

Covered California: Your Growing Hispanic Opportunity



UNIVISION[®]
COMMUNICATIONS INC

California Hispanics Spend Billions on Healthcare



\$9.2 Billion

2012 Spent by Hispanics in Out of
Pocket Healthcare Expenditures¹

Hispanics Account for 17% of California's
Total \$55Billion in Healthcare Expenditures

California Health Insurance Coverage



% Health Insured by California Metro Area

| California Metro Area | Hispanic | Non-Hispanic |
|-----------------------|----------|--------------|
| Total United States | 69% | 88% |
| California | 71% | 88% |
| Los Angeles | 69% | 87% |
| San Francisco* | 78% | 91% |
| San Diego | 69% | 89% |

* SF Based on information for available counties: Alameda, Contra Costa, San Francisco, San Mateo, Santa Clara (83% of SF MSA Hispanic Pop)

Communicating With The Target Segments You're Seeking



Hispanics Value Spanish Advertising To Learn About & Select Products

% Hispanics Are Likely to Agree:

29%

*“Advertising helps me **choose** products to buy for my children”*

31%

*“I remember about/pay more attention to products/services **advertised in Spanish**”*

49%

*“I think government & businesses should make more of an effort to **communicate in Spanish**”*

38%

*“I am much more loyal to companies that **advertise in Spanish**”*



The Majority of Hispanics in California Are Listening To Spanish-Language Radio

More Than 2 in 3 Of The Hispanic A18-49 & Bilingual HA18-49 Population In Each Market In California Tune Into Spanish-Language Radio Every Week!



Los Angeles

Hispanic A18-49 75%

Bilingual HA18-49 79%

San Francisco

Hispanic A18-49 62%

Bilingual HA18-49 70%

San Diego

Hispanic A18-49 78%

Bilingual HA18-49 81%

Your Univision Radio Opportunity



Univision Radio Reaches The **Eligible Hispanic Californians** You're Seeking

| Los Angeles | Hispanic A18-49 | UVR Reach |
|-------------------------------|-----------------|-----------|
| "Just Getting Started" (a) | 103,595 | 54% |
| "Independent & Connected" (b) | 203,653 | 63% |
| "Working Families" (c) | 629,798 | 75% |

| San Francisco | Hispanic A18-49 | UVR Reach |
|-------------------------------|-----------------|-----------|
| "Just Getting Started" (a) | 30,831 | 68% |
| "Independent & Connected" (b) | 39,005 | 80% |
| "Working Families" (c) | 167,339 | 76% |

| San Francisco | Hispanic A18-49 | UVR Reach |
|-------------------------------|-----------------|-----------|
| "Just Getting Started" (a) | 100,996 | 44% |
| "Independent & Connected" (b) | 22,284 | 54% |
| "Working Families" (c) | 129,529 | 81,820 |

68%

Univision Radio's Combined Reach of the Hispanics in Covered California's Qualification Segments in LA, SF, & SD

vs. 60% for Top 3 EL Stations

Please Note: Adjustments made due to exact criteria unavailable in Scarborough.

- (a) HHI criteria adjusted to "Less than \$25,000"
- (b) Age criteria adjusted to A18-34; HHI criteria adjusted to "Less than \$50,000"
- (c) HHI Criteria adjusted "Less than \$100,000"

Univision Radio Reaches the **Eligible Bilingual Californians** You're Seeking

| Los Angeles | Bilingual A18-49 | UVR Reach |
|-------------------------------|------------------|-----------|
| "Just Getting Started" (a) | 68,621 | 59% |
| "Independent & Connected" (b) | 153,128 | 63% |
| "Working Families" (c) | 397,873 | 80% |
| San Francisco | Bilingual A18-49 | UVR Reach |
| "Just Getting Started" (a) | 15,598 | 81% |
| "Independent & Connected" (b) | 23,365 | 91% |
| "Working Families" (c) | 95,248 | 80% |
| San Diego | Bilingual A18-49 | UVR Reach |
| "Just Getting Started" (a) | 68,435 | 53% |
| "Independent & Connected" (b) | 12,860 | 46% |
| "Working Families" (c) | 78,617 | 50% |

72%

Univision Radio's Reach of the Hispanics in Covered California's Qualification Segments in LA, SF, & SD

vs. 61% for Top 3 EL Stations

Please Note: Adjustments made due to exact criteria unavailable in Scarborough.

(a) HHI criteria adjusted to "Less than \$25,000"

(b) Age criteria adjusted to A18-34; HHI criteria adjusted to "\$25,000-\$49,999"

(c) HHI Criteria adjusted "\$35,000 - \$99,999"

Source: Scarborough Release 1 FY 2013, SF, SD, & LA Metros; Segment Criteria based on Media Brief for Covered California

Our Listeners Are **NOT** Engaged With Top Ranked EL Radio Stations in California



On Average, 48% of Hispanics In California Spend More Time with Univision Radio per Week.

Every week, the Average Hispanic in California Spends **MORE** Amount of Time with Univision Radio!

| Market | Demos | UVN Stations | Top 3 English Stations | % Advantage |
|---------------|-------------------|--------------|------------------------|-------------|
| Los Angeles | Hispanic A18-49 | 4:15 | 3:00 | +42% |
| | Bilingual HA18-49 | 3:45 | 3:15 | +15% |
| San Francisco | Hispanic A18-49 | 5:30 | 3:00 | +83% |
| | Bilingual HA18-49 | 5:15 | 3:00 | +75% |
| San Diego | Hispanic A18-49 | 4:30 | 3:15 | +38% |
| | Bilingual HA18-49 | 4:30 | 3:15 | +38% |

Source: 2013 Arbitron PPM 3-Book Avg. (MAR/APR/MAY 2013) Hispanic and Bilingual A18-49 (WTSL), Total Week UVN Stations vs. Top 3 EL Stations: LA (KIIS-FM, KPWR-FM, KBIG-FM), San Fran (KMEL/KMVQ/KYLD) & San Diego (KHTS/XHTZ/KSON) . No Threshold Set. M-Su 6a-12m

Univision Radio Listeners Can't Be Reached on EL Radio

% of Univision Radio NOT Reached by Top EL Radio Stations

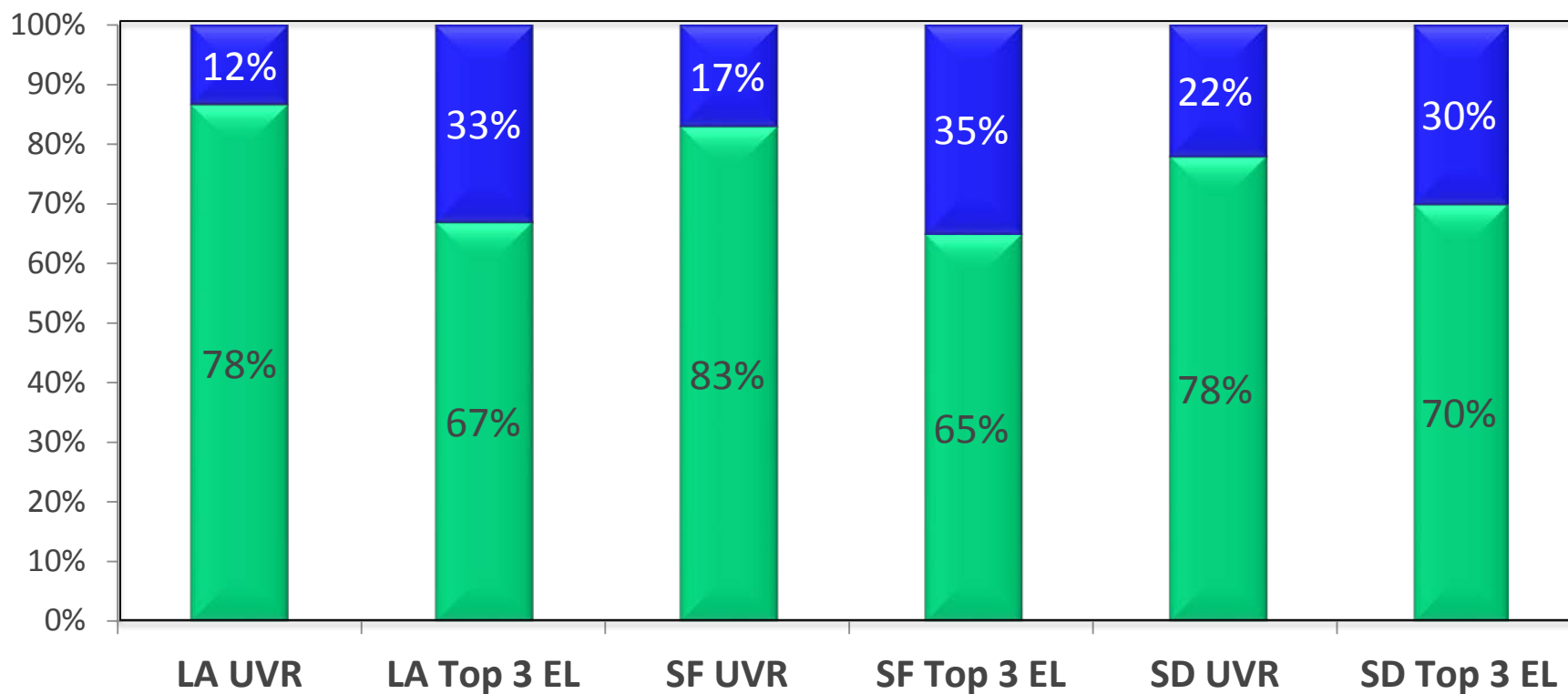
| | Los Angeles | | San Francisco | | San Diego |
|---------------|-------------|--|---------------|--|-----------|
| #1 EL Station | 89% | | 83% | | 80% |
| #2 EL Station | 80% | | 84% | | 80% |
| #3 EL Station | 79% | | 82% | | 96% |



EL Radio **Loses 1/3** of Their Hispanic Audience When “Light” Listening is Removed

% of Hispanic A18-49 Audience Listening More than 4 Hours Per Week

■ 4+ Hours Listening ■ "Light" Listening



“Light” Listening = Less Than 4 hours

Univision Radio Stations Remain **Top 10** Among **English Dominant/Bilingual Hispanics**

| Station | HA18-49 Rank | HA18-49 Rank (excluding Spanish Only) |
|---------|--------------|---------------------------------------|
| KSCA | #1 | #5 |
| KLVE | #4t | #6 |
| KRCD | #7 | #9 |

| Station | HA18-49 Rank | HA18-49 Rank (excluding Spanish Only) |
|---------|--------------|---------------------------------------|
| KBRG | #1 | #2 |
| KSOL | #2 | #3 |
| KVVF | #5 | #7t |

| Station | HA18-49 Rank | HA18-49 Rank (excluding Spanish Only) |
|---------|--------------|---------------------------------------|
| KLNV | #1 | #5 |
| KLQV | #1 | #4 |





Let Us Connect You To Your Hispanic Opportunity