



**nsights**

## **AHAA INSIGHTS SERIES**

**Hispanic Ad Spend Trends 2010-14**



# **Pharmaceutical Category**

May 26, 2015

# Methodology

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

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



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

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

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



Excluded English Media	Excluded Spanish Media
B2B	B2B
National Internet	Display
Outdoor	Outdoor
National Cinema	
Regional Cinema	

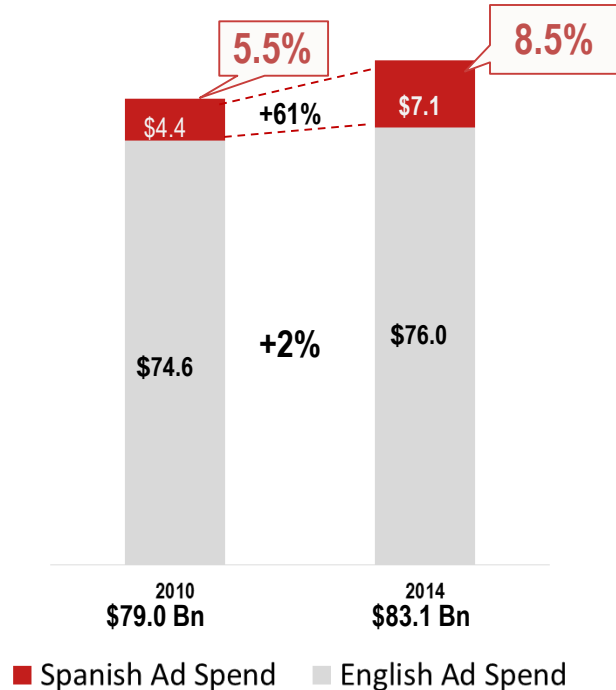




## Hispanic Share of AdSpend Soared to 8.5% in 2014.

### Top 500 Advertisers Increased Hispanic Media Spend by \$3Bn or 61% vs. only 2% in English AdSpend

#### Ad Spend by Media Language



- While overall Ad spend among the top 500 advertisers increased by 5% from **\$79.0Bn** to **\$83.1Bn** from 2010 to 2014, marketers made a steep increase in Hispanic Ad Spend, jumping **61%** from **\$4.4Bn** to **\$7.1Bn**.
- Hispanic allocation jumped to **8.5%** of all US top 500 marketers ad spend from 5.5% in 2010.
- English Media Ad Spend increased by 2% from **\$74.6Bn** in **2010** to **\$76.0Bn** in 2014
  - The English share of ad spend among the top 500 US marketers is down to **91.5%** in 2014 from **94.5%** in 2010.





# Pharma Category

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

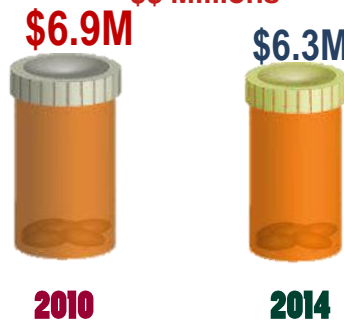
### Total Hispanic AdSpend\*

\$\$ Millions



### Average Pharma Hispanic AdSpend\*

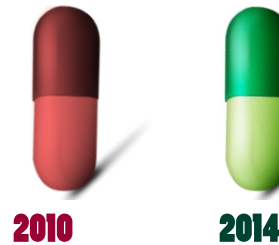
\$\$ Millions



### Hispanic % of Overall Pharma AdSpend\*

2.6%

2.5%



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

\*Among Top 500 in 2014

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

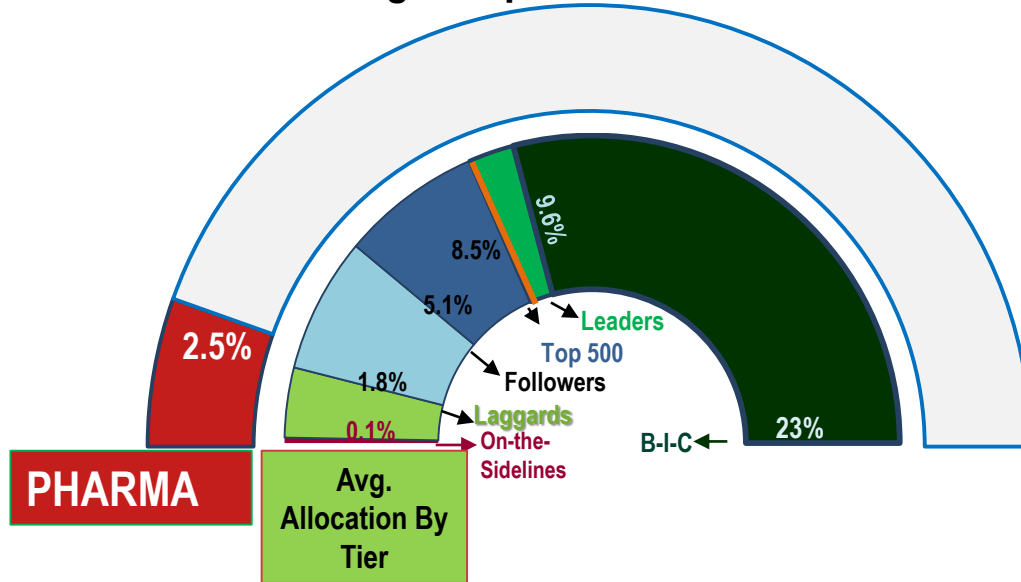


# Pharma Allocates 71% Less to Hispanic Dedicated Efforts Than The Top 500 U.S. Advertisers



PHARMA Allocation Index: **29**  $\left( \frac{\text{Pharma Companies}}{\text{Average Top 500}} \right)$

Pharma vs  
Advertisers Average Hispanic Dedicated Allocation



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



# Pharma Category Remains at a Laggard Allocation Level



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

INVESTMENT TIER	% Allocation Hisp Media	# of Companies		Hispanic (Span+Bilingual) Dedicated AdSpend \$		Hisp % Allocation	
		2010	2014	2010	2014	2010	2014
BIC	> 14.2%		0		\$ -		0.0%
Leader	6.4% - 14.2%		2		\$ 84,169		8.1%
Follower	3.6% - 6.3%	1	2	\$ 73,686	\$ 25,427	7.8%	4.5%
Laggard	1.0% - 3.5%	4	7	\$ 37,913	\$ 51,729	1.9%	1.8%
On-The-Sidelines	< 1%	18	15	\$ 47,052	\$ 3,185	1.5%	0.2%
<b>TOTAL</b>		<b>23</b>	<b>26</b>	<b>\$ 158,651</b>	<b>\$ 164,510</b>	<b>2.6%</b>	<b>2.5%</b>



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





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



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