers? Or, are those dollars still to come?*

*LOUIS:* By now, I wish I could answer that question with a resounding yes, but unfortunately I can't. At its most recent member meeting, the ANA Alliance for Inclusive and Multicultural Marketing (AIMM) shared results from their latest survey conducted with PQ Media, which reported that there was actually a decline in Spanish-language media investment as a share of all advertising spend, from 10.9% in 2019/2020 to 5.9% through September 2021. One would think this wouldn't be the case given long-term growth trends, where Hispanics have accounted for just over 50% of the total population growth since 2000. Over the last 20 years, we've increased our share of the total population from, 13.5% to 18.9% now, and yet research continues showing that Hispanic ad spend is nowhere near where it should be given the business opportunity and the consumers' ongoing connection to our culture.

This could be a result of a couple of factors, the first being the growing diversity of the U.S. population as a whole, combined with a misguided assumption that Hispanics are blending into and influencing the multicultural mainstream enough to the point that they can be reached through broad market initiatives. While there is a degree of truth to this, it's not enough when one considers the size of the Hispanic market, our connection to culture and language, as well as the role our cultural roots have in shaping our sense of personal identity. A May 2021 study by the Pew Research Center showed that not only are 77% of Hispanics very familiar with their roots, 71% feel a strong connection to their culture. What's more, over half (54%) of all Hispanics said that their Hispanic upbringing is central to their individual identity, both for foreign-born (61%) and US-Born (51%). So, the facts are that, yes, we are highly integrated into a diverse U.S. society and we have greater levels of English proficiency across all Hispanic segments, including English. However, we still define ourselves as Latinos and see this as unique and central to our personal identities. At a time where brands need to connect in ways that are authentic and on the consumers' terms, Hispanic-targeted channels with in-culture content and advertising are critical components to effectively engaging the primary growth consumer segment in today's new America.



# la musica



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Source: \*Apple App Store + Google Play App Store; User Ratings and Reviews

\*\*Nielsen Digital Streaming - January 2021 PPM for all 48 Markets, Average Quarter-Hour Persons 12+, Mon-Sun 6am-12m

The second is a somewhat poignant de-prioritization of the Spanish language and its role in helping Latinos connect with their culture and identity. This could be driven by Census numbers that show a growing share of U.S.-born Hispanic population, as well as research that shows [a decline in the percent of Hispanic households that speak Spanish in the home](#). However, given the growth of the entire Hispanic population, the [Pew Research Center](#) estimates that the number that speak Spanish at home is greater than ever before; estimated at just under 40 million people, which is larger than the entire Hispanic market back in 2000 (35.5 million). What's more, because of our strong connection to culture and the desire to pass it on to future generations, 86% of all Hispanic parents say they speak Spanish to their kids, which includes nearly three-quarters (71%) of second-generation Latinos and nearly half (49%) of Latinos that are third-generation or higher. Additionally, while the foreign-born share of the population has declined over the decades, [the absolute number of foreign-born Hispanics has increased by over 10 million people](#) since 2000. We anticipate a continued influx of immigrants from Latin America, which perpetuates the need for Spanish-language media and advertising. All of the above data points indicate that our community's connection and use of the Spanish language will only be reinforced in the years to come.

As it pertains to advertising, a multitude of quantitative studies have shown that in-culture ads targeting Hispanics in either language drive critical measures like ad recall, message comprehension, brand affinity and purchase intent. This has proven to be true even for English-speaking Hispanics viewing a Spanish-language ad, precisely because of their connection to culture and the fact that a brand recognizes the importance of the Hispanic community and our unique aspects as consumers. Now, some may ask if more English-speaking Hispanics would ever see these ads outside of quantitative research, and the [HMC research](#) showed that this answer is absolutely a resounding yes; where 80% of Hispanics ages 13 to 49 choose to watch Spanish-language TV as part of their regular viewing, and 40% stream video on-demand in Spanish.

The headlines about the 2020 Census results touted the ongoing growth of multicultural populations, driven by Hispanics, but these are not new news and are really more validations of long-term trends that have continued for the past 20 years. It's puzzling and frustrating to see the decline in Hispanic media spend, but perhaps 2020 Census results and other research that speak to the ongoing connection to culture and how it shapes individual identity will help clients see the importance of specific Hispanic-targeted efforts even when broad market communications are more inclusive and reflect a diverse mainstream population.

*Are there any particular trends that you are seeing with respect to the use of social media and programmatic among your clients seeking to reach U.S. Hispanics? Is there one category that stands out?*

*LOUIS:* In April, Pew released its [Social Media Fact Sheet](#), which shows Hispanics outpace in other groups in the use of social media (Hispanic 80%, Black 77%, White 69%), particularly on leading platforms like Instagram, TikTok, Snapchat, Facebook and YouTube. This is just the latest study that corroborates other by Comscore and other sources, and it shows a continuation of a long-term trend. Our agency has increased investment in social media advertising on behalf of our clients because of the value social brings in connecting on a lifestyle level and in a way that can help convert to transaction through an e-commerce platform. That's certainly the case with **Tajín**, which has very much become a lifestyle brand and has seen dramatic increases in e-commerce due to the pandemic.

*What's the biggest takeaway or observation you have with respect to the dynamic of Hispanic social media and content – in English or Spanish – of particular interest to these consumers?*

**LOUIS:** It is how social media has gone beyond being a facilitator to connection to becoming integrated into all aspects of our lives. This is true for everyone, but Hispanics over-index in most things related to digital and social media. Before 2020, it was already widely reported that Hispanics were more likely than the general population to use social sites to learn about products and services and more likely to share their product/service experience on social media. We're also long-time users of WhatsApp and Facebook to send messages and to place video calls. We've only increased our use of social to the point that it's now intertwined into everything we do.



We've gone beyond using social media for interpersonal communications and now use it as a substitute for when we're not able to gather in person. Prompted by lock-downs and social distancing, we started using social out of necessity for funerals, rosaries and masses for loved ones we lost, and that transferred to virtual versions of other gatherings, both traditional and new ones. We also saw avid use by the Hispanic Influencer and Creator communities, and they've become an increasing source of information, entertainment and inspiration for Millennial and Gen Z Hispanics because they can relate to and connect with them both personally, culturally and in their language, be it English, Spanish or a combination of both.

**HMO**

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### [U.S. Latinos are Primed for Podcasts - The Non-Listener](#)

Forty-four percent of U.S. Latinos have never listened to a podcast and 20% have not listened to a podcast in the last month, but a new study finds that 67% of U.S. Latinos who don't listen to podcasts already listen to spoken word audio.

### [The Latino Podcast Listener Report 2021](#)

The Latino Podcast Listener Report 2021 from Edison Research finds that 36% of U.S. Latinos age 18+ (16 million people) have listened to a podcast in the last month, which is a 44% increase over 2020 (25%). This is narrowing the gap with the overall 18+ U.S. population, of whom 40% are monthly podcast listeners. New research shows that this dramatic increase comes from both English-dominant and Spanish-dominant listeners.

# Why Big Data Will Be Your New Best Friend

That's the catchy subject line of a September 9 communique from the **National Association of Broadcasters (NAB)** in which the broadcast media advocacy group makes the following declaration:

*Everything is now a data point. We are all "sensored." Devices are networked to the Internet of Things. Data collection is automated, and decisions based on its aggregation are taken machine-to-machine in real time.*

How is this usage evolving and where will data science take us? **Adrian Pennington**, a veteran media and technology editor based in Liverpool, England, turns to **Bernard Marr**, a futurist who offers "six signposts that point the direction of travel between where we are today and where data science will take us in the future.

- AI As A Service
- Content Creation
- Small Data
- Edge Analytics
- Citizen Data Scientists
- Ethical and Responsible AI

[To read Pennington's article in full, please click here.](#)

The release of the report came prior to the decision on September 15 by the NAB to cancel the 2021 NAB Show and all concurrent events, including the "OTT Event of the Year," the Streaming Summit. It had been planned for October 11-12 in Las Vegas, Nevada.



HMO



# Hispanic

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Source: U.S. Census Bureau (2020)

# BIG DATA: TRULY A BIG DEAL

“Big data” and data science remains a big topic. As seen in the preceding pages, communication from the broadcast media trade organization **NAB** put “big data” front and center, calling it “your new best friend.”

Is that an overstatement? What role does data play in your decision making on behalf of your clients? That’s a question we asked to **Julio Arrieta**, Managing Director and Chief Marketing Officer of Houston-based **López Negrete Communications**.

In his view, it is not an overstatement at all. In fact, López Negrete Communications subscribes to the broader statement recently stated by *The Economist*: “The world’s most valuable resource is no longer oil, but data.”

That’s why Lopez Negrete maintains a mantra to start and end with the data.

“Our first step on every assignment is look at the data we have available from the client, identify the gaps and then figure out where and how we can source the additional data required to accurately profile the Hispanic audiences that our clients seek to attract and engage,” Arrieta says. This allows his team to make decisions based on facts across every step of the campaign development process.



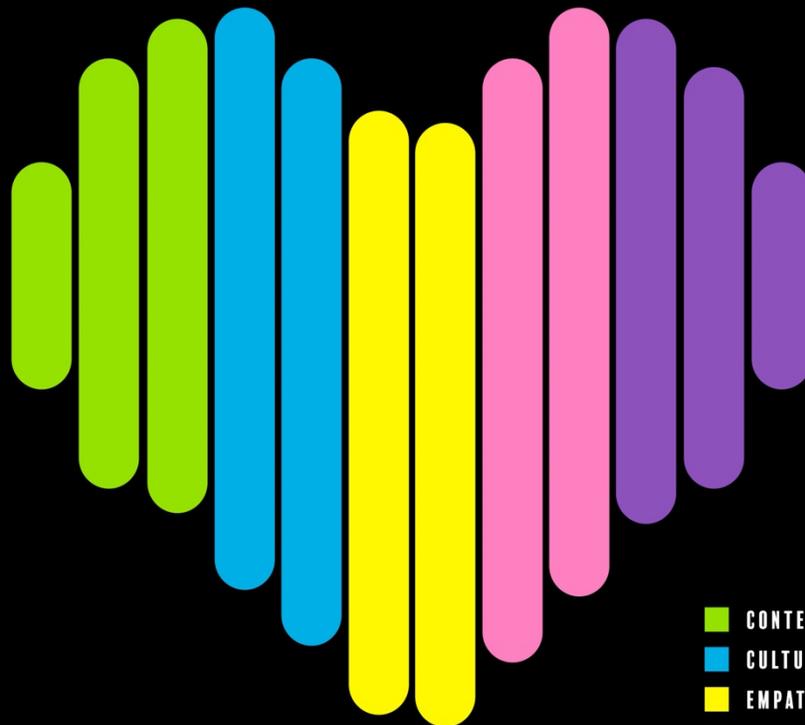
“And it’s not only having the data, it’s also about who and how you look at the data and what you ascertain from it; to get the ‘Maximum Return on Cultural Intelligence’ from any data set, one must understand the context in which was sourced and how it connects to culture. Our strategic business unit finds the ‘heart’ in the data,” he continues.

Is data driving the digital and online growth of the efforts of Lopez Negrete’s clients in the U.S. Hispanic market? And, if so, has this changed anything in respect to the planning process, from both the creative side and perhaps the media buying side?

“Data is a key driver of digital and online growth for the U.S. Hispanic market,” he says. “In our experience and given Hispanic ‘technographics,’ it automatically makes the continued and incremental increase for Hispanic digital investment. Data empowers us to show that our work works. When we develop and measure content that organically increases engagement, it helps us understand the magic of content that resonates with a very specific type of customer and that more budget should be assigned to that specific Hispanic initiative.”

As it pertains to the strategic planning process, data is at the core of it, Arrieta says. “As I mentioned, we start and end every campaign with the data. Data enable us to define a robust audience profile and persona with detailed technographics, psychographics, granular channel consumption, attitude and

# DOES YOUR DATA HAVE HEART?



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usages for a specific category or product and fuel the development of insights, and the fertile territories to explore to develop empathy between our client brands and the Hispanic consumer. It also helps us map the touchpoints through the consumer journey on which our creative – our liquid idea – must be manifested. Finally, this deep understanding of the Hispanic Persona, guides the media planning and buying process.”

## THE SOCIAL LENS, AMPLIFIED

At López Negrete Communications, social media is “absolutely” a focal point.

That said, “Social media campaigns work best when its content must provide consumer value,” Arrieta believes.

This, he adds, is what stops consumers from scrolling to the next post and inspires them to engage.

“The different dimensions of value this content provides — badge value, monetary value, access value — must be aligned with the realities and architecture of the brand across the entire purchase funnel,” Arrieta says. “Developing that content strategy by fleshing out the social manifestations that align to the brand and the specifics of the targeted audience and then deploying it, measuring and optimizing it is a huge job ... and too much responsibility for a single team. It should be done in collaboration with the strategy, media, PR and social and analytics teams. It’s too big and critical of a job for only one team.

Are there any particular trends Arrieta is seeing with respect to the use of social media and programmatic among LNC clients seeking to reach U.S. Hispanics? Is there one category that stands out?

“The fact that 24% of TikTok users are Hispanic is telling sign that our consumers are continuously seeking for new ways to express, create, connect and stand out,” he replies. “We are also seeing growth on platforms that help create topical communities, like **Discord**; this one is logical given our need to connect, learn from each other and unite around specific topics and that Hispanics have always over-indexed on gaming, the origin of this platform. In some Hispanic Personas, we are also seeing strong **Reddit** numbers. If it’s new, it’s very likely that our Hispanic consumers are already there, trying it out, experimenting and finding culturally unique ways to create, express and engage.”

“Developing that content strategy by fleshing out the social manifestations that align to the brand and the specifics of the targeted audience and then deploying it, measuring and optimizing it is a huge job ... and too much responsibility for a single team. It should be done in collaboration with the strategy, media, PR and social and analytics teams. It’s too big and critical of a job for only one team.”

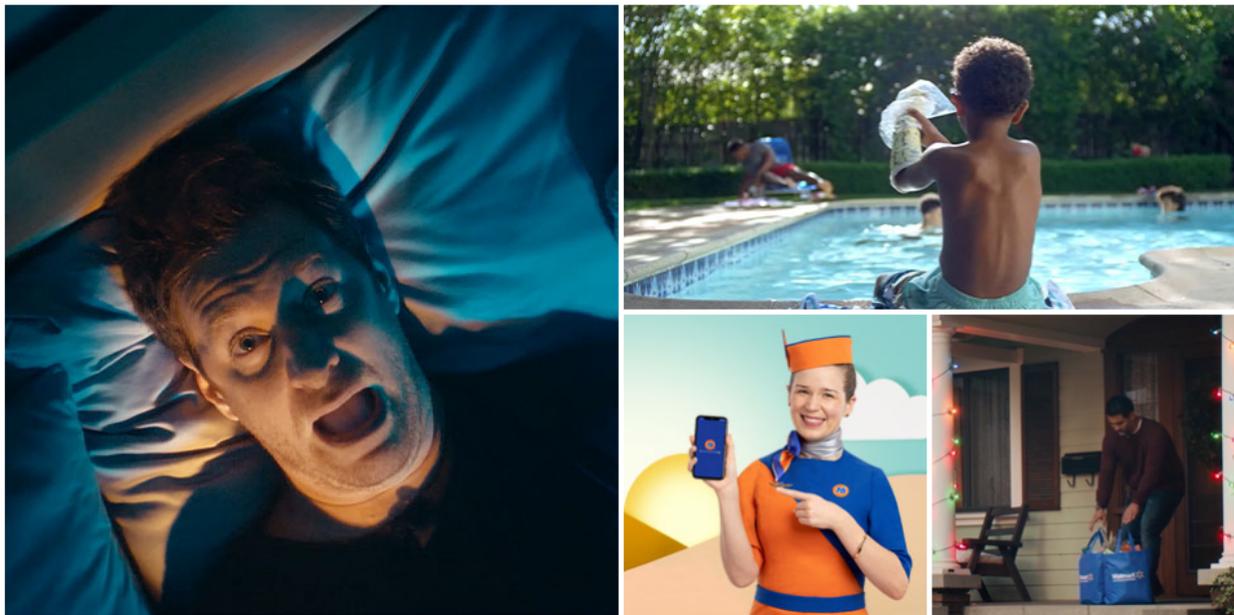
What’s the biggest takeaway or observation Arrieta has with respect to the dynamic of Hispanic social media and content – in English or Spanish – and how marketers are using this alongside – rather than as a replacement for – linear media including TV, radio and magazines or direct mail?

Arrieta splits its answer into two parts, first dealing with the takeaway.

“As much as possible, marketers should think of consumer ecosystems for a campaign and not a collection of individual channel actions,” Arrieta says. “Multi-screen viewing, the cultural fluidity of our audience, multigenerational householders — they all create complex content consumption dynamics that one tactic working in isolation can’t solve for. An ecosystem that supports the consumption, engagement, co-creation and sharing of brand content/message driving to the right points in the purchasing journey, and a strong data measurement always yields best results.”

Regarding the observation, Arrieta concludes, “There’s an untapped opportunity to support Hispanic-owned media properties and creators; there isn’t an easier way to identify media alternatives that resonate culturally than going to the creators. And, by design, they provide better Hispanic-specific data and measurement than non-endemic platforms.”

## HMO



*Some of the recent work conducted by López Negrete Communications, for (l-r) Mattress Firm, Walmart and 76.*

# BEING RELEVANT AND TIMELY, THANKS TO DATA

There's no question that digital and social media growth in the U.S. Hispanic market is ripe for acceleration. How can good research help shape the content and drive better advertising opportunities?

**David Mesas**, VP of Business Development at Claritas, which entered the space through its acquisition of Geoscape from Cesar Melgoza, believes that the more you know about your best customers, the better you can personalize the content and offers you make to Hispanic shoppers.

"All of the successful digital and social campaigns we're working on with clients are highly personalized and in-culture offers that speak one-to-one with each consumer," he says. "The campaigns with the best results are from brands that know their customers best and produce content powered by these insights."



As Claritas continues to see increased investments in digital and social media, Mesas believes it is important that brands continue to invest in understanding who their best customers are and what drives them to purchase. He says, "The last two years have shown us that those customer profiles can quickly change, and so can the best methods to reach them. We saw an increase in marketers investing in multichannel campaigns to connect with Hispanics both via online and offline channels. Combining the power of digital, social, email, and direct mail to significantly increase response rates."

As such, a focus on the customer journey requires two key needs: being relevant and timely, when and where the right Hispanic audiences choose to engage. "Digital and

social continue to play a vital role, but so are other online and offline channels," Mesas says. "The most effective marketers are the ones who have the deepest understanding of who these audiences are, what's important to them and where they engage throughout their entire purchase journey."

With audience psychographics and drill-downs still very important to marketers, how is Claritas working to ensure they have all of the data they need?

Mesas says, "We're consistently optimizing and updating the data available on Hispanic consumers to ensure everything is current based on ongoing changes in the marketplace. It's our goal to provide actionable insights that allow marketers to connect with Hispanics in-culture, in-language, and in the media they consume."

How are specialists such as those at Claritas helping its clients better understand the data, and better their decision making? "We always recommend a client start with leveraging their first party customer data," Mesas says. "We help them identify and understand their best Hispanic customers."

This includes segmenting beyond basic demographics and language usage. "We work with them to create profiles of their most loyal Hispanic customers, the ones who have the highest propensity to buy



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### Claritas has just released the 2021 version of our popular Hispanic American Market Report.

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their brand,” Mesas says. “For the clients with no customer data or a limited CRM database, we can tap into various datasets to identify the profile of their best prospective customers based on the client’s industry, shopper behaviors, demographics, and our segmentation systems. This process will identify the profiles of shoppers who have the highest propensity to buy the category and/or brand.”

Once the profiles are defined, Claritas will use them to build lookalike audiences they can reach via digital, email, social, and other channels. These same profiles, Mesas says, can be used to measure the results of the campaigns, giving clients a view into which segments performed best and drove the most sales.

That’s why Mesas is involved that increased investments by brands and their agencies to reach Hispanics will continue unabated.

“The proliferation of digital audience data is making it easier for marketers to connect with larger Hispanic audiences and measure the results in real time,” he says. “The key is the power that data gives you to attribute sales and results back to Hispanic digital media campaigns. Brands are now seeing a direct link between their digital investments in Hispanic audiences and measurable sales growth.”

## HMO



Claritas has just released a 24-page report that VP/Product Strategy Ron Cohen believes contains some valuable insights that can help to flesh out a brand manager’s Hispanic marketing strategy.

To learn more and to receive a copy of this report, visit [www.claritas.com](http://www.claritas.com) or call 1-800-234-5973



Everything a marketer needs to know about Hispanic consumers, media, top advertisers and trusted agencies.

## The HMC 2021 Hispanic Market Guide

To arm them with the cultural insights needed, the Hispanic Marketing Council (HMC) has released its 2021 Hispanic Market Guide, the most comprehensive resource on the U.S. Hispanic market.

The new guide is now available to view online or download for **FREE!**

**HERE**



# HOW TO PROPERLY USE THE DATA

It's been said repeatedly over the last 15 years, at the very least, that the "sheer size of the Hispanic market" makes it ripe for brand growth, given its strong ROI qualities.

Yet, here we are in 2022. The same old stories are being shared. Some marketers nod their head, and then invest in Black-targeted media if a multicultural ad dollar allocation must be made.

While the numbers certainly speak from themselves, the use of data is a precious aide that can eloquently take those numbers and turn them into prose.

"The numbers work to our benefit," says **Lili Gil Valleta**, founder and CEO of **CIEN+**, a cultural intelligence consultancy and marketing firm focused on diverse consumer groups. "If we let the data do the talking, there is no other path to accelerate growth."

As she sees it, data is a means to an end. And, it is what any disciplined business owner uses to make proper and prioritized business decisions. Still, Gil has an important point to make with how to use the data.

"The data is only as good as our ability to integrate it and embed it into our business plans," she says. "That is, not into the *Hispanic* business plan. That is, into *The Plan*. Long gone are the excuses that I don't have the insight or I don't have the data."

That's because insights and data are now coming with an inclusive lens. "Anyone that is not looking at the data with an inclusive lens today is just not trying hard enough, because the data is out there and available to understand."

In Gil's view, media companies arguably have the pulse of what has cultural resonance and emotional connection within the Hispanic consumer segment and its sub-markets. In fact, they have a greater degree of marketing intelligence than running a focus group or a cultural intelligence exercise, she says, as "there is power in what entertainment consumption tells us with respect to content and culture."



**"Anyone that is not looking at the data with an inclusive lens today is just not trying hard enough, because the data is out there and available to understand."**

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For example, the ABC sitcom *Modern Family* can show that a Hispanic storyline embedded into a mainstream content vehicle “can supercharge it and make it resonate with all of the viewers,” Gil says.

In Gil’s view, this suggests that cross-sharing with brand partners is an essential for attracting ad dollars, and maintaining a successful data-rich marketing campaign. To accomplish this, determining what is resonating with the hearts and minds of Hispanic TV viewers can help establish the best ways to connect with those who live a connected life.

It’s a benefit for the linear media company competing against digital media, as TV can “intercept them differently,” Gil says of marketers seeking Hispanic consumers.

## **TWO LANGUAGES, NO BOUNDARIES**

When Gil is asked to think of the ways data has helped in engaging the U.S. Hispanic audience, in particular since the start of 2021, she notes that the cross-pollination of language is key to understanding the Latino consumer of today.

“Before, it would be rare to watch non-Hispanic media, if there is such a thing, and be surprised with a culturally infused or bilingual message,” Gil remarks. “Now, I see Bad Bunny in Spanish in a spot for Cheetos when I watch anything in English because he happens to be the most-streamed artist of 2020 according to Spotify.”

Indeed, the role of cultural cues as a new mainstream – a new phenomenon – is shifting the rules of what data point one is tracking. What started for music and entertainment has now spread to advertising. As such, the ROI test is now what a Spanish-language spot is delivering for all consumers, not just Spanish speakers.

The concept is perhaps mind-blowing for some. However, it speaks loudly of how cultural relevance, at the heart of Gil’s work, is a paramount concern for CMOs and brand managers that truly want to see growth over the next decade.

Factor in digital media, and the increased access to choice only fuels this sense of cultural relevance as the overpowering concern for a marketer. “Greater access comes with a heightened expectation for things they want to come and search for,” Gil says. “It reinforces the demand for personalization. And, as the long tail of destinations gets longer and longer, not just one outlet can hold they keys to the kingdom.”

That, Gil believes, “is totally tripping us up in our media plans, because choice means going beyond assumptions.”

With ATSC 3.0 and the voluntary rollout of NEXTGEN TV by broadcast TV stations, addressable advertising is coming to over-the-air TV channels. Thus, personalization by the end of the decade will nearly be a requirement as niche destinations also benefit from marketers savvy enough not to look down on them and instead make them “emotionally invested partners.”

Gil comments, “What makes it into that grid when you turn on the Roku? Who holds the keys to those who control the content? The rules of engagement are changed, and emotional connection is more important than ever.”

## A CALL FOR INCLUSIVE ANALYTICS

As the U.S. Hispanic marketing and advertising community continues the discussion about inclusion and diversity – something Gil describes as “this tokenized idea that we are all in this together” – she warns that it is ultimately the way the data is gathered and subsequently used that matters most.

“We cannot be inclusive if our data and analytics are not inclusive,” Gil says. “It is not fixing the casting at the last mile of the creative process. It is channel and partner strategy mapping that is informed by the numbers that show you where the opportunity is. If we were as disciplined to include this inclusive data upstream as marketers, then the share going to the U.S. Hispanic market would be much larger than it is today.”

That’s why she believes that a “very different and disruptive” way to get data – social listening on steroids, if you will – carries weight with marketers.

“We have done so much to understand what being Hispanic really means to people,” she says. “It is about moving beyond things that are tokenized and interpreting the data differently.”

## How U.S. Hispanics Define Their Culture



CIEN+ | 1

Source: CulturalIntel study on Cultural Heritage, 2018, based on 5MM online conversations over a 12-month period ending in June 2018

HMO

## ABOUT THE AUTHOR

**Adam R Jacobson** is the publisher of *Hispanic Market Overview*, an independently produced annual White Paper that provides multicultural marketing and advertising professionals key information and fresh reports on what is driving the industry.

In addition to the annual *Hispanic Market Overview* report, launched in 2010, quarterly *HMO* reports produced exclusively for HispanicAd, including this report, offer specialized reviews of key topics of key importance to Hispanic market professionals.

The *2021 Hispanic Content, Data & Social Media Report* is in its fifth annual editing and joins the *Hispanic TV Upfront Report* and the *Hispanic Market Thought Leaders* reports.

Outside of his role with *Hispanic Market Overview*, Adam is the Editor-in-Chief of Streamline Publishing-owned *Radio + Television Business Report*, an online business journal serving the U.S. broadcast media industry. He has held this role since August 2016, which includes hosting the *RBR+TVBR InFOCUS Podcast*.

Adam's extensive career includes roles as a Multicultural Analyst for Mintel, as the Principal Analyst for the *Hispanic Radio Today* annual report, and as a corporate sales and marketing consultant for Adelante Media Group and Davidson Media Group. He has also served as an editor at *Hispanic Market Weekly* and held several editorial positions at *Radio & Records*. Early in his career, Adam contributed to the launch of *Latina Style Magazine* as a freelance writer.

Adam resides in Delray Beach, Fla., with his wife, Dana, and has perfected his culinary skills throughout the COVID-19 pandemic.



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