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Hispanic TV Programming Report

The definitive guide for multicultural marketers and advertising professionals



Navigating the Stream

From free-to-air
viewing to "FAST"
channel growth,
where does the
marketer go?

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On May 4, it became known that the "Godfather of Hispanic Marketing" had died. **Eduardo Caballero** was perhaps one of the most impactful advocates for Spanish-language media — radio and television — in United States history. Early in his career, he was the Executive VP and Director of Sales for Spanish International Network, the predecessor to what is today TelevisaUnivision, the largest Spanish-language media company in the world. Later in his career, after creating a rep firm focused on radio and developing the syndicated CNN Radio Noticias, he played a significant role in launching the precursor to what became MTV Tr3s.

As dapper as they come, Caballero was at time gracious and elegant. At other times, he was demanding and determined to get what he desired.

CONTINUING THE FIGHT AGAINST GIANTS

For the most part, however, Caballero's spirit and drive to bring to Spanish-speaking Hispanics in the U.S. the content and advertising it deserved is how people will remember him. And, in some respects, Caballero's passing comes as the U.S. Hispanic market faces crucial questions on where the ad dollars should flow. From English-language Hispanic-focused digital outlets to the two linear media giants seeking to gain eyeballs via OTT platforms, the U.S. Hispanic consumer has more choices than ever. In fact, linear and digital platforms serving U.S. Hispanics could see a BIGGER year than predicted due to the Writers Guild East and West strike, which has already put the 2023-2024 season at risk for total market English-language networks.

What's to come can only be positive for the U.S. Hispanic market, and we have Eduardo Caballero to thank. Noted Washington, D.C., communications attorney Frank Montero said of Caballero in a *Radio Ink* interview, "Eduardo's trademark was the silhouette of Don Quixote and he wore that symbol on his business card, his tie clip, and his cufflinks. I once asked him at a lunch why he chose Don Quixote as his logo, 'Is it because you're chasing windmills?' I asked, and Eduardo replied to me 'No, it's because I fight giants'."

Let's continue that spirit and fight for what the U.S. Hispanic media community deserves from advertisers.

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Staying Bold and Bright

Once again, **Estrella Media** enjoyed a big presence at the IAB NewFronts, with a prime midday presentation focused on “explosive digital growth.”

Then, on May 9, a 30-minute virtual upfront presentation was distributed via YouTube and through [HispanicAd.com](https://www.hispanicad.com).

Sticking with its theme of being “bold and bright” and acting “stronger together,” Estrella Media believes it has the content — and distribution platforms — that make it perhaps unrivaled when it comes to advertisers who seek the multi-generational Hispanic consumers.

That said, there are subtle changes in how Estrella Media is going to market.

For starters, the NewFront presentation demonstrates how Estrella Media’s investment in FAST Channels and AVOD opportunities helped set the company apart from a content delivery and technology standpoint.



"We want to be one of those 'top 5' channel preferences, and the good news is that we are free. No matter where you access our content, we are ad-supported and we want to be hassle-free."



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"We have great content that our studio is making, and we are also unincumbered," says **Rene Santaella**, the Chief Digital & Streaming Officer at Estrella Media.

"Combine that with a new ecosystem or landscape, which is FAST, and it is a booming and opportunistic thing for us."

Santaella, who was joined by **Steve Mandala**, Chief Revenue and Local Media Officer at Estrella Media, and Chief Content Officer **Enrique Guillen** in an exclusive *Hispanic TV Programming Report* roundtable interview, notes that the company led by CEO Peter Markham is taking advantage of technology. This has allowed Estrella Media to get its channels in front of as many eyeballs as possible — regardless of the device they're consuming Estrella's content on.

"Our audience, which is primarily 25-44 year olds, who are most likely to be parents and consume Spanish-language media, [consumes] FAST channels," Santaella says.



Estrella Media then started to roll out its advertising-supported video-on-demand Direct-to-Consumer business. Santaella says this was a secondary strategy. "That's been successful, too, because as it turns out we have fans who are interested in going farther with our content — exploring more."

Owning the content Estrella Media offers, in Santaella's view, is a key draw and differentiation point — one that consumers and marketers alike have been drawn to. Getting that content in as many venues as possible has few boundaries. "We are entrepreneurial in how we are approaching the digital marketplace," Santaella says. "We don't care about walled gardens. We care about allowing our audience to watch their favorite content wherever they want to watch it."

With some Hispanic media companies putting a noticeable focus on video-on-demand, Estrella Media is indeed taking a different approach. Rather than provide exclusive content on digital platforms, its goal is to be everywhere, all at once, if you will.

"There are lots of big aggregators out there," Santaella says. "We're playing with all of them as partners. It's very difficult to tell a consumer you have to watch your content 'here.'"

In some cases, if you're a Disney+ or a Netflix, that value proposition can work. That's not Estrella Media's game plan. "We want to be complimentary," Santaella says. "We want to be part of the consumers' choice set. We want to be one of those 'top 5' channel preferences, and the good news is that we are free. No matter where you access our content, we are ad-supported and we want to be hassle-free. If it is on Samsung TV Plus or it is on The Roku Channel or it is on the Estrella TV app, however it is they wish to enjoy that show we want to be there."

A DIVERSE MULTICHANNEL PLAY

From an advertising perspective, having a fully digital option to go alongside the linear channels seems appealing. But, is the Hispanic market behind the curve because of ongoing total market stories that continue to make advertiser attraction challenging for Spanish-language media companies such as Estrella?

"I would disagree with the premise," Steve Mandala answers. "I don't believe that what we are seeing is any decline in the market. If anything it is very much the opposite. We continue to see interest in reaching diverse audiences. The message is very clear to marketers that their fastest path to growth is to speak to more consumers."

Estrella Media's audio and video audiences, Mandala adds, are incremental to what the advertiser is already reaching. "I will tell you right now ... our business is healthy," he declares. "The digital space in particular we doubled last year and this year we expect to do it again. The root of that is really based in the idea that marketers want to speak to more consumers. Every marketer seeks growth — it is the name of game today and the only path to doing it is to be sure that your message is everywhere that it can be."

And, with older audiences still consuming traditional cable TV and younger Latinos gravitating toward FAST channels, Santaella couldn't agree more with Estrella Media's diverse distribution opportunities.



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ESTRELLA'S AUDIO STORY

While Estrella Media's Estrella TV unit is driving the ad dollars and consumers for the company, its radio stations — focused on Hispanics west of the Mississippi River who tend to gravitate toward regional Mexican music genres — continue to offer unique value propositions to listeners and marketers alike. In Los Angeles, its "Qué Buena" brand is enjoying a ratings resurgence, making it one of the most-listened-to stations in the nation in its format.

Bringing this content to digital platforms for further monetization is ongoing.

Guillen, the Chief Content Officer, comments, "We obviously live in a world where content is commoditized and fragmented. In that world, cannibalization doesn't really work anymore. You have to give people what they want, when they want, how they want it, and we are agnostic about it."

Thus, Estrella Media is more "digital first" than one may think. In fact, experimenting with social media and YouTube is also being explored for as-close-to concurrent distribution. "Short-form, long-form, everything needs to have a play on digital," Guillen says.



It's been nearly one year since Santaella rose to the role of Chief Digital and Streaming Officer at Estrella Media. What does he see as the biggest opportunity, and the biggest challenge, in the year ahead?

"The biggest opportunity is just making sure that we keep up with our audience growth with the monetization and that's a great problem to have," Santaella says. Digital has a lot of moving pieces to it."

At the NAB Show in Las Vegas, held in April 2023, Estrella Media revealed that it is migrating from broadcast operations to all cloud-based connected TV operations. "That's exciting because it allows you to set up channels in an entirely different way," Santaella says of the transition, powered by broadcast tech company Amagi. It also allows Estrella Media to grow into international marketplaces, Santaella adds.

Regarding the biggest challenge, the biggest one Santaella sees is that "the Hispanic audience has a significant GDP that is not necessarily represented in ad spend for digital video yet. And that is coming. It takes time for budgets to be allocated and moved over. We saw it with Connected TV between 2015 and 2020. Now, there is an opportunity to move budgets to digital video for Hispanic, and it is just going to keep growing."

SHOW AND TELL

Upfront Week remains a key "show-and-tell" opportunity for broadcast media and the advertising and media planning community. A virtual upfront video was held May 9 with the theme "Bold & Bright – Stronger Together." Mandala comments, "We love the Upfront."

But, the pandemic told Estrella that there's another way to share the company's content story than having a live, in-person event in New York or a hosted dinner at an upscale Midtown Manhattan venue, as in years past. "This is actually more user-friendly for both agencies and marketers," Mandala said.



Three big themes were discussed in the Upfront presentation: Content, the **Estrella Media Audience Solutions** launch, and digital opportunities aligned with linear properties.

The April launch of "EMAS" is perhaps the biggest news Estrella Media has for marketers seeking more reach. An integrated commercial sales team, EMAS will represent the linear and digital radio and television assets of its own and partner companies. Yes, EMAS is a play on *y más*, a Spanish-language phrase meaning "and more." And, the EMAS team will represent not only Estrella Media properties but those of **beIN SPORTS** and **Hemisphere Media Group** — owner of the former Univision Radio Puerto Rico stations and WAPA Television, among other properties. The benefit to beIN SPORTS and Hemisphere, with a collection of MVPD-distributed cable channels found across Latin America and broadcast radio and TV stations in Puerto Rico, Mandala says, is that EMAS provides more options for marketers. Additional partners are forthcoming.

Antonio Briceño, Managing Director of beIN SPORTS U.S. and Canada, commented, "beIN SPORTS is very excited to partner with Estrella Media to play a key role in engaging brands through innovative advertising and sponsorship opportunities. There is significant value for brands looking to connect with fans in unique ways through the sports content that our platforms offer."

Francisco Gimenez, who serves as Chief Operating Officer for Cable and Digital Networks at Hemisphere, added, "Hemisphere has always been committed to its mission of super-serving the high-growth U.S. Hispanic audience, with the leading movie and drama networks and the top channels serving the Puerto Rican, Central American, and Dominican communities, the second, third, and fifth largest Hispanic communities. Hemisphere is committed to providing differentiated, relevant, world-class content that keeps our audiences entertained, informed, and connected. This partnership brings the leading independent Spanish-language networks together to help brands and agencies grow their ability to connect with these communities. We are stronger together."

If someone were to ask the team at Estrella Media what sets the company apart heading into 2024, Mandala says without hesitation the content it provides Latino consumers.

Guillen concludes, "We are an innovative media company that covers every avenue of distribution, and we are hyperfocused on West Coast Mexican-majority U.S. Latinos. From Texas to Los Angeles, there is no other media company that has the breadth and scope of that demographic."

HTVU

Among the programming highlights shared by Estrella Media:

- ***El Lavadero*** — hosted by Sergio Bruna, the 8pm offering coming in autumn 2023 sees a roundtable chat program focused on celebrity culture and topics of interest on that day.
- ***Tu-Night con Angelica y Nacho*** — a revisioning of what had been a late-night variety show helmed by Omar Chaparro. Now, it will be a satirical news and comedy offering that sees Angelica Vale and Nacho Lozano co-anchoring. It will air at 9pm with Lozano reporting from Mexico City and Vale in Estrella Media's Empire Center headquarters in Burbank, Calif. "We still have the option to do more with Omar as it is a different show," a company spokesperson tells Hispanic TV Programming Report.



venga con nosotros



"Come with us." That's the invitation from **NBCUniversal Telemundo Enterprises** shared on May 11 by the Comcast unit that includes "Tplus" — the U.S. Hispanic-focused programming component within the Peacock OTT platform.

There's, of course, much to share about the Telemundo network, but new details for Tplus productions are among the biggest of takeaways from NBCU in this year's Upfront season.

Sharing details of its 2023–2024 season ahead of its Upfront event, Telemundo is inviting brands to "Come With Us" as the network and NBCUniversal celebrates Latinos. The goal is to welcome marketers "to activate in recognizing their vibrancy, diversity, and far-reaching influence in American culture."

At the Telemundo network, the big prime-time draw is the 9pm Eastern telenovela *El Señor de los Cielos*. Now in its eighth season, viewers continue to be drawn to the series. A ninth season has gotten the green light.

Beau Ferrari, Chairman of NBCUniversal Telemundo Enterprises, commented, "We are excited to present a robust content offering entertainment, news and sports featuring premium properties, the biggest stars and tentpoles designed to reach and engage the full spectrum of Latinos at scale, in both languages and across all platforms."





NBCUNIVERSAL ONE PLATFORM REACHES 8 IN 10 U.S. HISPANICS

NBCU brings together the best stories that connect with U.S. Hispanics across all platforms. We bring together our unmatched reach and insights to develop deep relationships with your Hispanic consumers.

Source: H2'21-H1'22, Hispanic P18+, (UEs based on Total HHs, not TV HHs) TV- Nielsen. C3, Total Day, Reach %, 1 minute qualifier (Incl Syndication); Digital- comScore Video Metrix: Media Metrix, Multi-Platform Data US Only; STB VOD-Canoe Reach and HHs, SNL Kagan using Nielsen VPVH. NBCU Connect based on FW Markets in comScore OTT Intelligence H2'21-H1'22, P18+ is 1:1. Peacock based on comScore VMXJul'21-Jun'22. All YouTube data (competitor-specific YT assets and YT Parent-level) is Mobile/Desktop Only (exclCTV). Non-Linear Hispanic % Comps based on comScore MMX Multiplatform. Excl Apple News



Among the other prime-time offerings shared by Telemundo are **Vuelve a Mi**, starring William Levy; **El Conde: Amor y Honor** — a period drama starring Fernando Colunga; the dramatic thriller **Mujer de Oro**; the first co-production with Turkey's Inter Medya studios (**Atrapada en la Jaula Azul**); and the latest Turkish scripted series, **Secretos de Sangre**, premiering in late May 2023.

Then, there's the 2024 Paris Olympic Games and the FIFA Women's World Cup, which Telemundo expects will bring audiences of value to marketers.

Más Noticias

The big reveal regarding Tplus and the expansion of its free ad-supported channel (FAST) offerings is the debut of **Telemundo Deportes Ahora**.

The offering, which joins 24/7 Spanish-language news channel **Noticias Telemundo Ahora**, includes pre- and post-game analysis, original shows, and added content for fans around Telemundo's biggest sports properties.

There's more regarding Tplus, with the limited series "Menendez & Menudo: Boys Betrayed" on Peacock attracting attention. For 2023-2024, an exclusive first look deal with **Wilmer Valderrama**'s WV Entertainment is in play.

Led by WVE's SVP of Production and Development Jessica Acevedo, this partnership will bring Hispanic-led TV projects to SVOD services for Hispanic audiences around the world, NBCU says. "WV Entertainment has led the way in highlighting and uplifting the stories of LatinX and underrepresented communities across traditional media and podcasts and will further this mission via this new partnership," the network says.

Lastly, Tplus programming includes three Peacock originals: **Reggaeton: The Sound that Conquered the World**; fútbol-themed drama **90 Minutes**; and **Gente Sana**, which uncovers global music icon J Balvin's candid revelations about his journey towards mental wellness.



Hispanic Market Overview.

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**2023
EDITION**

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The advertising and marketing industry's
annual State of the Industry report



A CALL FOR FULL INCLUSION

As the second half of 2023 arrives, there's a welcomed, fiery undertone in the conversations of U.S. Hispanic marketing and advertising leaders. From "right-sizing" budgets to going beyond "in culture," is now the time for the big Hispanic growth story that remains elusive ... and overdue?



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The Pay-TV Evolution

Here's a key takeaway to digest as the 2023-2024 NewFront and Upfront season comes to a close and marketers finalize their buying activity for the year ahead:

Hispanic TV content viewers in the U.S. overindex for subscription streaming services (SVODs) compared to total market consumers.

Welcome to the new brand growth opportunity — one ripe with consumer connectivity issues on any screen they choose to view their favorite video content on.

The finding comes from "FOCUS Latinx Volume 1," a report from Horowitz Research. [Note: It is the editorial policy of Hispanic TV Programming Report to refer to Latino and/or Hispanic audiences with universally accepted nomenclature.]

The Horowitz report also finds that 76% of Latino TV content viewers subscribe to at least one SVOD service, compared to 67% of all consumers. When considering password-sharing and promotional bundles, over 8 in 10 Latinx have access to at least one SVOD. **Netflix, Amazon Prime, Disney+, Peacock, and Max** top the list of most popular subscription streaming services among Hispanics, with over half having access to each.

There's no brief 100-page Hispanic marketing **handbook** tenaciously worked on **for** over thirty years to help you write and create insightful advertising in-culture and in-language, not translated by some hard-coded bot but lovingly created by humans, so the work delivers king-sized results for **Latinos** through a fully authentic approach that resonates with the **culture** of these customers, not just as consumers, but as people who have time-honored **traditions and** who live unique **experiences** deserving of branded content which expertly navigates the relationship between language and culture through a masterful display of advertising as a craft.

...But there is an agency.



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THE SPANISH-LANGUAGE SVOD STORY

While the global SVOD giants certainly have captured the U.S. Hispanic consumer – in particular, Netflix, which has invested in several high-profile Mexico-based productions for five years, including "Control Z" – the U.S. Hispanic-focused SVOD is gaining steam.

According to Horowitz, some 20% of U.S. Latinos have access (either via a subscription or some free way to access) to **Vix**, the premium service offered by TelevisaUnivision following its acquisition of Spanish-language streamer Pantaya. Ahead of the NewFronts, the service expanded to both advertising-supported video on demand (AVOD) and SVOD options.

This could bring even more eyeballs to what is arguably TelevisaUnivision's biggest focus point, given the outsized attention given to Vix in both 2022 and again this year.

Just how swift is OTT adoption among Hispanics? Take a gander at the use of AVOD services, based on Horowitz's research. With a proliferation of new free services, Hispanics are flocking to the AVOD universe while also embracing free ad-supported TV (or "FAST" channels). In 2019, some 14% of U.S. Latino consumers said they use free streaming services; this year, some 76% report using them. FAST channel consumption is driving use of these services, which 48% of Hispanic respondents use, Horowitz says.

Importantly, Horowitz finds, Spanish-language content remains important. Of those participating in their study, some 72% of U.S. Hispanic viewers watch Spanish-language TV content at least occasionally, while 63% watch "international" content.

As Horowitz sees it, this is a content play. And, it serves as a driver for subscriptions: Nearly 58% say Spanish-language TV content or content geared toward Hispanic audiences is important for their household to have. However, the way the streaming ecosystem is evolving could make it challenging for services that stream exclusively Spanish-language content to attract the level of viewership other services enjoy, some Horowitz findings suggest.

"Like most consumers, U.S. Hispanic TV content viewers say they often have a hard time finding something to watch; in fact, they over-index compared to the average consumer for feeling this way," Horowitz finds. This, Horowitz adds, could be driven by the need to search across more services – including Spanish-language and international services as well as mainstream ones – to find the content they are interested in viewing.

The top FAST services used by Hispanic viewers include YouTube, Tubi, Pluto TV, Roku and Freevee. Free, Hispanic-targeted streaming services, like OnDemandLatino and ViX, are gaining traction.

AN EASIER SEARCH ENGINE

According to Horowitz, Improved content management on streaming sites is helping make Spanish-language and/or Latinx-themed content discovery a more consumer-friendly process. Some 6 in 10 U.S. Latinos surveyed by Horowitz watch content they find by visiting curated Hispanic-themed collections on their streaming services at least occasionally. That finding comes from another recent Horowitz study, "FOCUS Latinx Volume II: Viewing Behaviors 2023."

Here's the biggest challenge for the OTT platform specifically targeting U.S. Hispanic consumers: When asked, unaided, which streaming service comes to mind for having the best selection of Hispanic/Latino-themed content, Netflix tops the list by a wide margin — even compared to brands that have traditionally dominated Spanish-language television.

Adriana Waterston, Chief Revenue Officer and Insights & Strategy Lead for Horowitz Research, comments, "Services that stream exclusively in Spanish need to compete with the existential threat of an ever-increasing number of mainstream services beefing up their Spanish-language and international libraries as well as offering Spanish audio and/or subtitles for most of their content. Consumer marketing to keep Spanish-language services top-of-mind, combined with strategies to drive discovery tune-in, will be critical for them to survive and thrive."



Netflix tops the list by a wide margin — even compared to brands that have traditionally dominated Spanish-language television.

▶ Nuestra.TV

A 'Holistic' Hispanic AVOD Offering

Courtesy of minority-owned mobile advertising and digital media firm **Adsmovil**, the **Nuestra.TV** advertising-fueled video on demand platform has been busily seeking to gain consumers within the multigenerational U.S. Hispanic market.

According to Adsmovil, it reaches 69% of the total U.S. Hispanic digital population, working with some 3,000 digital publishers across Iberoamérica and the U.S.

Nuestra.TV is an AVOD platform — one Adsmovil says is specifically created "for the holistic Hispanic market, across cultures, languages and generations." The platform was created in 2020 by Adsmovil CEO **Alberto Pardo**.

With advertisers keeping their eye on the entire U.S. Hispanic market opportunity, Nuestra.TV has two programs that it is promoting as key viewer draws. One is targeted for young children, while the other is focused on "Latino-centric eateries" and is a reality "road trip" series perhaps of interest to their parents.



The adult-appealing program puts Latina entrepreneurs, influencers and best friends Tania Torres (a.k.a. Tani Estefy) and Liliana Becerra (a.k.a. Lily B) on a tour of "the best Latin-centric eateries" in "Buen Provecho by Latina Approved."

The focal point of each episode: what makes these food destinations authentic and unique.

"We're very excited about this new original program," Pardo says. "This culturally relevant series created exclusively for Nuestra.TV is a perfect fit for our platform and is specifically designed to embrace the TOTAL Hispanic market, across generations, ages, and language preferences."

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As the 2023 NAB Show began in Las Vegas on Sunday, April 16, Schramm Marketing Group founder and President Joe Schramm discussed streaming and "the New Age of Hispanic Programming" with AGC Chief Creative Officer Lourdes Diaz, Estrella Media Chief Content Officer Enrique Guillen and Mexico City-based Warner Bros. Discovery Head of Development for Scripted Content for Mexico and Colombia Jorge Tijerina. With TelevisaUnivision not filling a panel slot following the promotion earlier this year of Bilal Joa Silar to lead SVOD and AVOD content on ViX and Telemundo Global Studios EVP of Production and Development Karen Barroeta unable to attend due to travel woes associated with record flooding in Fort Lauderdale, the session was lightly attended and touched on general topics shared in this report.



In 2023, Nuestra.TV launched its first original bilingual animated children's series: "MariVi: The Master Navigator." The series is an adaptation from Maria Twena's children's book series of the same name. The first episodes were made available to consumers in April on the free video-streaming service, which "aims to entertain, inform, and empower Hispanic audiences across cultural diversity, generations, languages, and devices."

"Nuestra.TV has been committed to supporting education since its inception," says Pardo. "The MariVi Master Navigator Series authentically depicts what it's like to grow up in a first-generation, immigrant household and delivers on our mission of representation. Ensuring that all family members see themselves in the media, as they truly are, is paramount to the empowerment of all Hispanics. I am very excited with the launch of this series."

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HISPANIC TV UPFRONT REPORT

2023 Edition

CANELA.TV



The 1st Free Streaming Service for US Hispanics. Offering culturally relevant programming in Spanish & English, including Live Channels, VOD and original programs.

A 'Proprietary Data and Audience Solution Arrives'

It calls itself "a leading, female and minority-owned technology driven company committed to redefining digital media experiences for the Latino community." And, it was front and center at the increasingly important **2023 IAB NewFronts**.

The appearance by **Canela Media** offered marketers a clear indication of where product innovation sits at the company. There's also a content roadmap for 2023-2024 that was shared.

But, the biggest headline from the NewFronts appearance was the debut of **Canela Connect**, "a proprietary data solution for advertisers." There was also the news pertaining to the "evolution" of Canela Studios' content strategy. For 2023-2024, more than 2,000 hours of original content is on the way — including Season 2 of its series *Secretos de Villanas* and its spinoff, *Secretos de las Indomables*.



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2,000 HOURS OF ORIGINALS

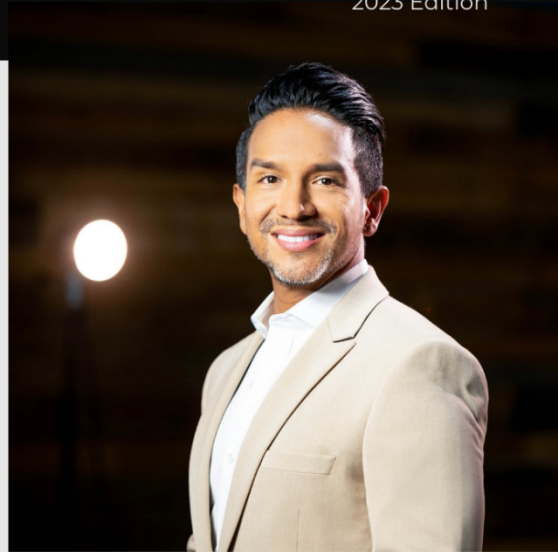
With Andrés Rincón, Senior Vice President of Sales East and LatAm Regions (pictured, at right), joined by founder/CEO Isabel Rafferty, CMO Oswald Méndez, and SVP of Sales for the West and Central Regions Matt Montemayor, Canela says its Canela Connect offering is centered on an OTT-first approach — one that helps identify U.S. Hispanic audiences in English- and Spanish-language OTT platforms.

"Canela Connect provides unprecedented OTT scale for advertisers to reach U.S. Hispanics, thanks to the direct connections that Canela Media has with Roku, Samsung, Vizio, FreeTV and many more," the company says.

In particular, Canela Connect identifies U.S. Hispanic audiences with increased precision through its OTT first party deterministic data collected over time across Canela Media's platforms.

This, the company says, drives reach across its extended premium OTT partners "with more granular measurability."

Canela Connect and Canela Media's expanded OTT audience scale can provide brands a potential to reach over 50 million uniques, the company says.



"We're committed to disrupting through data and content, while connecting with communities authentically," Rafferty said. "Our goal is to continue to innovate not just in the content we produce for our audience, but in how our advertising partners can reach the U.S. Hispanic audience with more precision and across the OTT ecosystem beyond our platforms, regardless of the language in which they consume content."

Among the new content for 2023-2024 shared are:

- Canela News (daily) – an AVOD Spanish-language news offering
- ¡PONLE CANELA! – a 30-minute daily entertainment news program that puts the spotlight on everything that matters to the Latino audience in the world of pop culture and international entertainment.
- 40 original movies in development exclusively for Canela.TV.

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A HOST OF ORIGINALS, COURTESY OF ROKU

Roku® Originals

Once known as the OTT gateway, The Roku Channel is gaining viewers for its own content. Now, the offerings include more U.S. Hispanic-focused fare.

Why should marketers give attention to Roku? Perhaps new series from Jennifer Lopez, Juanpa Zurita and Jaime Camil says it all.

"The deep engagement we have seen within the Spanish-language content category on The Roku Channel in the U.S., as well as the exceptional growth of the service in Mexico, are all signs of the strong appetite for free ad-supported streaming amongst Spanish-speaking and bilingual audiences," said **David Eilenberg**, Head of Content for Roku Media. "We're committed to delivering high-quality, culturally relevant original programming to tens of millions of viewers, and we are thrilled to welcome such an exceptional new group of on-camera and off-camera creative voices to our Roku Originals lineup."

The new projects, Roku says, further enhance its Spanish-language original programming and, it adds, complement the overall growth of Spanish content consumption on The Roku Channel. "Spanish-language programming on The Roku Channel was streamed by more unique households than any free, ad-supported standalone app for Spanish-language content on the Roku platform in the U.S. in the fourth quarter," Roku shares. In the second half of last year, Roku's Spanish-language Roku Originals made Roku a top Spanish-language content provider. And, Mexico is The Roku Channel's largest international market, bringing synergies between that nation and the U.S.



SERVING THE *Latino Community* FOR OVER 25 YEARS



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VIRI SOLANO



CESAR CONTRERAS



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EMMY AWARD WINNING NEWSCASTS

As TelevisaUnivision's largest affiliate, Entravision is committed to producing localized, relevant and engaging news that serves the Latino community. Having won over 100 Emmys across two decades, we are committed to producing quality newscasts that make a difference in the lives of Latinos. Above all, we are passionate about fostering community engagement with the content we produce to connect, serve, and build loyalty.

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Among the key new series heading to Roku are “Carpe DM with Juanpa,” starring and executive produced by Juanpa Zurita; “Desde La Raíz,” featuring and executive produced by award-winning actor Jaime Camil; “Serenata De Las Estrellas,” hosted by Julissa Bermudez and featuring Latin artists, including singer Chiquis, rapper and singer Snow Tha Product, and rock bands Los Lobos and Ozomatli; and “La Divina Comida” featuring Alex Lora, Belinda, Carlos Gatica, Dulce María, Emmanuel, Erik Rubín, Faisy, Itatí Cantoral, José Ángel Bichir, Karol Sevilla, Manu Nna, Margarita The Cumbia Goddess, María León, Michelle Rodríguez, Rafa Márquez, and Verónica Toussaint.

Additionally, Roku announced and set release dates for brand-new Spanish-language Roku Original series “Batalla en Abuela’s Kitchen” (June 9) and “Un Millón de Gracias” (August 11), the third season of English-language Roku Original series “Thanks a Million,” executive produced by Jennifer Lopez. The new season will feature Chiquis, Gina Torres, Jaime Camil, Javier “Chicharito” Hernández, Lauren Jauregui, Michael Peña, Michelle Rodríguez, Pau Gasol, Sofia Reyes, and Wilmer Valderrama.

The total market opportunity for Roku also has a bit of Hispanic flair.

These series include **“Celebrity Family Cook Off” (working title)** hosted by Manolo Gonzalez Vergara and executive produced by Sofia Vergara. With six episodes, it is produced for Roku by Butternut, a Wheelhouse company, and Latin World Entertainment. Courtney White, Brent Montgomery, and Teri Weideman serve as executive producers for Butternut, with Sofia Vergara, Manolo Gonzalez Vergara, Kate Presutti, and Luis Balaguer executive producing for Latin World Entertainment.

“Bringing together the power of the Roku platform and the strong storytelling of our top-tier global creative partners has made Roku Originals unmissable TV for millions of streamers,” Ellenberg boasts. “We’re thrilled to delight our audience with new premium original series and proud to continue the Roku Originals stories that audience already love, by bringing several series back for more.”

COOKING UP A CONSUMER DRAW



Warner Bros. Discovery U.S. Hispanic, ahead of the 2023-2024 Upfront season, took a moment to highlight its latest content partnership with GroupM and COCINA Media, the multicultural owned-and-operated content and digital media company.

They've teamed up once again with noted celebrity chef (and Executive Producer) **Aarón Sánchez** on "El Toque De Aarón." The original series follows Sánchez and his team as they help Latino restaurants in Southern California reach new heights.

Kimberly Clark's **Viva** paper towels brand is confirmed as an integrated sponsor, with other GroupM clients featured throughout the series. It airs on both Discovery Familia sibling network Hogar de HGTV.

"Warner Bros. Discovery's U.S. Hispanic networks continue to be regarded as leaders in the multicultural marketing space," said **David Tardio**, Vice President of Integrated Ad Sales and Marketing at Warner Bros. Discovery's U.S. Hispanic. "When brands look to better target the Latino audience segment, they come to us because of our decades of experience and our trusted insights: we know our audience, their interests, and their passions. In turn, we look for the same authenticity in our partners, and are thrilled for another opportunity to link up with COCINA Media and GroupM on this exciting new series."

GroupM Multicultural President **Gonzalo Del Fa** commented, "At GroupM, we are proud of our ability to integrate the brands we serve into culture-defining properties like these while accessing premium talent and partners. To create a more vibrant media marketplace, it is critical that we focus our attention on enhancing media owners and properties that drive positive cultural influence. We are thrilled to be part of the journey to elevate the passions and stories that will truly resonate with consumers."

A DIGITAL FOOTPRINT GROWS VIA A NEW STREAMING PLATFORM



With John Leguizamo serving as a partner, the merged NGL Collective and mitú, a social media darling, have jumped into the OTT arena.

In 2022, NGL Collective and mitú announced a combination of their businesses. The result? "One of the largest digital media and entertainment companies catering to U.S. Latinos" came to be. But, nglmitú has a unique target audience — the 80% of the 62 million U.S. Hispanics who speak English.

With strong Comscore rankings and mitú's community of more than 13 million followers, the combined team at nglmitú is convinced their time is now.

"NGLmitú presents the most comprehensive approach to reaching Latino audiences through our different brands and offerings," says **Joe Bernard**, Chief Revenue Officer of NGLmitú. "We create content by Latinos, for Latinos in language, in culture and in context which allows us to speak and connect with our community authentically."

Specifically, mitúTV bills itself as an English-language and bilingual programming service that seeks "to fill the gap" in the Connected TV space among Hispanic targeted services. Originals include "Three Gs in a Pod," "Girl, Let Me Tell You," "Spill the Chisme," "Cholos Try," "Things Latina Moms Say," and "La Cocina." Production facilities include a 14,000 square foot studio in East Los Angeles, Calif. Other productions come courtesy of Inland Entertainment Network, Digital Bodega and the Immigration Archive Project. "The channel's programming aims to represent the diverse faces of Gen Y/Z US Latinos and offer an alternative to Spanish-dominant Connected TV content sourced from Latin America."

Adds Leguizamo, "MitúTV is changing the game when it comes to entertainment created by Latinos for Latinos all in one place. Everyone knows we're a huge part of today's streaming audience. MitúTV provides an easy way for Latinos to access authentic content and see themselves positively portrayed like never before."

**A PLACE WE
CAN BOLDLY
BE OURSELVES**

mitútv

Aquí caben todos.

Aquí caben todos.



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LIVE AND ON DEMAND, 24/7.

WATCH NOW

LIVE AND ON DEMAND, 24/7.

WATCH NOW

LIVE AND ON DEMAND, 24/7.

WATCH NOW



The company has also unveiled plans to "double down" on its female lifestyle brand, **FIERCE by mitú**.

FIERCE was created in 2017 to build a community of Latinas and women of color to celebrate their successes, support one another, share resources and open much-needed dialogues, nglmitú says. With an engaged and supportive community, NGLmitú "is supporting the power of Latinas and women of color" by launching FIERCE's first ever vodcast, "Girl, Let Me Tell You." It is helmed by "three stellar women providing their unabashed points of view on topics affecting Latinas and women of color."

FIERCE will also hold its first-ever *JEFAS Awards*, honoring Latinas in business and entrepreneurship, as well as entering the experiential space through an unforgettable event from mitú Studios in Los Angeles where its digital community of influencers, creators, and fans will share space in real life.

As Vanessa Vigil, Chief Brand Officer of NGLmitú, sees it, "With more Latinas enrolled in higher education, starting new businesses, and contributing nearly one trillion to the US economy, we believe it is the perfect time to expand the influence of FIERCE by mitú through content and activations that further enable the incredible potential within this community."

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**2023
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Presented by



The advertising and marketing industry's
annual State of the Industry report



A CALL FOR FULL INCLUSION

As the second half of 2023 arrives, there's a welcomed, fiery undertone in the conversations of U.S. Hispanic marketing and advertising leaders. From "right-sizing" budgets to going beyond "in culture," is now the time for the big Hispanic growth story that remains elusive ... and overdue?



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'PLEASE FIX THIS PROBLEM — TODAY. FOR GOOD'

That's the plea delivered during the TelevisaUnivision Upfront presentation by President of Advertising Sales and Marketing Donna Speciale, pointing to new and improved currency in use from Nielsen.

UPFRONT 2023-24 | TelevisaUnivision

It was promoted as a chance to make "a real connection," with a connection to a culture "we know and love" — Hispanic culture, which is more mainstream than ever.

The TelevisaUnivision message delivered on May 16 to marketers and advertisers was simple: *Get Louder*. And, by being a partner with TelevisaUnivision, getting Spanish-language consumers that use the company's products ensures *all* Hispanic consumers are reached.

"THE AUDIENCE IS 29 PERCENT BIGGER THAN WHAT IS MEASURED. HOW SO? NIELSEN JUST TOLD US"

— DONNA SPECIALE,
PRESIDENT OF
ADVERTISING SALES
AND MARKETING AT
TELEVISAUNIVISION

THE NATION'S **#1** RADIO STATION
SPEAKS SPANISH!

W S K Q - F M



...AND IT'S
HISPANIC-OWNED!



Source: Nielsen National Regional Database; Fall 2022; US Total; M-Su 6a-12m; P 18-49 Station Rankings Based on: Top 100 All Stations; Nielsen Digital Streaming

For TelevisaUnivision, the biggest cross-platform reach component is **ViX**, which the company has heavily promoted across the last several months. And, before any discussion of the company's linear networks, **Pierluigi Gazzolo**, CEO for ViX, spoke at length about ViX's capabilities following introductory remarks from **Donna Speciale** that repeated many of the key statements Hispanic market advocates have been sharing for the last



several years — this is a population of Young America that is driving the nation's collective culture, driving the tastemakers. "The future is bright, optimistic and resilient, and ready to buy your products and use your services."

The other big takeaway is how satisfied TelevisaUnivision is with new Nielsen currency that the company believes resolves a big measurement gap.

**ViX****UNIMÁS****TUDN**

Incremental viewership.
Incremental engagement.

With ViX clearly a key driver for TelevisaUnivision, streaming-first content will be gaining new viewers over the summer on a linear channel: UniMás, the second broadcast TV network in the U.S. within the company's stable.

That news was shared some 35 minutes into the Upfront presentation, with nary a word about the Univision network from company executives despite its continued role as a key revenue and audience driver. Yet, there was one video segment that showed Speciale playing *fútbol* with some of Mexico's biggest all-time stars in an attempt to demonstrate the unique *pasión* for the "beautiful game" and why Spanish matters to viewers.

The cultural connection TelevisaUnivision's U.S. content delivery vehicles has with the Hispanic consumer was a theme that permeated the Upfront, from sports programming including Liga MX — the premier soccer league in Mexico — and news of a three-year contract extension with the Mexican National Team, to news and analysis shows featuring such heralded journalists as **Jorge Ramos**.

But, what about the scripted and non-scripted shows coming in 2023-2024? The unscripted shows were first discussed by Speciale in the Upfront presentation. The scripted programs? There was no discussion, nor was there any conversation regarding Univision network programming before "Despacito" singer Luis Fonsi performed one hour into an Upfront presentation offering little for advertisers aside from the big-picture delivery story.

AN AUDIO SOLUTION THRIVES IN ITS 20TH YEAR



HRN
Media Network

HRN remains a key entry point for media buyers, planners and advertisers who seek to reach Spanish-language radio consumers. That said, reaching the consumer's ear in 2023 is vastly more complex than it was 20 years ago. "It has matured a great deal since 2003," says **Clark Logan**, who holds the title of President and Partner of HRN. "The past 20 years has seen a total evolution in network radio in the U.S. Hispanic radio market."

HRN's origins are rooted in the 1990s when Clark's father, Dave, first considered targeting Spanish-language radio consumers. Dave Logan was a longtime ABC Radio Network sales guy, and he loved radio.

In 2003, radio advertising veteran Dave Logan believed there was a need in the marketplace for a new independent Hispanic radio network. Today, it is known across the broadcast radio industry as HRN and is a Gen Media Partners property.

"He was a 'Mad Men' guy from the 1960s and he worked at Interop, serving a wired music radio network," Clark Logan recalls. "As he understood network radio, he saw a real need as Univision got into the game." At the time, the Hispanic market giant had its eye on the general market dollar. They created a radio network – one that Clark Logan calls "a beautiful product that was the gold standard." He adds, "That was the thought process, and Interop was losing share."

That's the now-shuttered national advertising rep firm that, overnight, saw national ad dollars start to go to Hispanic market buys. "The fax machine stopped ringing," Clark Logan notes.

This post-Sept. 11, 2001 sputter led him to come on board and work for his father. Clark describes the environment of the times.

“Univision introduced their network model to buyers, and it was more efficient, and they hit their goals. That’s when the need for a second network was born.” HRN was born as a part of Interep, with father and son running it.

“Before that, it was an idea for six to eight months,” Clark Logan recalls. “There were some light sales but nothing that would cause a reaction, or anyone would notice.” That’s because the No. 1 question Clark and Dave Logan had to answer was, ‘How do you go up against Univision?’

Their response? “Interep had hundreds of Hispanic stations already under contract, so that allowed us to engage them and talk to them,” Clark Logan says. “Spanish Broadcasting System (SBS) was at Interep. That was the mothership, which allowed us to sell their product in the network environment.”

SBS would eventually go on their own route. But, what their involvement offered the Logans was a statement to the market that the stations they represented were just as great as those of Univision. “Buyers liked it, they had a choice,” Clark Logan says.

Eventually, Lotus Communications and were brought into the mix Entravision, as were Bustos Media and former radio station owner Border Media Partners, the operation led by Tom Castro, today a board member with Latino Media Network.

So how did a traffic reporter on WCBS-2 in the 1990s end up working with his dad as a Hispanic radio network rep? Clark Logan says it is thanks to the purchase by Westwood One of Metro Traffic, where he had been employed.

There’s more to the tale. “Truth be told, I needed to make more money,” he admits. “I pushed the on-air talent opportunities as far as I could.” In chatting with his father, he learned that Interep was “working on this Spanish thing.”

With no salary and \$400 a week in unemployment compensation, Clark went to help build HRN with his father. “We had nothing,” he recalls. “We had no support except from [Interep head] Ralph Guild, and a guy named George Pine. They gave us the cover fire just to go, to support my dad publicly.”

The pricing was different. The style was different. “There were a lot of internal issues,” Clark Logan says. But, with that support from the top of Interep, that gave the Logans the time needed to bring in revenue and allow HRN to grow.

PROMISES DELIVERED

How did HRN evolve out of Interep? Interep went bankrupt. The demise of the once-mighty national radio rep firm resulted in the loss of hundreds of jobs. Clark Logan says, “About 600 sales people selling radio were taken off the streets ... Gone.”

HRN was purchased by Focus360, owned by Phil Brown. Yet, Gen Media Partners, with former Interep employees, sat from afar and watched the Logans. And, with Gen Media having the SBS contract, HRN was buying through them.

One day, a purchase agreement was put forth. On January 1, 2015, Gen Media took over. What did that provide HRN? “Power,” the younger Logan says. Meanwhile it has been said that Dave Logan’s philosophy was to “keep it simple, clean, and always deliver on promises.” Today, Clark is now delivering on this HRN mission statement. That said, the dynamic of Hispanic radio today isn’t the same. Where does digital audio play in the mix of advertiser options?

Acknowledging that streaming and “the good ol’ internet” were big game-changers for Radio.

Clark Logan says, “We just kept it simple, and we didn’t change our business model. Yet, it is a very complicated business, and it takes a lot of skill and manpower and money to do it right. The landscape has changed a great deal, but we stick to where the budgets are, and the data show the Hispanic listener is different than the Caucasian. It’s a culture – the content is great. The shows cover a whole gamut of things.”

Today, more than 300 Hispanic-targeted radio stations work with HRN. What does this say about the staying power of Hispanic radio, in an era when so much focus is on digital solutions with addressability? Clark Logan points to three things: Scale, Reach and Content.



As the Upfront season commenced for 2023-2024, HRN enjoys an exclusive partnership with Estrella Media, including popular regional Mexican-formatted syndicated program Don Cheto al Aire and his sidekick Giselle. Ana Maria Canseco and Fernando Fiore are also in the mix.

While those are formidable offerings, are there particular challenges Clark Logan faces on a daily basis, despite all of the premium inventory HRN is associated with? Perhaps. But, as he sees it, one should simply stick to the basics and stick to HRN's reach. Another plus? "We pay a lot of our stations cash."

If one were to spot Clark Logan on an elevator, what would his elevator pitch be if asked what marketers and advertisers should understand about HRN? "It combines stations that give an advertiser reach and scale, so that the advertiser gets ROI buying radio," he says. "It has to work, or they are not going to come back. Nissan, Macy's, The Home Depot – it has to work. And, commercials on our network helps you push consumers through the door. In the Hispanic market, we move product. That's all the advertiser cares about."

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Hispanic TV Programming Report

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